CMIS ADMINISTRATOR

A user that is authorized to be a System Administrator will have additional menu options. Some of these menu options are necessary for use in the initial setup and maintenance of CMIS.

As a CMIS System Administrator, you will be responsible for the oversight and general operation of CMIS. It is very important that you do not share your user name and password. It is acceptable to have a back-up administrator, however, limit the number of back-ups.

CCU SETUP

Choose CCU Setup from the Administration menu. *(See Figure 1)*

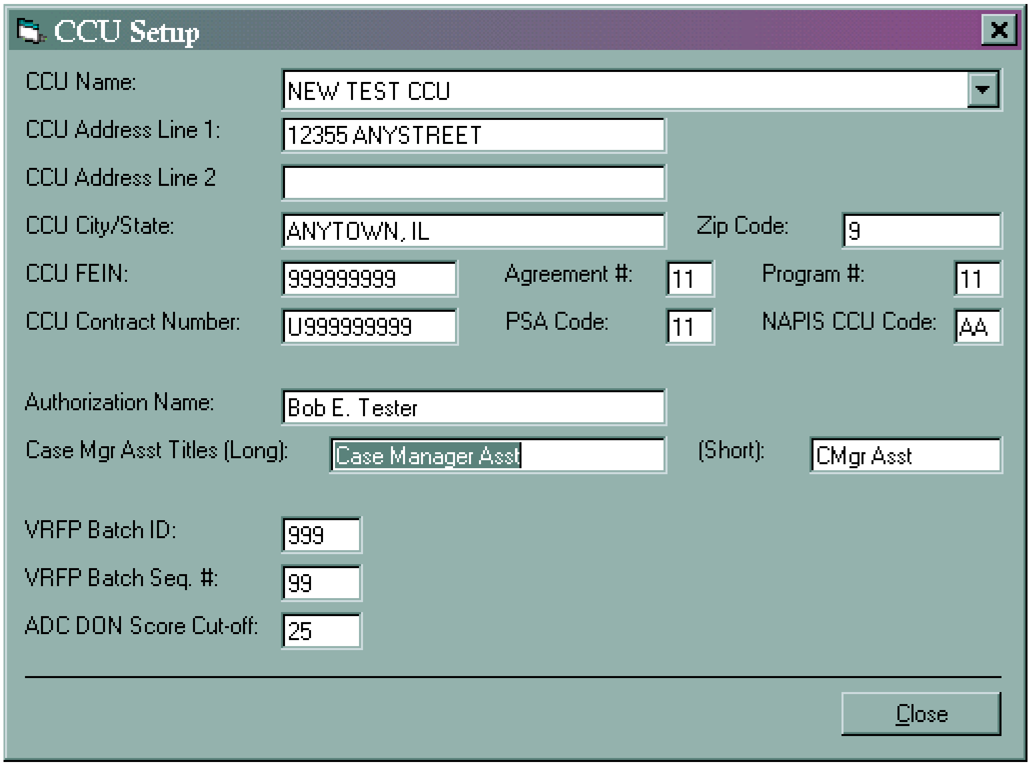


Figure 1

Choose the CCU Name from the drop down menu. The choices available are from the CCP Providers Lookup Table. If your CCU is not in the list, you will need to add it to the CCP Providers Lookup Table.

The Authorization Name is the name that will appear in the from column on the printed Authorization Memorandum. This name is usually the CCU director.

Fill in all fields with the information appropriate for your CCU. Click Close when you are finished.

USER SETUP

User Setup is used to add new users or edit existing users. Passwords are set up for each individual user as well as the level of authorization. The ability for a user to view ANE client information is set here.

There are several levels of authorization in CMIS. (See Table 1)

Auth Level	Browse Client Info	Print CCP Reports	Print All Reports	Add Client Info	Edit Client Info	Update CCU Info	Update Lookup Tables	CAT VRFP Transmit	NAPIS Export
Guest	X								
Reporter (IDoA)	X	X							
Reporter (CCU)	X	X	X						
Operator	X			X	X				
Operator Plus	X	X	X	X	X				
Administrator	X	X	X	X	X	X	X	X	X

Table 1

Choose User Setup from the Administration menu. *(See Figure 2)*

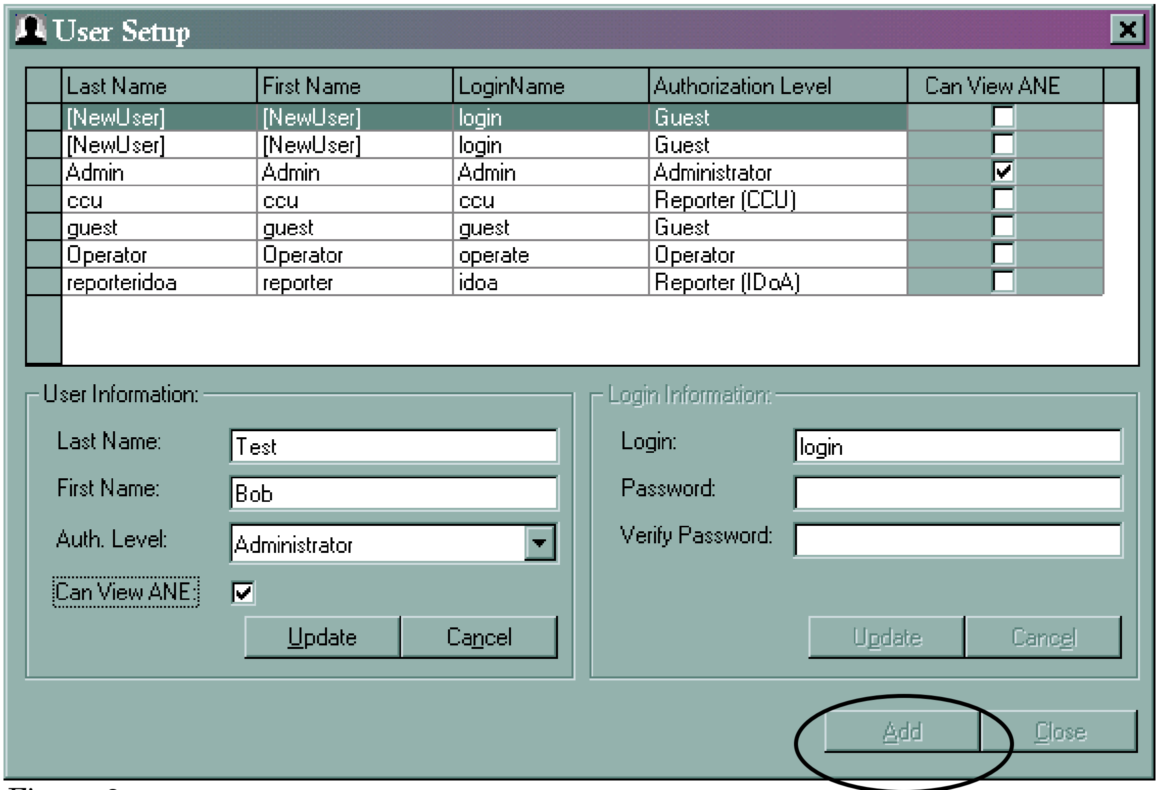


Figure 2

The User Setup is completed in two steps. The User information is added first and then the Login Information.

Click Add to Begin. First you will enter the User Information, enter the Last Name and First Name. Choose the Auth. Level from the drop down menu. Click in the Can View ANE box to make a checkmark if the User should have the ability to view ANE client information. Click Update.

Next, enter the Login Information. Enter the Login ID and Password. Click Update. After you click update, the password field will blank.

To update an existing entry, use your mouse to click on the User in the top of the screen. Make the necessary changes in the bottom portion of the User Setup Screen and click update.

Click Add to add another user. Click close when you are finished.

Note: Each User should have their own unique ID and Password. Users should be encouraged not to give out their ID or password.

2. LOOKUP TABLES

UPDATE LOOKUP TABLES

To add entries to a lookup table, choose Update Lookup Tables from the Administration menu. Pick the table to update. *(See Figure 1)*

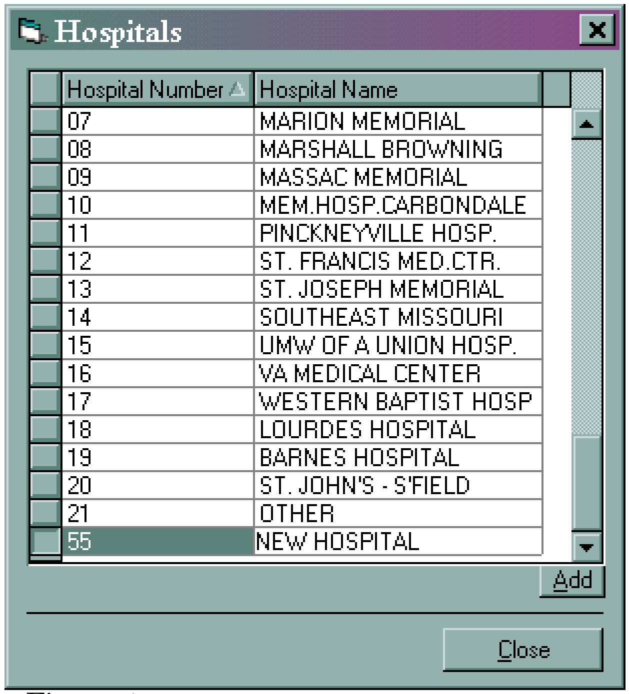


Figure 1

To add a new entry, click Add. The cursor will go to the bottom of the screen. Click on and change the Number and enter the new Hospital Name. Click Close when you are finished. You can change the name of an existing entry by clicking on that entry and typing over the name.

You cannot delete an entry from a lookup table.

The following Lookup Tables **can** be updated:

- Case Managers
- Case Manager Assistants
- CCP Providers
- CCUs
- Hospitals
- Locator Codes
- Nursing Homes
- Title III Providers
- Zip Codes

Note: No other Lookup Tables should be updated unless you receive written instructions to do so.

CAT TRANSMITTAL

Once a week, you will generate a CAT transmittal file containing CATs that you have created throughout the week. This CAT Transmittal file will be sent to IDoA via modem or mail.

Sending the CAT Transmittal file to IDoA is a multi-step process.

1. Run the CAT Transmittal procedure in CMIS to create the CAT Transmittal file on diskette.
2. Send the CAT Transmittal file to IDoA.
   - Via Modem – Using the diskette created in step “1”, run the IDoA transmit procedure.
   - Via Mail – Send the diskette created in step “1” to IDoA.

RUN THE CAT TRANSMITTAL PROCEDURE

Insert a diskette into your floppy or "A" drive on the computer.

Choose CAT Transmittal from the Process menu. *(See Figure 1)*

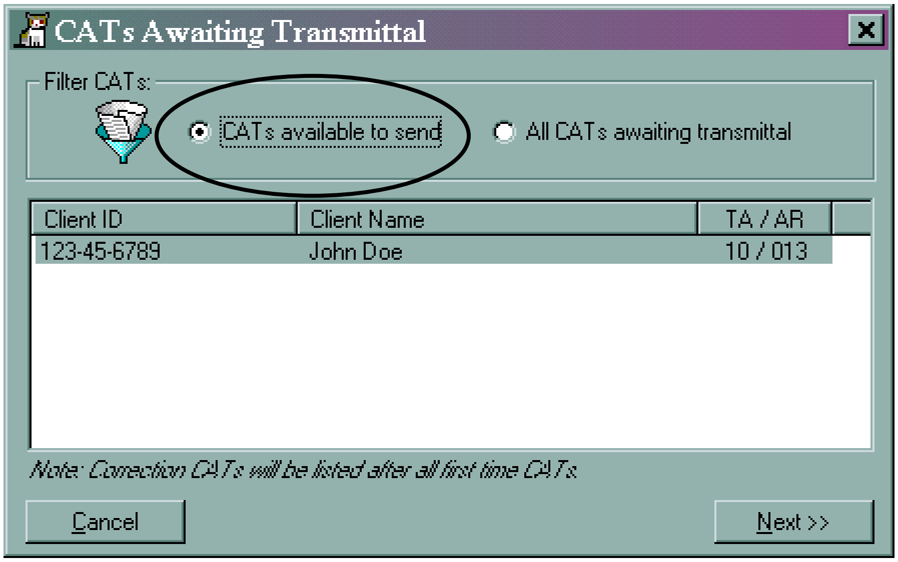


Figure 1

Choose CATs available to send from the Filter CATs field and click Next. All CATs displayed on the screen will be transmitted. The CAT Transmittal Progress screen will be displayed. *(See Figure 2)*

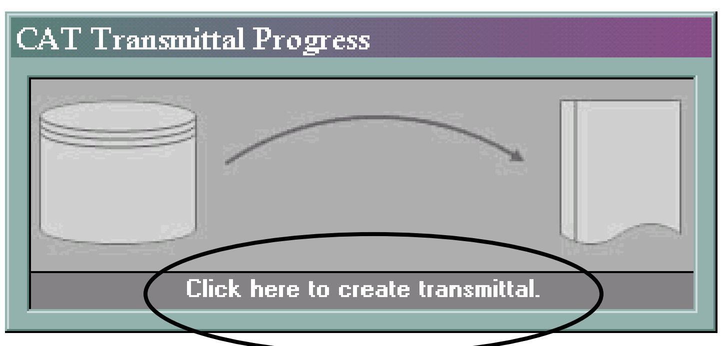


Figure 2

Click on the screen to continue. The CAT Transmittal will be sent to the A: drive of the computer the process was initiated from.

Note: A copy of the transmittal will also be sent to the C: drive of the computer. If the file does not copy to the diskette for any reason, it can be manually copied from the C: drive to the diskette in the A: drive.

A screen will display a list of clients that were included in the CAT Transmittal. You should always print this listing because it shows what CATs were sent to IDoA during the CAT Transmittal procedure.
(See Figure 3)

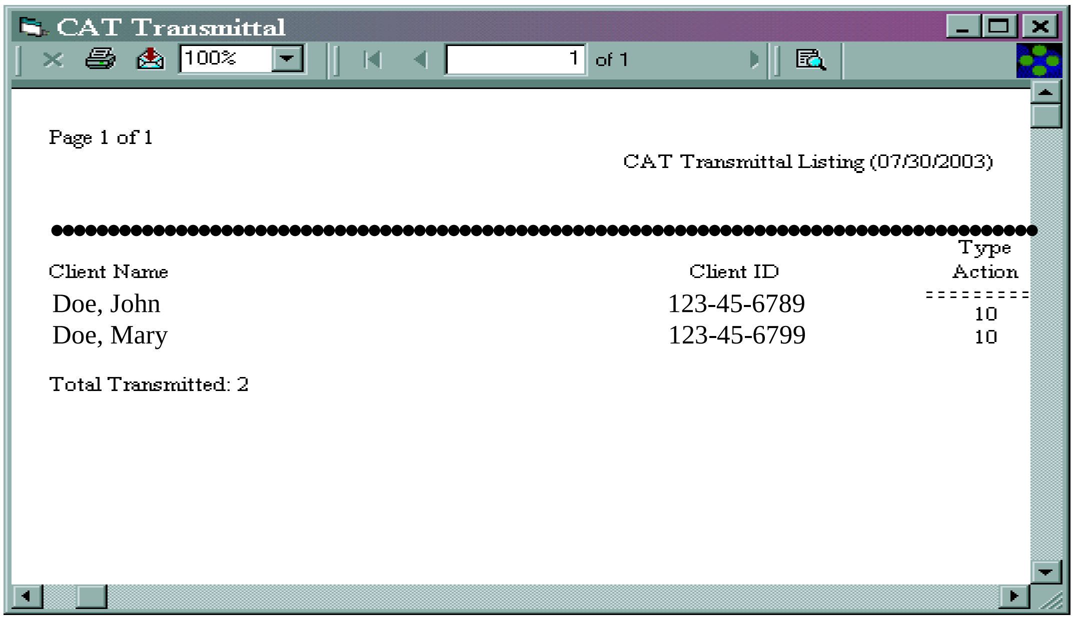


Figure 3

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the CAT Transmittal Listing, click on the printer icon. To close the window, click on the X in the upper right corner.

After closing the print window, you will be asked if you would like to write the file to diskette. *(See Figure 4)*

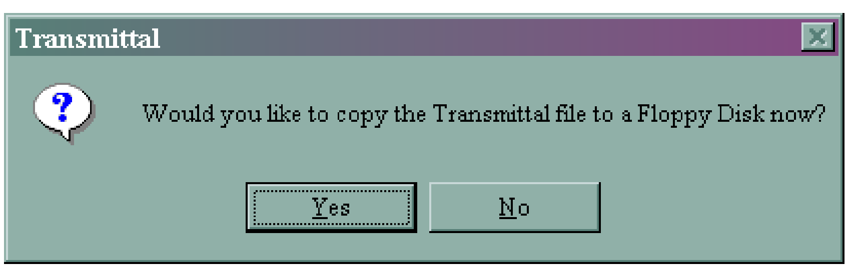


Figure 4

Answer Yes to write the file to your computer's A drive. If you answer No, the file will still be saved to your computer's C drive and can be copied to diskette.

Note: You can only run the CAT Transmittal Process once a day.

COPY A CAT TRANSMITTAL TO DISKETTE

If there was a problem with your transmittal file and you need to send another copy of the CAT Transmittal to diskette, you can copy the file from the C: Drive of the computer from which you ran the CAT Transmittal.

The CAT Transmittal process creates a file on the C: drive of the computer that you run the procedure on. The file name is CAT.txt located in the following directory:

C:\Program Files\CMIS\CMIS\Transmittals\CAT\

Insert a diskette into your floppy or "A" drive on the computer.

Using either My Computer or Windows Explorer, go to the above directory and right click on the CAT.txt file and choose copy.

Change your directory to your floppy or "A" drive, right click anywhere on the screen and choose Paste. This will copy the file to your diskette.

SEND THE CAT TRANSMITTAL FILE TO IDOA

The CAT Transmittal file that you created in the above procedure has to be sent to IDoA. You can send the diskette either via modem or via diskette in the mail.

Via Modem

To send the CAT Transmittal file via modem, you still need to use the diskette created above. The IDoA transmission procedure uses the diskette to send the file to IDoA. To send the CAT Transmittal file to IDoA, run the IDoA transmit procedure to send the file to IDoA via modem.

Via Diskette

To send the CAT Transmittal file via diskette, simply label the CAT Transmittal diskette created above and send it by mail to IDoA.

REPRINT CAT TRANSMITTAL

To reprint the CAT Transmittal choose Reprint CAT Transmittal from the Administration menu. The Reprint CAT Transmittals screen will open. *(See Figure 1)*

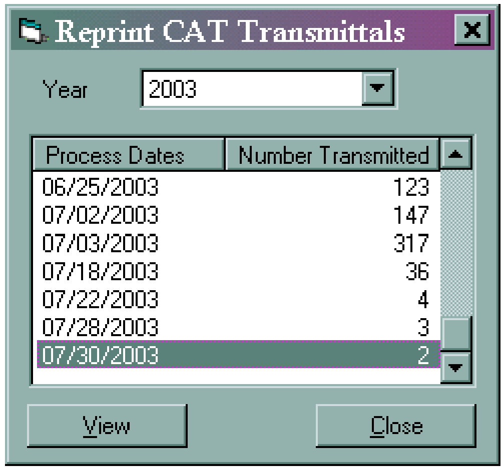


Figure 1

Arrow down or click on the Process Date to reprint. Click View to display the CAT Transmittal Listing. *(See Figure 2)*

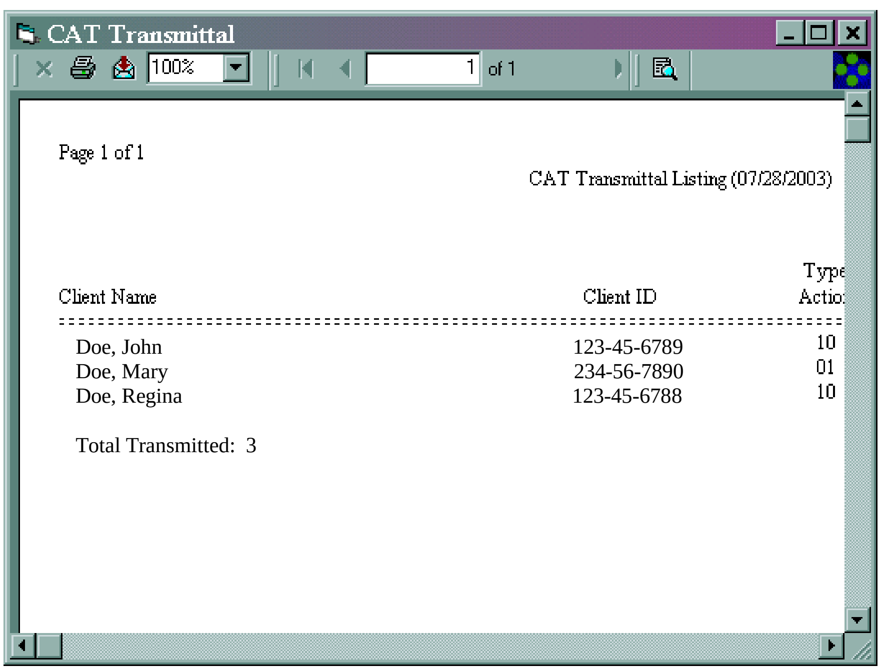


Figure 2

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the CAT Transmittal Listing, click on the printer icon. To close the window, click on the X in the upper right corner.

COPY A CAT TRANSMITTAL TO DISKETTE

If there was a problem with your transmittal file and you need to send another copy of the CAT Transmittal to diskette, you can copy the file from the C: Drive of the computer from which you ran the CAT Transmittal.

The CAT Transmittal process creates a file on the C: drive of the computer that you run the procedure on. The file name is CAT.txt located in the following directory:

C:\Program Files\CMIS\CMIS\Transmittals\CAT

Insert a diskette into your floppy or "A" drive on the computer.

Using either My Computer or Windows Explorer, go to the above directory and right click on the CAT.txt file and choose copy.

Change your directory to your floppy or "A" drive, right click anywhere on the screen and choose Paste. This will copy the file to your diskette.

VRFP TRANSMITTAL

On a monthly basis, you will generate a Vendor Request for Payment (VRFP) Report and diskette transmittal to forward to the Illinois Department on Aging (IDoA). The VRFP is generated based on the billing codes entered during the CAT Creation process. The billing code entered in the Assessment information is stored in CMIS. When the VRFP is run, CMIS will put a date in the VRFP date field in the CCP Assessment record. This VRFP date is used by the system to determine whether a client's billing data was sent to IDoA or not.

To ensure that the correct billing information is put on the VRFP, you must be sure that the data entry operators enter the correct billing codes in the Assessment information during the CAT Creation process. CMIS prints a facsimile of the VRFP. An authorized signature on the VRFP is still required before sending VRFP Reports and the VRFP transmittal diskette to IDoA.

RUN THE VRFP TRANSMITTAL PROCEDURE

Insert a diskette into your floppy or “A” drive on the computer.

Choose VRFP Transmittal from the Process menu. *(See Figure 1)*

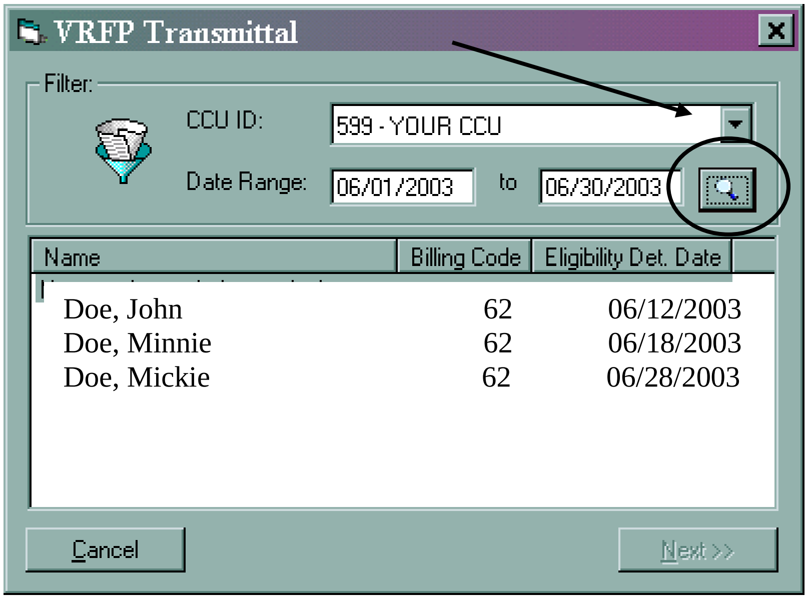


Figure 1

Choose the appropriate CCU ID from the drop down menu. Enter the Date Range and click on the magnifying glass icon. Click Next to Continue.

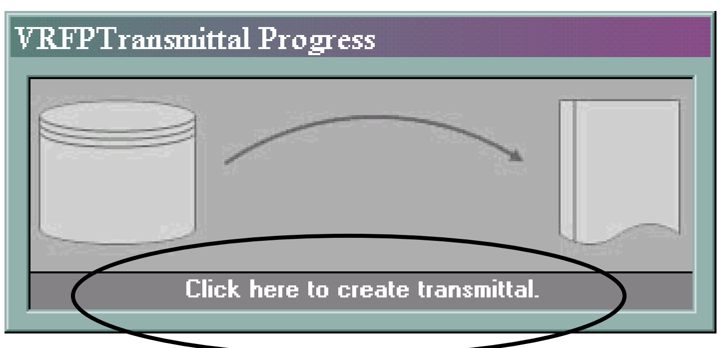


Figure 2

Click on the screen to continue. The VRFP Transmittal will be sent to the A: drive of the computer the process was initiated from. *(See Figure 2)*

Note: A copy of the transmittal will also be sent to the C: drive of the computer. If the file does not copy to the diskette for any reason, it can be manually copied from the C: drive to the diskette in the A: drive.

A screen will display a list of clients that were included in the VRFP Transmittal. This list will be sent with the diskette to IDoA and should always be printed.
(See Figure 3)

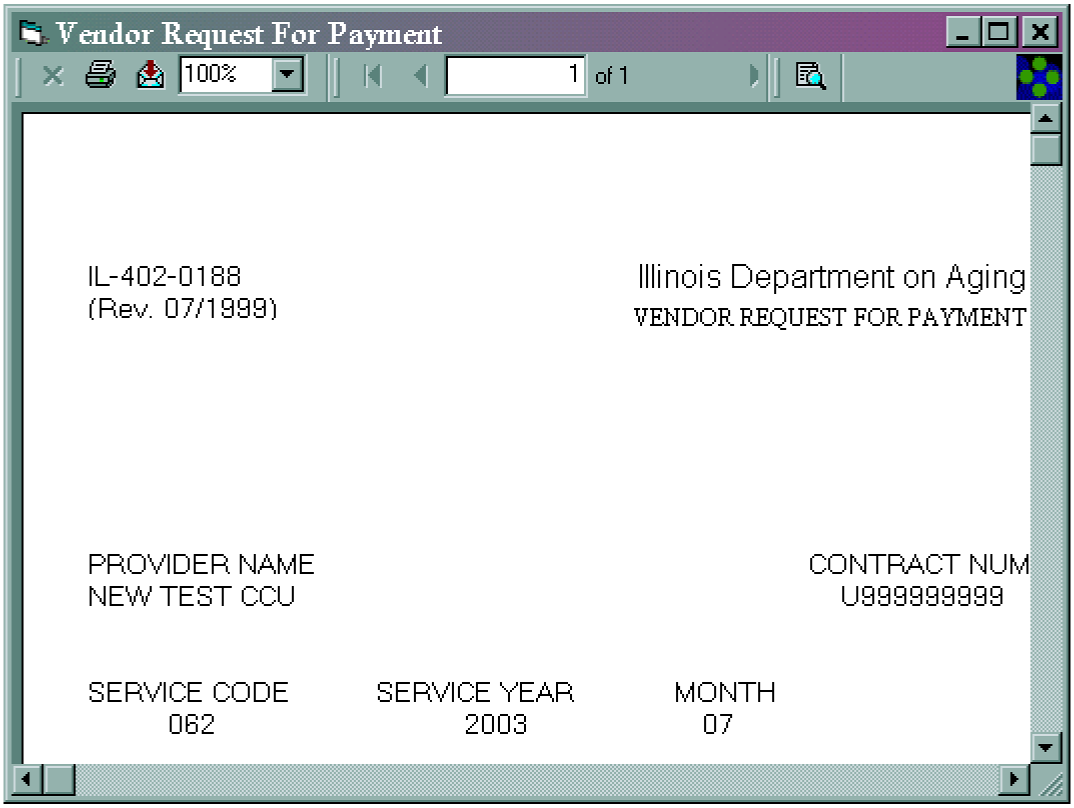


Figure 3

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the VRFP Transmittal Listing, click on the printer icon. To close the window, click on the X in the upper right corner.

After closing the VRFP Report screen, another screen will display the VRFP Audit Report. The Audit report can be used to compare the individual batches to the total on the audit report to ensure correct billing. *(See Figure 4)*

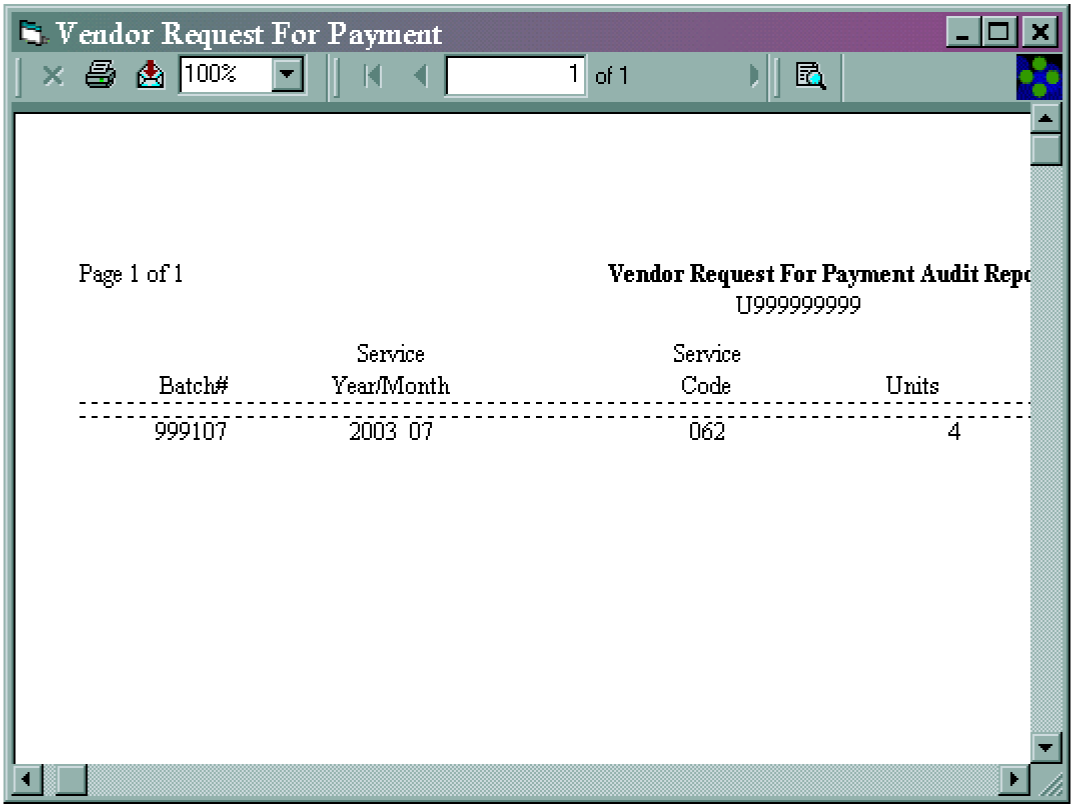


Figure 4

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the VRFP Audit Report, click on the printer icon. To close the window, click on the X in the upper right corner.

A screen will ask if the results are correct. Click Yes to continue and mark the records as billed. Click No if there is a problem. *(See Figure 5)*

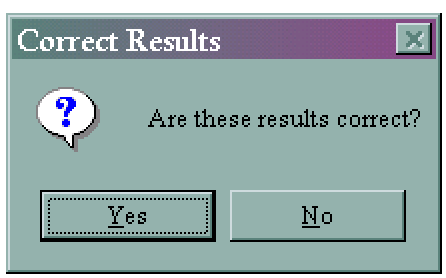


Figure 5

Note: The VRFP will not be complete if you click No and it will be necessary to run the process again.

SEND THE VRFP TRANSMITTAL FILE TO IDOA

The VRFP Transmittal file that you created in the above procedure has to be sent to IDoA. Label the VRFP diskette created above and send it by mail to IDoA. The paperwork generated must also be sent with the diskette.

If you are generating multiple VRFP's, send each VRFP in a separate envelope to IDoA.

REPRINT VRFP TRANSMITTAL

To reprint the VRFP Transmittal, choose Reprint VRFP Transmittal from the Administration menu. The Reprint VRFP Transmittals screen will open. *(See Figure 1)*

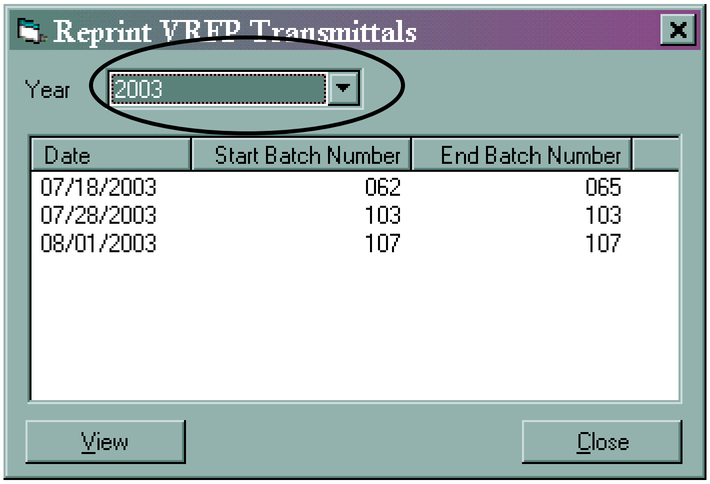


Figure 1

Choose the Fiscal Year from the drop down menu. Arrow down or click on the Process Date to reprint. Click View to display the VRFP Transmittal Listing. *(See Figure 2)*

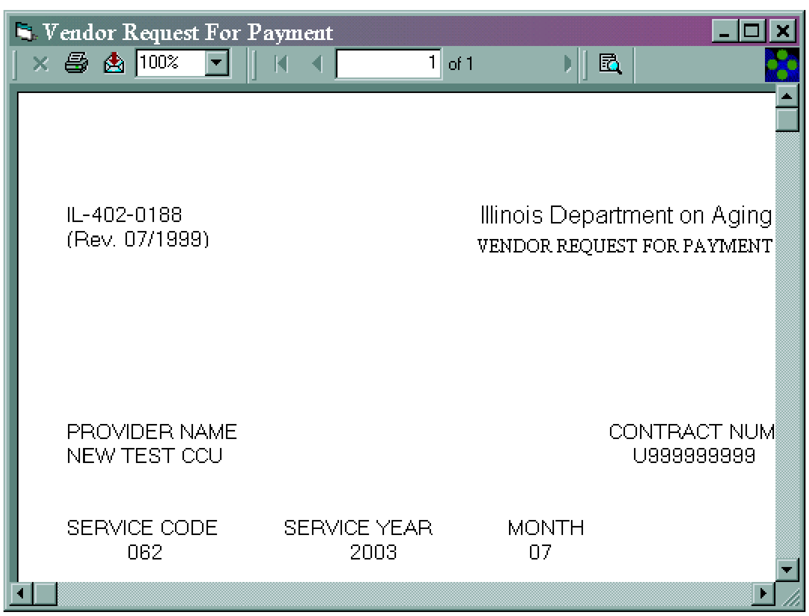


Figure 2

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the VRFP Transmittal Listing, click on the printer icon. To close the window, click on the X in the upper right corner.

After closing the VRFP Report window, another screen will display the VRFP Audit Report. The Audit report can be used to compare the individual batches to the total on the audit report to ensure correct billing. *(See Figure 3)*

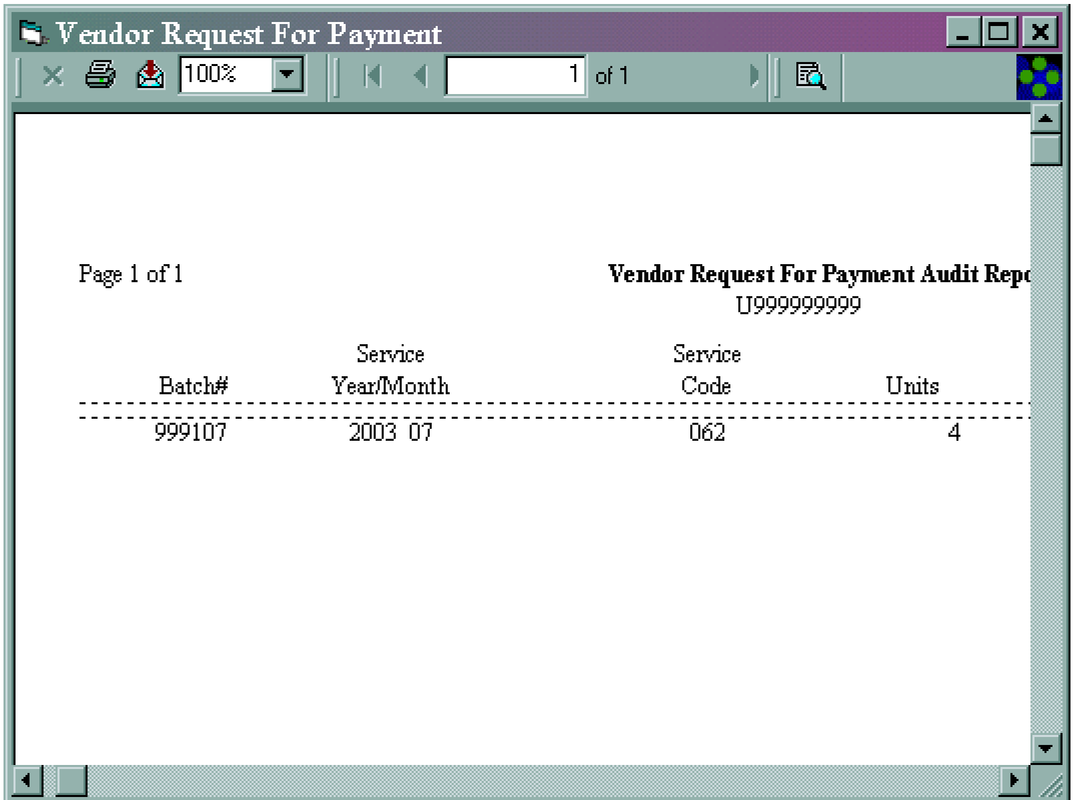


Figure 3

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the VRFP Audit Report, click on the printer icon. To close the window, click on the X in the upper right corner.

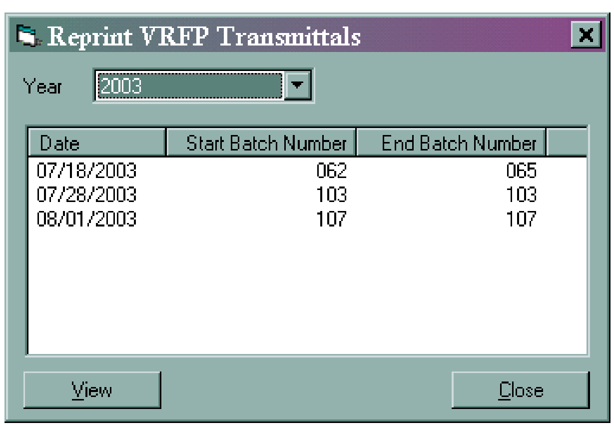


Figure 4

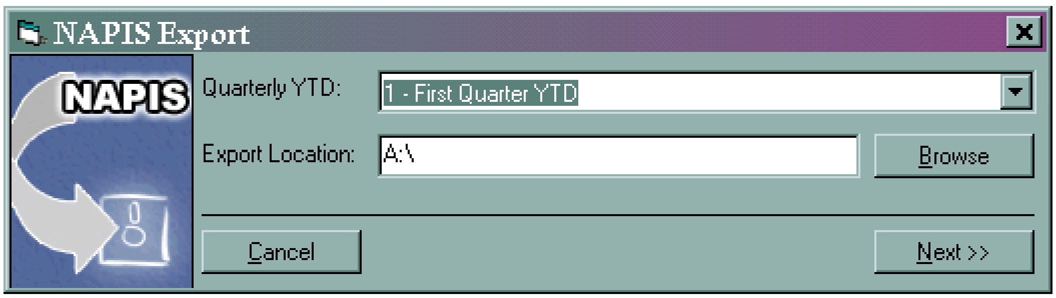
Click Close on the Reprint VRFP Transmittals screen when you are finished. *(See Figure 4)*

NAPIS EXPORT

In CMIS, you run a NAPIS Export in order to transfer information entered into CMIS to your Area Agency on Aging (AAA).

In order for data to be exported on the NAPIS Export, you must enter Client Service Activity for the specific Title III program. Any Client Service Activity entered into CMIS for a Title III program during the Federal Fiscal time period chosen during the NAPIS Export routine, will be sent during the NAPIS export.

Choose NAPIS Export from the Process menu. *(See Figure 1)*



Choose the date range from the drop down menu. Choose the computer drive and location to export the file. By clicking on the Browse button you can change the Export Location to a folder on your local or network drive. Click Next to continue.

The NAPIS export will be sent to your designated drive location.

A report of the clients contained within the NAPIS Export will open on your screen.
(See Figure 2)

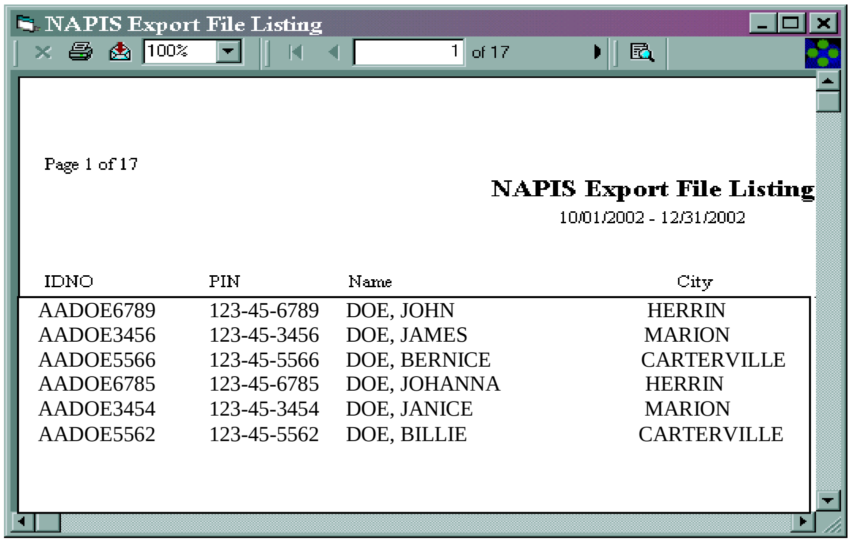


Figure 2

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the NAPIS Export File Listing, click on the printer icon. To close the window, click on the X in the upper right corner.

After closing the NAPIS Export File Listing screen, another screen will open with the NAPIS Export Summary Listing. *(See Figure 3)*

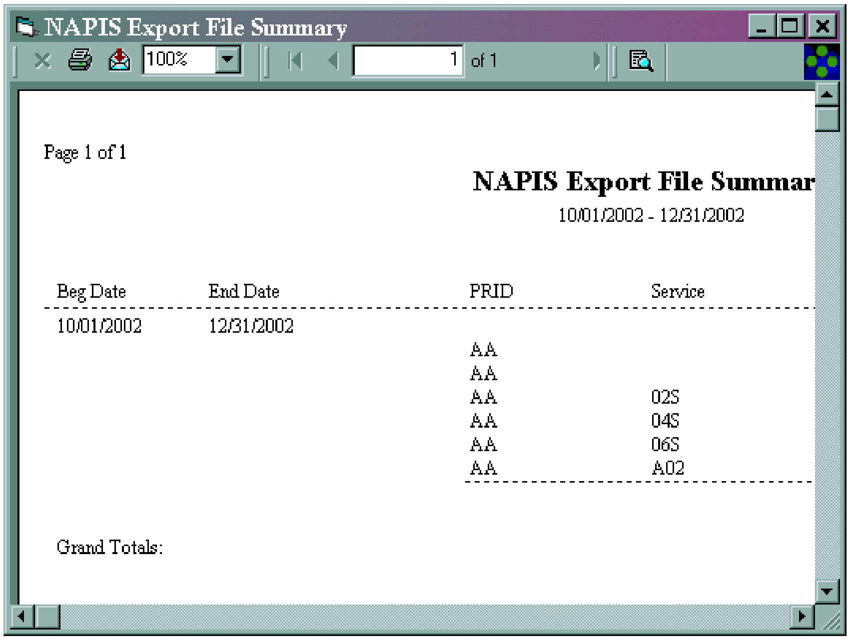


Figure 3

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the NAPIS Export File Summary, click on the printer icon. To close the window, click on the X in the upper right corner. After closing this screen, a message will appear that the NAPIS Export is complete. Click OK to complete the NAPIS Export.
(See Figure 4)

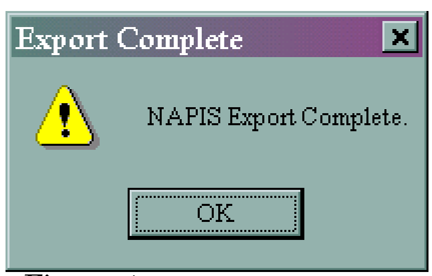


Figure 4

DELETE CANCELLED AUTHORIZATIONS

The Delete Cancelled Authorizations procedure can be used to delete the authorizations that have been cancelled. This procedure will delete all cancelled authorizations that have been entered. It is not required that you run this procedure.

Note: If your CCU uses cancelled Auths as a tracking/audit mechanism, you will not want to run this procedure.

To begin, choose Delete Cancelled Authorizations from the Administration menu. *(See Figure 1)*

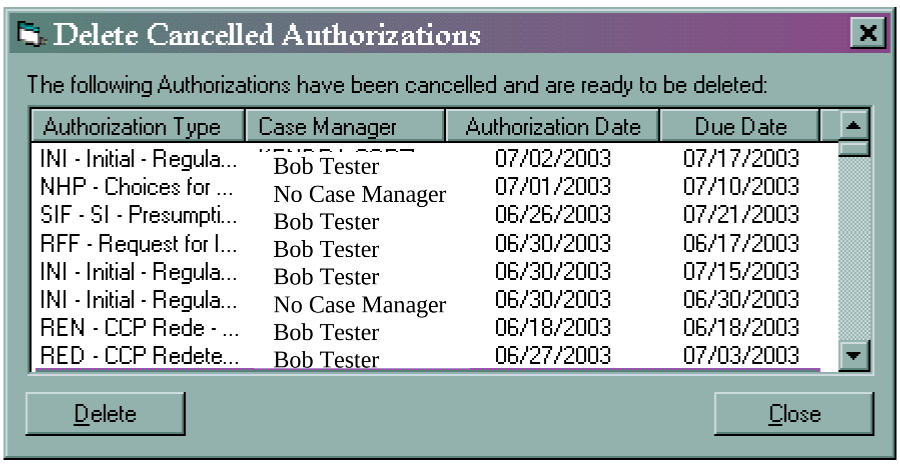


Figure 1

Click Delete to begin. This Process can be time consuming depending on the number of authorizations that need to be deleted.

Click Close to exit without deleting or when you are finished.

5. NEXT ASSESSMENT GENERATION

Next Assessment Generation is a tool that will generate authorizations for annual re-determinations in CMIS.

Choose Next Assessment Generation from the Administration menu. *(See Figure 1)*

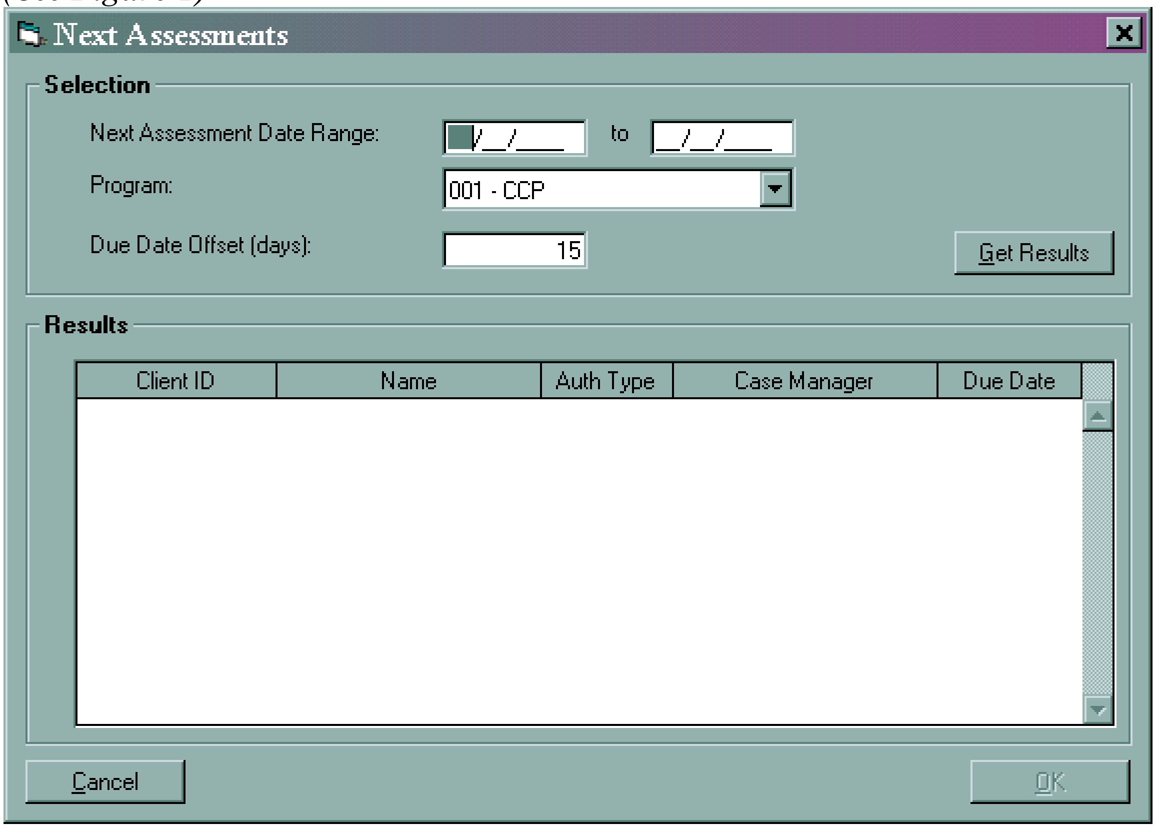


Figure 1

The dates that you enter in the Next Assessment Date Range field will determine which annual redeterminations are generated. If the next assessment date in the CMIS assessment record falls between the range of dates you enter in the Next Assessment Date Range fields, an annual Redetermination will be created during this procedure.

Since the assignments are made in CMIS based on the Next Assessment Date, if you set the Due Date field to 0, the due date on the authorization will be the same as the Next Assessment Date from the client's last assessment. If you enter a number, for example 15, in the Due Date field you can make the due date on the authorization be 15 days prior to the Next Assessment Date.

After entering the Next Assessment Date Range, choose the needed Program from the drop down list. Enter the Due Date Offset, then click Get Results to continue.

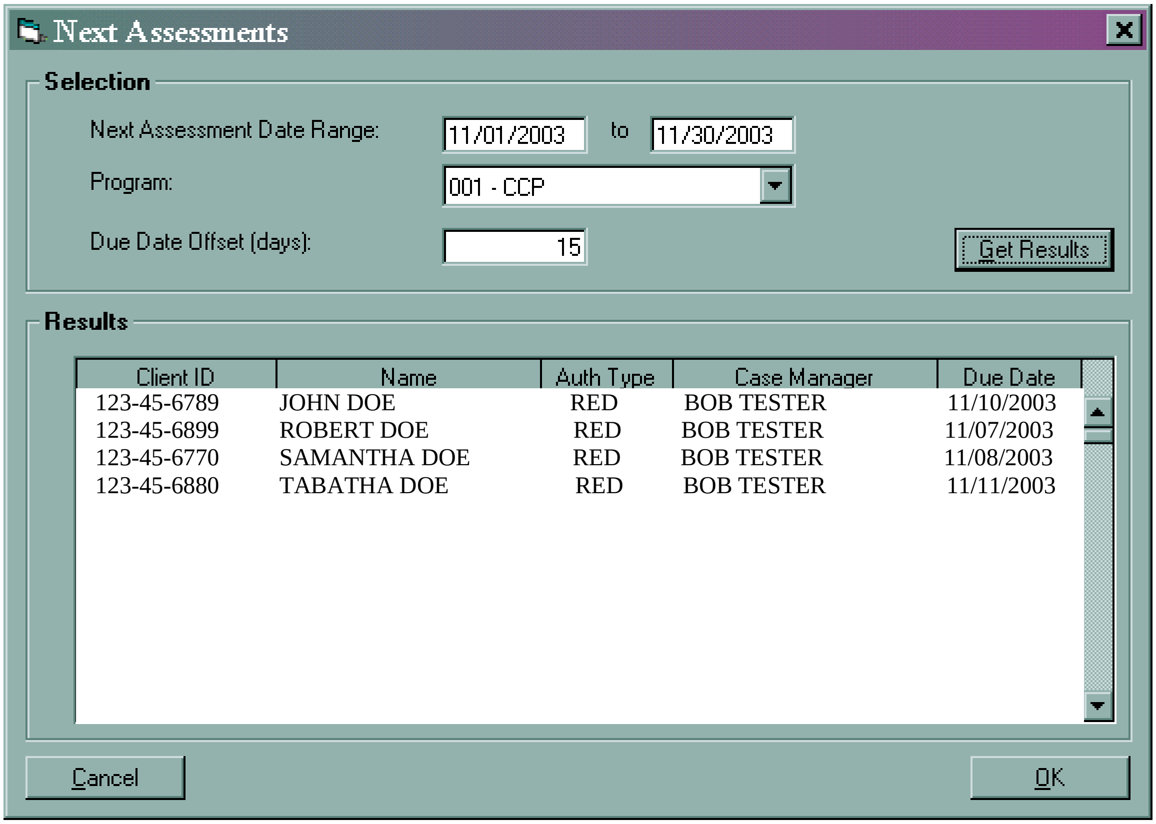


Figure 2

The clients will be displayed in the Results section of the screen. Click OK to continue. *(See Figure 2)*

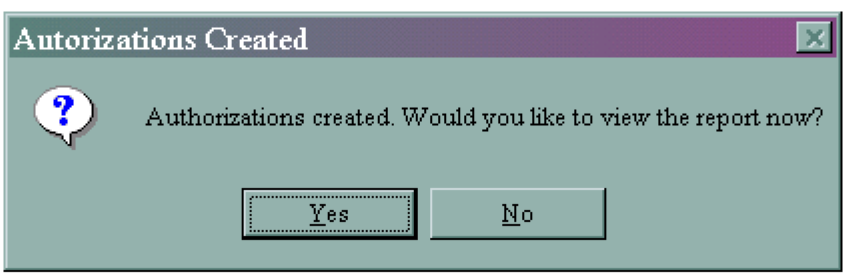


Figure 3

Click Yes to view the report. Clicking Yes will allow you to view and/or print all or some of the Authorization Memorandums. If you do not need to print the Auths, click No. *(See Figure 3)*

Choosing Yes to View Authorizations will display the Authorization Memorandums in a new screen. *(See Figure 4)*

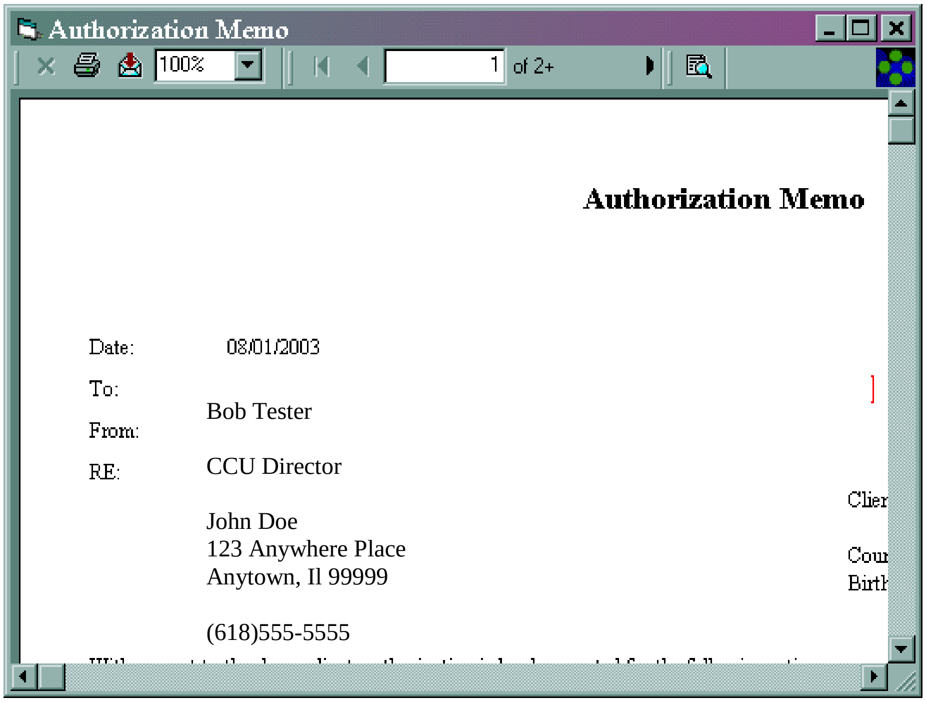


Figure 4

To view additional information, click on the arrows at the bottom and sides of the window or use your arrow keys. To print the Authorization Memos, click on the printer icon. To close the window, click on the X in the upper right corner.

When you are finished, the results section of the screen will be empty, Click the X in the upper right corner to close. *(See Figure 5)*

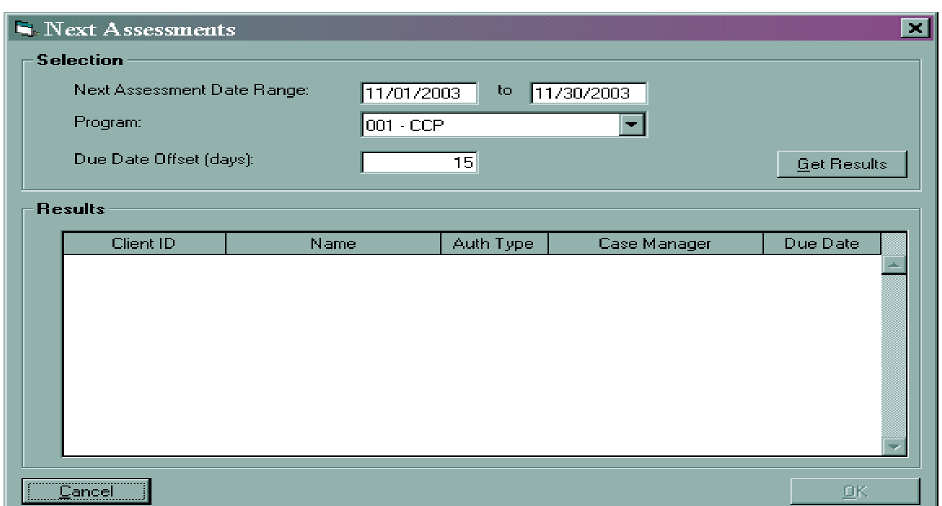


Figure 5

BACKUP

It is recommended that you routinely back up your CMIS database. Please work with your Network or Computer personnel to perform a backup of the CMIS database.

LOGS

CMIS creates two types of text files to log events during use of the system. An Error log is created to log any system errors. A User log is created to record transactions performed by a user. These logs are created on the computer workstation that the data is being entered on. There are separate Error and User folders that are found in the following directory: C:\Program Files\CMIS\CMIS\Logs.

It is recommended that these folders be emptied at least every 2-3 months. These logs are created on each individual computer. If you have ten workstations, each workstation will contain a set of logs.

7. MANAGE REPORT DATA

THIS FEATURE IS PLACEMARKED FOR FUTURE COMPATABILITY OF CMIS.