Chapter 22 – Organizations

Table of Contents

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

Organizations – Overview

Introduction   KAMIS Organizations are used in a variety of ways in many different processes and functions. An Organization can be an:

- Adult Care Home
- Provider Service Area for various HCBS waivers or other funding sources
    - ADRC (Aging and Disability Resource Center)
    - CDDO (Community Developmental Disability Organization)
    - CMHC (Community Mental Health Center)
    - PRTF (Psychiatric Residential Treatment Facility)
- Other Service Provider
- Hospital

These are just some common examples.

When an organization is set up in KAMIS, an organization role is assigned to it. The role determines how the organization is used in KAMIS, and plays a role in the access an organization has to data within KAMIS.

History   Prior to the implementation of KanCare (privatized Medicaid services) in January 2013, HCBS customers' plans of care were entered in KAMIS, and HCBS Providers used in the plans of care were downloaded to the Organizations table in KAMIS from DCF (formerly SRS.) No changes could be made to those organization records.

As of January 1, 2013, HCBS plans of care are no longer entered for services (other than the assessment) so the HCBS provider download no longer occurs.

Error! Not a valid bookmark self-reference.

Introduction   The Organizations page is accessed via the KAMIS Navigation Menu Bar.

How To   Follow the steps in the table below to access Organization Administration.

Step	Action	Result
1.	On the KAMIS Home Page, click on the **Organizations** navigation menu bar button.	The Organization Search page displays.

Organization Search

Introduction   Use Organization Search to find an organization, and view the details and address information.

If creating a new organization, a search must be done first to confirm the organization does not already exist.
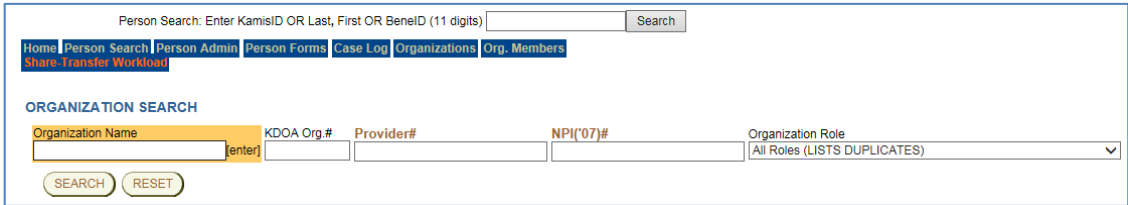
Search Requirements
- Enter either the organization name (full name or partial) or the organization number, if known.
- At least the first two characters of the organization name must be entered.

Note: Take care if selecting a specific organization role with the search. If a specific role is selected, and the organization does not have that role associated with it, the organization will not display.

How To   Follow the steps in the table below to complete an Organization search.

Step	Action	Result
1.	Access the Organizations main page (Organization Search)	The Organization Search page displays.
	Person Search: Enter KamisID OR Last, First OR BeneID (11 digits) [ ] Search Home Person Search Person Admin Person Forms Case Log Organizations Org. Members Share-Transfer Workload **ORGANIZATION SEARCH** Organization Name KDOA Org.# Provider# NPI('07)# Organization Role [enter] [ ] [ ] [ ] All Roles (LISTS DUPLICATES) SEARCH RESET	
2.	Enter either the **Organization Name** or **KAMIS Organization Number** The organization name and number can both be entered, but both must match for a successful search result.	Enter either the partial (at least two characters) or full name of the Organization.
3.	If desired, select **Role** from the drop-down list.	Optional - Default is All Roles.
4.	Click on the **Search** button.	See the table below with explanation of possible search results.

Organization Search, continued

How To (continued)

Step	Action	Result

If Organization	Then
Not returned	The Active Organizations region will not contain any results. Refer to the next section for instructions on creating a new organization.

ORGANIZATION SEARCH

Organization Name: hawk [enter]   KDOA Org.#   Provider#   NPI('07)#   Organization Role: All Roles (LISTS D

SEARCH   RESET

Active Organizations   Create

Org. Name	KDOA Org.#	Provider#	Primary NPI#	Eff. Date	Role Type

Organization History

Org. Name	KDOA Org.#	Provider#	Primary NPI#	Eff. Date	Term. Date	Role Type

If Organization	Then
Is returned	The Active Organizations table will display all matching results. Instructions on how to update the information is covered later in this chapter.

