Chapter 7 – Forms Selection

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Form Status

Introduction   All KAMIS forms have a status. The status of a form determines what can be done with the form.

Status Definitions   The table below lists all KAMIS form statuses and the purpose and use of each one:

Status	Purpose
Aborted	Cancels the form
Dementia Abort	Cancels the form due to the customer having dementia
Special Abort	Cancels the form due to special circumstances
Terminal Abort	Cancels the form due to the customer being terminal
Approved	A complete form validation is done to ensure all required fields are completed. The form is read only; no changes can be made once the form is saved in Approved status. Specific to Plans of Care and Care Assessments: Allows payment to be released for processing
Incomplete - Follow-up Needed	Indicates that the form has been returned to the Assessor, Case Manager, or other responsible party, due to incomplete or unclear information. This status enables the form to be saved without all the required fields completed.
Projected	Budget status
Submit for Approval	Form is ready to be approved. The submitting user does not have approval security rights.
Work In Progress	Indicates that the form is being worked and is not yet completed. Enables the form to be saved without all the required fields completed.

Selecting a New Form

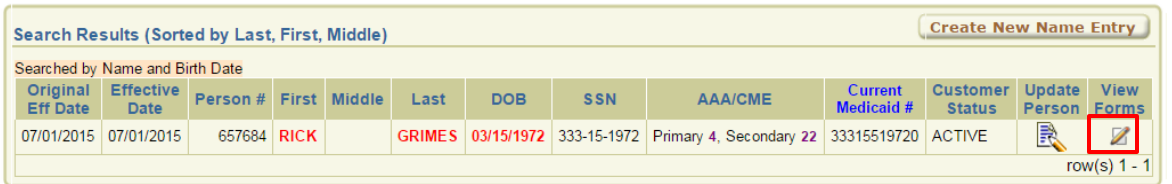**Introduction**   All information entered into KAMIS is a result of information being received and a form being completed to record the information.

Recommendation   Add or update all customer and associate information before you begin creating a form associated to the customer.

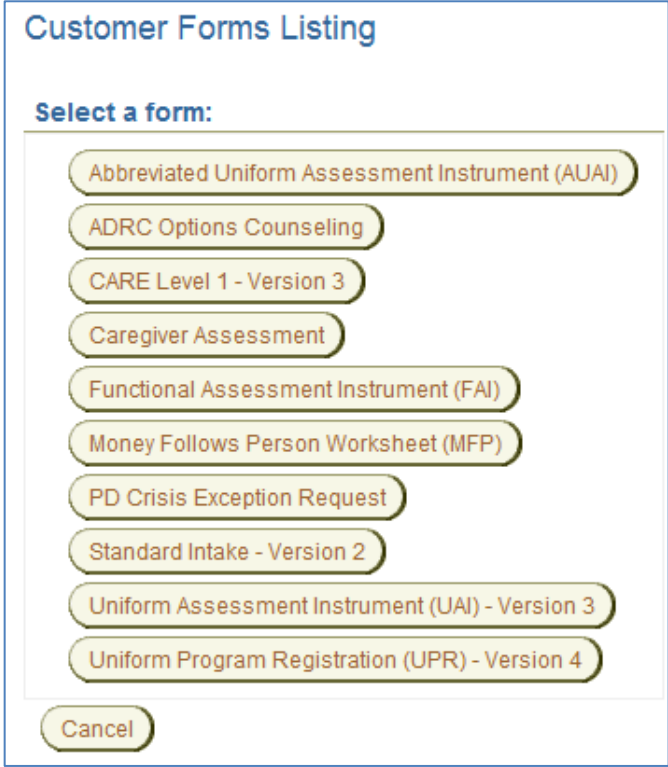**How To**   Follow the steps in the table below to select a form:

Step	Action	Result
1.	Locate customer through Person Search	The Customer search results displays.

Step	Action	Result
2.	In the Search Results table, in the appropriate customer row, Single click on the View Forms icon:	If previously entered forms exist, a listing will be displayed. If forms do not exist, a 'No forms found' message will display.

Forms exist:

No Forms exist:

Continued on next page

Selecting a New Form, continued

Step	Action	Result
3.	Click on the **Create New Form** button located above the forms list.	A list of forms displays. The forms that appear in this list are determined by the user's security access roles.
	Customer Forms Listing **Select a form:** Abbreviated Uniform Assessment Instrument (AUAI) ADRC Options Counseling CARE Level 1 - Version 3 Caregiver Assessment Functional Assessment Instrument (FAI) Money Follows Person Worksheet (MFP) PD Crisis Exception Request Standard Intake - Version 2 Uniform Assessment Instrument (UAI) - Version 3 Uniform Program Registration (UPR) - Version 4 Cancel	
4.	Click on the button of the desired form.	The blank form will automatically open.

Selecting an Existing Form

Introduction A previously saved form can be accessed at any time from the Customer Forms Listing. If the form status is Approved, a read-only version of the form opens, and no changes can be made.

How To Follow the steps in the table below to open an existing form:

Step	Action	Result
1.	Locate the customer through Person Search.	Customer search results display.
2.	In the Search Results table, click on the appropriate customer's View Forms icon	The Customer Forms Listing displays.

Step	Action	Result
3.	Click on the underlined form name. The underline indicates an active link to the form. Note: If a form is not underlined, there is no link, and the form cannot be opened. This may occur if the logged in user does not have the required security to access the form, or the form is an older version that is no longer supported by KAMIS.	Form opens with previously saved information displayed. If the form is in Approved status, the fields will not be editable. If the form is in Work in Progress status, the fields are editable.

These are all links to open the labeled form: