



Case Management Information System “CMIS”

Section 1: Employment Outcomes Instructions – pages 2 - 10

Section 2: Planned Rates Instructions – pages 11 - 17

Division of Developmental Disabilities
2/1/2010 updated

CMIS: Employment Outcomes & Planned Rates

Section 1: Employment Outcomes process

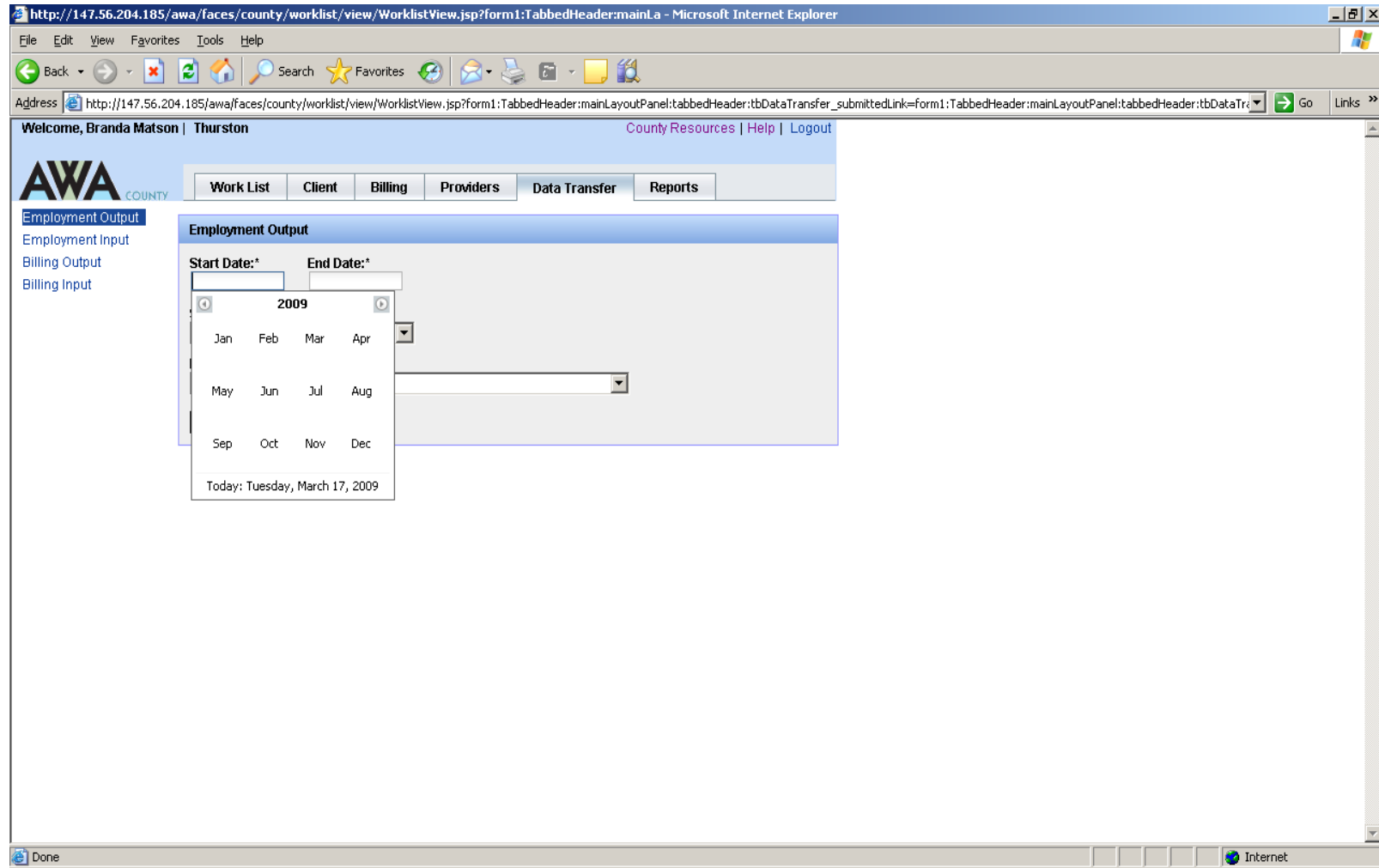
1. Find the “Data Transfer” tab and then choose “Employment Output” on the left of the screen. Your screen should look similar to below.

