

# 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    - Recently Withdrawn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)

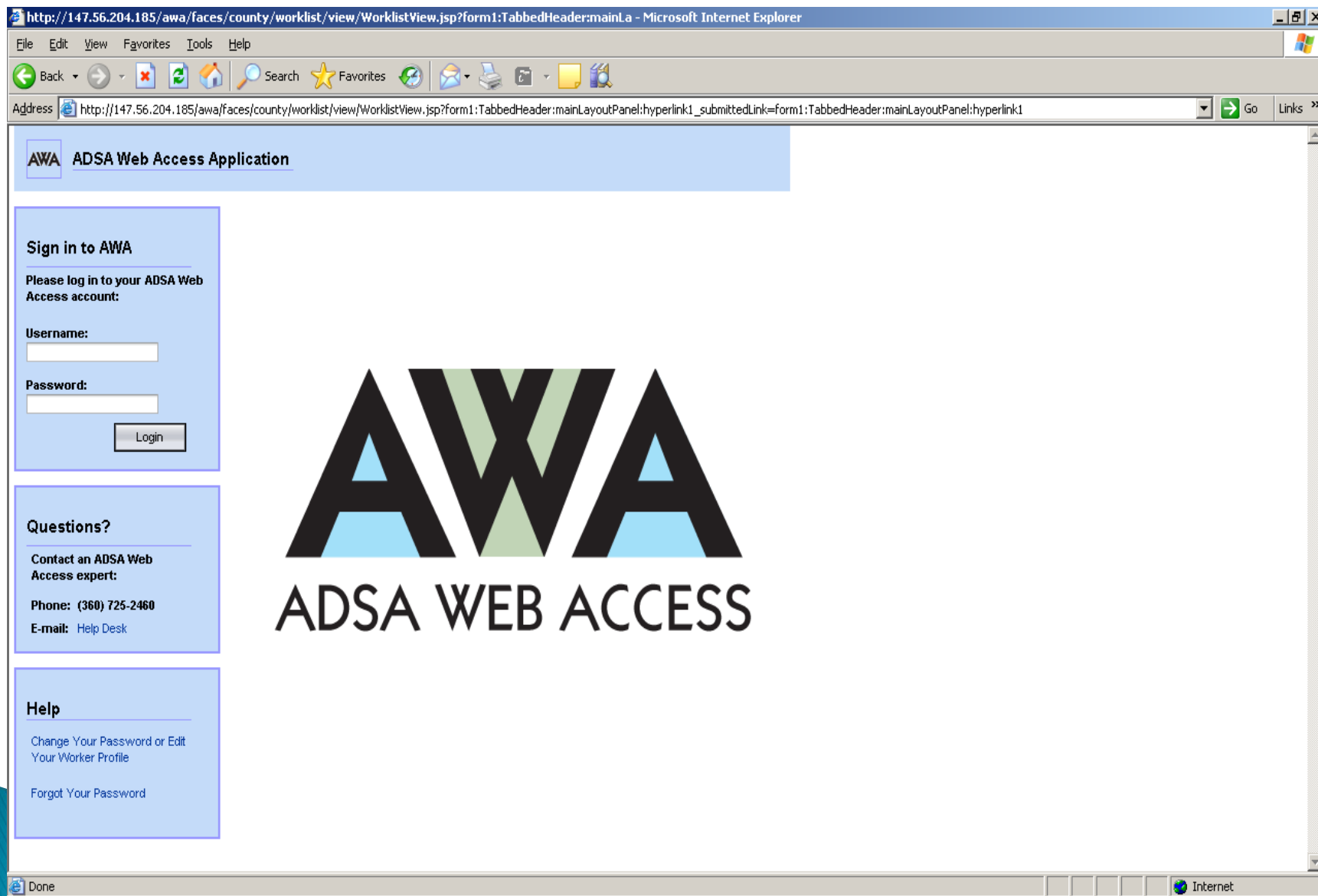
# Features, continued

- ▶ 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.

