Chapter 6 – Person Administration

Table of Contents

Important

The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the assessment forms to be saved in approved status.

The information that is required due to policy may be different from those that are system required.

General Information

Introduction

This section explains how to enter a new person into KAMIS.

Requirement

A person search must be done to ensure that the person has not been previously entered into the KAMIS System.

Background

All persons entered into KAMIS are located in the same database table but different roles can be assigned depending upon why the person is in the system. A person can have multiple roles assigned (customer, associate, case manager, etc.). Therefore, no one person should be entered more than once into the system.

Duplicate Records

If duplicates records are found, determine which KAMIS number has the most actuate information in person administration and notify the KDOA Help Desk of the duplicate record. The Help Desk will need the following information:

- Customer Name
- All KAMIS Numbers involved
- Indicate if there are assessment forms on both KAMIS Numbers
- Indicate the KAMIS Number should be retained.

Adding a New Person

Important

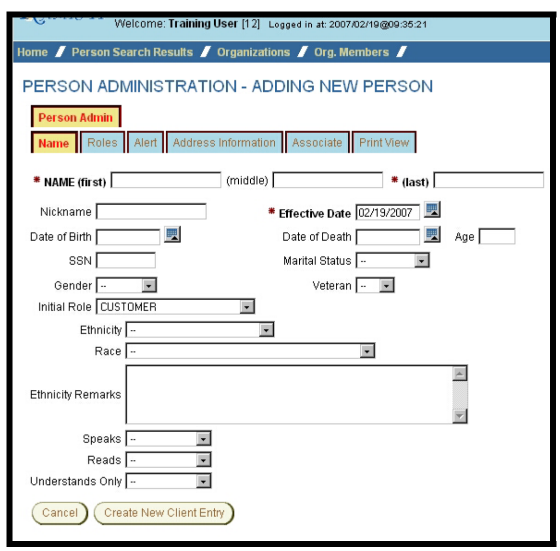
Due to the history collection features of KAMIS, a person's detail record can be updated only once within a 24 hour period.

How To

Follow the steps in the table below to add a new person in KAMIS.

Step	Action	Results
1.	Complete a person search.	No data found will be displayed.

Step	Action	Results
2.	On the Person Search results page, click on the **Create New Name Entry** button.	Person Administration – Adding New Person Page will be displayed.



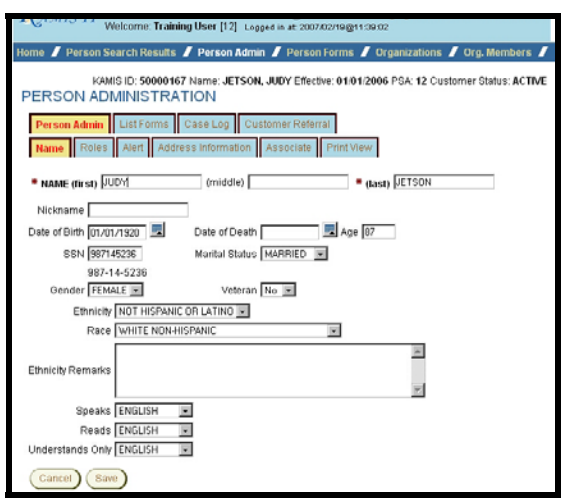
Continued on next page

How To (continued)

Step	Action	Results
3.	Enter **First**, **Middle** and **Last** name. If the customer goes by a Nick name, that name can also be entered.	Do not use punctuation. See Note below.

Note: Search requirement is to use two characters in the first name field. If a person has just initials as the legal first or middle name (i.e. A J Smith) enter the name with a period (A**.** J**.** Smith).

Step	Action	Results
4.	Enter the persons' **Effective Date**.	Use the Assessment or Intake date.
5.	The **Initial Role** will be populated as customer but can be changed.	A role is required.
6.	Complete the information that pertains to the customer.	No fields are required. There is some information that is required by certain forms or services, i.e. Ethnicity, Race or Social Security Number.
7.	Click on the **Create New Client Entry** button.	Person will be saved, a KAMIS ID will be issued by the system and the screen will advance to the Roles tab.



Possible Duplicate Record Found

Introduction

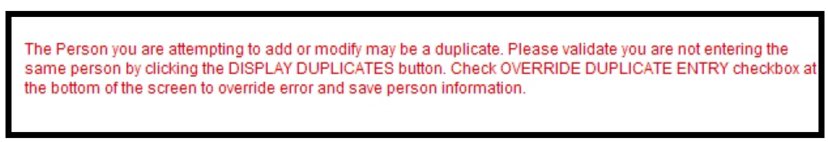
Since no one person should be entered more than once into the system, there is an edit check done upon the save of a new person or when the Social Security Number or Date of Birth is changed or added to an existing person.

How To

Follow the steps in the table below to review the possible duplicate record.

<table>
<tr><th>Step</th><th>Action</th><th>Results</th></tr>
<tr><td>1.</td><td>When the Save button is clicked a check is done for possible duplicate person records within KAMIS.</td><td>The check compares the following in order:

Person Last Name
Person First Name
Social Security Number
Date of Birth

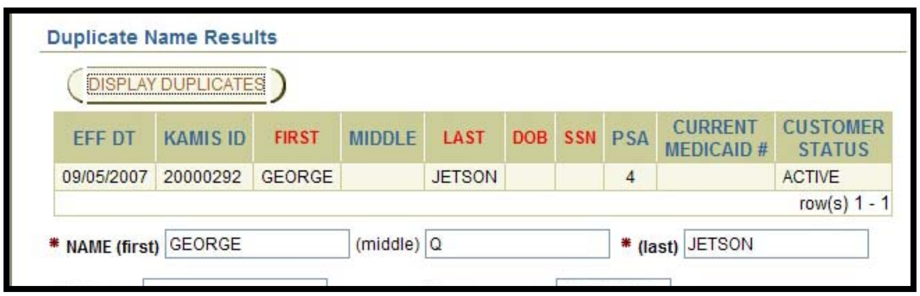
If a duplicate is found the following occurs:</td></tr>
<tr><td></td><td colspan="2">
<table>
<tr><td>A Duplicate Name Results message is displayed.</td><td>See below</td></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>A Display Duplicates button is displayed.</td><td>
</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Possible Duplicate Record Found, Continued

How To (continued)

<table>
<tr><th>Step</th><th>Action</th><th>Results</th></tr>
<tr><td></td><td>An Override Duplicate Entry check box is displayed under the Create New Client Entry button.</td><td>

The check box is not active until the Display Duplicate button is accessed.</td></tr>
<tr><td>2.</td><td>Click on the Display Duplicates button.</td><td>A table listing all possible duplicate records will be displayed.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>3.</td><td>Compare the information to determine if the new entry and the person(s) listed are or are not the same person.</td><td>Follow the steps below:</td></tr>
</table>

Continued on next page

Possible Duplicate Record Found, Continued

How To (continued)

<table>
<tr><th>Step</th><th>Action</th><th>Results</th></tr>
<tr><td></td><td colspan="2">
<table>
<tr><th>Determination</th><th>Action</th></tr>
<tr><td>Not sure</td><td>Open a new KAMIS window (use the “new window” link in the header area) and search for the displayed person and compare the additional information in Person Administration (Address, etc.) to determine if this is a duplicate record.</td></tr>
<tr><td>Is the same person</td><td>Click on the Cancel button at the bottom of the window. Person Administration will close without creating the new/duplicate person.</td></tr>
<tr><td>Is not the same person</td><td>Click on the Override Duplicate Entry check box. Will display as checked.</td></tr>
</table>
</td></tr>
<tr><td>4.</td><td>Click on the Create New Client Entry button.</td><td>Person is created.</td></tr>
</table>

Adding Person Roles

Introduction

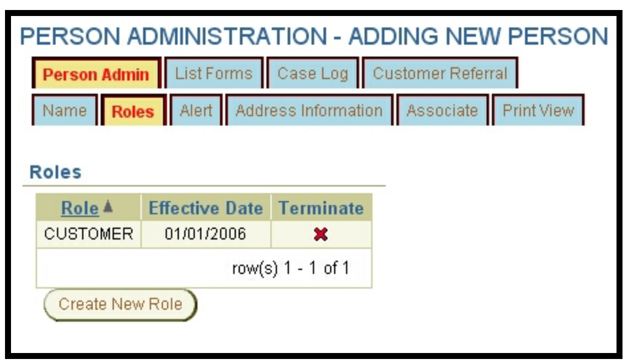
Every person within KAMIS has a particular role. When a person is added into the system a role must be entered. One person can have several roles.