ORGANIZATION SEARCH

Organization Name: [enter]   KDOA Org.#: 12   Provider#   NPI('07)#   Organization Role: All Roles (LISTS D

SEARCH   RESET

Active Organizations   Create

Org. Name	KDOA Org.#	Provider#	Primary NPI#	Eff. Date	Role Type
KS DEPT. FOR AGING AND DISABILITY SERVICES	12			01/01/97	AREA AGENCY ON AGING *eff: 01/01/97*

Organization History

Org. Name	KDOA Org.#	Provider#	Primary NPI#	Eff. Date	Term. Date	Role Type

Create a New Organization

Introduction   As an organization starts doing business with KDADS, and becomes a part of the KAMIS system, the organization will need to be entered into KAMIS.

Use the organization's business name as provided by the organization, when entering it into KAMIS. Exception: do not use punctuation in the name, as some processes in KAMIS do not interpret special characters such as commas and dashes correctly and they can cause unexpected results.

How To   Follow the steps in the table below to create a new organization. Note: Fields marked with a red * are required.

Step	Action	Result
1.	Complete the **Organization Search** process to confirm the organization does not yet exist in KAMIS.	No results display, confirming the need to create a new organization.
2.	Click on the **Create** button.	The **Organization Administration – Adding New Organization** page displays.

Create a New Organization, continued

How To (continued)

Step	Action	Result
3.	Enter the **Organization Name**.	Required field. Do not use any punctuation.
4.	Enter the **Organization Effective Date**.	Required field
5.	If the Organization is a Provider that falls under a Parent Organization, (Meal Sites, etc.) select that Parent Organization from the drop down box.	Not a Required Field
6.	Complete any optional information if known.	
7.	Select an **Organizational Role** from the drop-down list.	Required field. Other roles can be added after the Organization is saved (covered later in the chapter.)
8.	Enter the **County code** of the primary county where the company does business.	Required field. Other counties can be added after the Organization is saved (covered later in the chapter.)
9.	The KOTA State ID is not currently being used.	It will eventually be auto-filled if the organization is licensed in KOTA.
10.	Enter the organization's address details under the **Business Address** region.	Required Fields: • Street • City • County • State • Zip Code • Primary Phone

ORGANIZATION ADMINISTRATION - ADDING NEW ORGANIZATION

New Organization Details

* Organization Name: SUPPLY99
* Effective Date: 02/01/2015
Parent Organization:
Comment:

Minority Owned? Yes
USDA Eligible?
FEIN:
* Organization Role: SERVICE PROVIDER
* County (code): SN   SHAWNEE
KOTA State ID:

Business Address

* Street: 1212 S 99TH ST
* City: TOPEKA
* County (code): SN   SHAWNEE
* State (code): KS   KANSAS
* Zip: 66666 -
* Primary Phone: 7851111212
Alternate Phone:
Cell Phone:
Fax Phone:
Email:
Website:
Directions:
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Back   Create

Create a New Organization, continued

How To (continued)

Step	Action	Result
11.	Click on the **Create** button.	The Organization is saved and the Organization Search page displays with the new Organization displayed in the Active Organizations table.

ORGANIZATION SEARCH

Organization Name	KDOA Org.#	Provider#	NPI('07)#	Organization Role
SUPPLY99 [enter]				SERVICE PROVIDER

SEARCH   RESET

Active Organizations   Create

Org. Name	KDOA Org.#	Provider#	Primary NPI#	Eff. Date	Role Type
SUPPLY99	30000184			02/01/15	SERVICE PROVIDER *eff.* 02/01/15

Organization History

Org. Name	KDOA Org.#	Provider#	Primary NPI#	Eff. Date	Term. Date	Role Type

Assign Additional Roles to an Organization

Introduction   Organizations must have at least one entity role assigned to it. An entity role defines what type of organization it is. The initial role is assigned when the organization is first created in KAMIS. The entity roles may define the organization as a Service Provider, Sub-Provider, Nursing Facility, Hospital, etc. The role allows the organization to display in certain fields in assessments or other forms. It is possible for an organization to have more than one role assigned to it.

