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**Important**

The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in approved status. The information that is required due to policy may be different from those that are system required.
Person Administration Requirements

Introduction
Depending on the form, certain fields are required within Person Administration.

Required Fields for Approved Form Status
- **NAME (first) (last)** – Customer Legal Name
- **Date of Birth**
- **SSN**
- **Marital Status**
- **Gender**
- **Ethnicity**
- **Race**
- **Speaks** – Defaults to English
- **Reads** – Defaults to English
- **Understands Only** – Defaults to English

Address Information Region:
- Address Type of **Residence**
  - **Street**
  - **City**
  - **County** – If out of state – use County "ZZ"
  - **State** – If out of country – use State "ZZ"
  - **Zip**
  - **Residence** – Rural or Urban

IDD Additional Info Tab
- **Disabilities Information:**
  - **Identified Disabilities**
  - **Intellectual Assessment**
  - **Hearing Assessment**
  - **Vision Assessment**

**Residential & Day Program Information:**
- **Residential Status**
- **Day Programs**
Customer Information Heading

**Introduction**

The customer heading displays basic information regarding the customer.

Click on the ‘More Person Info...’ link to view the current demographic information of the customer.

![Customer Information Table]

Clicking on the “On Waiting List” link will display the Waiting List Detail page.
Overview

**BASIS Assessment**
The BASIS assessment form is used for adult clients applying for or served by the Intellectual/Developmentally Disabled (IDD) waiver.

**Automated Processes**
The only service that is included in the KAMIS Plan of Care that is associated with the BASIS Assessment is the cost of the assessment itself. All other client services are managed by their Managed Care Organization (MCO). When the BASIS assessment is saved in Approved status, KAMIS automatically creates the Plan of Care with the Assessment line entry, and then automatically processes the billing for the assessment using the Service Provided (225) tool.

KDADS pays the assessment during the first billing cycle after the billing record was created.
Main Assessment Info. Navigation Tab

**Prerequisite**  Add or update all customer and associate information before beginning the assessment data entry. Refer to the ‘Person Administration Requirements’ section at the beginning of this chapter for required Person Admin fields.

**Form Reference**  Page 1 of the BASIS Assessment form.

![BASIS Assessment Form](image)

**Important**  The *Main Assessment Info* page must be saved before any other tabs/pages in the assessment can be accessed. Once the save is successful, the next navigational level tab will automatically display.

**Required Fields**  All required fields (marked with a red asterisk [*]*) on the Main Assessment Info page must be completed in order to save the page.

*Time of Assessment* is required for Initial Assessments; it is added and displays automatically when the assessment is saved in ‘Approved’ status.

*Continued on next page*
### Main Assessment Info. Navigation Tab, continued

#### Required Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Purpose/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Status</td>
<td>The form status is automatically set to Work in Progress when the assessment is first created. The form cannot be saved in Approved status until all required fields on all pages are completed.</td>
</tr>
<tr>
<td>Assessment Type</td>
<td>The Assessment Type describes the specific kind of BASIS assessment being created.</td>
</tr>
<tr>
<td>Face to Face Meeting Date</td>
<td>This is the date the assessor met with the customer/parents/guardians and completed the assessment.</td>
</tr>
<tr>
<td>Assessment Completed Date and Time</td>
<td>This is a read only field and is automatically populated with the date and time that the form is saved in KAMIS in Approved status.</td>
</tr>
<tr>
<td>Reassessment Date</td>
<td>This is a read only field and is automatically populated with the date that is 364 days after the ‘Assessment Completed Date.’</td>
</tr>
<tr>
<td>Assessment Location</td>
<td>Where the assessment was done.</td>
</tr>
<tr>
<td>Assessor Search (Last, First) and Assessor drop-down list</td>
<td>Who performed the assessment. To select an assessor, type in the full or partial LAST name in the Assessor Search field and press the enter key. The Assessor drop-down list populates with the search results. Click on the appropriate Assessor name/organization to select.</td>
</tr>
<tr>
<td>Customer has a Current Medicaid Card</td>
<td>Respond as appropriate – Yes or No</td>
</tr>
<tr>
<td>Waiting for Services</td>
<td>Respond as Appropriate – Yes or No</td>
</tr>
</tbody>
</table>

**Customer has a Current Medicaid Card**

**Waiting for Services**
Main Assessment Info. Navigation Tab – File Upload

Document File Upload Region

Once the Main Assessment Info. page is saved successfully, an additional region displays, providing a way to upload files that attach to the assessment form.