<u>Example</u>: Elroy Jetson may be a customer but also an associate on his sisters record.

Available Roles	
Assessor	Customer
Associate	Doctor
Care Recipient	Employee
Caregiver	MMIS User
Caregiver Grandparent	Nurse
Case Manager	Social Worker

How to

Follow the steps in the table below to add a role to a customer.

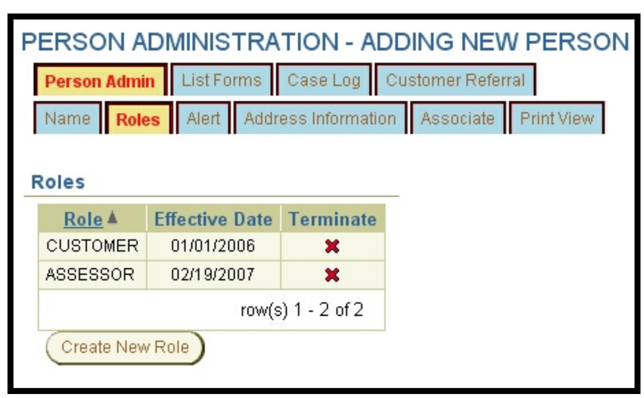
<table>
<tr><th>Step</th><th>Action</th><th>Results</th></tr>
<tr><td>1.</td><td>On the Roles tab.</td><td>Role assigned page will be displayed.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>2.</td><td>Click on Create New Role button.</td><td>Role Administration page will be displayed.</td></tr>
</table>

Continued on next page

How to (continued)

Step	Action	Results
3.	Select the **Role** to be added. Only one role can be selected at a time.	Radio button will become shaded.

Step	Action	Results
4.	Click on the **Create New Role** button	The page will return to the Roles tab. All Active Roles are displayed in the Roles table.



Alert

Introduction

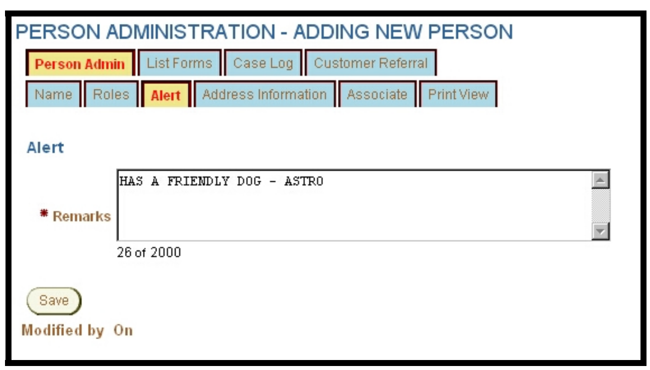
The alert is a tool to convey an immediate informational notice regarding a customer. After a search is done and the forms list is accessed for the person the alert will be displayed in red.

Important

Policy has indicated that the alert should be used only for information that needs to be immediately known. (example: Only speaks Russian – Need Interpreter". Or "No information to Son, John Doe, due to alleged abuse."

How To

Follow the steps in the table below to add the alert.

Step	Action	Results
1.	In the **Alert** Remarks field, complete the information that pertains to the customer.	
		
2.	Click on the **Save** button	Information is saved and the page is forwarded to the Address Information tab.

Adding Address Information

Introduction

This section explains how to enter an address for a person in KAMIS.

Address Types

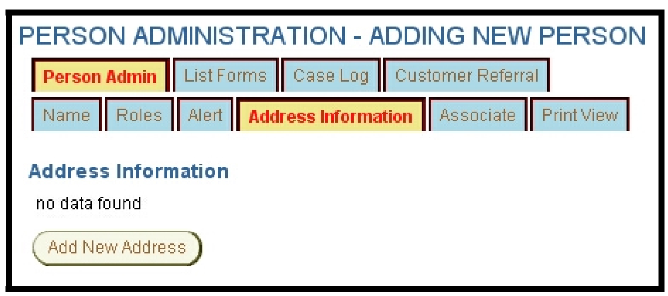
A person may have several different types of addresses.

Available Address Types	
Alternate	Mailing
Billing	Residential *__Required for Customers__
Business	Shipping

How To

Follow the steps in the table below to add an address.

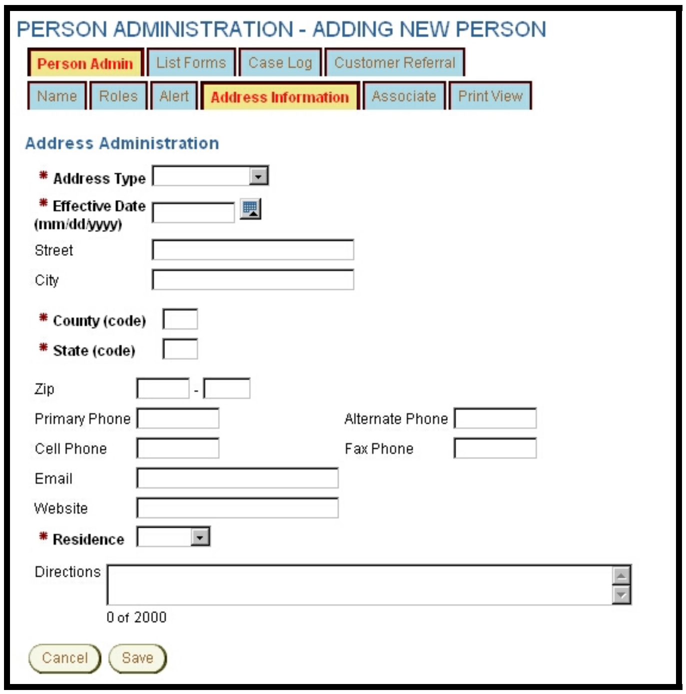
Step	Action	Results
1.	The **Address Information** Page is displayed.	The message "no data found" will be displayed for a new person.



Continued on next page

How To (continued)

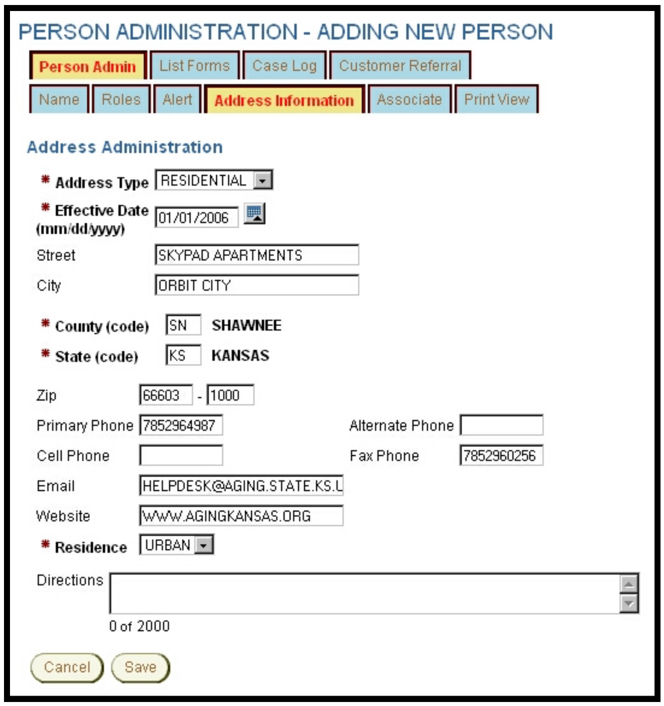
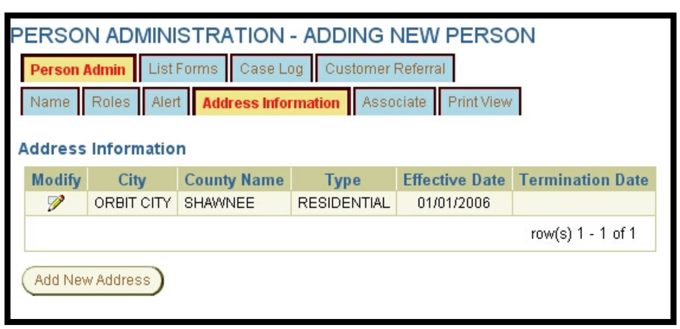
Step	Action	Results
2.	Click on the **Add New Address** button.	Address fields will be displayed.