How To   Follow the steps in the table below to add an additional role to an organization.
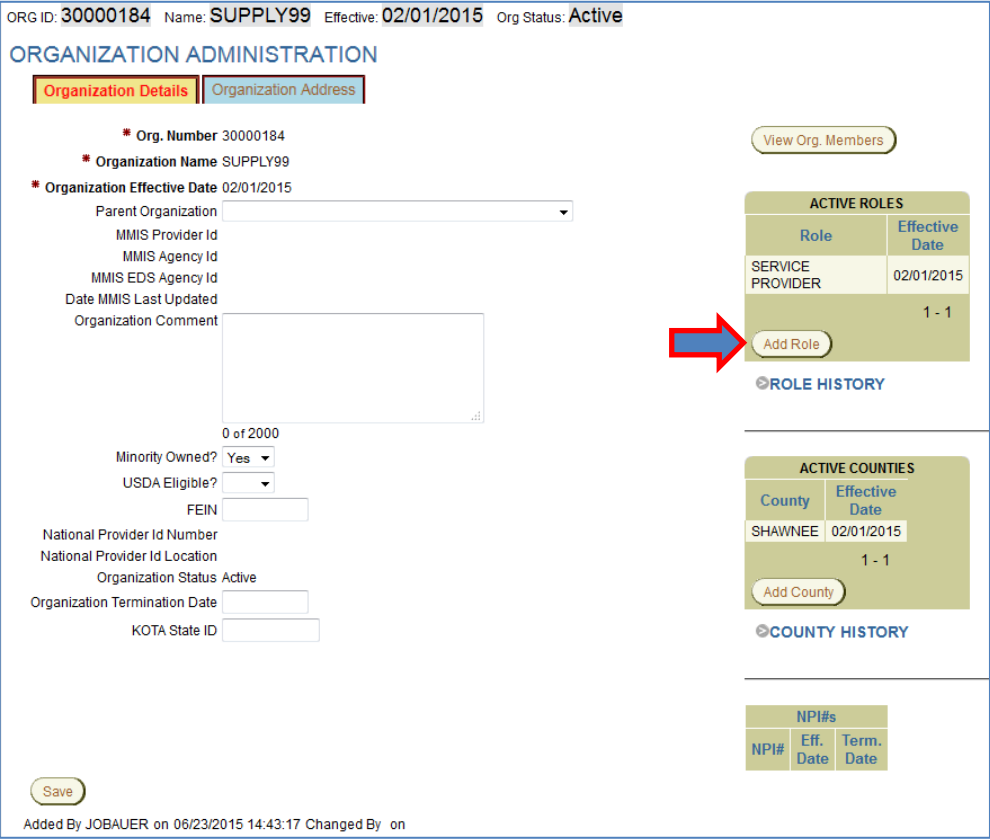
Step	Action	Result
1.	Search for the Organization using **Organization Search**	The **Active Organizations** table will display the results
2.	Click on the organization name link in the **Org. Name** column.	The Organization Administration page displays.

Assign Additional Roles to an Organization, continued

How To   (continued)

Step	Action	Result
3.	Click on the **Add Role** button in the Active Roles region.	The Organization Details/Select Role page displays.

Assign Additional Roles to an Organization, continued

How To   (continued)