The screenshot shows a web browser window displaying the AWA County Worklist application. The browser's address bar shows the URL: <https://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:TabbedHeader:mainL>. The application header includes the text "Welcome, Branda Matson | Thurston" and "County Resources | Help | Logout". The main navigation menu contains tabs for "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". The "Data Transfer" tab is selected, and the "Employment Output" sub-tab is active on the left sidebar. The main content area displays the "Employment Output" form with the following fields:

- Start Date:*** and **End Date:***: Two text input fields.
- Service Type:**: A dropdown menu.
- Provider:**: A dropdown menu.
- Generate**: A button.

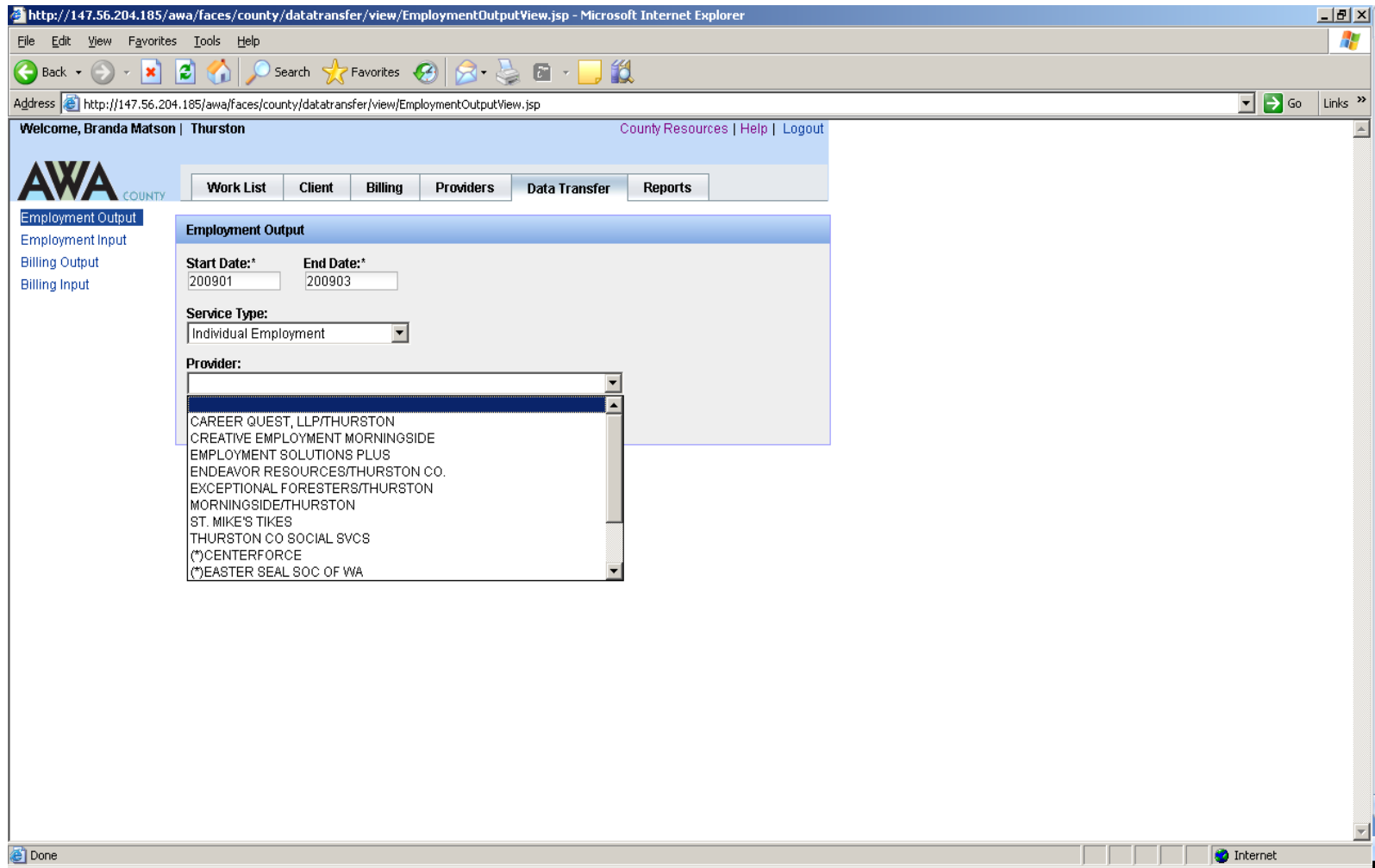
CMIS: Employment Outcomes & Planned Rates

