

Chapter 6 – Person Administration

Table of Contents

| | |
|---|----|
| General Information..... | 1 |
| Adding a New Person | 2 |
| Possible Duplicate Record Found..... | 4 |
| Adding Person Roles..... | 7 |
| Alert | 9 |
| Adding Address Information | 10 |
| Updating Address Information | 13 |
| Adding Associates | 15 |
| Associate Search..... | 16 |
| Person Not Found - Adding a New Person as an Associate | 17 |
| Adding an Associate to a Customer..... | 18 |
| Displaying Addresses for Associates..... | 21 |
| Terminating an Associate and Customer Association | 22 |
| Changing a Person’s Status..... | 24 |
| Changing a Customer's Status – Line Item Search..... | 25 |
| Changing a Customer's Status – Inactive..... | 27 |
| Changing a Customer's Status – Deceased | 29 |
| Changing a Customer's Status – Through the Plan of Care | 30 |
| Change Customer Status to Active | 31 |
| Print View | 34 |

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 accurate 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.
-

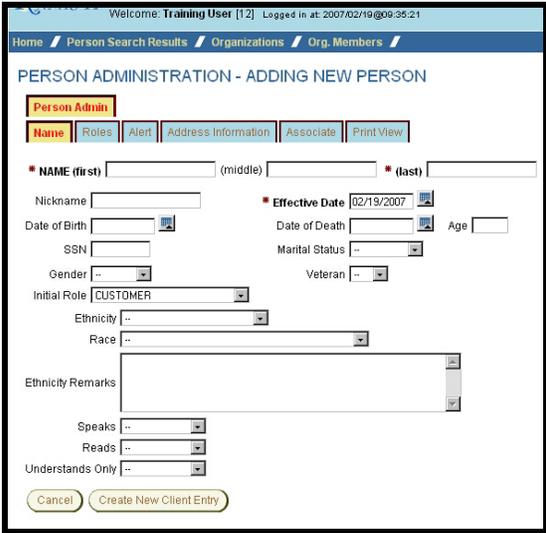
Adding a New Person

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. |
|  | | |
| 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

Adding a New Person, Continued

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. |

The screenshot shows a web application interface for 'PERSON ADMINISTRATION'. At the top, it displays 'Welcome: Training User [1, 2] Logged in at: 2007/02/19 11:39:02'. Below this is a breadcrumb trail: 'Home / Person Search Results / Person Admin / Person Forms / Organizations / Org. Members'. The main content area shows 'KAMIS ID: 50000167 Name: JETSON, JUDY Effective: 01/01/2006 PGA: 12 Customer Status: ACTIVE'. There are several tabs: 'Person Admin' (selected), 'List Forms', 'Case Log', and 'Customer Referral'. Underneath, there are sub-tabs: 'Name', 'Roles', 'Alert', 'Address Information', 'Associates', and 'Print View'. The 'Name' sub-tab is active, showing fields for 'NAME (first)' (JUDY), '(middle)', and '(last)' (JETSON). Other fields include 'Nickname', 'Date of Birth' (01/01/1920), 'Date of Death', 'Age' (87), 'SSN' (987145236), 'Marital Status' (MARRIED), 'Gender' (FEMALE), 'Veteran' (No), 'Ethnicity' (NOT HISPANIC OR LATINO), and 'Race' (WHITE NON-HISPANIC). There is also an 'Ethnicity Remarks' text area. At the bottom, there are dropdown menus for 'Speaks' (ENGLISH), 'Reads' (ENGLISH), and 'Understands Only' (ENGLISH). 'Cancel' and 'Save' buttons are at the bottom left.

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.

| Step | Action | Results | | | | | | |
|---|---|---|--|-----------|---|--|---|---|
| 1. | When the Save button is clicked a check is done for possible duplicate person records within KAMIS. | <p>The check compares the following in order:</p> <ul style="list-style-type: none"> Person Last Name Person First Name Social Security Number Date of Birth <p>If a duplicate is found the following occurs:</p> | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td data-bbox="548 1045 919 1121" style="width: 50%; padding: 5px;">A Duplicate Name Results message is displayed.</td> <td data-bbox="919 1045 1386 1121" style="width: 50%; padding: 5px;">See below</td> </tr> <tr> <td colspan="2" data-bbox="565 1159 1373 1285" style="text-align: center; padding: 5px;"> <div style="border: 1px solid black; padding: 5px; color: red; font-size: small;"> The Person you are attempting to add or modify may be a duplicate. Please validate you are not entering the same person by clicking the DISPLAY DUPLICATES button. Check OVERRIDE DUPLICATE ENTRY checkbox at the bottom of the screen to override error and save person information. </div> </td> </tr> <tr> <td data-bbox="548 1323 919 1398" style="padding: 5px;">A Display Duplicates button is displayed.</td> <td data-bbox="919 1323 1386 1528" style="text-align: center; padding: 5px;">  </td> </tr> </table> | | | A Duplicate Name Results message is displayed. | See below | <div style="border: 1px solid black; padding: 5px; color: red; font-size: small;"> The Person you are attempting to add or modify may be a duplicate. Please validate you are not entering the same person by clicking the DISPLAY DUPLICATES button. Check OVERRIDE DUPLICATE ENTRY checkbox at the bottom of the screen to override error and save person information. </div> | | A Display Duplicates button is displayed. |  |
| A Duplicate Name Results message is displayed. | See below | | | | | | | |
| <div style="border: 1px solid black; padding: 5px; color: red; font-size: small;"> The Person you are attempting to add or modify may be a duplicate. Please validate you are not entering the same person by clicking the DISPLAY DUPLICATES button. Check OVERRIDE DUPLICATE ENTRY checkbox at the bottom of the screen to override error and save person information. </div> | | | | | | | | |
| A Display Duplicates button is displayed. |  | | | | | | | |

Continued on next page

Possible Duplicate Record Found, Continued

How To (continued)

| Step | Action | Results |
|------|---|---|
| | <p>An Override Duplicate Entry check box is displayed under the Create New Client Entry button.</p> |  <p>The check box is not active until the Display Duplicate button is accessed.</p> |
| 2. | <p>Click on the Display Duplicates button.</p> | <p>A table listing all possible duplicate records will be displayed.</p> |
| | |  |
| 3. | <p>Compare the information to determine if the new entry and the person(s) listed are or are not the same person.</p> | <p>Follow the steps below:</p> |

Continued on next page

Possible Duplicate Record Found, Continued

How To (continued)

| Step | Action | Results | | | | | | | | |
|-------------------------------|--|--------------------|--------|----------|--|---------------------------|--|-------------------------------|--|--|
| | <table border="1"> <thead> <tr> <th data-bbox="547 491 919 529">Determination</th> <th data-bbox="919 491 1395 529">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="547 529 919 825">Not sure</td> <td data-bbox="919 529 1395 825">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 data-bbox="547 825 919 972">Is the same person</td> <td data-bbox="919 825 1395 972">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 data-bbox="547 972 919 1083">Is not the same person</td> <td data-bbox="919 972 1395 1083">Click on the Override Duplicate Entry check box. Will display as checked.</td> </tr> </tbody> </table> | Determination | Action | Not sure | 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. | Is the same person | Click on the Cancel button at the bottom of the window. Person Administration will close without creating the new/duplicate person. | Is not the same person | Click on the Override Duplicate Entry check box. Will display as checked. | |
| Determination | Action | | | | | | | | | |
| Not sure | 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. | | | | | | | | | |
| Is the same person | Click on the Cancel button at the bottom of the window. Person Administration will close without creating the new/duplicate person. | | | | | | | | | |
| Is not the same person | Click on the Override Duplicate Entry check box. Will display as checked. | | | | | | | | | |
| 4. | Click on the Create New Client Entry button. | Person is created. | | | | | | | | |

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.