Step	Action	Results
3.	Select **Address Type**.	Required field. The Residential address is required for all assessment forms.
4.	Enter **Address Effective Date**.	Required field
5.	Enter address details.	County and State fields are required.

Continued on next page

How To (continued)

Step	Action	Results
6.	Verify that the correct option is selected in the **Residence** field.	Required field
		
7.	Click on the **Save** button.	Page is returned to Address Information table.
		

Updating Address Information

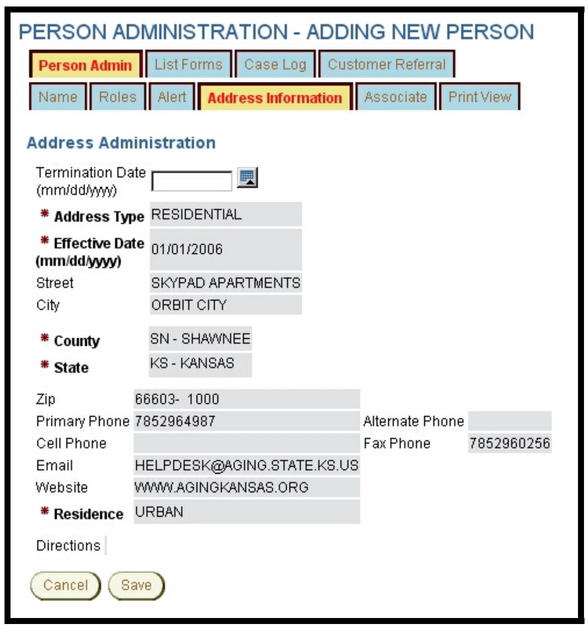
Introduction

From time to time, current customer address information will need to be updated.

How To

In order to change the address of the person, the old address will need to be terminated and the new address added.

Step	Action	Result
1.	Click on the **Modify** icon next to the address to be terminated.	Address Administration page is displayed.



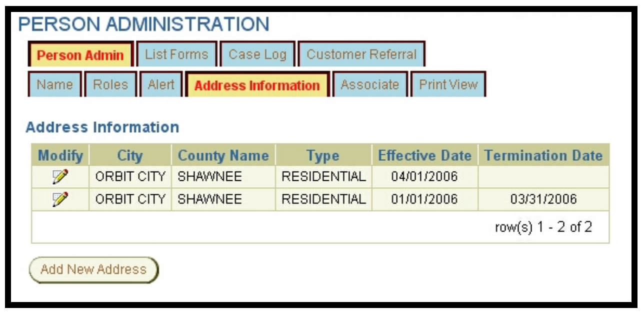
Step	Action	Result
2.	Enter the **Termination Date**	

Continued on next page

Updating Address Information, Continued

How To (continued)

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>3.</td><td>Click on the Save button</td><td>Page is returned to the Address Information table displaying the save message and the terminated address line.</td></tr>
<tr><td colspan="3">



</td></tr>
<tr><td>4.</td><td>Add new address with correct / current information.</td><td>See previous section for instructions on how to add addresses.</td></tr>
</table>

Adding Associates

Introduction

An Associate in KAMIS is a person that has personal or business relationship with the customer.

Relationship Types

An Associate will have some type of relationship with the customer. The relationships are listed below:

Available Relationship Types	
Brother	Housing Manager
Case Manager	Landlord
Clergy	Mother
Conservator	Mother-in-law
Cousin	Neighbor
Daughter	Nephew
Daughter-in-law	Niece
Durable Power of Attorney (DPOA)	Non-Married Partners
Durable Power of Attorney for Health Care Decisions (DPOAHCD)	Other
Employee	Self
Father	Sister
Father-in-law	Son-in-law
Friend	Spouse
Granddaughter	Stepfather
Grandson	Stepmother
Guardian	

Associate Types

Available Associate Types	
Caller / Referred By	Friend / Acquaintance
Emergency Contact	Legal Guardian
Family Member	Present at Assessment
Financial Contact	Primary Caregiver
Financially Responsible	Primary Contact

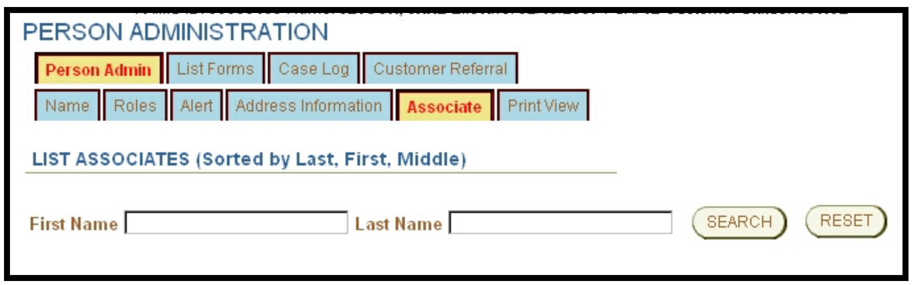
Associate Search

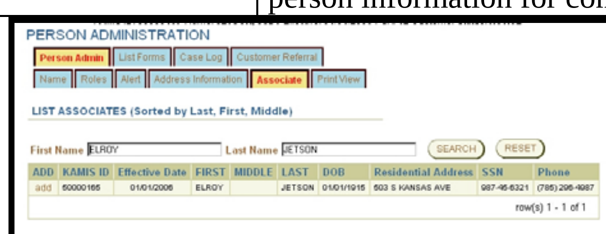
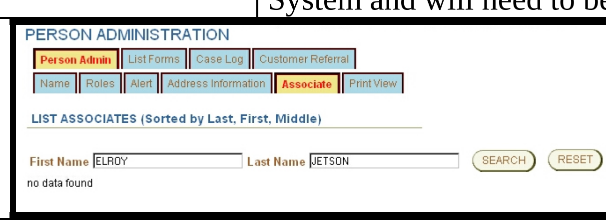
Introduction

This section explains how to search for an existing associate for a customer in KAMIS.

How To

Follow the steps in the table below to search for an associate in KAMIS.

Step	Action	Results
1.	The **Associates** tab is active.	An Associate List table (if available) will be displayed along with the Search option.
		
2.	In the search area, enter in the name of the associate.	Use the same search requirements as in person search.
3.	Click on the **Search** button.	A search will be performed.

If	Then
Person is found	Table will be displayed with the person information for comparison.
	
Person is not found	The person is new to the KAMIS System and will need to be added.
	

Person Not Found - Adding a New Person as an Associate

Introduction This section explains how to add a new associate in KAMIS.

How To Follow the steps in the table below to add a new associate in KAMIS.

Step	Action	Results
1.	Search for an associate.	No results returned.
2.	Click on the **Person Search Results** link in the KAMIS Menu Bar.	The person search page will be displayed with previous search results also displayed.

Step	Action	Results
3.	Click on the **Reset** button	Previous results are removed.
4.	**Search** for the person.	The search should return no results. Add the person with a role of Associate. There is minimal information required for an associate.
5.	Click on the **Person Search Results** link in the KAMIS Menu Bar again.	Person search page will be displayed.
6.	**Search** for the customer who the associate is to be added.	Results table will be displayed.
7.	Click on the **Update Person** icon.	Person Administration page will be displayed. Continue to next section.

Adding an Associate to a Customer

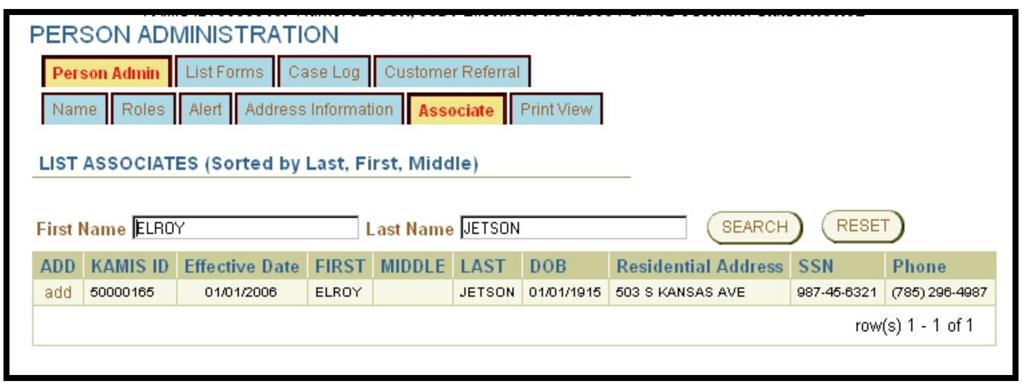
Introduction

Once an Associate is added as a person, they need to be associated to the customer.

How To

Follow the steps in the table below to add an associate to a customer.

Step	Action	Results
1.	Customer's Person Administration page is displayed.	
2.	Click on the **Associate** navigation tab if not already displayed.	Associate page will be displayed.
3.	Complete the **Search** for Associate, if not already displayed.	Search Results table will be displayed.

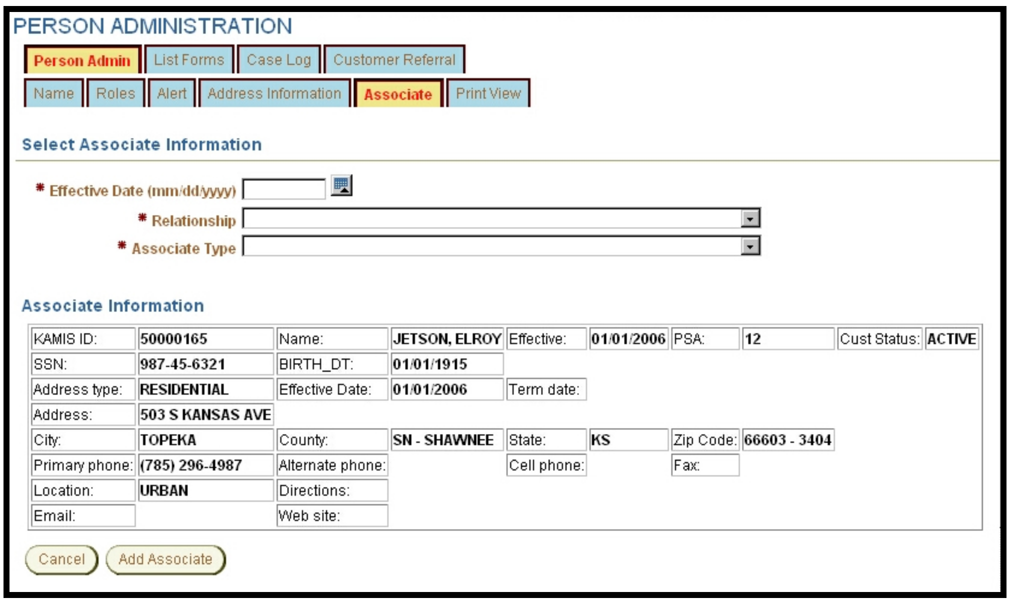


Continued on next page

Adding an Associate to a Customer, Continued

How To (continued)

Step	Action	Results
4.	Click on the **Add** icon located in the row of the appropriate person.	Associate Information page will be displayed.



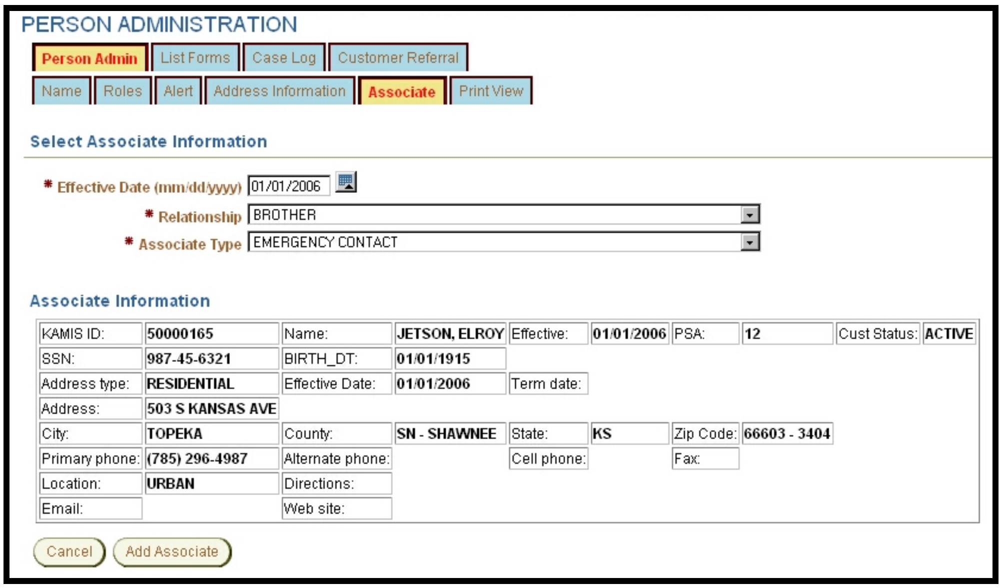
Step	Action	Results
5.	Enter the **Effective Date**	Required field
6.	Select **Relationship**	Required field
7.	Select **Associate Type**	Required field

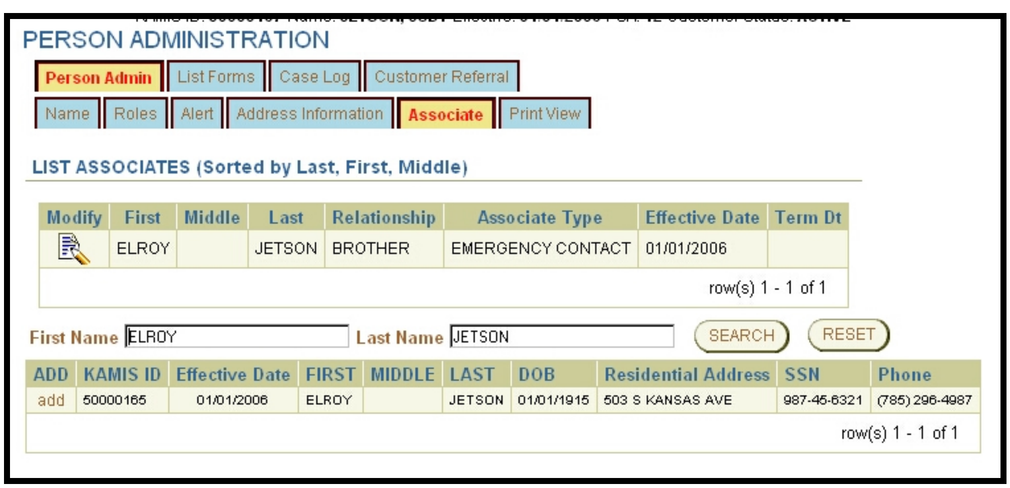
Continued on next page

Adding an Associate to a Customer, Continued

How To (continued)

Step	Action	Results
8.	Click on the **Add Associate** button.	Associate information is added to the Associate Listing table with the save notice displayed.





Displaying Addresses for Associates

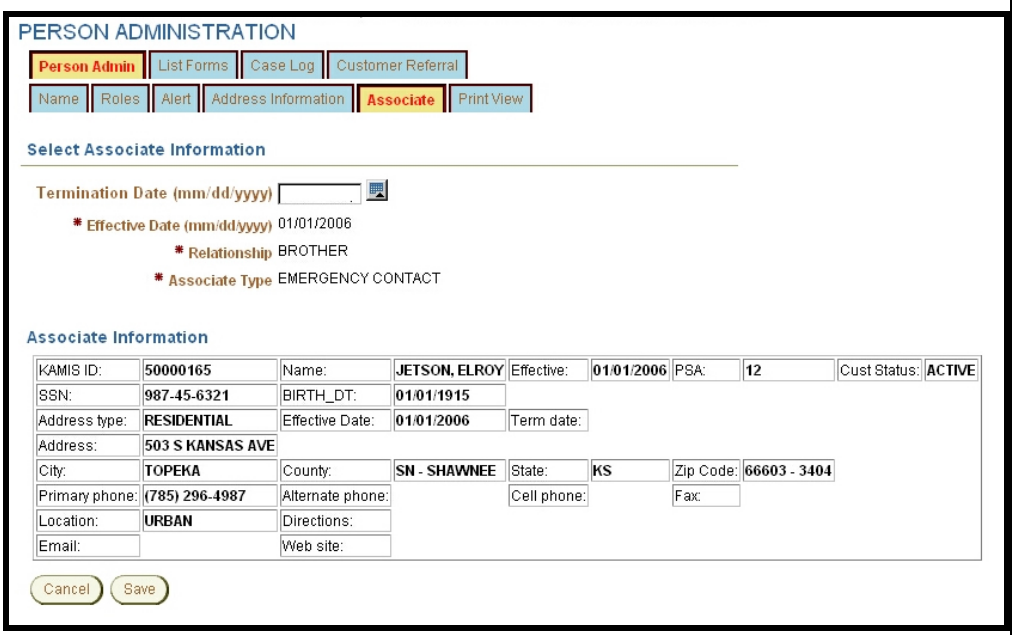
Introduction

The associate information table on the associate level 2 navigation tab displays only a limited amount of information.

How To

Follow the steps in the table below to display an associate's address.

Step	Action	Result
1.	Open Person Administration and click on the **Associate** Navigation tab.	Associate name(s) and limited information will be displayed in the table.
2.	Click on **Modify** to view the person information for the associate.	Results will display the address and phone number information.



Terminating an Associate and Customer Association

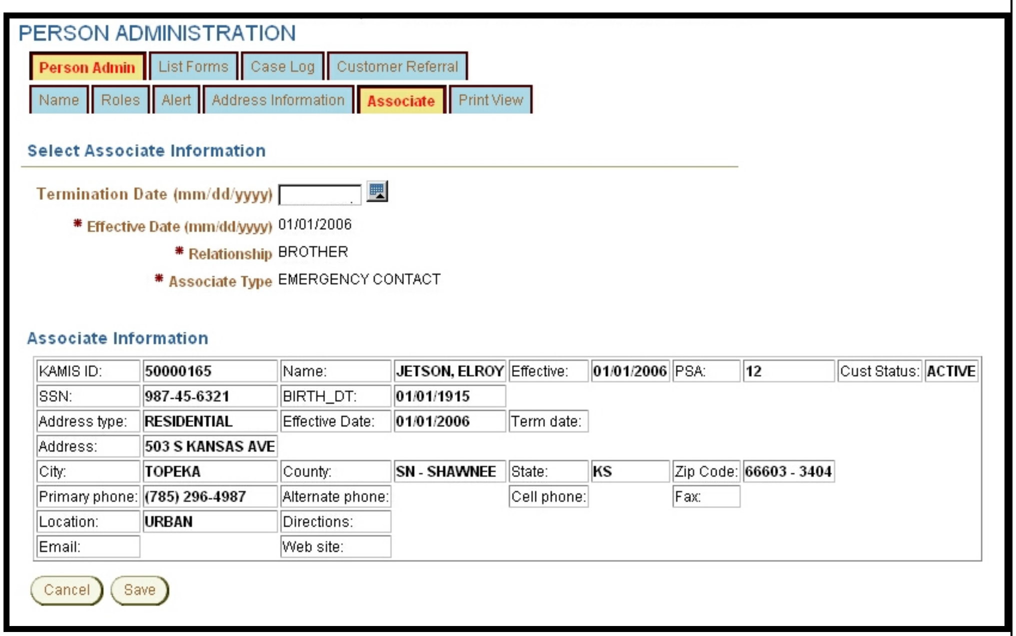
Introduction

From time to time, an association between the customer and associate may need to be terminated. This may be due to the customer no longer doing business with the associate as in the case of an Attorney or a death of a family member, etc.

How To

The below steps are accomplished on the Customer's Person Administration page.

Step	Action	Result
1.	Click on the **Modify** icon next to the associate to be terminated.	Associate Information page is displayed.

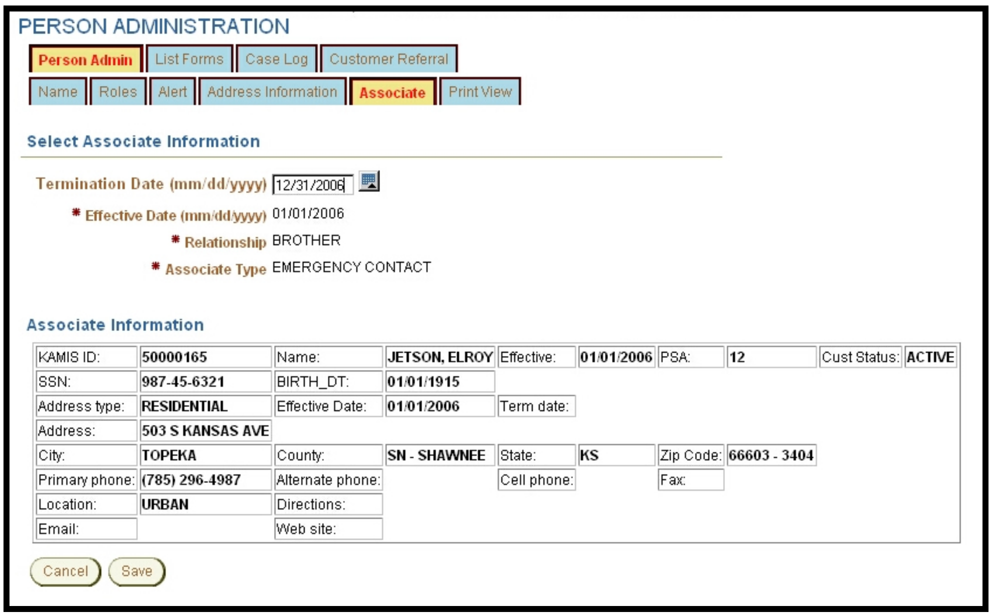


Continued on next page

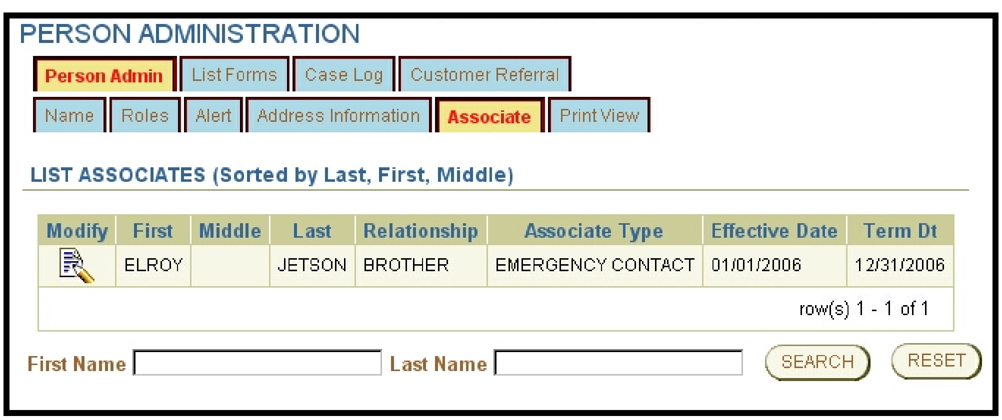
Terminating an Associate and Customer Association, Continued

How To (continued)

Step	Action	Result
2.	Enter the **Termination Date**	



Step	Action	Result
3.	Click on the **Save** button	The page is returned to the Associate Information page with the updated information and the save notice displayed.



Changing a Person’s Status

Introduction

A person’s status within the KAMIS System can be changed from active to inactive or deceased.

Important:

Since there is a possibility of multiple active Plans of Care for one person, **caution** should be taken in reviewing the services and funding before changing the person status on a customer.

A KAMIS user changing a person status to inactive or deceased on a Plan of Care with SCA, OAA, etc. funded services should be aware to NOT impact a Plan of Care that contains HCBS/FE funded services.

Likewise, changing a person status to inactive or deceased on a Plan of Care with HCBS/FE funded services should be aware to NOT impact a Plan of Care that contains SCA, OAA, etc. funded services.

The person status change should be halted until all persons responsible for data entry for all funding types to be impacted have been consulted.

Open Service Line Items

HCBS/FE Funded services –

- Open end dates
- Future dated service line items

Other Funded services –

- Open discharge codes
- Future dated service line items

Switching a Customer back to Active

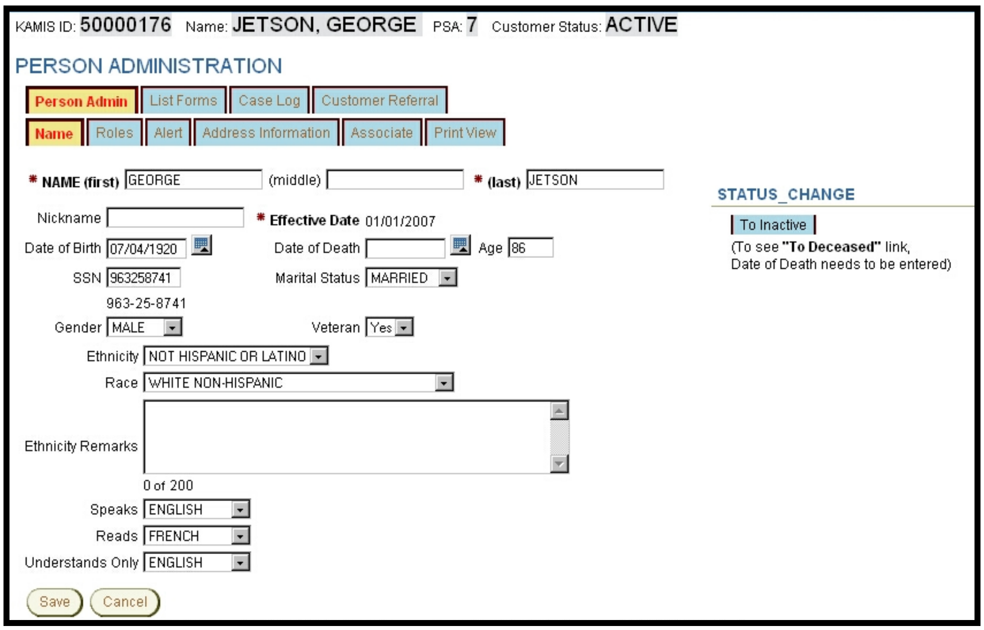
It is now an option to change a customer's status back to active from either the inactive or deceased status.

Changing a Customer's Status – Line Item Search

How To

Follow the steps in the table below to start the process of changing a Customer's status in KAMIS through the Person Administration function. This section describes the System search for open service line items.

Step	Action	Result
1.	Complete a person search.	Correct person is displayed.
2.	Click on the **Update Person** icon.	Person Administration window for person will be displayed.
3.	On the **Name tab**	Person information displays as well as a Status Change region.



Step	Action	Result
4.	For Inactive Status:	A system search will be processed to locate any open service line items on Plans of Care from 2005 to the present. Two options will display depending upon this system search.

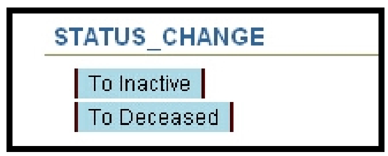
Continued on next page

Changing a Customer's Status – Line Item Search, Continued

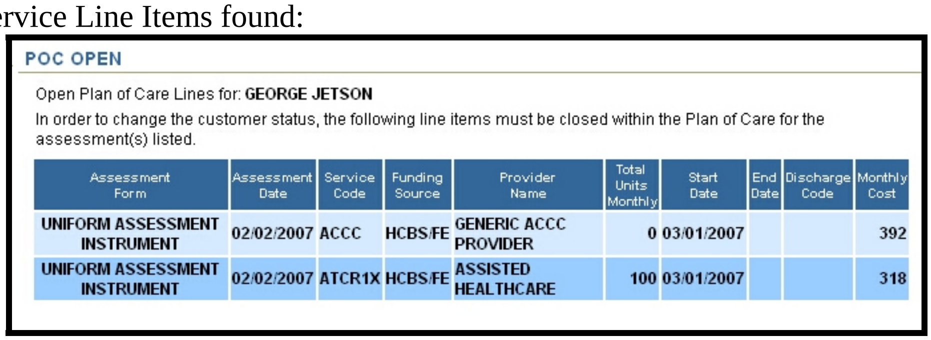
How To (continued)

Step	Action	Result

Status	Action
Inactive	Click on the **To Inactive** link under the Status Change region.
Deceased	Type in the **Death date**. Click on **Save**. Click on the **To Deceased** link under the Status Change region.



Service Line Items found:

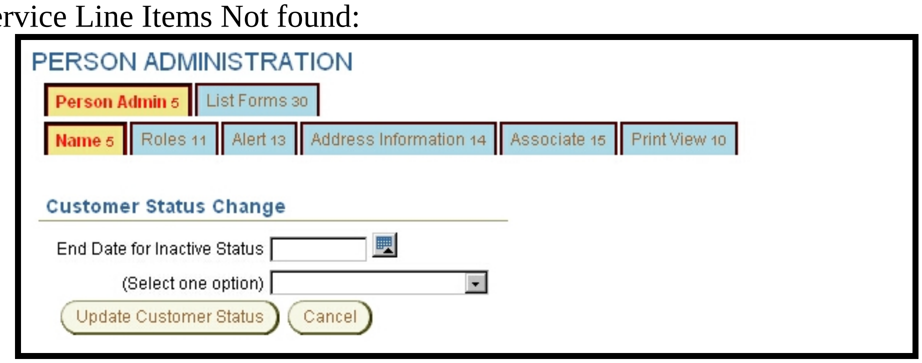

POC OPEN

Open Plan of Care Lines for: **GEORGE JETSON**

In order to change the customer status, the following line items must be closed within the Plan of Care for the assessment(s) listed.

Assessment Form	Assessment Date	Service Code	Funding Source	Provider Name	Total Units Monthly	Start Date	End Date	Discharge Code	Monthly Cost
UNIFORM ASSESSMENT INSTRUMENT	02/02/2007	ACCC	HCBS/FE	GENERIC ACCC PROVIDER	0	03/01/2007			392
UNIFORM ASSESSMENT INSTRUMENT	02/02/2007	ATCR1X	HCBS/FE	ASSISTED HEALTHCARE	100	03/01/2007			318

Service Line Items Not found:

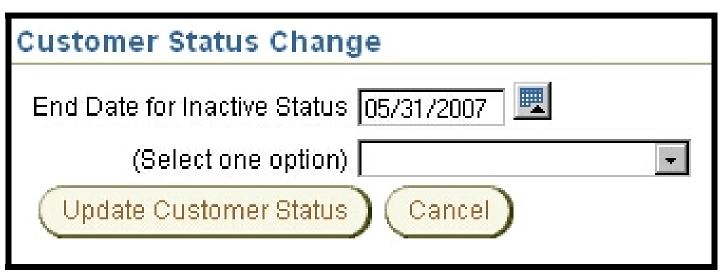


Changing a Customer's Status – Inactive

How To

Follow the steps in the table below to change a customer's status to inactive in KAMIS through the Person Administration function.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1.</td><td>Complete the line item system search.</td><td>Instructions in the previous section.

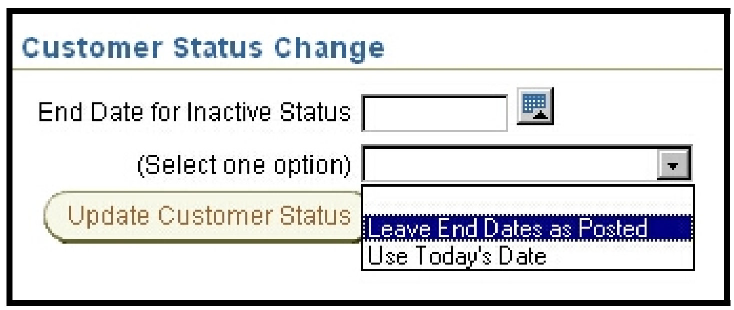
One of two options will occur.</td></tr>
<tr><td></td><td colspan="2">
<table>
<tr><th>Open POC Service Line Items Found</th><th>Action</th></tr>
<tr><td>Yes</td><td>Open the Plan of Care as indicated in the table listing and close the open service line items as appropriate.</td></tr>
<tr><td>No</td><td>Customer Status Change options will display. Follow the steps below.</td></tr>
</table>
</td></tr>
<tr><td>2.</td><td>There are three options for selection.</td><td></td></tr>
<tr><td></td><td colspan="2">
<table>
<tr><th>Option</th><th>Action</th></tr>
<tr><td>End Date for Inactive Status</td><td>Type in the date for the customer to be inactive. The end dates in all Plans of Care will change to that date.</td></tr>
<tr><td colspan="2">
</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Changing a Customer's Status – Inactive, Continued

How To (continued)

Option	Action
Leave End Dates as Posted	The end dates in all Plans of Care will remain unchanged.
Use Today's Date	The end dates in all Plans of Care will change to today's date.



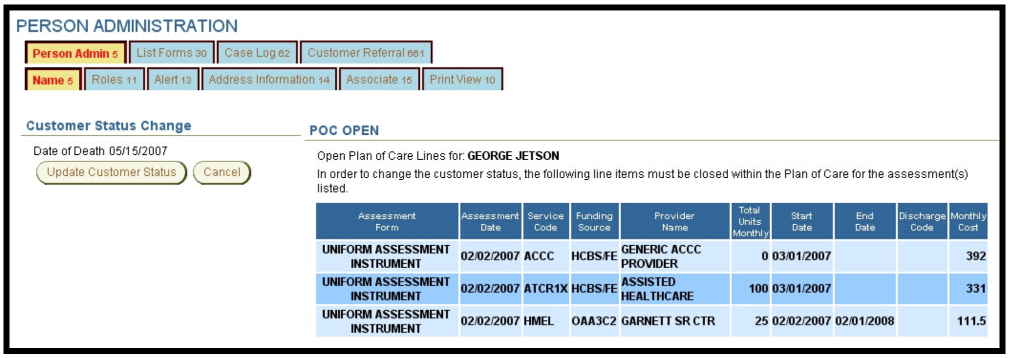
Step	Action	Result
3.	Click on the **Update Customer Status** button.	The following will occur: • Customer status will be changed to inactive and reflect in the Customer Heading area. • The end dates on service line items that were past the entered date is changed. • The discharge code is changed to 25 in any service line item where the end date was changed.

Changing a Customer's Status – Deceased

How To

Follow the steps in the table below to change a customer's status to deceased in KAMIS through the Person Administration function.

Step	Action	Result
1.	Complete the line item system search.	Instructions in the previous section. If services are found a table listing will be displayed.



Step	Action	Result
2.	Click on the **Update Customer Status** button. No additional steps are needed to change the customer to deceased.	The following will occur: • Customer status will be changed to deceased and reflect in the Customer Heading area. • The end dates on service line items that were past the entered date is changed. • The discharge code is changed to 2 in any service line item where the end date was changed.

Changing a Customer's Status – Through the Plan of Care

How To

Follow the steps in the table below to change a customer's status to inactive or deceased in KAMIS through the Plan of Care.

Step	Action	Result
1.	Open the Plan of Care and close the open service line items as appropriate.	
2.	Click on the **Save All POC Info** button.	If all line items have been closed, a message will be displayed.

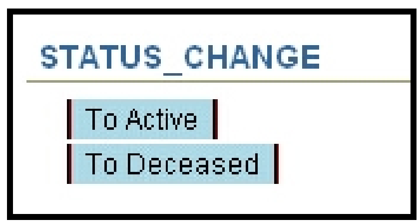
Step	Action	Result
3.	Click **OK**	Page will be forwarded to the Person Administration page. Follow the previous instructions to change the customer's status.

Change Customer Status to Active

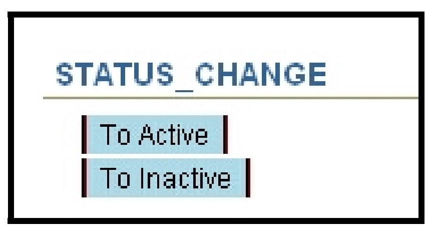
How To Follow the steps in the table below to change a customer's status back to active in KAMIS through Person Administration.

Step	Action	Result
1.	Complete a person search.	Correct person is displayed.
2.	Click on the **Update Person** icon.	Person Administration window for person will be displayed.
3.	On the **Name tab**	Person information displays as well as a Status Change region.

Current Status	Action
Inactive	Click on the **To Active** or **To Deceased** link under the Status Change region.



Current Status	Action
Deceased	Click on the **To Active** or **To Inactive** link under the Status Change region.



Once one of the above links is pressed the page will be forwarded to the Customer Status Change Region.

Continued on next page

Change Customer Status to Active, Continued

How To (continued)

Step	Action	Result
4.	Click on the **Update Customer Status** button.	The following will occur:

Changing		
From	**To**	**Result**
Inactive	Active	• Customer status will be reflected in the Customer Heading area. • In the POC, the End dates & Discharge Codes will remain with the same dates and code of 25.
Deceased	Active	• Customer status will be reflected in the Customer Heading area. • The Death Date will remain. • In the POC, the End dates & Discharge Codes will remain with the same dates and code of 2.

Continued on next page

How To (continued)

Step	Action	Result

Changing		Result
From	**To**	
Inactive	Deceased (Need to enter the Death Date in order to see the To Deceased link.)	• Customer status will be reflected in the Customer Heading area. • In the POC, the End dates & Discharge Codes will change to the death date and the discharge code will change to 2.
Deceased	Inactive	• Need to select one of the Inactive dating options. Recommend that the Leave End Dates as Posted be used. • Customer status will be reflected in the Customer Heading area. • The Death Date will remain. • In the POC, the End dates & Discharge Codes will remain with the same dates and code of 2.