2. Enter the “Start date” and “End date” for the range of authorized clients you would like to see and/or update employment information on. A pop up calendar should appear when you click once in the appropriate “Start...” or “End...” box. Select the dates you want with a click (note: if you have chosen the wrong date just click and the pop up calendar will appear for you to choose the correct date. If you prefer not to use the pop up calendar just start to enter the date in yyymm format. Both the “Start date” and “End date” are required data fields.



CMIS: Employment Outcomes & Planned Rates

3. Choose the “Service Type” from the drop down or do not choose a type and receive all service types: Individual Employment, Group Supported Employment, and Person to Person.
4. If you have chosen one “Service Type” then you may choose a “Provider”. If you do not choose one provider you will receive all providers for the chosen service type.
5. Click on the “Generate” button and open or save the file.
6. Most often you will choose to save the file.



CMIS: Employment Outcomes & Planned Rates

7. An output file that contains the following information should appear.
8. Complete items 6 through 13.
9. Save completed file on your computer.
10. Next step is to “Input” or upload the file into the CMIS.

	Name	Values
1	Client County	Logged on County – <i>pre-filled</i>
2	Provider	From Open Authorization– <i>pre-filled</i>
3	ADSA ID	From Open Authorization– <i>pre-filled</i>
4	Client Last Name	From Client Demographics– <i>pre-filled</i>
5	Client First Name	From Client Demographics– <i>pre-filled</i>
6	Employer Name	Text – 64 characters possible
7	Job Type	Code – 4 digits (see list on next page)
8	Start Date	Date MM/DD/YYYY
9	End Date	Date MM/DD/YYYY
10	Medical Insurance	Blank, Y or N
11	Dental Insurance	Blank, Y or N
12	Paid Leave	Blank, Y or N
13	Retirement	Blank, Y or N
14	Last Employment Outcome Update Date	From Last Employment Outcome Update Date on the CMIS database