Example: 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.

| Step | Action | Results |
|--|---|---|
| 1. | On the Roles tab. | Role assigned page will be displayed. |
|  | | |
| 2. | Click on Create New Role button. | Role Administration page will be displayed. |

Continued on next page

Adding Person Roles, Continued

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. |

PERSON ADMINISTRATION - ADDING NEW PERSON

Person Admin | List Forms | Case Log | Customer Referral

Name | **Roles** | Alert | Address Information | Associate | Print View

Role Administration

* Select Role Type ASSESSOR
 ASSOCIATE
 CARE RECIPIENT
 CAREGIVER
 CAREGIVER GRANDPARENT
 CASE MANAGER
 DOCTOR
 EMPLOYEE
 MMIS USER
 NURSE
 SOCIAL WORKER

* Status ACTIVE
 * Effective Date 02/19/2007

Cancel Create New Role

| | | |
|----|--|---|
| 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. |
|----|--|---|

PERSON ADMINISTRATION - ADDING NEW PERSON

Person Admin | List Forms | Case Log | Customer Referral

Name | **Roles** | Alert | Address Information | Associate | Print View

Roles

| Role ▲ | Effective Date | Terminate |
|----------|----------------|-----------|
| CUSTOMER | 01/01/2006 | ✘ |
| ASSESSOR | 02/19/2007 | ✘ |

row(s) 1 - 2 of 2

Create New Role

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 |

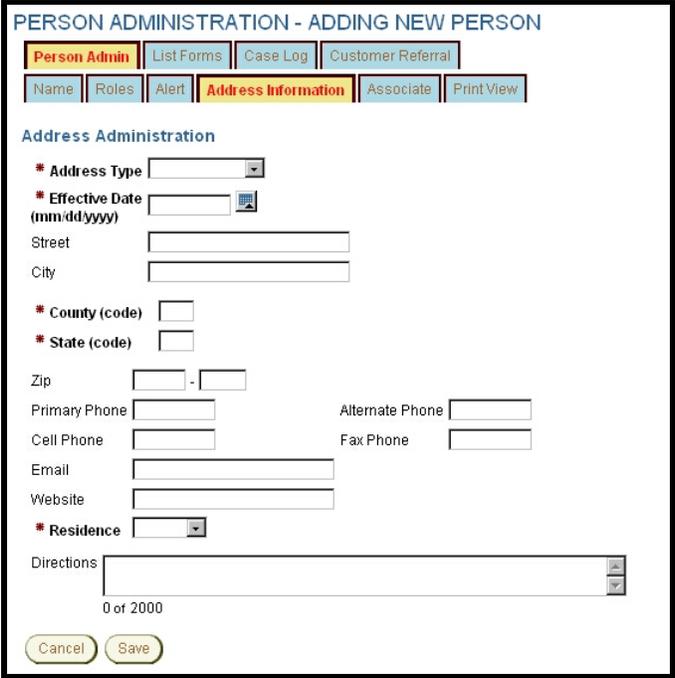
How To Follow the steps in the table below to add an address.

| 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

Adding Address Information, Continued

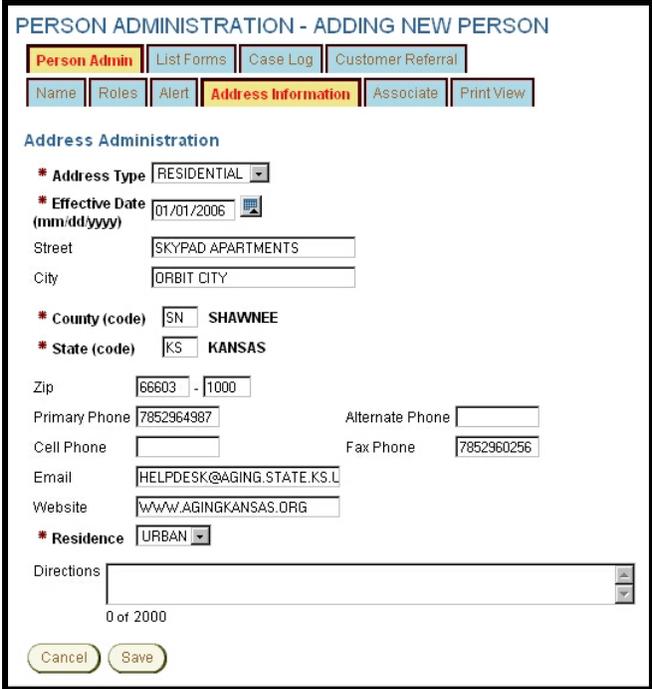
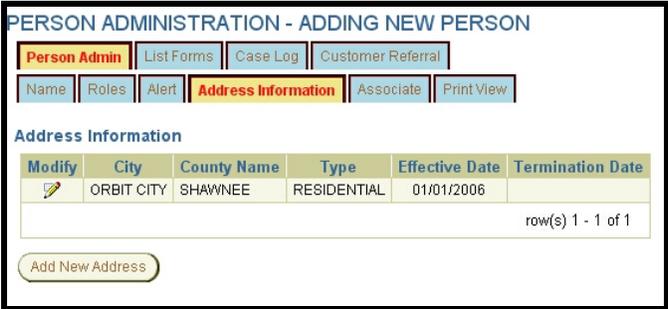
How To (continued)

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

Adding Address Information, Continued

How To (continued)

| Step | Action | Results | | | | | | | | | | | | |
|--|---|--|-------------|----------------|------------------|------|----------------|------------------|--|------------|---------|-------------|------------|--|
| 6. | Verify that the correct option is selected in the Residence field. | Required field | | | | | | | | | | | | |
|  <p>The screenshot shows a web form titled "PERSON ADMINISTRATION - ADDING NEW PERSON". At the top, there are navigation tabs: "Person Admin" (highlighted), "List Forms", "Case Log", and "Customer Referral". Below these are sub-tabs: "Name", "Roles", "Alert", "Address Information" (highlighted), "Associate", and "Print View". The "Address Administration" section contains the following fields: <ul style="list-style-type: none"> * Address Type: RESIDENTIAL (dropdown) * Effective Date: 01/01/2006 (calendar icon) Street: SKYPAD APARTMENTS City: ORBIT CITY * County (code): SN SHAWNEE * State (code): KS KANSAS Zip: 66603 - 1000 Primary Phone: 7852964987 Alternate Phone: (empty) Cell Phone: (empty) Fax Phone: 7852960256 Email: HELPDESK@AGING.STATE.KS.L Website: WWW.AGINGKANSAS.ORG * Residence: URBAN (dropdown) Directions: (empty text area, 0 of 2000 characters) At the bottom are "Cancel" and "Save" buttons. </p> | | | | | | | | | | | | | | |
| 7. | Click on the Save button. | Page is returned to Address Information table. | | | | | | | | | | | | |
|  <p>The screenshot shows the "PERSON ADMINISTRATION - ADDING NEW PERSON" form, now displaying the "Address Information" table. The table has the following structure: <table border="1"> <thead> <tr> <th>Modify</th> <th>City</th> <th>County Name</th> <th>Type</th> <th>Effective Date</th> <th>Termination Date</th> </tr> </thead> <tbody> <tr> <td></td> <td>ORBIT CITY</td> <td>SHAWNEE</td> <td>RESIDENTIAL</td> <td>01/01/2006</td> <td></td> </tr> </tbody> </table> Below the table, it says "row(s) 1 - 1 of 1" and there is an "Add New Address" button. </p> | | | Modify | City | County Name | Type | Effective Date | Termination Date | | ORBIT CITY | SHAWNEE | RESIDENTIAL | 01/01/2006 | |
| Modify | City | County Name | Type | Effective Date | Termination Date | | | | | | | | | |
| | ORBIT CITY | SHAWNEE | RESIDENTIAL | 01/01/2006 | | | | | | | | | | |

Updating Address Information

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

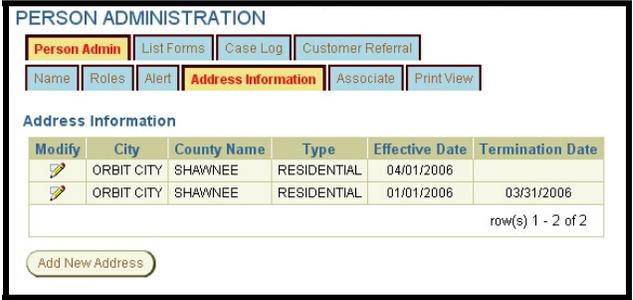
How To In order to change the address of the person, the old address will need to be terminated and the new address added.

| Step | Action | Result |
|---|---|---|
| 1. | Click on the Modify icon next to the address to be terminated. | Address Administration page is displayed. |
|  | | |
| 2. | Enter the Termination Date | |

Continued on next page

Updating Address Information, Continued

How To (continued)

| Step | Action | Result | | | | | | | | | | | | | | | | | | |
|--|---|--|-------------|----------------|------------------|------|----------------|------------------|--|------------|---------|-------------|------------|--|--|------------|---------|-------------|------------|------------|
| 3. | Click on the Save button | Page is returned to the Address Information table displaying the save message and the terminated address line. | | | | | | | | | | | | | | | | | | |
|  <p>The screenshot shows a web application interface titled "PERSON ADMINISTRATION". It features a navigation menu with buttons for "Person Admin", "List Forms", "Case Log", and "Customer Referral". Below this is a secondary menu with "Name", "Roles", "Alert", "Address Information", "Associate", and "PrintView". The "Address Information" section contains a table with the following data:</p> <table border="1"> <thead> <tr> <th>Modify</th> <th>City</th> <th>County Name</th> <th>Type</th> <th>Effective Date</th> <th>Termination Date</th> </tr> </thead> <tbody> <tr> <td></td> <td>ORBIT CITY</td> <td>SHAWNEE</td> <td>RESIDENTIAL</td> <td>04/01/2006</td> <td></td> </tr> <tr> <td></td> <td>ORBIT CITY</td> <td>SHAWNEE</td> <td>RESIDENTIAL</td> <td>01/01/2006</td> <td>03/31/2006</td> </tr> </tbody> </table> <p>Below the table, it indicates "row(s) 1 - 2 of 2" and includes an "Add New Address" button.</p> | | | Modify | City | County Name | Type | Effective Date | Termination Date | | ORBIT CITY | SHAWNEE | RESIDENTIAL | 04/01/2006 | | | ORBIT CITY | SHAWNEE | RESIDENTIAL | 01/01/2006 | 03/31/2006 |
| Modify | City | County Name | Type | Effective Date | Termination Date | | | | | | | | | | | | | | | |
| | ORBIT CITY | SHAWNEE | RESIDENTIAL | 04/01/2006 | | | | | | | | | | | | | | | | |
| | ORBIT CITY | SHAWNEE | RESIDENTIAL | 01/01/2006 | 03/31/2006 | | | | | | | | | | | | | | | |
| 4. | Add new address with correct / current information. | See previous section for instructions on how to add addresses. | | | | | | | | | | | | | | | | | | |

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 | |

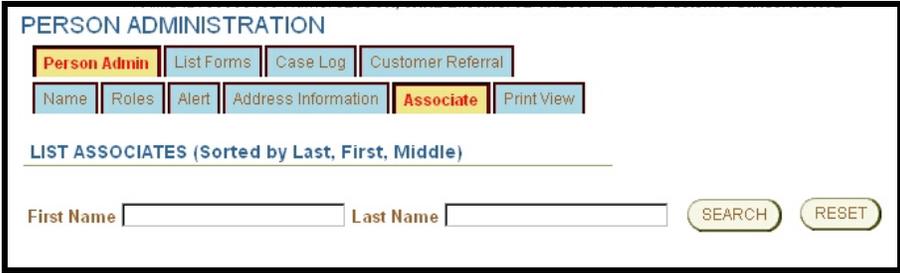
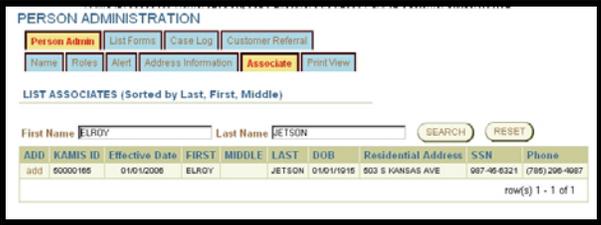
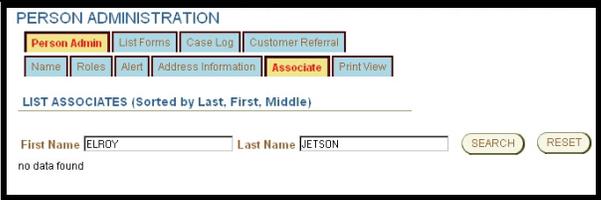
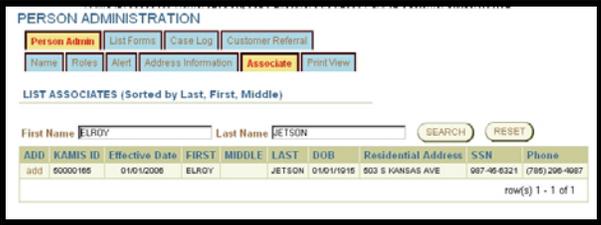
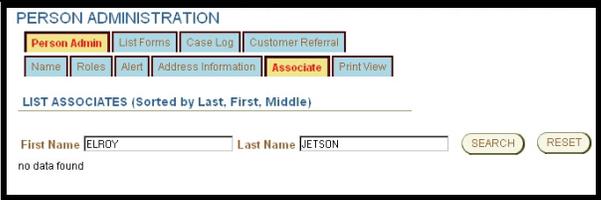
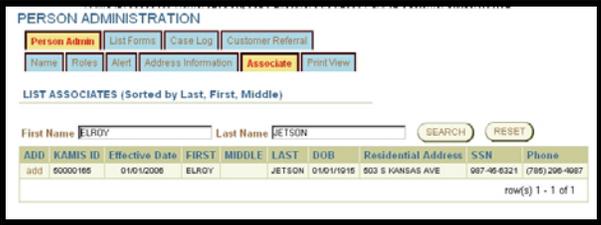
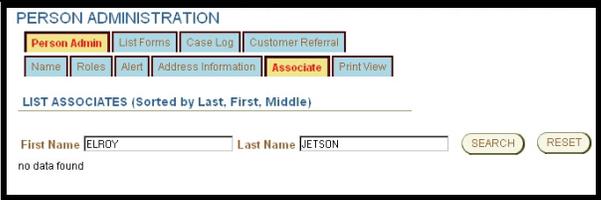
Associate Types