The screenshot shows a web browser window displaying the AWA County Work List application. The browser's address bar shows the URL: <http://147.56.204.185/awa/faces/navigation/view/ChooseCountyView.jsp>. The application header includes a welcome message for Branda Matson | Adams and links for County Resources, Help, and Logout. The main navigation bar contains tabs for Work List, Client, Billing, Providers, Data Transfer, and Reports. The 'Work List' tab is active, and a dropdown menu is open, showing the following options: Referral - Pending County Review, Referral - Approved, Pending Authorization, Referral - Recently Withdrawn, Authorization - Recently Approved, Authorization - Recent Funding Source Change, Authorization - To-Date in Next 30 Days, and Authorization - To-Date in Past 30 Days. The table below the dropdown has columns for #, Request Date, Client Name, and Status.

#	Request Date	Client Name	Status
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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 screenshot shows a web browser window with the URL <http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpReferral:1:liRequ>. The browser is Microsoft Internet Explorer. The page title is "Welcome, Branda Matson | Thurston". The page has a navigation bar with tabs: "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". The "Work List" tab is selected. The page content is divided into three main sections: "Referral Request", "Resident County Response", and "Service County Response".

**Referral Request**

<b>Request Date:</b> 03/02/2009	<b>Client Name:</b> [Redacted]	<b>County of Residence:</b> Thurston	<b>County of Contract:</b> Thurston
<b>Service Type:</b> Individual Employment	<b>Provider:</b> CAREER QUEST, LLP/THURSTON		
<b>Funding Source:</b> State Only Client	<b>Tentative Start Date:</b> 04/01/2009		

**Resident County Response**

**County:** Thurston **Response:**

**Comments:**

[Text Area]

**Service County Response**

**County:** Thurston **Response:** [Dropdown]

**Service Type:** Individual Employment **Planned Start Date:** [Text Box] **Unit Type:** [Dropdown]

**Provider:** [Text Box]

**Min Rate / Unit:** **Max Rate / Unit:** **Min Units / Month:** **Max Units / Month:**



The lower half of the Referral form has 11 possible fields for county completion. The provider “Indicate Planned Start date” cannot be sooner than 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”.

http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpReferral:1:liRequ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Mail Print Address Book Recent

Address http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpReferral:1:liRequestDate\_submittedLink=form1:dpReferral:1:liRequestDate Go Links >>

[County Service Referral](#)  
[County Service Auth](#)  
[Employment Outcome](#)

**Service Type:**  
Individual Employment

**Provider:**  
CAREER QUEST, LLP/THURSTON

**Funding Source:**  
State Only Client

**Tentative Start Date:**  
04/01/2009

**Resident County Response**

**County:** Thurston

**Response:**

**Comments:**

**Service County Response**

**County:** Thurston

**Response:**

**Service Type:** Individual Employment

**Planned Start Date:**

**Unit Type:**

**Provider:**

**Min Rate / Unit:** \$

**Max Rate / Unit:** \$

**Min Units / Month:**

**Max Units / Month:**

**Comments:**

**Processing Status:** Pending County Response

☐ Authorization Exists

Print Save Cancel

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

http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpAuthorization:5:l - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Address Book

Address http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpAuthorization:5:lAuthNumber\_submittedLink=form1:dpAuthorization:5:lAuthNumber Go Links »

**County Service Authorization** **Planned Rate**

**Client Service Auth**

**Service Type:**  
Group Supported Employment

**Provider Name:** MORNINGSIDE/THURSTON **Provider Number:** P000028

**Address:**  
PO BOX 7936

**City:** OLYMPIA **State:** WA **Zip:** 98507

**Authorization Period**

**From Date:** 02/01/2009 **To Date:** 09/30/2009

**Funding**

Source	Start Date
8	02/01/2009

**Status**

Open

Print Cancel

Done Internet

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.

http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:hyperl - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Copy Paste

Address http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:hyperlink5\_submittedLink=form1:hyperlink5 Go Links »

Welcome, Branda Matson | Clark [County Resources](#) | [Help](#) | [Logout](#)

**AWA** COUNTY

Client Search > Client Service Auth

Work List Client Billing Providers Data Transfer Reports

County Service Authorization Planned Rate Add Planned

Unit Rate Start Date	Unit Type	Min Units/Month	Max Units/Month	Min Unit Rate	Max Unit Rate
08/01/2009	Hour	5.00	10.00	50.0000	75.0000
04/01/2009	Hour	10.00	30.00	50.0000	75.0000

Demographics  
Overview  
Client Contact  
Residence History  
Collateral Contact  
County Service Referral  
County Service Auth  
Employment  
Outcome

Done Internet

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.

The screenshot shows a web browser window with the URL `http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:hyperlink5`. The page is titled "Welcome, Branda Matson | Clark" and includes navigation links for "County Resources", "Help", and "Logout". The main content area is divided into tabs: "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". The "Client" tab is selected, and the "County Service Auth" section is active. A table titled "County Service Authorization" is displayed, with columns for "Unit Rate Start Date", "Unit Type", "Min Units/Month", "Max Units/Month", "Min Unit Rate", and "Max Unit Rate". The table contains two rows of data: one for "08/01/2009" and "Hour", and another for "04/01/2009" and "Hour". A "Planned Rate Dialog" box is open, allowing users to update the unit rate. The dialog includes a "Unit Type" dropdown, input fields for "Min Units per Month", "Max Units per Month", "Min Unit", and "Max Unit", and a "Unit Rate Start Date" field. The dialog also features "Delete", "Save", and "Cancel" buttons.

Unit Rate Start Date   Unit Type   Min Units/Month   Max Units/Month   Min Unit Rate   Max Unit Rate

08/01/2009	Hour				
04/01/2009	Hour				

**Planned Rate Dialog**

Unit Type:\*

Min Units per Month   Max Units per Month   Min Unit   Max Unit

Unit Rate Start Date:\*

Delete   Save   Cancel

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.

The screenshot shows a web application interface for a client named Branda Matson. The browser address bar indicates the URL: [http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jspx?form1:ClientNavigation:hlEmploymentOutcome\\_submittedLink=form1:ClientNavigation:hlEmploymentOutcome](http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jspx?form1:ClientNavigation:hlEmploymentOutcome_submittedLink=form1:ClientNavigation:hlEmploymentOutcome). The page title is "Welcome, Branda Matson | Thurston".

The main content area is divided into two sections. The top section, titled "SSA / DVR", displays the following information:

<b>PASS:</b>	<b>IRWE:</b>	<b>Subsidy:</b>	<b>DVR Status:</b> Eligible	<b>DVR Status Date:</b> 12/18/2008
<b>DVR Counselor:</b> Deborah Roberts	<b>DVR Counselor Office:</b> WS Thurston County	<b>DVR Counselor Email:</b> RobertR@dshs.wa.gov	<b>DVR Counselor Phone:</b> (360) 704-3575	

The bottom section, titled "Employment Outcome List", displays a table with the following columns: Employer Name, Job Type, Start Date, and End Date. The table contains one entry:

Employer Name	Job Type	Start Date	End Date
Starbucks	Food Services Occupations	03/20/2009	

The left sidebar contains a navigation menu with the following items: Overview, Client C, Demographics, Overview, Client Contact, Residence History, Collateral Contact, County Service Referral, County Service Auth, and Employment Outcome (which is currently selected).

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.

The screenshot displays a web browser window with the address `http://147.56.204.185/awa/faces/county/client/view/CountyServiceReferralDetailView.jsp?form1:ClientNavigation:hlEmploymentOutcome_submittedLink=form1:ClientNavigation:hlEmploymentOutcome`. The page title is "Welcome, Branda Matson | Thurston". The main navigation bar includes "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". The left sidebar shows a tree view with "Demographics", "Overview", "Client Contact", "Residence History", "Collateral Contact", "County Service Referral", "County Service Auth", and "Employment Outcome". The "Employment Outcome" section is active, showing "SSA / DVR" and "Employment Outcome List" with a link to "Employer Name".

The "Employment Outcome Dialog" form is open, containing the following fields and controls:

- Employer's Name:** A text input field.
- Job Type:** A dropdown menu.
- Start Date:** A date input field.
- End Date:** A date input field.
- Employment Benefits:** A section with four checkboxes: ☐ Medical Insurance, ☐ Paid Leave, ☐ Dental Insurance, and ☐ Retirement.
- Buttons:** "Delete", "Save", and "Cancel".