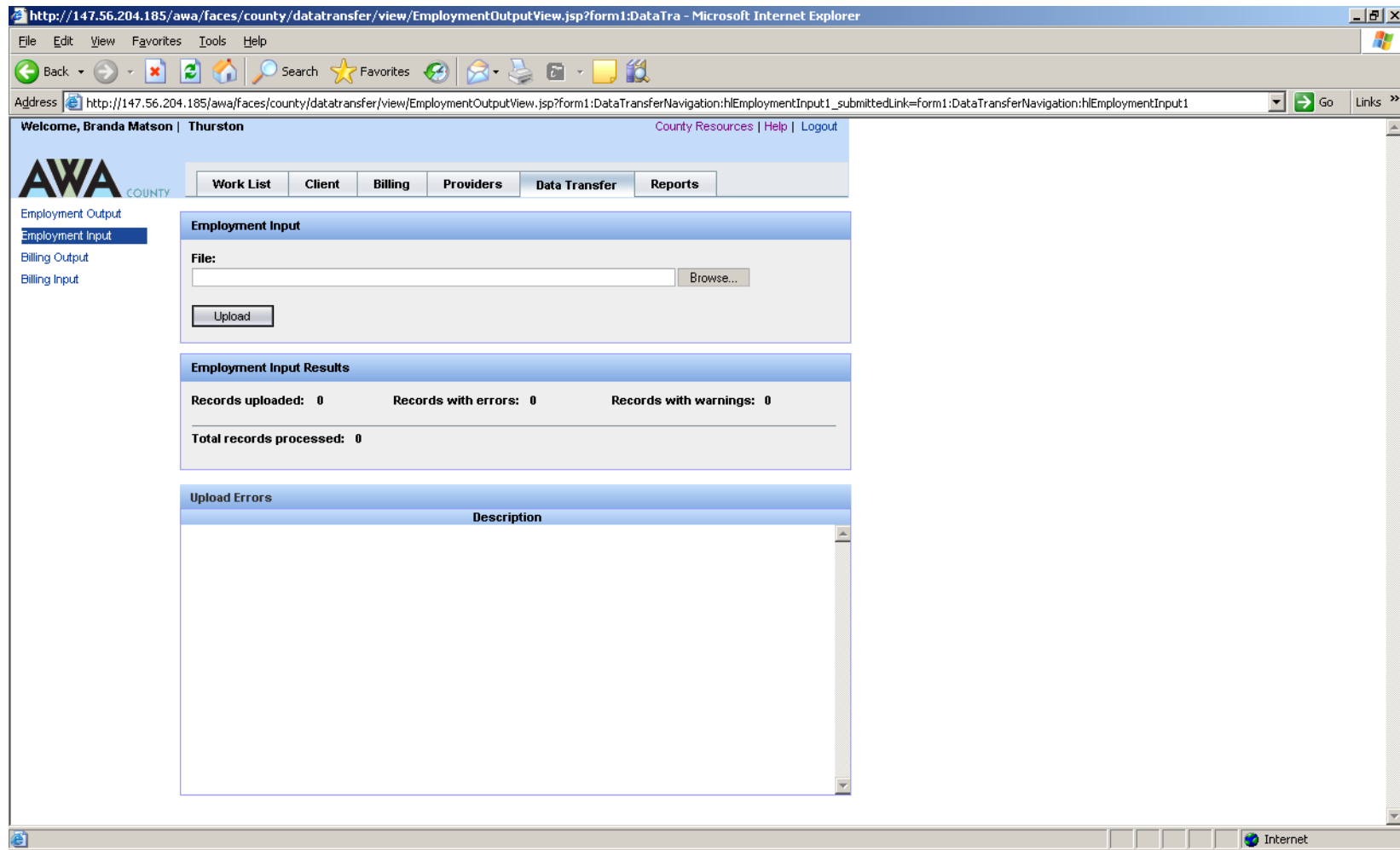
CMIS: Employment Outcomes & Planned Rates

Job Type – 4 digit code:

Code	Description
JT01	Clerical
JT02	Labor
JT03	Management
JT04	Self Employed
JT05	Service
JT08	Administrative Support Occupations
JT09	Animal Husbandry, Agriculture and Related Occupations
JT10	Education Occupations
JT11	Food Services Occupations
JT12	Lodging, Building and Related Occupations
JT13	Machine Trade Occupations
JT14	Manufacturing, Construction and Related Occupations
JT15	Medical/Health Care Occupations
JT16	Personal Service Occupations
JT17	Physical Sciences and Laboratory Technology Occupations
JT18	Professional and Support Specialists
JT19	Social Service Occupations
JT20	Wholesale/Retail Trade Occupations
JT21	Other Occupations

CMIS: Employment Outcomes & Planned Rates

11. Choose the “Employment Input” tab.
12. File: Browse appears, click on browse and find the file name you previously saved – click on it.
13. File name should appear in the box after File:
14. Hit Upload and the input results and errors will appear (note this is an identical process to the monthly billing).



