

## Chapter 4 – Standards and Navigation Methods

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# Data Entry Standards

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## Introduction

For ease of entry and to keep the 'look and feel' of data entered into KAMIS II consistent, the following Data Entry Standards were developed.

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## Data Entry Standard

Type in all CAPS

In general, no punctuation –

Example: When entering an address: *123 SW TOPEKA BLVD APT 2C*  
not *123 S.W. TOPEKA BLVD, APT. #2C*

### Exceptions:

- If a person has just initials as the first or middle name (i.e. A J Smith) enter the name with a period (A. J. Smith)
- If Last Name has an apostrophe (O'Neil) use the apostrophe
- If Last Name is hyphenated (Smith-Jones) use the hyphen
- If entering sentence or paragraph entries in a text box, use normal punctuation (commas, periods).

First Name field - Use the person's legal name, not a nickname or preferred name. There is a Nickname field that can be used for other than legal first names.

Last Name field - Include the name suffix (Jr/Sr/III/IV etc.)

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## Hint

When possible, maximize the browser. This will ensure that all fields are easily accessed.

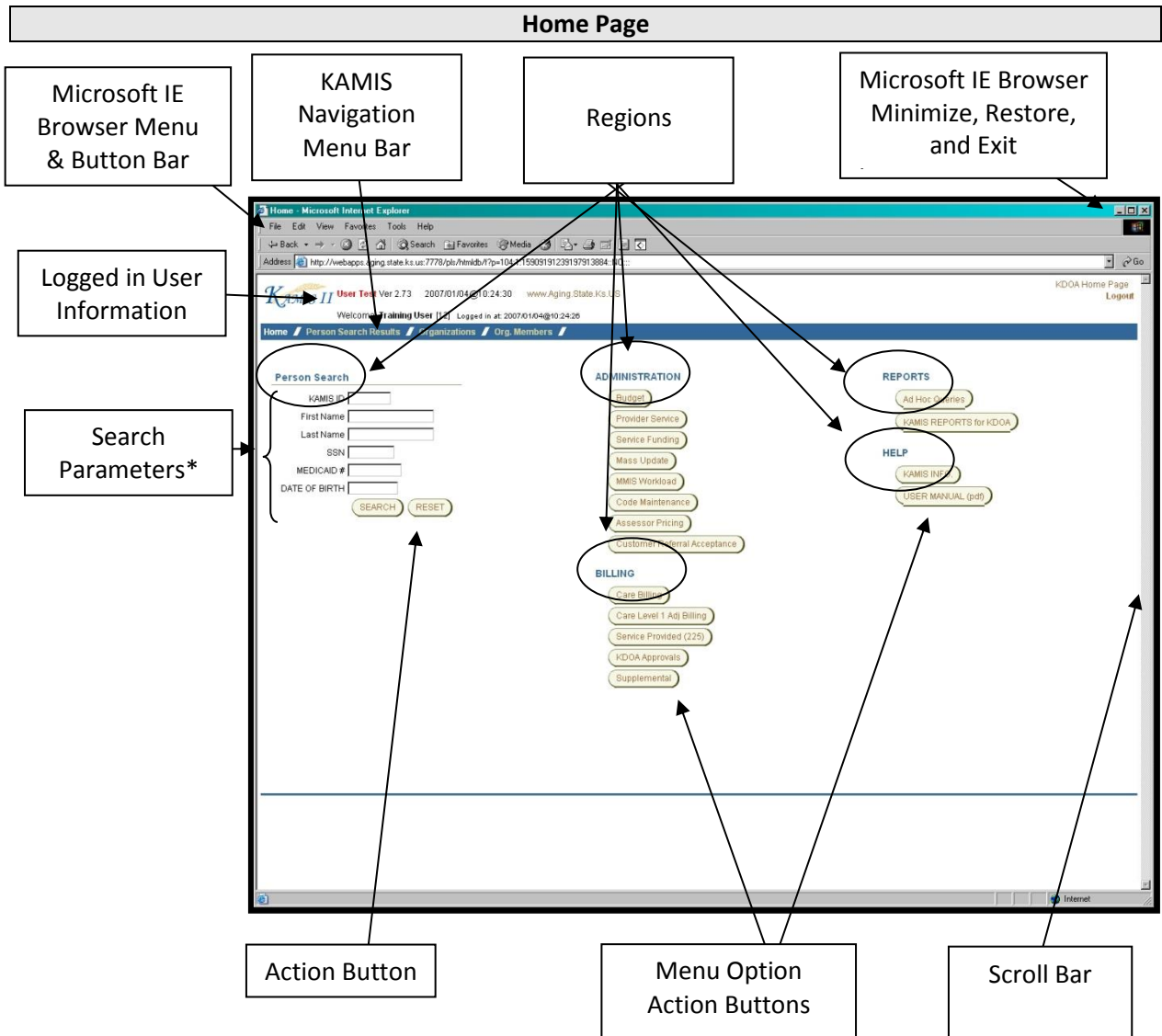
Be patient, as repeated clicks will re-start the request and slow the response time. In some instances, it may produce errors. Some errors may require exiting and re-launching KAMIS. Beware that at peak Internet usage times, the performance of the system may vary.

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# KAMIS II Home Page

**Introduction** The Home Page of KAMIS II carries all the program options and commands.

**Page Components** Below are the Home Page components.



\*The Person Search region on the KAMIS II Home Page works the same as the dedicated Person Search page. The function is duplicated here for convenience. It doesn't matter which Person Search you use; the Search Results will always take you to the dedicated Person Search page.

# Person Search Page

## Introduction

KAMIS II is a person-centric application. That means that if you need to perform a function connected to a person (update demographics, do an assessment, create a plan of care/service authorization, etc.), you must search for the person first. The Person Search page of KAMIS II provides a variety of parameters that you can do searches on.

## Page Components

Below are the Person Search Page components with search results displayed.

**Search Results Page**

Home
Person Search
Person Admin
Person Forms
Case Log
Organizations
Org. Members
KAMIS Maintenance
KOTA / KAMIS Facilities

Person Search  
Search

**Search Selections**

Person #  First Name (optional)  Last Name (Two character minimum)  SSN  Medicaid #  Date of Birth

Search [Reset Selections](#)

done: 0:01

**Search Results (Sorted by Last, First, Middle)** [Create New Name Entry](#)

Searched by Name, only customers within your AAA/CME and unassigned customers are displayed

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	AAA/CME	Current Medicaid #	Customer Status	Update Person	View Forms
01/15/2007	01/15/2007	311650	BARBARA		HILL			No AAA/CMEs found				
01/31/2008	01/31/2008	335655	BARBARA		HILL	06/24/1932		Primary 4		ACTIVE		
03/02/2001	03/02/2001	136169	BECKY		HILL			No AAA/CMEs found				
04/27/2006	04/27/2006	293726	BILL	E	HILL	11/01/1927		Primary 4		ACTIVE		
09/12/2000	09/12/2000	71417	BILL		HILL			No AAA/CMEs found				
09/03/2004	07/11/2007	249344	BILLY	M.	HILL	09/29/1926		Primary 4		ACTIVE		
08/08/2002	08/08/2002	192086	BILLYB		HILL			No AAA/CMEs found				
01/01/1997	01/01/1997	91155	BLANCHE	R.	HILL	12/15/1901		Primary 4		ACTIVE		
10/27/2003	10/27/2003	223613	BRENDA		HILL			No AAA/CMEs found				
01/01/1997	05/11/2006	224668	BRIDGIE	R	HILL	08/28/1911		Primary 4		DECEASED		
06/29/2000	06/29/2000	62888	BERNICE		HILLMAN			No AAA/CMEs found				
03/19/2001	03/19/2001	138797	BILL	R.	HILLS			No AAA/CMEs found				

row(s) 1 - 12

**KAMIS II Navigation Bar**

**Primary/Secondary Navigation Tabs**

**Search Parameters**

**Search Results**

# Form Pages and Their Components

## Introduction

Most KAMIS II forms are designed to follow the corresponding paper forms. However, some field locations may differ in KAMIS than they do on the paper form. In those cases, the order of pages may differ.

All multiple-page forms in KAMIS II have Primary Navigation Tabs, and often, Secondary Navigation Tabs to help the user navigate from one page to another within the form.

## Page Components

KAMIS II forms have a variety of field types that are used for data entry. For example, you may type text into a text box, make a selection from a pre-defined drop-down list, or make a single selection using 'radio buttons.'

The screenshot shows a web form titled "Form Page" for a customer named PEGGY HILL. The form includes a header with customer information, a title "Standard Intake - Version 2", and a series of navigation tabs: Customer, Functional Assessment, Financial, Customer Referrals, Intake Information Assistance, Print View, Main, and Demographics. The "Main" tab is active. The form contains several fields: Organization (4 - JAYHAWK AREA AGENCY ON AGING), Form Status (WORK IN PROGRESS), Intake Type (dropdown), Intake Date (text box), Interviewer (text box), Intake Source (radio buttons for 3160, Telephone - Customer, Telephone - Family / Provider, Other), and a Referral Comment (text area). A "Create" button is at the bottom left. On the left side, boxes with arrows point to these components: Customer Information, Primary/Secondary Navigation Tabs, Drop-Down List, Text Area, Radio Button Selection List, and Text Box.

**Note:** There will be a **Save** action button on the first tab of the form. This will save the form to the database. Once a page is saved, most forms will automatically advance to the next page, and the Primary and/or Secondary tab will reflect the new page location. If the page does not automatically advance, you can click on the desired primary/secondary navigation tab to go to that page.

*Continued on next page*

## Form Pages and Their Components, Continued

### Page Components







The following is the breakdown of the Components.

Component	Description
Navigational Links	Links on the page which when clicked will forward the page to another feature within KAMIS.
Navigational Primary Tabs	The top row of tabs at the top of the form. These tabs define the primary pages of the form.
Navigational Secondary Tabs	The second row of tabs that appear under the primary tabs. The secondary tabs change as you move to a different primary tab. Not all primary tabs have secondary tabs.
Text Fields	Fields where the data is typed into a text box (single line) or text area (multiple lines).
Drop Down Lists	Fields with an arrow on the right side. When clicked, a pre-defined list is displayed to make your selection from.  To select the desired list entry, type the first letter of the selection desired and the selection will forward to the first entry that starts with that character. To select the specific entry: <ul style="list-style-type: none"> <li>• Continue to press the same character and the listing will forward down the list</li> <li>• Use the mouse to scroll down the list</li> <li>• Use the down arrow key on your keyboard</li> </ul>
Check Boxes	Small boxes that are selected to indicate a 'yes' response. When selected, the box will fill with a check mark <input checked="" type="checkbox"/> or an X <input checked="" type="checkbox"/> .  Check boxes are used when more than one option can be selected.
Radio Buttons	A circular field that when selected, will fill with a darkened circle <input checked="" type="radio"/> . When selected, the answer indicates "yes".  Radio buttons are use when only one option can be selected.
Date Picker	Fields that are formatted to only accept a date may include a date picker icon. Clicking on the icon launches a small calendar in a separate window. Clicking on the specific date in the calendar month/year displayed will insert that exact date into the form field. The Date Picker is option; you can always type the date in manually (following the date format defined for the field.)

# Navigational Icons and Buttons

## Introduction

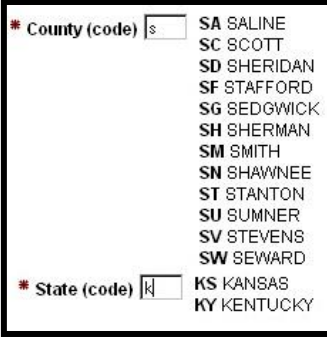
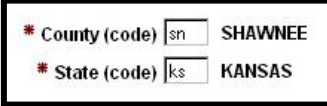



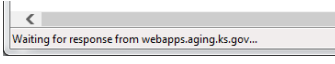


Icons are used in KAMIS II as visual aids to indicate certain actions.

Icon	Action
	<p><b>View/Modify Icon.</b> Clicking on this icon will open the corresponding form or page indicated in the table or column heading in the table. Forms that are in Approved status can only be viewed.</p>
	<p><b>Access Icon.</b> Clicking on this icon will perform the action as indicated in the column heading, i.e. open the corresponding form.</p>
	<p><b>Required Field icon for Work in Progress status.</b> This field is required in order to save the form in Work in Progress status.</p>
	<p><b>Required Field icon for Approved status.</b> This field is required in order to save the form in Approved status.</p>
<p>See below</p>	<p><b>Search fields.</b> The field above the empty drop-down list is a search field. You must type something here in order to populate the drop-down list. Type the search criteria in the yellow highlighted field (just enter a few characters if unsure of the exact spelling and/or spacing of the name) and press Enter. The drop-down list will populate with all entries that match the search criteria. Click once on the search result to highlight it. Once the item is highlighted, it is selected and you can move on to the next field.</p>
<p><b>Blank Field</b></p> 	
<p><b>Completed Field</b></p> 	

*Continued on next page*

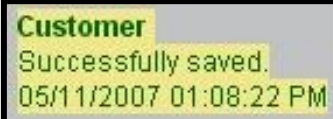
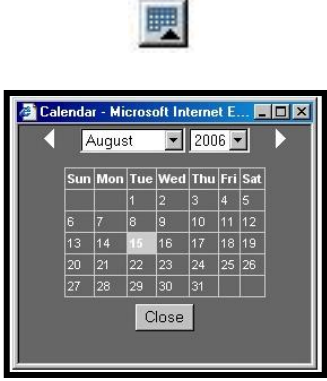
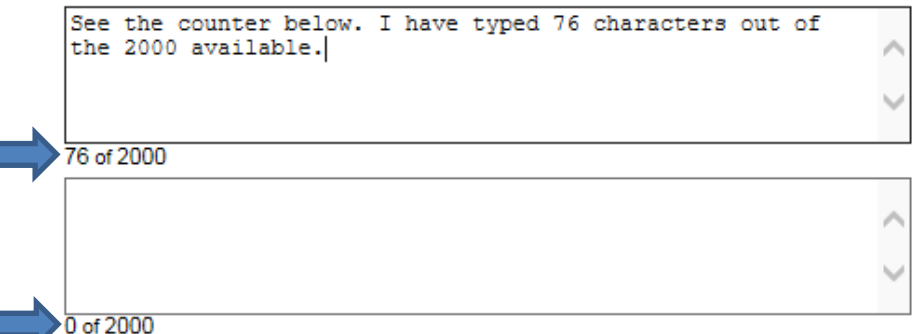


## Navigational Icons and Buttons, Continued

Icon	Action
<p style="text-align: center;"><b>Select Fields</b></p>  <p style="text-align: center;"><b>Completed Fields</b></p> 	<p><b>County and State Code Fields.</b> Start typing the County or State Abbreviation Code and a reference listing will be displayed. This will ensure that the correct county code is used.</p>
 (Region closed)  (Region expanded)	<p><b>Expand Arrow Indicator.</b> The arrow in a circle indicates that there could be additional information available to view. Click on the arrow and the subsequent region will expand.</p>
	<p><b>Action Button.</b> The buttons are labeled according to the action they will perform.</p>
<p>Examples:</p>  	<p><b>Status Indicator.</b> To determine whether a page has finished saving or loading, look at your browser's status bar located at the bottom of the browser. You may get either a message or a 'load bar' that increases in length as a page saves or a new page loads. The browser status indicator will be displayed at any time there is a request made to the KAMIS II database to either save information to KAMIS or return information to your browser screen.</p>
<p>row(s) 11 - 20 of 49</p> 	<p><b>Page Advance Indicators.</b> KAMIS allows a certain number of lines of data to be seen at a time. When there is more information to be displayed, page advance indicators with previous and next buttons will be displayed.</p>

*Continued on next page*

## Navigational Icons and Buttons, Continued

Icon	Action
	<p><b>Save Notice.</b> A notice will appear in green in the heading area. If there is an error it will display in the same area but in the color red.</p>
	<p><b>Date Picker Icon and Calendar.</b> The Date Picker allows for an optional way to enter a date into a date-formatted field. Navigate to the desired month and year, then click on the specific day you want to enter.</p>
<p>See examples below:</p>	<p><b>Comment Box:</b> As you type in the box, the counter below the box indicates how many characters you have typed of the maximum available.</p>
	

## KAMIS Navigation Menu Bars

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### Navigation Menu Bar Versions

Below are the two versions of what the navigation menu bar may look like. The first one is how it looks on the KAMIS II Home Page prior to an initial person search. The bottom one is how it looks after the person search, and either Update Person or View Forms has been selected for a customer.