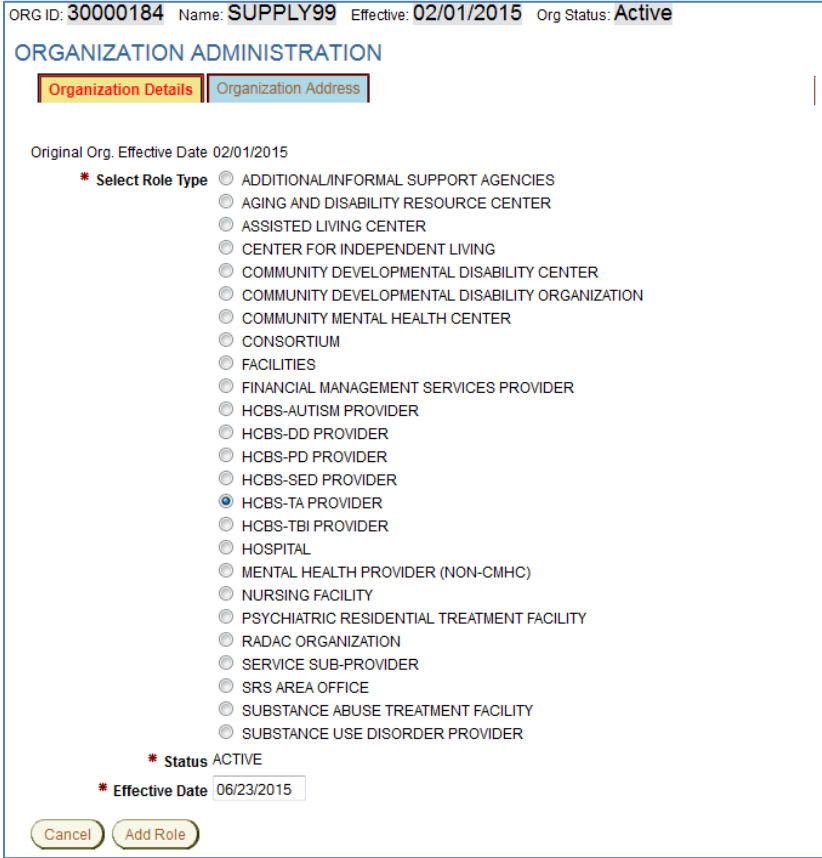| Step	Action	Result
	ORG ID: 30000184 Name: SUPPLY99 Effective: 02/01/2015 Org Status: Active **ORGANIZATION ADMINISTRATION** Organization Details Organization Address Original Org. Effective Date 02/01/2015 * Select Role Type ○ ADDITIONAL/INFORMAL SUPPORT AGENCIES ○ AGING AND DISABILITY RESOURCE CENTER ○ ASSISTED LIVING CENTER ○ CENTER FOR INDEPENDENT LIVING ○ COMMUNITY DEVELOPMENTAL DISABILITY CENTER ○ COMMUNITY DEVELOPMENTAL DISABILITY ORGANIZATION ○ COMMUNITY MENTAL HEALTH CENTER ○ CONSORTIUM ○ FACILITIES ○ FINANCIAL MANAGEMENT SERVICES PROVIDER ○ HCBS-AUTISM PROVIDER ○ HCBS-DD PROVIDER ○ HCBS-PD PROVIDER ○ HCBS-SED PROVIDER ● HCBS-TA PROVIDER ○ HCBS-TBI PROVIDER ○ HOSPITAL ○ MENTAL HEALTH PROVIDER (NON-CMHC) ○ NURSING FACILITY ○ PSYCHIATRIC RESIDENTIAL TREATMENT FACILITY ○ RADAC ORGANIZATION ○ SERVICE SUB-PROVIDER ○ SRS AREA OFFICE ○ SUBSTANCE ABUSE TREATMENT FACILITY ○ SUBSTANCE USE DISORDER PROVIDER * Status ACTIVE * Effective Date 06/23/2015 Cancel Add Role	
4.	Select a **Role** by clicking on the radio button. Note: Only one role can be selected and added at a time.	Required. The radio button fills in.
5.	Enter the **Effective Date** of the new role. Change the default current date if necessary.	Required

Continued on next page

Assign Additional Roles to an Organization, continued

How To (continued)

Step	Action	Result
6.	Click on the **Add Role** button.	• The Organization Administration/ Organization Details main page displays • The Active Roles region is updated to show the newly added role
7.	Repeat the above steps until all additional roles have been added.	

Note: The Role History region shows any previously added roles that have been terminated.

Terminate Active Role from an Organization

Introduction   An Organization may discontinue services that entail a certain Role assignment. For example, a nursing facility may close its Assisted Living Center. If this happens, that particular role should be terminated so it is no longer an active role.

Note: Since an organization must have at least one active role, the following process can only be done if the organization has a minimum of two active roles.

How To   Follow the steps in the table below to terminate a role of an organization.

Step	Action	Result
1.	Search for the Organization	The Active Organizations table display with the results
1.	Click on the organization name link in the Org. Name column.	The Organization Details page displays.
2.	In the **Active Roles** region, click on the **x** in the Terminate column for the role to be terminated.	The Organization Details/Terminate Role page displays.
3.	Enter the **Termination Date**	

Note: The Termination Date can be no earlier than the last day of the previous month.
Example: Today is June 23. The termination date can be no earlier than May 31.