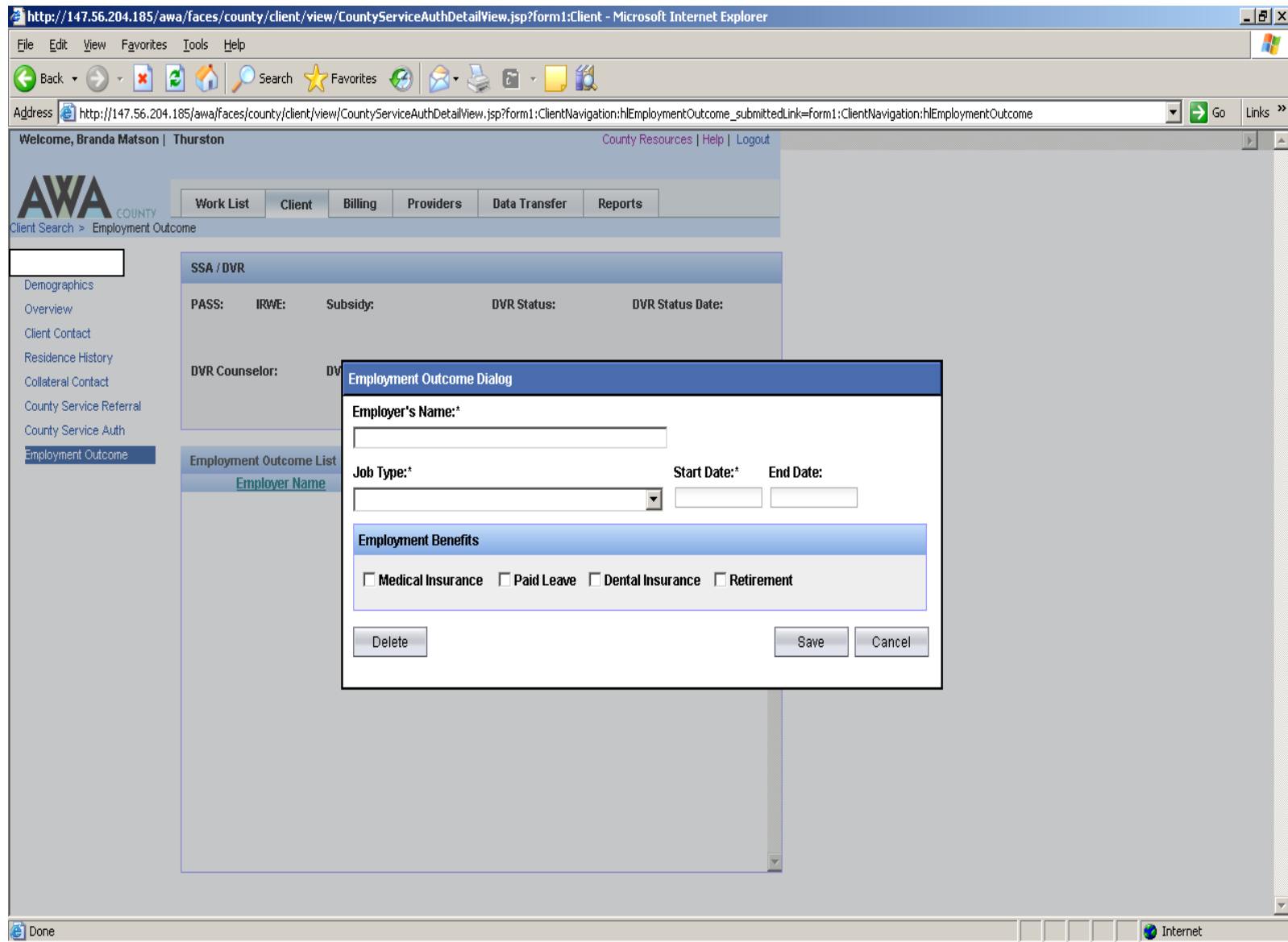
CMIS: Employment Outcomes & Planned Rates

15. Click on the "Client" tab. Search for a client. Find the "Employment Outcome" on the left of the screen.
16. Uploaded employment outcome information will appear on the "Employment Outcome" tab bottom half of screen.
17. Available SSA / DVR information will appear on the top half of the screen.

The screenshot displays the AWA County web application interface. At the top, the browser address bar shows the URL: `http://147.56.204.185/awa/faces/county/client/view/EmploymentOutcomeView.jsp?form1:ClientNavigation:hlEmploymentOutcome2_submittedLink=form1:ClientNavigation:hlEmploymentOutcome2`. The page header includes a welcome message for Branda Matson in Thurston and navigation links for County Resources, Help, and Logout. A main navigation menu contains tabs for Work List, Client, Billing, Providers, Data Transfer, and Reports. The Client tab is active, and the left sidebar shows a search box and a list of navigation options, with "Employment Outcome" selected. The main content area is divided into two sections. The top section, titled "SSA / DVR", contains fields for PASS, IRWE, Subsidy, DVR Status, DVR Status Date, DVR Counselor, DVR Counselor Office, DVR Counselor Email, and DVR Counselor Phone. The bottom section, titled "Employment Outcome List", features a table with columns for Employer Name, Job Type, Start Date, and End Date. A single entry is visible: Safeway, Food Services Occupations, 09/29/2008. An "Add Employment" link is located to the right of the table header. The browser's taskbar at the bottom shows the Internet Explorer icon and the word "Internet".

CMIS: Employment Outcomes & Planned Rates

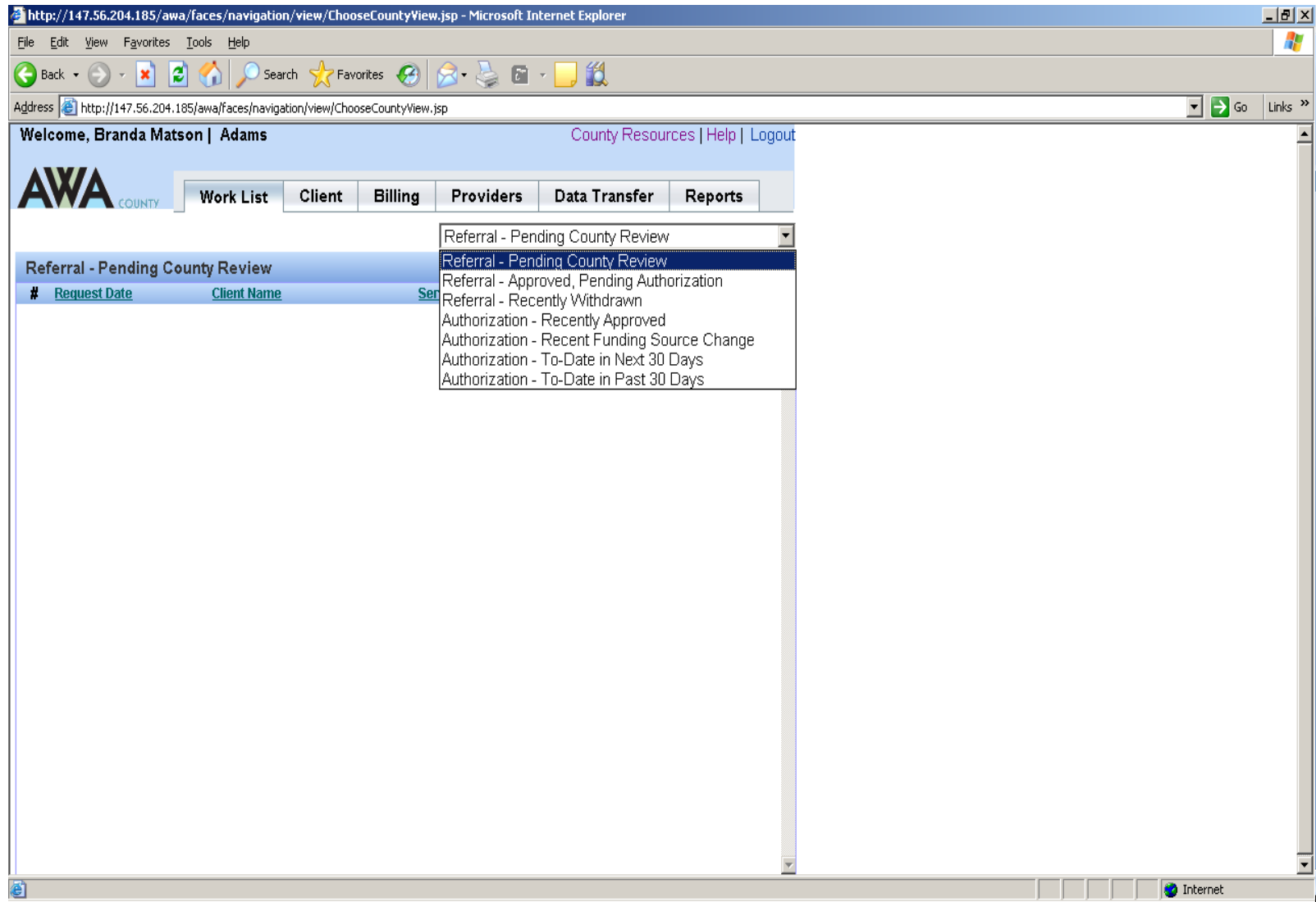
18. An “Add Employment” button allows for an instant update – an option to uploading many client records.



CMIS: Employment Outcomes & Planned Rates

Section 2: Planned Rates process

1. The "Referral" information has been modified to capture Minimums and Maximums for rates and service hours/month.



CMIS: Employment Outcomes & Planned Rates

2. The Rate / Unit has been expanded to include a Minimum and Maximum Rate / Unit.
3. The Rate / Unit needs to correlate to the Unit Type.
4. The number of Units / Month has been modified to include minimums and maximums but is now referred to as Service Hrs / Mo.
5. The “Minimum & Maximum Service Hrs / Mo.” translates to the range of service hours a client can expect to receive from their service provider per month.

The screenshot shows a web browser window displaying a form titled "County Service Referral". The form is organized into several sections:

- Client Information:** Client Name (text input), County of Residence (Thurston), County of Contract (Thurston), Service Type (Individual Employment), Provider (CAREER QUEST, LLP/THURSTON), Funding Source (State Only Client), and Tentative Start Date (04/01/2009).
- Resident County Response:** County (Thurston), Response (text input), and Comments (text area).
- Service County Response:** County (Thurston), Response (dropdown menu), Service Type (Individual Employment), Planned Start Date (text input), Unit Type (dropdown menu), Provider (dropdown menu), Min Rate / Unit (\$), Max Rate / Unit (\$), Min Units / Month (text input), and Max Units / Month (text input). There is also a Comments field.
- Processing Status:** A dropdown menu currently set to "Pending County Response" and a checkbox for "Authorization Exists".

6. All other referral information remains the same:
 - ▶ Indicate Planned Start date (date cannot be sooner than the case manager's tentative start date)
 - ▶ Unit billing type (Hour, Day, Month)
 - ▶ Confirm Provider "or" reject and offer a comment for the case manager
 - ▶ Complete minimum and maximum unit rate that correlates to the unit type
 - ▶ Complete minimum and maximum service hours / month (range of service hours client can expect from provider)
 - ▶ Comment(s) if necessary
 - ▶ Change Processing status to Finalized

CMIS: Employment Outcomes & Planned Rates

7. From the finalized referral the case manager issues the CSA.

The screenshot shows a web browser window displaying a 'County Service Authorization' form. The browser's address bar shows the URL: `http://147.56.204.185/awa/faces/county/worklist/view/WorklistView.jsp?form1:dpAuthorization:6:lAuthNumber_submittedLink=form1:dpAuthorization:6:lAuthNumber`. The browser's status bar at the bottom indicates 'Done' and 'Internet'.

