Washington State Developmental Disabilities

Case Management Information System "CMIS"
County information

March 2009

CMIS Features

- County Work List
  - Referrals
    - Pending County Review
    - Approved, Pending Authorization
    - Recently Withdrawn
  - Authorizations
    - Recently Approved
    - Recent Funding Source Change
    - Service To Date in Next 30 Days
    - Service To Date in Past 30 Days

Features, continued

- Client information:
  - Demographics (including School District & transition year)
  - Overview (Case Manger, Eligibility, Program Plan)
  - Client Contact (Residence, Mailing, e-mail)
  - Residential History
  - Collateral Contact and Role
  - County Service Referral
  - County Service Authorization
  - Employment Outcome (SSA, DVR, Employer, Job type, Job benefits)

Features, continued

- Service Providers
  - Search
  - Update (Address, Phone, Evaluation date)
- Data Transfer
  - Employment / Employer information
  - Billing information
- Billing preview
- Reports
  - Billing Summary and Detail
  - Transition Student by Fund Year
  - Cost Benefit Analysis by Service type
  - Review

Features, continued

- County resources links
  - Technical information
  - Training materials
  - Billing instructions
  - System notifications
- Help screen
  - Instant information about the screen you are on

A county signs into the web-based application. Each county staff has a unique login and password with specific rights to a specific county(s).
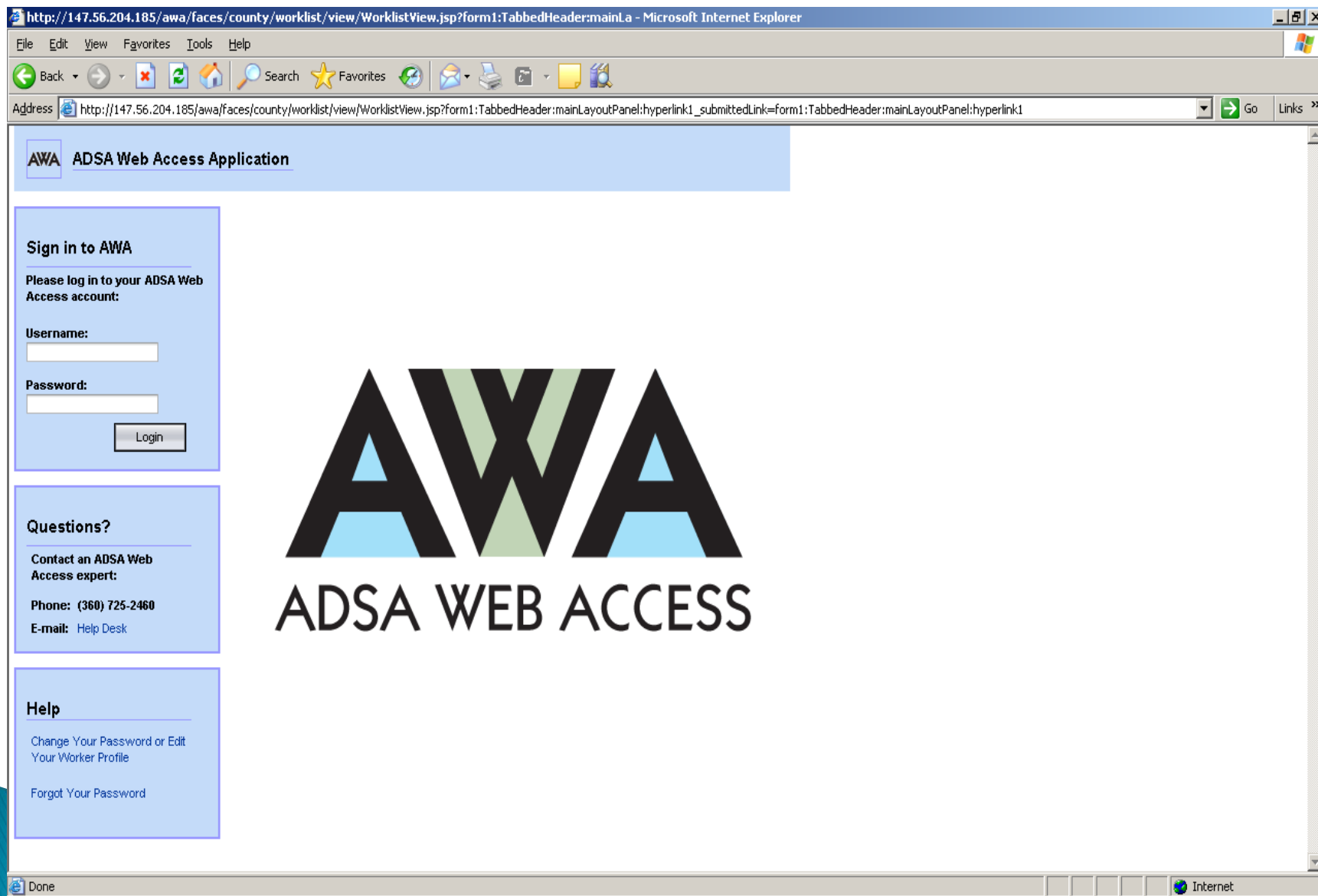
County Work List – Referrals or Authorizations. Once signed in, the Work list screen appears. The county chooses what they want to review – Referral or Authorization and the status.

A sample Referral pending county review from case manager to county. A Referral is generated by a case manager (info includes: request date, client name, county of residence, county of contract, service type, service provider, funding source, tentative service start date).

Screen shot of referral continues on next page.

The lower half of the Referral form has 11 possible fields for county completion. The provider "Indicate Planned Start date" cannot be sooner then the "Tentative Start date" that the case manager provided. Unit billing type can be an Hour, Day, or Month. The Minimum and Maximum units represent the range of service hours a client can expect from their provider. Once all information is complete the "Processing Status" is changed to "Finalized".

County Service Authorization "CSA" sample. From the finalized referral a case manager issues a CSA or sometime referred to as the authorization.

Planned Rates / Planned Service Hours. The Planned Rates and service hour range is populated from the finalized Referral now part of the CSA, hence second tab under CSA.

Planned Rate is updated as change occurs. Counties will use this screen to update changes like the amount of provider service hours and/or the unit rate. Case managers receive a tickler notifying them of the change for their client.

Employment Outcomes. Top half of screen contains Social Security Administration "SSA" information such as PASS, IRWE, or Subsidy. Also displayed is DVR information including status (Application, Eligible, Plan, Plan – Employed, Post Employment service), status date, counselor name, office location, email, phone. The lower half has the employment outcomes information.

Employment Outcomes updates. An "Add Employment" button allows for instant updates – an option to uploading many client records later described in employment/employer related information output.

Once a month, Counties submit Billing Information and Employment Outcome Information:

▸ Data transfer files
  ◦ Information for each client in an Comma Separated Value ".CSV" format.
  ◦ Provider completes information.
  ◦ County uploads completed file into CMIS system.
  ◦ CMIS validates information.
  ◦ Data available thru reports.

"Output" client information. Two choice types:
   1. Billing – choose the service month, service type and provider.
   2. Employment – choose the range of time for corresponding client
       CSA's to be identified, service type, and provider.

Individual Employment Billing "Output" information: Provider receives output file for each service category and all clients they provide services to.

Name	Value
Authorization number	From CSA *prefilled*
Service year month	From output selection *prefilled*
Service code	From CSA *prefilled*
Service provider name	From CSA *prefilled*
County provider number	From CSA *prefilled*
Client last name	From CSA *prefilled*
Client first name	From CSA *prefilled*
Client middle initial	From CSA *prefilled*
ADSA client id	From CSA *prefilled*
Fund source code	From CSA *prefilled*
Service from date	From CSA *prefilled*
Service to date	From CSA *prefilled*
County id – residence	From CSA *prefilled*

IE Billing "Output" information continued. Half the file is prefilled by the CMIS system and the balance the service provides inputs monthly.

Name	Value
County id – provider	From CSA *prefilled*
Units Type Code	Text – 1 character
Number of units	A number 999999.99
Unit rate	A number 999999.99
# of client hours paid	A number 999999.99
# of client hours volunteer	A number 999999.99
# of client hours other community	A number 999999.99
Gross wages	A number 999999.99
Provider staff hours total	A number 999999.99
in discovery, job prep	A number 999999.99
in marketing, job development	A number 999999.99
in job coaching – retention	A number 999999.99
record keeping, meetings	A number 999999.99

Employment information gathered. Similar to the Billing, the client's employment information is half prefilled, the balance requires the input by the service provider. Different from the Billing, is that information is only needed as something new occurs or changes in the client's employment status.

Name	Values
Client county	Logged on county *prefilled*
Service provider	From open CSA *prefilled*
ADSA client ID	From open CSA *prefilled*
Client last name	From client demographics *prefilled*
Client first name	From client demographics *prefilled*
Employer name	Text – 64 characters possible
Job type	List of choices
Start date	Date mm/dd/yyyy
End date	Date mm/dd/yyyy
Medical insurance	Blank, yes or no
Dental insurance	Blank, yes or no
Paid leave	Blank, yes or no
Retirement	Blank, yes or no

Input / Upload Billing or Employment Results. Once uploaded the number of records uploaded, records with errors, records with warnings, and the total records processed are displayed.

Multiple reports are available for review in CMIS.

County Resources | Help | Logout

AWA COUNTY

| Work List | Client | Billing | Providers | Data Transfer | **Reports** |

Billing Statements
Transition Fund Year
Cost Benefit Analysis

Cost Benefit Analysis Report

Service Type:*   **Start Month (YYYYMM):***   **End Month (YYYYMM):***

Group Supported Employment

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Billing Statements
Transition Fund Year
Cost Benefit Analysis

Billing Statements

Billing Summary

Billing Month:*

03/2009

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Billing Summary by Provider

Billing Month:*

03/2009

Provider:

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