Continued on next page

Terminate Active Role from an Organization, continued

How To   (continued)

Step	Action	Result
4.	Click on the **Terminate Role** button	The Organization Administration/ Organization Details main page displays. The Role History region expands to show the terminated role.

Assign Additional Counties to an Organization

Introduction   When setting up a new organization, the primary county that the organization does business in is required.

Many organizations do business in more than one county, and some form fields in KAMIS populate drop-down lists based on an organization's active county entries.

How To   Follow the steps in the table below to add an additional county to an Organization.

Step	Action	Result
1.	Use Organization Search to find the organization	The Active Organizations table displays the results
2.	Click on the organization name link in the Org. Name field	The organization detail page displays.

Continued on next page

Assign Additional Counties to an Organization

How To (continued)

Step	Action	Result
3.	In the Active Counties region, click on the **Add County** button.	County page will display.

Step	Action	Result
4.	In the County (code) field, type the first letter of the county to be added.	A list of counties starting with this letter displays.
5.	Type the second letter of the desired county and press the Tab key.	The list reduces to the single county name to be added.

Step	Action	Result
6.	Type the Effective Date of the county if different from the default current date.	
7.	Click the Save button.	The main Organization Details page displays and the additional county is added to the ACTIVE COUNTIES region.

Continued on next page

Assign Additional Counties to an Organization

How To (continued)

Step	Action	Result
8.	Repeat the previous steps until all additional counties have been added to the organization.	The Active Counties region updates with each county added.

Note: The County History region will populate and be expandable once at least one active county has been terminated.

Terminate a County

Introduction   If an organization quits doing business or discontinues services within a particular County, the county needs to be terminated as an Active County in Organization Administration.

Note: Since an organization must have at least one Active County, at least two counties must be active before one can be terminated.
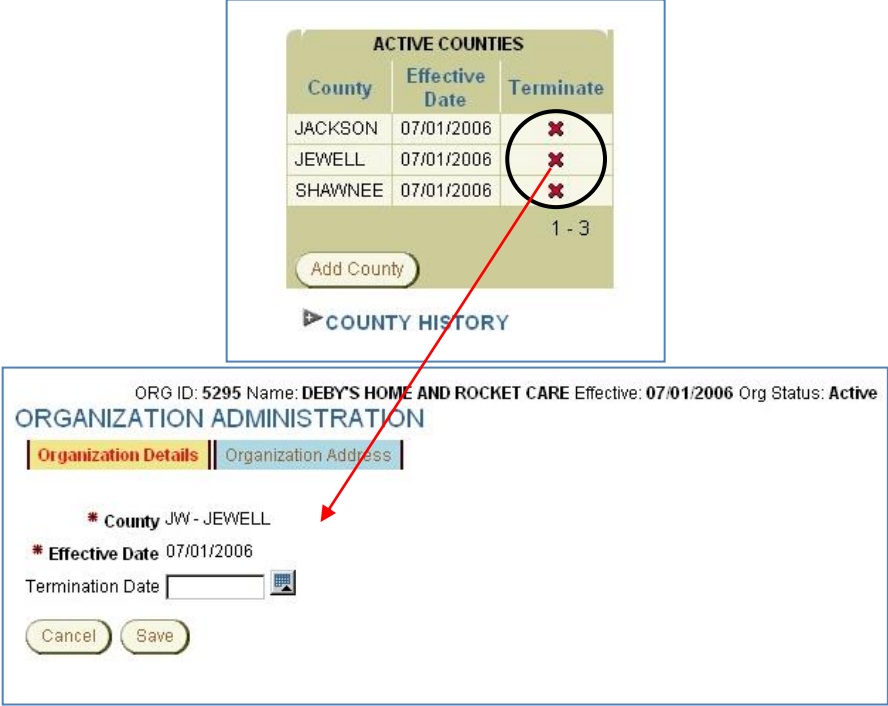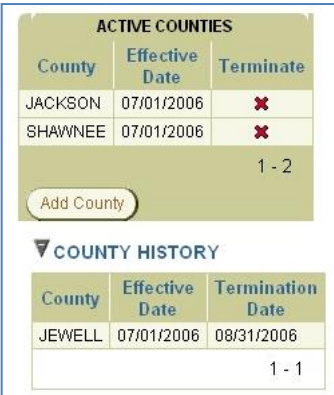
How To   Follow the steps in the table below to terminate an Active County in an Organization.