The form is titled 'County Service Authorization' and 'Planned Rate'. It contains the following sections:

- Client Service Auth**
 - Service Type:** Individual Employment
 - Provider Name:** EMPLOYMENT SOLUTIONS PLUS
 - Provider Number:** P207146
 - Address:** 1113 Sleater Kinney RD SE
 - City:** Olympia
 - State:** WA
 - Zip:** 98503
- Authorization Period**
 - From Date:** 03/01/2009
 - To Date:** 06/30/2009
- Funding**

Source	Start Date
CP	03/01/2009
- Status**
 - Open

At the bottom of the form, there are 'Print' and 'Cancel' buttons.

CMIS: Employment Outcomes & Planned Rates

8. The Planned Rates and Service Hour Range are populated from the finalized referral now part of the CSA - second tab.

The screenshot shows a web browser window displaying a web application interface. The browser's address bar shows the URL: `http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:tabSet1:tab2_submittedLink=form1:tabSet1:tab2`. The page title is "Welcome, Branda Matson | Thurston" with links for "County Resources | Help | Logout".

The application has a navigation menu with tabs: "Work List", "Client", "Billing", "Providers", "Data Transfer", and "Reports". Below this is a breadcrumb trail: "Client Search > Client Service Auth".

The main content area is titled "County Service Authorization" and "Planned Rate". It features a table with the following data:

Unit Rate	Start Date	Unit Type	Min Units/Month	Max Units/Month	Min Unit Rate	Max Unit Rate
	04/01/2009	Hour	15.00	15.10	15.0000	15.0500

There is an "Add Planned Rate" link in the top right corner of the table area. A sidebar on the left contains a list of navigation options: "Demographics", "Overview", "Client Contact", "Residence History", "Collateral Contact", "County Service Referral", "County Service Auth" (highlighted), and "Employment Outcome".

CMIS: Employment Outcomes & Planned Rates

9. Counties will use this screen to update changes such as the amount of provider service hours and/or changes to the unit rate or unit type. Case managers receive a tickler when changes are made.

The screenshot shows a web browser window displaying the CMIS application. The browser address bar shows the URL: `http://147.56.204.185/awa/faces/county/client/view/CountyServiceAuthDetailView.jsp?form1:tabSet`. The application header includes a welcome message for Branda Matson in Thurston and navigation tabs for Work List, Client, Billing, Providers, Data Transfer, and Reports. The main content area is titled 'County Service Authorization' and 'Planned Rate'. A table displays the current planned rate:

Unit Rate Start Date	Unit Type	Min Units/Month	Max Units/Month	Min Unit Rate	Max Unit Rate
04/01/2009	Hour	15.00	15.10	15.0000	15.0500

A 'Planned Rate Dialog' box is open, allowing for updates. It contains the following fields:

- Unit Type:*
- Min Rate/Unit:*
- Max Rate/Unit:*
- Min Units/Month:*
- Max Units/Month:*
- Unit Rate Start Date:*

Buttons for 'Delete', 'Save', and 'Cancel' are located at the bottom of the dialog.

CMIS: Employment Outcomes & Planned Rates

For additional information you have a couple of options:

- ▶ The “County Resources” link found on your web page will take you to the CMIS Project Intranet where you will find material related to the County CMIS project including billing instruction, business requirements, sample output files, etc.
- ▶ The “Help” link also on your web page provides you with instant information related to the screen you are on.
- ▶ You can always call the ADSA Help Desk
 - In the Olympia area: 360/725-2460
 - Statewide: 1-800-818-4024 or
 - Email: ADSAHelpDesk@dshs.wa.gov