| 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.

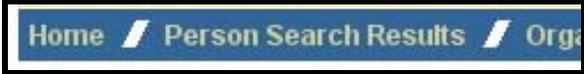
How To Follow the steps in the table below to search for an associate in KAMIS.

| 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. | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>Person is found</td> <td>Table will be displayed with the person information for comparison.</td> </tr> <tr> <td colspan="2">  </td> </tr> <tr> <td>Person is not found</td> <td>The person is new to the KAMIS System and will need to be added.</td> </tr> <tr> <td colspan="2">  </td> </tr> </tbody> </table> | | | 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. |  | |
| 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. |
|  | | |
|  | | |
| 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. |

PERSON ADMINISTRATION

[Person Admin](#) | [List Forms](#) | [Case Log](#) | [Customer Referral](#)

[Name](#) | [Roles](#) | [Alert](#) | [Address Information](#) | [Associate](#) | [Print View](#)

LIST ASSOCIATES (Sorted by Last, First, Middle)

First Name Last Name

| ADD | KAMIS ID | Effective Date | FIRST | MIDDLE | LAST | DOB | Residential Address | SSN | Phone |
|-----|----------|----------------|-------|--------|--------|------------|---------------------|-------------|----------------|
| add | 50000165 | 01/01/2006 | ELROY | | JETSON | 01/01/1915 | 503 S KANSAS AVE | 987-45-6321 | (785) 296-4987 |

row(s) 1 - 1 of 1

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. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid black; padding: 10px;"> <p>PERSON ADMINISTRATION</p> <p> Person Admin List Forms Case Log Customer Referral </p> <p> Name Roles Alert Address Information Associate Print View </p> <p>Select Associate Information</p> <p>* Effective Date (mm/dd/yyyy) <input type="text"/></p> <p>* Relationship <input type="text"/></p> <p>* Associate Type <input type="text"/></p> <p>Associate Information</p> <table border="1"> <tr> <td>KAMIS ID:</td> <td>50000165</td> <td>Name:</td> <td>JETSON, ELROY</td> <td>Effective:</td> <td>01/01/2006</td> <td>PSA:</td> <td>12</td> <td>Cust Status:</td> <td>ACTIVE</td> </tr> <tr> <td>SSN:</td> <td>987-45-6321</td> <td>BIRTH_DT:</td> <td>01/01/1915</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Address type:</td> <td>RESIDENTIAL</td> <td>Effective Date:</td> <td>01/01/2006</td> <td>Term date:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Address:</td> <td colspan="9">503 S KANSAS AVE</td> </tr> <tr> <td>City:</td> <td>TOPEKA</td> <td>County:</td> <td>SN - SHAWNEE</td> <td>State:</td> <td>KS</td> <td>Zip Code:</td> <td colspan="3">66603 - 3404</td> </tr> <tr> <td>Primary phone:</td> <td>(785) 296-4987</td> <td>Alternate phone:</td> <td></td> <td>Cell phone:</td> <td></td> <td>Fax:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Location:</td> <td>URBAN</td> <td>Directions:</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Email:</td> <td></td> <td>Web site:</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p> <input type="button" value="Cancel"/> <input type="button" value="Add Associate"/> </p> </div> | | | KAMIS ID: | 50000165 | Name: | JETSON, ELROY | Effective: | 01/01/2006 | PSA: | 12 | Cust Status: | ACTIVE | SSN: | 987-45-6321 | BIRTH_DT: | 01/01/1915 | | | | | | | Address type: | RESIDENTIAL | Effective Date: | 01/01/2006 | Term date: | | | | | | Address: | 503 S KANSAS AVE | | | | | | | | | City: | TOPEKA | County: | SN - SHAWNEE | State: | KS | Zip Code: | 66603 - 3404 | | | Primary phone: | (785) 296-4987 | Alternate phone: | | Cell phone: | | Fax: | | | | Location: | URBAN | Directions: | | | | | | | | Email: | | Web site: | | | | | | | |
| KAMIS ID: | 50000165 | Name: | JETSON, ELROY | Effective: | 01/01/2006 | PSA: | 12 | Cust Status: | ACTIVE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SSN: | 987-45-6321 | BIRTH_DT: | 01/01/1915 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Address type: | RESIDENTIAL | Effective Date: | 01/01/2006 | Term date: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Address: | 503 S KANSAS AVE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| City: | TOPEKA | County: | SN - SHAWNEE | State: | KS | Zip Code: | 66603 - 3404 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Primary phone: | (785) 296-4987 | Alternate phone: | | Cell phone: | | Fax: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Location: | URBAN | Directions: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Email: | | Web site: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 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. |

PERSON ADMINISTRATION

[Person Admin](#) | [List Forms](#) | [Case Log](#) | [Customer Referral](#)
[Name](#) | [Roles](#) | [Alert](#) | [Address Information](#) | [Associate](#) | [Print View](#)

Select Associate Information

* Effective Date (mm/dd/yyyy)