# 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.

The screenshot shows a web browser window with the following details:

- Browser:** Microsoft Internet Explorer
- Address Bar:** [http://147.56.204.185/awa/faces/county/datatransfer/view/BillingInputView.jsp?form1:DataTransferNavigation:hlEmploymentOutput\\_submittedLink=form1:DataTransferNavigation:hlEmploymentOutput](http://147.56.204.185/awa/faces/county/datatransfer/view/BillingInputView.jsp?form1:DataTransferNavigation:hlEmploymentOutput_submittedLink=form1:DataTransferNavigation:hlEmploymentOutput)
- Page Header:**
  - Left: Welcome, Branda Matson | Thurston
  - Right: [County Resources](#) | [Help](#) | [Logout](#)
- Navigation Menu:**
  - Work List
  - Client
  - Billing
  - Providers
  - Data Transfer**
  - Reports
- Main Content Area:**
  - Employment Output** (Section Header)
  - Start Date:  End Date:
  - Service Type:
  - Provider:
  -
- Left Sidebar:**
  - [Employment Output](#)
  - [Employment Input](#)
  - [Billing Output](#)
  - [Billing Input](#)



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 <i>prefilled</i>
Service year month	From output selection <i>prefilled</i>
Service code	From CSA <i>prefilled</i>
Service provider name	From CSA <i>prefilled</i>
County provider number	From CSA <i>prefilled</i>
Client last name	From CSA <i>prefilled</i>
Client first name	From CSA <i>prefilled</i>
Client middle initial	From CSA <i>prefilled</i>
ADSA client id	From CSA <i>prefilled</i>
Fund source code	From CSA <i>prefilled</i>
Service from date	From CSA <i>prefilled</i>
Service to date	From CSA <i>prefilled</i>
County id – residence	From CSA <i>prefilled</i>

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 <i>prefilled</i>
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 <i>prefilled</i>
Service provider	From open CSA <i>prefilled</i>
ADSA client ID	From open CSA <i>prefilled</i>
Client last name	From client demographics <i>prefilled</i>
Client first name	From client demographics <i>prefilled</i>
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.

The screenshot shows a web browser window with the address bar displaying the URL: `http://147.56.204.185/awa/faces/county/datatransfer/view/BillingOutputView.jsp?form1:DataTransf`. The browser's address bar also shows a search path: `http://147.56.204.185/awa/faces/county/datatransfer/view/BillingOutputView.jsp?form1:DataTransferNavigation:hBillingInput1_submittedLink=form1:DataTransferNavigation:hBillingInput1`. The page title is "Welcome, Branda Matson | Thurston". The page features a navigation menu with tabs: "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". The "Data Transfer" tab is selected. The main content area is divided into three sections: "Billing Input", "Billing Input Results", and "Upload Errors". The "Billing Input" section contains a "Service Type:" dropdown menu set to "Individual Employment", an "Input File:" text box with a "Browse..." button, and an "Upload" button. The "Billing Input Results" section displays the following statistics: "Records uploaded: 0", "Records with errors: 0", "Records with warnings: 0", and "Total records processed: 0". A "Download Errors" button is located at the bottom of this section. The "Upload Errors" section is currently empty, showing only a header "Description". The browser's status bar at the bottom indicates "Internet".

http://147.56.204.185/awa/faces/county/datatransfer/view/BillingOutputView.jsp?form1:DataTransf - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Copy Paste

Address http://147.56.204.185/awa/faces/county/datatransfer/view/BillingOutputView.jsp?form1:DataTransferNavigation:hBillingInput1\_submittedLink=form1:DataTransferNavigation:hBillingInput1 Go Links >>

Welcome, Branda Matson | Thurston County Resources | Help | Logout

**AWA** COUNTY

Employment Output  
Employment Input  
Billing Output  
Billing Input

Work List Client Billing Providers Data Transfer Reports

**Billing Input**

Service Type: Individual Employment Input File: Browse... Upload

**Billing Input Results**

Records uploaded: 0 Records with errors: 0 Records with warnings: 0

Total records processed: 0 Download Errors

**Upload Errors**

Description
-------------

Internet

# Multiple reports are available for review in CMIS.

Welcome, Branda Matson | Thurston

[County Resources](#) | [Help](#) | [Logout](#)



Work List

Client

Billing

Providers

Data Transfer

Reports

Billing Statements

Transition Fund Year

Cost Benefit Analysis

## Cost Benefit Analysis Report

Service Type:\*

Group Supported Employment

Start Month (YYYYMM):\*

End Month (YYYYMM):\*

Generate PDF

Generate XLS

Billing Statements

Transition Fund Year

Cost Benefit Analysis

## Billing Statements

### Billing Summary

Billing Month:\*

03/2009

Generate PDF

Generate XLS

### Billing Summary by Provider

Billing Month:\*

03/2009

Provider:

Generate PDF

Generate XLS