Print View

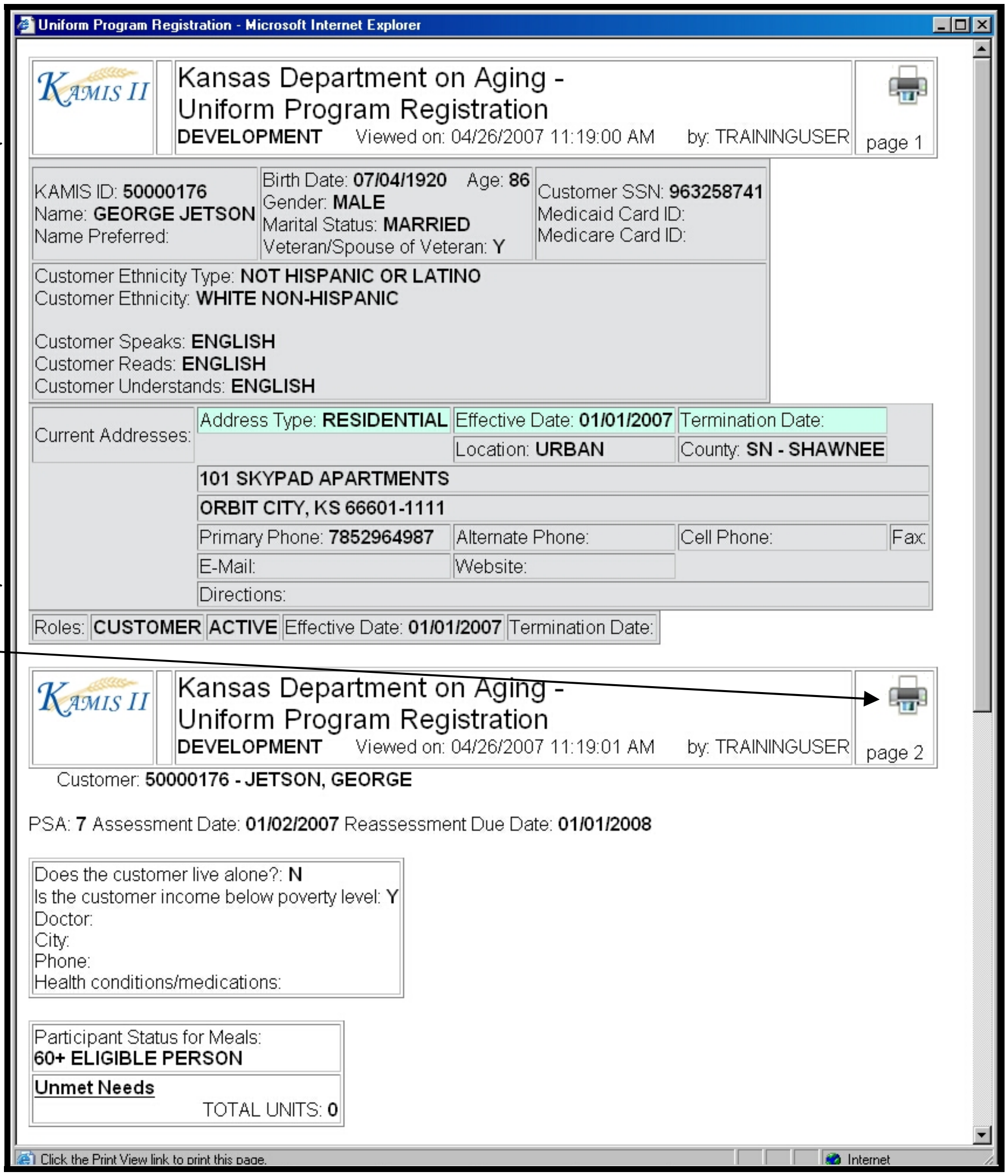
Form Reference

This tab will give the opportunity to print the assessment information in its entirety. The format will not be in the same arrangement as the form, but it will be divided into sections of information according to the paper form. This will open in a separate window from the assessment.

Print View

The grayed background area indicates the information is from Person Administration

When printing the pages will separate as indicated.


Uniform Program Registration - Microsoft Internet Explorer

KAMIS II | Kansas Department on Aging - Uniform Program Registration
DEVELOPMENT Viewed on: 04/26/2007 11:19:00 AM by: TRAININGUSER | page 1

KAMIS ID: **50000176**
Name: **GEORGE JETSON**
Name Preferred:

Birth Date: **07/04/1920** Age: **86**
Gender: **MALE**
Marital Status: **MARRIED**
Veteran/Spouse of Veteran: **Y**

Customer SSN: **963258741**
Medicaid Card ID:
Medicare Card ID:

Customer Ethnicity Type: **NOT HISPANIC OR LATINO**
Customer Ethnicity: **WHITE NON-HISPANIC**

Customer Speaks: **ENGLISH**
Customer Reads: **ENGLISH**
Customer Understands: **ENGLISH**

Current Addresses: | Address Type: **RESIDENTIAL** | Effective Date: **01/01/2007** | Termination Date:
Location: **URBAN** | County: **SN - SHAWNEE**
101 SKYPAD APARTMENTS
ORBIT CITY, KS 66601-1111
Primary Phone: **7852964987** | Alternate Phone: | Cell Phone: | Fax:
E-Mail: | Website:
Directions:

Roles: **CUSTOMER** **ACTIVE** Effective Date: **01/01/2007** Termination Date:

KAMIS II | Kansas Department on Aging - Uniform Program Registration
DEVELOPMENT Viewed on: 04/26/2007 11:19:01 AM by: TRAININGUSER | page 2

Customer: **50000176 - JETSON, GEORGE**

PSA: **7** Assessment Date: **01/02/2007** Reassessment Due Date: **01/01/2008**

Does the customer live alone?: **N**
Is the customer income below poverty level: **Y**
Doctor:
City:
Phone:
Health conditions/medications:

Participant Status for Meals:
60+ ELIGIBLE PERSON
Unmet Needs
TOTAL UNITS: **0**

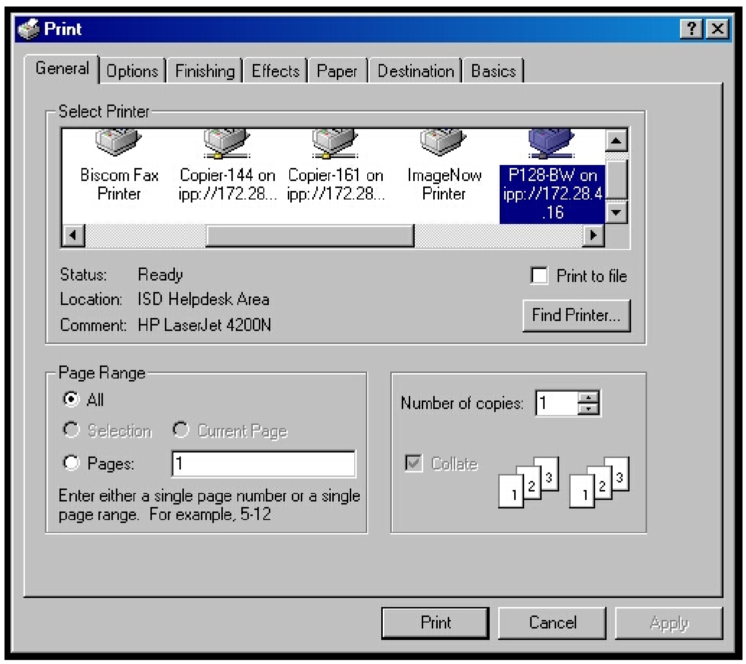
Click the Print View link to print this page. | Internet

Continued on next page

To Print

Follow the steps in the table below to complete the Customer Referral process.

Step	Action	Result
1.	Click on the **printer icon** at the top right of any region.	Printer dialog box will display. (This may look different depending upon your printer and the options available.)



Step	Action	Result
2.	Select the **Page Range**	See table below for options.

Option	Result
All	All pages will print
Pages (enter the page number)	Only the specified page will print.

Step	Action	Result
3.	Click on **Print**.	Document will print.

To Close

The window can be closed by clicking on the ☒ in the right upper corner.