* Relationship

* Associate Type

Associate Information

| | | | | | | | | | |
|----------------|------------------|------------------|---------------|-------------|------------|-----------|--------------|--------------|--------|
| KAMIS ID: | 50000165 | Name: | JETSON, ELROY | Effective: | 01/01/2006 | PSA: | 12 | Cust Status: | ACTIVE |
| SSN: | 987-45-6321 | BIRTH_DT: | 01/01/1915 | | | | | | |
| Address type: | RESIDENTIAL | Effective Date: | 01/01/2006 | Term date: | | | | | |
| Address: | 503 S KANSAS AVE | | | | | | | | |
| City: | TOPEKA | County: | SN - SHAWNEE | State: | KS | Zip Code: | 66603 - 3404 | | |
| Primary phone: | (785) 296-4987 | Alternate phone: | | Cell phone: | | Fax: | | | |
| Location: | URBAN | | | | | | | | |
| Directions: | | | | | | | | | |
| Email: | | | | | | | | | |
| Web site: | | | | | | | | | |

PERSON ADMINISTRATION

[Person Admin](#) | [List Forms](#) | [Case Log](#) | [Customer Referral](#)
[Name](#) | [Roles](#) | [Alert](#) | [Address Information](#) | [Associate](#) | [Print View](#)

LIST ASSOCIATES (Sorted by Last, First, Middle)

| Modify | First | Middle | Last | Relationship | Associate Type | Effective Date | Term Dt |
|--------|-------|--------|--------|--------------|-------------------|----------------|---------|
| | ELROY | | JETSON | BROTHER | EMERGENCY CONTACT | 01/01/2006 | |

row(s) 1 - 1 of 1

First Name Last Name

| ADD | KAMIS ID | Effective Date | FIRST | MIDDLE | LAST | DOB | Residential Address | SSN | Phone |
|-----|----------|----------------|-------|--------|--------|------------|---------------------|-------------|----------------|
| add | 50000165 | 01/01/2006 | ELROY | | JETSON | 01/01/1915 | 503 S KANSAS AVE | 987-45-6321 | (785) 296-4987 |

row(s) 1 - 1 of 1

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. |

PERSON ADMINISTRATION

[Person Admin](#) | [List Forms](#) | [Case Log](#) | [Customer Referral](#)
[Name](#) | [Roles](#) | [Alert](#) | [Address Information](#) | **[Associate](#)** | [Print View](#)

Select Associate Information

Termination Date (mm/dd/yyyy)

* Effective Date (mm/dd/yyyy) 01/01/2006

* Relationship BROTHER

* Associate Type EMERGENCY CONTACT

Associate Information

| | | | | | | | | | |
|----------------|------------------|------------------|---------------|-------------|------------|-----------|--------------|--------------|--------|
| KAMIS ID: | 50000165 | Name: | JETSON, ELROY | Effective: | 01/01/2006 | PSA: | 12 | Cust Status: | ACTIVE |
| SSN: | 987-45-6321 | BIRTH_DT: | 01/01/1915 | | | | | | |
| Address type: | RESIDENTIAL | Effective Date: | 01/01/2006 | Term date: | | | | | |
| Address: | 503 S KANSAS AVE | | | | | | | | |
| City: | TOPEKA | County: | SN - SHAWNEE | State: | KS | Zip Code: | 66603 - 3404 | | |
| Primary phone: | (785) 296-4987 | Alternate phone: | | Cell phone: | | Fax: | | | |
| Location: | URBAN | Directions: | | | | | | | |
| Email: | | Web site: | | | | | | | |

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. |

PERSON ADMINISTRATION

Person Admin | List Forms | Case Log | Customer Referral

Name | Roles | Alert | Address Information | Associate | Print View

Select Associate Information

Termination Date (mm/dd/yyyy)

* Effective Date (mm/dd/yyyy) 01/01/2006

* Relationship BROTHER

* Associate Type EMERGENCY CONTACT

Associate Information

| | | | | | | | | | |
|----------------|------------------|------------------|---------------|-------------|------------|-----------|--------------|--------------|--------|
| KAMIS ID: | 50000165 | Name: | JETSON, ELROY | Effective: | 01/01/2006 | PSA: | 12 | Cust Status: | ACTIVE |
| SSN: | 987-45-6321 | BIRTH_DT: | 01/01/1915 | | | | | | |
| Address type: | RESIDENTIAL | Effective Date: | 01/01/2006 | Term date: | | | | | |
| Address: | 503 S KANSAS AVE | | | | | | | | |
| City: | TOPEKA | County: | SN - SHAWNEE | State: | KS | Zip Code: | 66603 - 3404 | | |
| Primary phone: | (785) 296-4987 | Alternate phone: | | Cell phone: | | Fax: | | | |
| Location: | URBAN | Directions: | | | | | | | |
| Email: | | Web site: | | | | | | | |

Continued on next page

Terminating an Associate and Customer Association, Continued

How To (continued)

| Step | Action | Result | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|-----------------------------------|--|---------------|--------------|-------------------|----------------|--------------|----------------|----------------|---------|--------------|--------|------|-------------|-----------|-------------------|------------|------------|--|--|--|--|---------------|-------------|-----------------|------------|------------|--|--|--|--|--|----------|------------------|--|--|--|--|--|--|--|--|-------|--------|---------|--------------|--------|----|-----------|--------------|--|--|----------------|----------------|------------------|--|-------------|--|------|--|--|--|-----------|-------|-------------|--|--|--|--|--|--|--|--------|--|-----------|--|--|--|--|--|--|--|
| 2. | Enter the Termination Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid black; padding: 10px;"> <p>PERSON ADMINISTRATION</p> <p> Person Admin List Forms Case Log Customer Referral Name Roles Alert Address Information Associate Print View </p> <p>Select Associate Information</p> <p>Termination Date (mm/dd/yyyy) <input type="text" value="12/31/2006"/> </p> <ul style="list-style-type: none"> * Effective Date (mm/dd/yyyy) 01/01/2006 * Relationship BROTHER * Associate Type EMERGENCY CONTACT <p>Associate Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>KAMIS ID:</td> <td>50000165</td> <td>Name:</td> <td>JETSON, ELROY</td> <td>Effective:</td> <td>01/01/2006</td> <td>PSA:</td> <td>12</td> <td>Cust Status:</td> <td>ACTIVE</td> </tr> <tr> <td>SSN:</td> <td>987-45-6321</td> <td>BIRTH_DT:</td> <td>01/01/1915</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Address type:</td> <td>RESIDENTIAL</td> <td>Effective Date:</td> <td>01/01/2006</td> <td>Term date:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Address:</td> <td colspan="9">503 S KANSAS AVE</td> </tr> <tr> <td>City:</td> <td>TOPEKA</td> <td>County:</td> <td>SN - SHAWNEE</td> <td>State:</td> <td>KS</td> <td>Zip Code:</td> <td colspan="3">66603 - 3404</td> </tr> <tr> <td>Primary phone:</td> <td>(785) 296-4987</td> <td>Alternate phone:</td> <td></td> <td>Cell phone:</td> <td></td> <td>Fax:</td> <td colspan="3"></td> </tr> <tr> <td>Location:</td> <td>URBAN</td> <td>Directions:</td> <td colspan="7"></td> </tr> <tr> <td>Email:</td> <td></td> <td>Web site:</td> <td colspan="7"></td> </tr> </table> <p style="text-align: center;"> <input type="button" value="Cancel"/> <input type="button" value="Save"/> </p> </div> | | | KAMIS ID: | 50000165 | Name: | JETSON, ELROY | Effective: | 01/01/2006 | PSA: | 12 | Cust Status: | ACTIVE | SSN: | 987-45-6321 | BIRTH_DT: | 01/01/1915 | | | | | | | Address type: | RESIDENTIAL | Effective Date: | 01/01/2006 | Term date: | | | | | | Address: | 503 S KANSAS AVE | | | | | | | | | City: | TOPEKA | County: | SN - SHAWNEE | State: | KS | Zip Code: | 66603 - 3404 | | | Primary phone: | (785) 296-4987 | Alternate phone: | | Cell phone: | | Fax: | | | | Location: | URBAN | Directions: | | | | | | | | Email: | | Web site: | | | | | | | |
| KAMIS ID: | 50000165 | Name: | JETSON, ELROY | Effective: | 01/01/2006 | PSA: | 12 | Cust Status: | ACTIVE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SSN: | 987-45-6321 | BIRTH_DT: | 01/01/1915 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Address type: | RESIDENTIAL | Effective Date: | 01/01/2006 | Term date: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Address: | 503 S KANSAS AVE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| City: | TOPEKA | County: | SN - SHAWNEE | State: | KS | Zip Code: | 66603 - 3404 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Primary phone: | (785) 296-4987 | Alternate phone: | | Cell phone: | | Fax: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Location: | URBAN | Directions: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Email: | | Web site: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | Click on the Save button | The page is returned to the Associate Information page with the updated information and the save notice displayed. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid black; padding: 10px;"> <p>PERSON ADMINISTRATION</p> <p> Person Admin List Forms Case Log Customer Referral Name Roles Alert Address Information Associate Print View </p> <p>LIST ASSOCIATES (Sorted by Last, First, Middle)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Modify</th> <th>First</th> <th>Middle</th> <th>Last</th> <th>Relationship</th> <th>Associate Type</th> <th>Effective Date</th> <th>Term Dt</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"></td> <td>ELROY</td> <td></td> <td>JETSON</td> <td>BROTHER</td> <td>EMERGENCY CONTACT</td> <td>01/01/2006</td> <td>12/31/2006</td> </tr> </tbody> </table> <p style="text-align: right;">row(s) 1 - 1 of 1</p> <p> First Name <input type="text"/> Last Name <input type="text"/> <input type="button" value="SEARCH"/> <input type="button" value="RESET"/> </p> </div> | | | Modify | First | Middle | Last | Relationship | Associate Type | Effective Date | Term Dt | | ELROY | | JETSON | BROTHER | EMERGENCY CONTACT | 01/01/2006 | 12/31/2006 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Modify | First | Middle | Last | Relationship | Associate Type | Effective Date | Term Dt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | ELROY | | JETSON | BROTHER | EMERGENCY CONTACT | 01/01/2006 | 12/31/2006 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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. |

KAMIS ID: 50000176 Name: JETSON, GEORGE PSA: 7 Customer Status: ACTIVE

PERSON ADMINISTRATION

[Person Admin](#)
[List Forms](#)
[Case Log](#)
[Customer Referral](#)

[Name](#)
[Roles](#)
[Alert](#)
[Address Information](#)
[Associate](#)
[Print View](#)

* NAME (first) GEORGE (middle) (last) JETSON
 [STATUS_CHANGE](#)

Nickname * Effective Date 01/01/2007
 [To Inactive](#)

Date of Birth 07/04/1920 Date of Death Age 86
 (To see "To Deceased" link, Date of Death needs to be entered)

SSN 963258741 Marital Status MARRIED
 963-25-8741

Gender MALE Veteran Yes

Ethnicity NOT HISPANIC OR LATINO
 Race WHITE NON-HISPANIC

Ethnicity Remarks
 0 of 200

Speaks ENGLISH
 Reads FRENCH
 Understands Only ENGLISH

| | | |
|----|----------------------|--|
| 4. | For Inactive Status: | <p>A system search will be processed to locate any open service line items on Plans of Care from 2005 to the present.</p> <p>Two options will display depending upon this system search.</p> |
|----|----------------------|--|

Continued on next page

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

How To (continued)

| Step | Action | Result | | | | | | |
|----------|---|--------|--------|----------|--|----------|---|--|
| | <table border="1"> <thead> <tr> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Inactive</td> <td>Click on the To Inactive link under the Status Change region.</td> </tr> <tr> <td>Deceased</td> <td>Type in the Death date. Click on Save. Click on the To Deceased link under the Status Change region.</td> </tr> </tbody> </table> | 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. | |
| 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:

PERSON ADMINISTRATION

[Person Admin 5](#) | [List Forms 30](#)

[Name 5](#) | [Roles 11](#) | [Alert 13](#) | [Address Information 14](#) | [Associate 15](#) | [Print View 10](#)

Customer Status Change

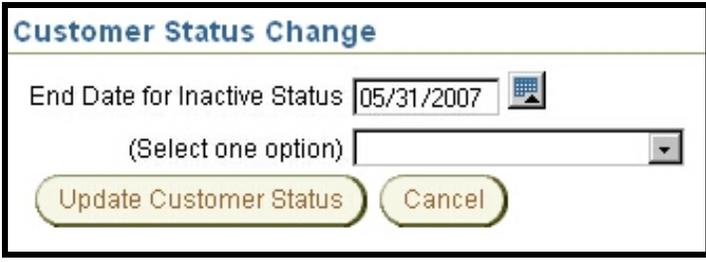
End Date for Inactive Status 

(Select one option)

Changing a Customer's Status – Inactive

How To

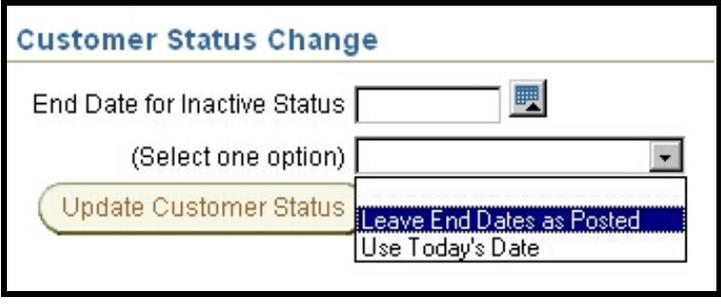
Follow the steps in the table below to change a customer's status to inactive in KAMIS through the Person Administration function.

| Step | Action | Result | | | | | | |
|-----------------------------------|---|---|--------|------------------------------|--|----|--|--|
| 1. | Complete the line item system search. | Instructions in the previous section. One of two options will occur. | | | | | | |
| | <table border="1"> <thead> <tr> <th>Open POC Service Line Items Found</th> <th>Action</th> </tr> </thead> <tbody> <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> </tbody> </table> | Open POC Service Line Items Found | Action | Yes | Open the Plan of Care as indicated in the table listing and close the open service line items as appropriate. | No | Customer Status Change options will display. Follow the steps below. | |
| Open POC Service Line Items Found | Action | | | | | | | |
| Yes | Open the Plan of Care as indicated in the table listing and close the open service line items as appropriate. | | | | | | | |
| No | Customer Status Change options will display. Follow the steps below. | | | | | | | |
| 2. | There are three options for selection. | | | | | | | |
| | <table border="1"> <thead> <tr> <th>Option</th> <th>Action</th> </tr> </thead> <tbody> <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> </tbody> </table>  | Option | Action | End Date for Inactive Status | Type in the date for the customer to be inactive. The end dates in all Plans of Care will change to that date. | | | |
| Option | Action | | | | | | | |
| End Date for Inactive Status | Type in the date for the customer to be inactive. The end dates in all Plans of Care will change to that date. | | | | | | | |

Continued on next page

Changing a Customer's Status – Inactive, Continued

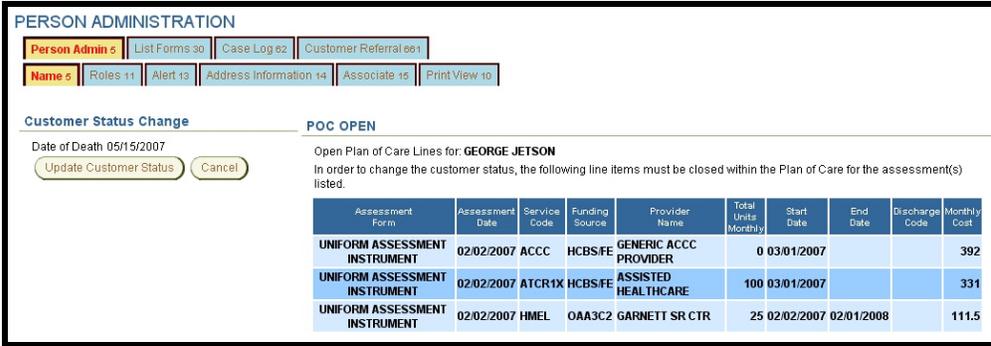
How To (continued)

| Step | Action | Result | | | | | | |
|--|---|---|--------|---------------------------|---|------------------|---|--|
| | <table border="1"> <thead> <tr> <th data-bbox="560 489 979 527">Option</th> <th data-bbox="979 489 1401 527">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 527 979 604">Leave End Dates as Posted</td> <td data-bbox="979 527 1401 604">The end dates in all Plans of Care will remain unchanged.</td> </tr> <tr> <td data-bbox="560 604 979 716">Use Today's Date</td> <td data-bbox="979 604 1401 716">The end dates in all Plans of Care will change to today's date.</td> </tr> </tbody> </table>  | 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. | |
| 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. | | | | | | | |
| 3. | Click on the Update Customer Status button. | <p>The following will occur:</p> <ul style="list-style-type: none"> • 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. | | | | | | |
| <div style="border: 1px solid black; padding: 5px;"> KAMIS ID: 20000079 Name: JETSON, GEORGE PSA: 7 Customer Status: INACTIVE </div> | | | | | | | | |

Changing a Customer's Status – Deceased

How To

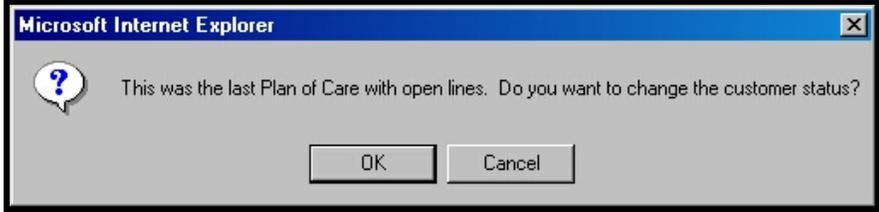
Follow the steps in the table below to change a customer's status to deceased in KAMIS through the Person Administration function.

| 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. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  <p>PERSON ADMINISTRATION</p> <p>Person Admin 6 List Forms 30 Case Log 62 Customer Referral 661</p> <p>Name 5 Roles 11 Alert 13 Address Information 14 Associate 15 Print View 10</p> <p>Customer Status Change POC OPEN</p> <p>Date of Death 05/15/2007</p> <p>Open Plan of Care Lines for: GEORGE JETSON</p> <p>In order to change the customer status, the following line items must be closed within the Plan of Care for the assessment(s) listed.</p> <table border="1"> <thead> <tr> <th>Assessment Form</th> <th>Assessment Date</th> <th>Service Code</th> <th>Funding Source</th> <th>Provider Name</th> <th>Total Units Monthly</th> <th>Start Date</th> <th>End Date</th> <th>Discharge Code</th> <th>Monthly Cost</th> </tr> </thead> <tbody> <tr> <td>UNIFORM ASSESSMENT INSTRUMENT</td> <td>02/02/2007</td> <td>ACCC</td> <td>HCBS:FE</td> <td>GENERIC ACCC PROVIDER</td> <td>0</td> <td>03/01/2007</td> <td></td> <td></td> <td>392</td> </tr> <tr> <td>UNIFORM ASSESSMENT INSTRUMENT</td> <td>02/02/2007</td> <td>ATCR1X</td> <td>HCBS:FE</td> <td>ASSISTED HEALTHCARE</td> <td>100</td> <td>03/01/2007</td> <td></td> <td></td> <td>331</td> </tr> <tr> <td>UNIFORM ASSESSMENT INSTRUMENT</td> <td>02/02/2007</td> <td>HMEL</td> <td>OAA3C2</td> <td>GARNETT SR CTR</td> <td>25</td> <td>02/02/2007</td> <td>02/01/2008</td> <td></td> <td>111.5</td> </tr> </tbody> </table> | | | 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 | | | 331 | UNIFORM ASSESSMENT INSTRUMENT | 02/02/2007 | HMEL | OAA3C2 | GARNETT SR CTR | 25 | 02/02/2007 | 02/01/2008 | | 111.5 |
| 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 | | | 331 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UNIFORM ASSESSMENT INSTRUMENT | 02/02/2007 | HMEL | OAA3C2 | GARNETT SR CTR | 25 | 02/02/2007 | 02/01/2008 | | 111.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | Click on the Update Customer Status button. No additional steps are needed to change the customer to deceased. | The following will occur: <ul style="list-style-type: none"> 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. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>KAMIS ID: 20000079 Name: JETSON, GEORGE PSA: 7 Customer Status: DECEASED</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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

How To

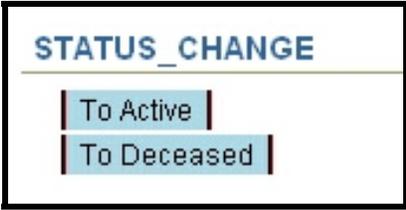
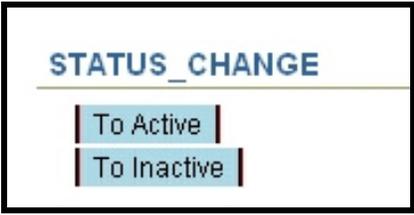
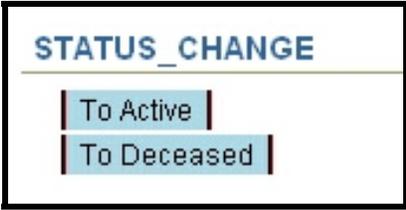
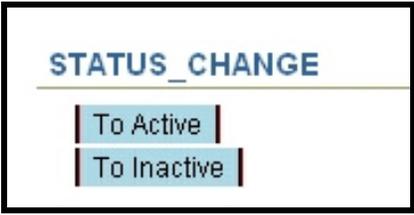
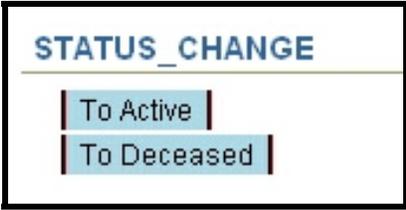
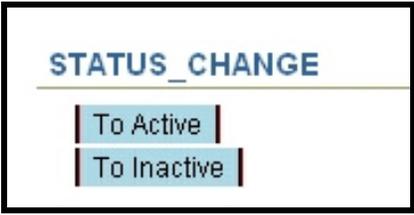
Follow the steps in the table below to change a customer's status to inactive or deceased in KAMIS through the Plan of Care.

| 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. |
|  | | |
| 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. | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Current Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Inactive</td> <td>Click on the To Active or To Deceased link under the Status Change region.</td> </tr> <tr> <td colspan="2" style="text-align: center;">  </td> </tr> <tr> <td>Deceased</td> <td>Click on the To Active or To Inactive link under the Status Change region.</td> </tr> <tr> <td colspan="2" style="text-align: center;">  </td> </tr> <tr> <td colspan="2">Once one of the above links is pressed the page will be forwarded to the Customer Status Change Region.</td> </tr> </tbody> </table> | | | Current Status | Action | Inactive | Click on the To Active or To Deceased link under the Status Change region. |  | | 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. | |
| Current Status | Action | | | | | | | | | | | | | |
| Inactive | Click on the To Active or To Deceased link under the Status Change region. | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | |
| 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: | | | | | | | | | | | | |
| | <table border="1"> <thead> <tr> <th colspan="2">Changing</th> <th>Result</th> </tr> <tr> <th>From</th> <th>To</th> <th></th> </tr> </thead> <tbody> <tr> <td>Inactive</td> <td>Active</td> <td> <ul style="list-style-type: none"> 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. </td> </tr> <tr> <td>Deceased</td> <td>Active</td> <td> <ul style="list-style-type: none"> 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. </td> </tr> </tbody> </table> | Changing | | Result | From | To | | Inactive | Active | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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. | |
| Changing | | Result | | | | | | | | | | | | |
| From | To | | | | | | | | | | | | | |
| Inactive | Active | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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

Change Customer Status to Active, Continued

How To (continued)

| Step | Action | Result | | | | | | | | | | | | |
|----------|--|--|--|--------|------|----|--------|----------|--|---|----------|----------|--|--|
| | <table border="1"> <thead> <tr> <th colspan="2" data-bbox="568 489 893 525">Changing</th> <th data-bbox="893 489 1373 525">Result</th> </tr> <tr> <th data-bbox="568 525 727 562">From</th> <th data-bbox="727 525 893 562">To</th> <th data-bbox="893 525 1373 562">Result</th> </tr> </thead> <tbody> <tr> <td data-bbox="568 562 727 856">Inactive</td> <td data-bbox="727 562 893 856">Deceased (Need to enter the Death Date in order to see the To Deceased link.)</td> <td data-bbox="893 562 1373 856"> <ul style="list-style-type: none"> 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. </td> </tr> <tr> <td data-bbox="568 856 727 1306">Deceased</td> <td data-bbox="727 856 893 1306">Inactive</td> <td data-bbox="893 856 1373 1306"> <ul style="list-style-type: none"> 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. </td> </tr> </tbody> </table> | Changing | | Result | From | To | Result | Inactive | Deceased (Need to enter the Death Date in order to see the To Deceased link.) | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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. | |
| Changing | | Result | | | | | | | | | | | | |
| From | To | Result | | | | | | | | | | | | |
| Inactive | Deceased (Need to enter the Death Date in order to see the To Deceased link.) | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | Birth Date: 07/04/1920 | Age: 86 | Customer SSN: 963258741 |
| Name: GEORGE JETSON | Gender: MALE | Marital Status: MARRIED | Medicaid Card ID: |
| Name Preferred: | Veteran/Spouse of Veteran: Y | | 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 |

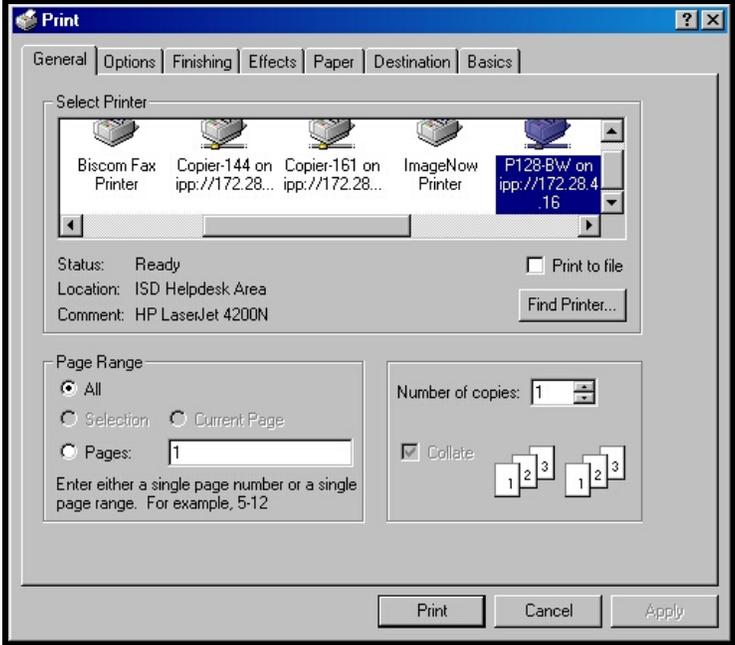
Click the Print View link to print this page.

Continued on next page

Print View, Continued

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.) | | | | | | |
|  | | | | | | | | |
| 2. | Select the Page Range | See table below for options. | | | | | | |
| <table border="1"> <thead> <tr> <th>Option</th> <th>Result</th> </tr> </thead> <tbody> <tr> <td>All</td> <td>All pages will print</td> </tr> <tr> <td>Pages (enter the page number)</td> <td>Only the specified page will print.</td> </tr> </tbody> </table> | | | Option | Result | All | All pages will print | Pages (enter the page number) | Only the specified page will print. |
| Option | Result | | | | | | | |
| All | All pages will print | | | | | | | |
| Pages (enter the page number) | Only the specified page will print. | | | | | | | |
| 3. | Click on Print . | Document will print. | | | | | | |

To Close

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