The new buttons on the second menu bar provide links to the selected customer's Person Administration page or their Forms List.

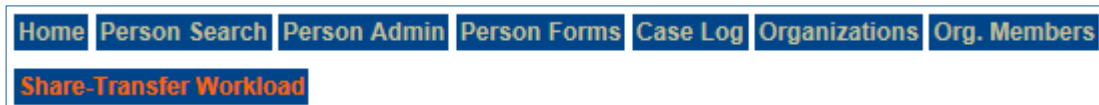
Additional buttons may appear on the menu bar depending on what security access you have in KAMIS.

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Prior to initiating a Person Search (no connection to a previously searched for customer):



After finding a customer and accessing their information:



Link	Description
Home	Returns to the KAMIS Home Page
Person Search	Returns to the Person Search Page with the last completed search displayed.
Person Admin	Accesses the Person Administration Information for the person selected from the search criteria.
Person Forms	Accesses the list of current forms for the person selected from the search criteria. A new form can be created from this area also.
Organizations	Displays the Organization Search Page.
Organization Member	Displays the Organization Members Search Page.

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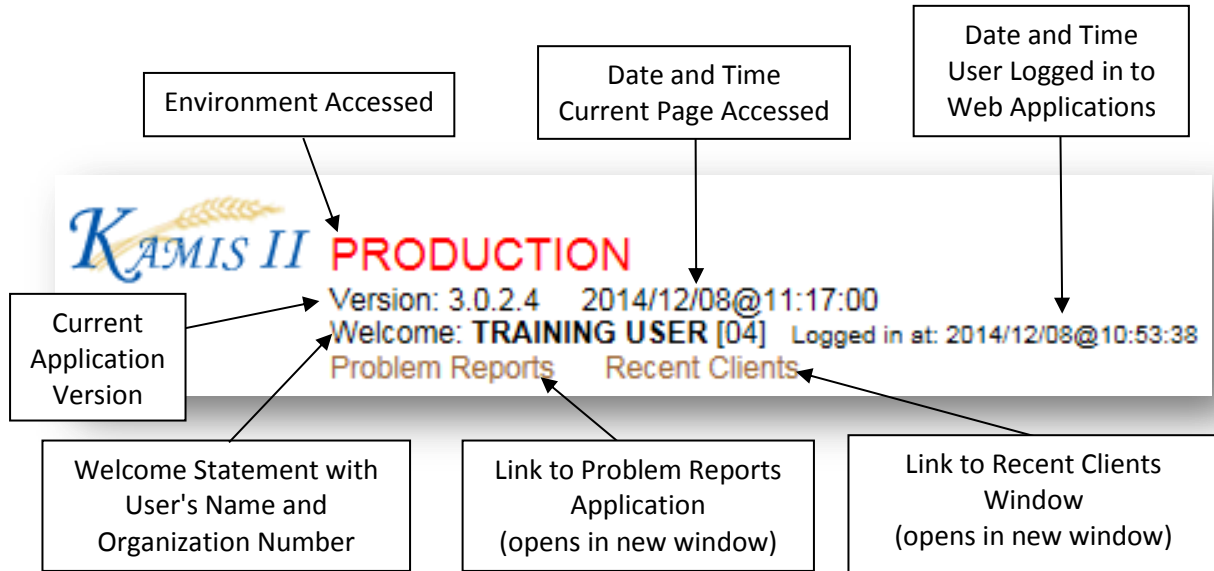
# Login Information

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**Introduction** The top left corner of all KAMIS screens will display a Log-In status information area.

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**KAMIS Heading** The heading will be displayed at the top of every page in KAMIS II.



# Field Navigation

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## Introduction

The field navigation methods are consistent with all pages in KAMIS.

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## Select Data (highlight)

For Data Entry there are several ways to select data within a field.

Type of Field	Navigation Methods	Result
Single entry fields	<ul style="list-style-type: none"><li>• Tab to the field</li><li>• Double-click mouse</li><li>• Click and drag to select</li></ul>	Highlights data

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## Keyboard Actions

The following are the keyboard actions used to navigate through and/or take action on form fields.

Key	Action
Tab	Move to next field
Shift + Tab	Move to previous field
Space Bar	Checks or unchecks a check box Selects a radio button
Arrow Keys	Moves through and selects radio buttons in a field
Enter	Processes an action button. Must tab to the action button, then press Enter.

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## Note

You can always use the mouse to click any field to make it the active field.

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## Field Navigation, Continued

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### Field Type / Data Entry Navigation

Depending on the type of field, there are a variety of ways to complete the entry of the field, whether it be typing text or selecting an pre-defined option.

Once a selection is made, tab to or mouse click in the next field to advance.

Type of Fields	Data Entry Methods	Action
Text or Comment Fields	<ul style="list-style-type: none"><li>• Keyboard</li></ul>	Type data to be entered.
Check Boxes	<ul style="list-style-type: none"><li>• Space Bar</li><li>• Mouse Click</li></ul>	Selects or de-selects the check box.
Radio Buttons	<ul style="list-style-type: none"><li>• Mouse Click</li><li>• Arrow keys</li></ul>	Selects the desired radio button. To de-select it, a different radio button in that field must be selected.
Drop Down Boxes	<ul style="list-style-type: none"><li>• Mouse Click and scroll to desired item in list OR</li><li>• Type the first letter of the desired item, then press the down arrow key until the specific item is selected</li></ul>	Will forward the insertion point down the listing.

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# Printing Forms and Reports

## Introduction

There are three options for printing from KAMIS.

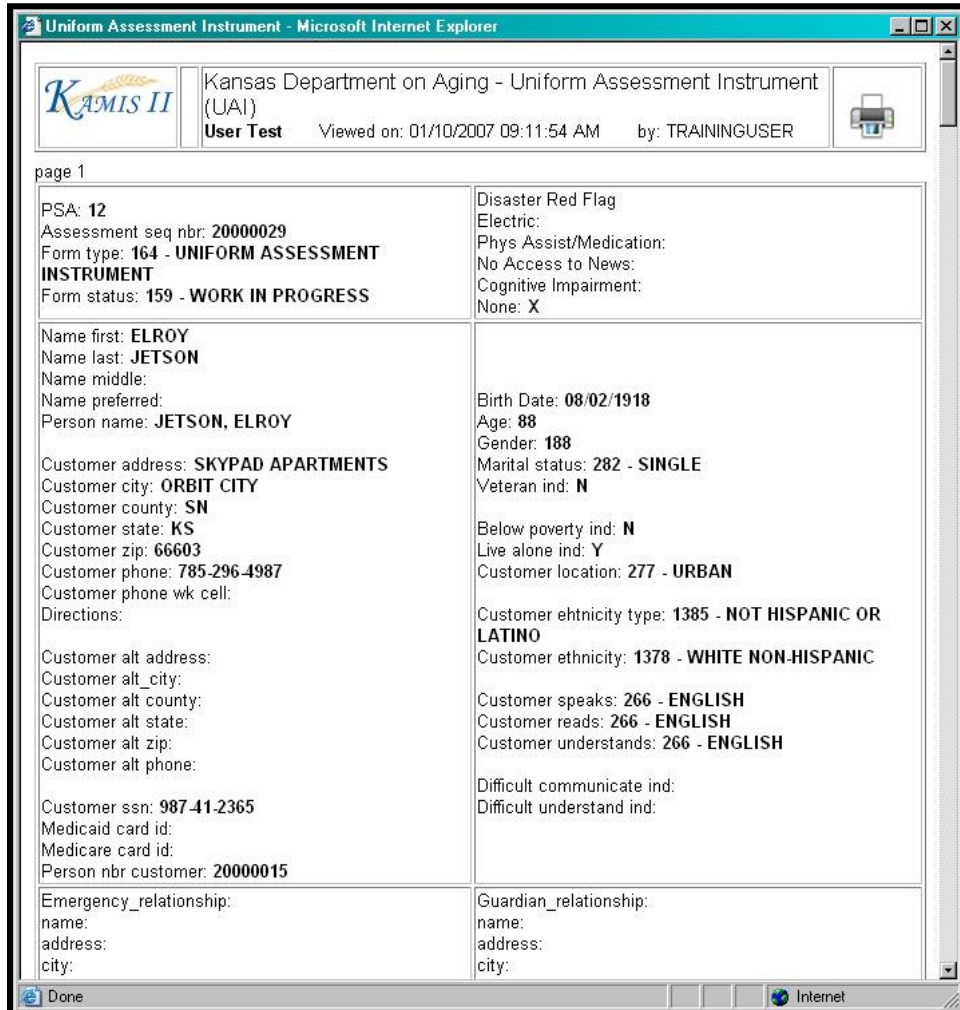
- Print a form using the Print View primary navigational tab in some forms
- Print a form using the Print Icon on the Forms List page
- Print 'canned' reports using KAMIS Reports (New Format)

## Print from the Form Primary Navigational Tab



## Print View

Clicking on the Print View tab opens the Print View layout of the form. It will open in a separate browser window. The sample below is the Uniform Assessment Instrument (UAI).



Uniform Assessment Instrument - Microsoft Internet Explorer

KAMIS II Kansas Department on Aging - Uniform Assessment Instrument (UAI)  
User Test Viewed on: 01/10/2007 09:11:54 AM by: TRAININGUSER

page 1

PSA: 12 Assessment seq nbr: 20000029 Form type: 164 - UNIFORM ASSESSMENT INSTRUMENT Form status: 159 - WORK IN PROGRESS	Disaster Red Flag Electric: Phys Assist/Medication: No Access to News: Cognitive Impairment: None: X
Name first: ELROY Name last: JETSON Name middle: Name preferred: Person name: JETSON, ELROY  Customer address: SKYPAD APARTMENTS Customer city: ORBIT CITY Customer county: SN Customer state: KS Customer zip: 66603 Customer phone: 785-296-4987 Customer phone wk cell: Directions:  Customer alt address: Customer alt_city: Customer alt county: Customer alt state: Customer alt zip: Customer alt phone:	Birth Date: 08/02/1918 Age: 88 Gender: 188 Marital status: 282 - SINGLE Veteran ind: N  Below poverty ind: N Live alone ind: Y Customer location: 277 - URBAN  Customer ethnicity type: 1385 - NOT HISPANIC OR LATINO Customer ethnicity: 1378 - WHITE NON-HISPANIC  Customer speaks: 266 - ENGLISH Customer reads: 266 - ENGLISH Customer understands: 266 - ENGLISH  Difficult communicate ind: Difficult understand ind:
Customer ssn: 987-41-2365 Medicaid card id: Medicare card id: Person nbr customer: 20000015	Guardian_relationship: name: address: city:

Emergency\_relationship:  
name:  
address:  
city:

Continued on next page

## Printing Forms and Reports, Continued

### Print from the Forms List Page

Print the Assessment forms or the Plan of Care from the Forms List by clicking on the printer icon.

Forms List Create New Form

Form Type	Form Date	Form Status	PSA	Unmet Needs	Plan of Care	
<a href="#">ABBREVIATED UNIFORM ASSESSMENT INSTRUMENT</a>	01/05/2007	APPROVED	12	<a href="#">UMN</a>	<a href="#">create</a>	
<a href="#">UNIFORM ASSESSMENT INSTRUMENT</a>	01/01/2007	APPROVED	12	<a href="#">UMN [1]</a>	<a href="#">APP</a>	
<a href="#">ABBREVIATED UNIFORM ASSESSMENT INSTRUMENT</a>	12/30/2006	APPROVED	12	<a href="#">UMN [1]</a>	<a href="#">create</a>	

Back

### KAMIS Reports Option

We are in the process of updating KAMIS Reports to a new report format. There are a limited number of reports that can be printed using the KAMIS Reports – New Format button on the KAMIS Home Page or the Web Applications Home Page.

### New Format

**KAMIS II**  
 Welcome: **Jo Bauer** [12] Logged in at: 2014/12/08@14:51:14

Reports Menu / CBS Management Reports / IDD Management Reports / M

[Return to KAMIS Home Page](#)

**CBS Management Reports**

[REASSESSMENTS DUE - FAI, AUAI, UAI, UPR \(KMS\\_0173\)](#)

[SERVICE PLANNED REPORTS](#)  
KMS\_0001

[SERVICE PROVIDED REPORTS](#)  
KMS\_0006

### Old Format

If you need a report from the old format, submit your request via a KDADS Problem Report, and include the report name and/or number, with all the required parameters needed for the report.