Follow the instructions in the Document File Upload region to upload files associated with this customer’s BASIS Assessment.
Health Info. Navigation Tab – Medical, Seizures, Medications

Form Reference
Page 2 of the BASIS Assessment form

Top portion of the page

Required Fields
All fields displayed on this page are required in order to save the page.

Special Information

*Types of Seizures in the last year:

No seizures this year:

If “YES” is selected (Yes - there were no seizures), the other five questions in the section cannot have a ‘YES’ response.

Continued on next page
Health Info. Navigation Tab – Medical, Seizures, Medications, continued

Form Reference
Page 2 of the BASIS Assessment form, continued

Bottom portion of the page

Required Fields
All fields displayed on this page are required in order to save the page.

Special Information

Is Individual currently taking prescription medication?
If “NO” is selected, the eight Medications listed will automatically display “NOT CURRENTLY TAKING”, and Does Individual receive medication by injection? question will automatically display “NO”.

If any of the above fields are changed to “CURRENTLY TAKING” or “YES” a message at save will display indicating two or more responses do not correctly match, and the page cannot be saved as filled out.
Adaptive Behaviors Navigation Tab – Mobility, Communication

Form Reference
Page 3a of the BASIS Assessment form

Top portion of the page

Required Fields
All fields displayed on this page are required in order to save the page.

Special Information

*Uses a Wheelchair:*

If “NO” is selected, The *Wheelchair Mobility* field will automatically display “Does Not Use Wheelchair”.

If the *Wheelchair Mobility* field is changed to another option other than “Does Not Use Wheelchair” the *Uses a Wheelchair* field will switch to “YES”.

Continued on next page
Adaptive Behaviors Navigation Tab – Mobility, Communication, continued

Form Reference
Page 3a of the BASIS Assessment form, continued

Bottom portion of the page

Required Fields
All fields displayed on this page are required in order to save the page.
Adaptive Behaviors Navigation Tab – Self-Care Skills and Daily Skills

Form Reference
Page 3b of the BASIS Assessment form

Top portion of the page

Required Fields
All fields displayed on this page are required in order to save the page.

Hint
If a number other than 1, 2, 3, or 4 is entered, a warning box will display when tabbing or mouse-clicking out of the field.

Continued on next page
Adaptive Behaviors Navigation Tab – Self-Care Skills and Daily Skills, continued

Form Reference
Page 3b of the BASIS Assessment form, continued

Bottom portion of the page

Daily Living Skills

* Indicate how independently the individual typically performs each task:

- Makes Bed: 1
- Cleans Room: 1
- Does Laundry: 1
- Uses Telephone: 1
- Shops for simple Meal: 1
- Prepares Food that do not require cooking: 1
- Uses Stove or Microwave: 1
- Cross Street in Residential Neighborhood: 1
- Uses Public Transportation for simple direct trip: 1
- Manages own Money: 1

Adaptive Score: 327.77

Hint
If a number other than 1, 2, 3, or 4 is entered, a warning box will display when tabbing or mouse-clicking out of the field.

Required Fields
All fields displayed on this page are required in order to save the page.
Maladaptive Behaviors Navigation Tab – Behaviors

Form Reference

Page 4 of the BASIS Assessment form

Top portion of the page

Required Fields

All fields displayed on this page are required in order to save the page.

Continued on next page
Maladaptive Behaviors Navigation Tab – Behaviors, continued

Form Reference
Page 4 of the BASIS Assessment form, continued

Bottom portion of the page

Required Fields
All fields displayed on this page are required in order to save the page.

Hint
Once the Save button is selected, the form will automatically forward to the Main Assessment Info. navigation tab so that the form status can be changed from Work in Progress to Approved.
Approve (Complete) the Form

Overview
The data entry of the BASIS form within KAMIS is completed. For the form to be completed, it needs to be in “Approved” status. Once the form is in Approved status and saved, the following will occur:

- All fields will be disabled.
- The Converted Score and Tiers will be calculated.
- Based on standard criteria, a notice will display stating either ‘Functionally Eligible’ or ‘Functionally Not Eligible.’
- Based on criteria* that determine under what funding code an assessment should be paid, and if it should be paid, the following automated processes run:
  - Plan of Care is automatically created with the Assessment service line entered.
  - Services Provided (225) entry is automatically created.
  - KDADS Accounting Division pays the CDDO on the next monthly payment cycle.
*If Assessment Location is not “State Institution”, the POC/billing process runs using the appropriate funding code depending on whether the Customer has a Current Medicaid Card field response is “YES” (BASFED1) or “NO” (BASFED0).

If Assessment Location is “State Institution”, and the Assessment Type is “Annual Re-evaluation”, “Special Re-evaluation with Permission”, or “Transferred from another Facility”, and the assessing organization is one of two pre-defined CDDOs, the automated POC/billing process runs using the IDDSGF funding code.

Continued on next page
Approve (Complete) the Form, continued

How To

Follow the steps in the table below to finish the data entry process.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>In the Form Status field, select “Approved”.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Click on Save.</td>
<td>A double check of all validations, both in Person Administration and within each Assessment page, will be completed.</td>
</tr>
<tr>
<td>3.</td>
<td>If a required field has not been completed, errors will display on the page.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>The error listing will state either Person Administration (Customer) or the Navigation Tab location and the field name causing the error.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Navigate to the page and field containing the error(s) and enter or correct the data.</td>
<td>Remember to click the Save button on each page that is updated.</td>
</tr>
<tr>
<td>6.</td>
<td>Once all the errors have been corrected, navigate back to the Main Assessment Info. Navigation Tab.</td>
<td></td>
</tr>
</tbody>
</table>

Continued on next page
How To

*Continued*

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>In the Form Status field, select “Approved”</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Click on <strong>Save</strong>.</td>
<td>The validation check will occur again.</td>
</tr>
<tr>
<td>9.</td>
<td>If no errors, the form will be saved as Approved.</td>
<td>All fields will be read-only and the form can no longer be edited.</td>
</tr>
</tbody>
</table>

![IDD BASIS Assessment](image)
Re-Evaluation Letter Navigation Tab

Overview

The Re-Evaluation Letter navigation tab contains the re-evaluation letter that is completed based on the data entered in the Assessment, and information pulled from the customer’s Person Administration records.

To print the letter, use the Page Setup instructions and Print button located in the top-left corner of the page.

To exit out of the Re-Evaluation Notice and return to the BASIS Assessment, click on the Return to Assessment button (next to the Print button).
Notice Navigation Tab

Overview

The Notice navigation tab contains the Notice of Action letter that is completed based on the data entered in the Assessment, and information pulled from the customer’s Person Administration records.

To print the letter, use the Page Setup instructions and Print button located in the top-left corner of the page.
Print View Navigation Tab

Overview

This tab provides a print view version of the BASIS assessment. Print View opens in a new window, providing a scroll bar to view all the form data on one screen. The Print View format does not display in the same layout as the online form, but it is divided into sections of information based on the paper form.

Print View Window

To print the Print View version of the BASIS Assessment, use the Print button located at the top of the Print View window.

The grayed out portion of the form indicates information from Person Administration.

The white background is obtained from the BASIS assessment.

To return to the BASIS assessment in KAMIS, simply close the Print View window by clicking on the ☐ in the right upper corner.