Step	Action	Result
1.	Use Organization Search to find the organization	The Active Organizations table displays the results
2.	Click on the organization name link in the Org. Name field	The Organization Detail page displays.

Continued on next page

Terminate a Countyy, continued

How To (continued)

Step	Action	Result
3.	In the Active Counties region, click on the **x** next to the county to be terminated.	The County page displays.

Step	Action	Result
4.	Type the **Termination Date** of the organization's association with the county.	The Termination Date can be no earlier than the last day of the previous month. Example: Today is June 23. The termination date can be no earlier than May 31.
5.	Click the **Save** button.	The Organization Details page displays and the County History region is populated.

Change an Organization Address

Introduction   When an Organization is added to KAMIS, an active organization address must be included. To change an address, the current address is not simply updated; rather the current one must be terminated and a new address added. Because there must be at least one active address, the new one must be added before the current one can be terminated – assuming there is only one address entered.

How To   Follow the steps in the table below to change the address for an Organization.

Step	Action	Result
1.	Use Organization Search to find the organization	The Active Organizations table displays the results
2.	Click on the organization name link in the Org. Name field	The Organization Detail page displays.

Continued on next page

Change an Organization Address, continued

How To   (continued)

Step	Action	Result
3.	Click on the **Organization Address** tab.	The **Active Addresses** table displays on the Organization Address page.

ORG ID: **30000184**   Name: **SUPPLY99**   Effective: **02/01/2015**   Org Status: **Active**

ORGANIZATION ADMINISTRATION

Organization Details 1002 | Organization Address 1005

ACTIVE ADDRESSES

City	County	State	Type	Effective Date	View/ Terminate
TOPEKA	SHAWNEE	KS	BUSINESS	02/01/2015	✎

1 - 1

(Add Address)

⊙ADDRESS HISTORY

Step	Action	Result
4.	Click on the **Add Address** button.	The Add Address page displays.

ORG ID: **30000184**   Name: **SUPPLY99**   Effective: **02/01/2015**   Org Status: **Active**

ORGANIZATION ADMINISTRATION

Organization Details 1002 | Organization Address 1005

Original Org. Effective Date 02/01/2015

* **Address Type** [▼]

* **Effective Date** 06/24/2015
  (mm/dd/yyyy)

* **Street** [   ]

* **City** [   ]

* **County (code)** [   ]

* **State (code)** [   ]

* **Zip** [   ]-[   ]

* **Primary Phone** [   ]   Alternate Phone [   ]

Cell Phone [   ]   Fax Phone [   ]

Email [   ]   Website [   ]

Directions [   ]

0 of 2000

(Save) (Cancel)

Note: Fields marked with a red * are required.

Change an Organization Address, continued

How To   (continued)

Step	Action	Result
5.	Select the **Address Type** from the drop-down list.	Use Business address type if terminating a business address. An organization must have a Business address.
6.	Enter the new **Effective Date**	
7.	Enter the **Address Details**	Required Fields: • Street • City • County • State • Zip (code) • Primary Phone
8.	Click the **Save** button	The Active Addresses table displays and the new address is added to the table.

ORG ID: **30000184**   Name: **SUPPLY99**   Effective: **02/01/2015**   Org Status: **Active**

ORGANIZATION ADMINISTRATION

Organization Details 1002 | Organization Address 1005

ACTIVE ADDRESSES

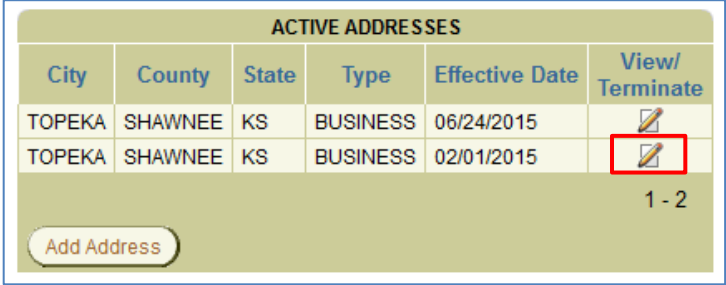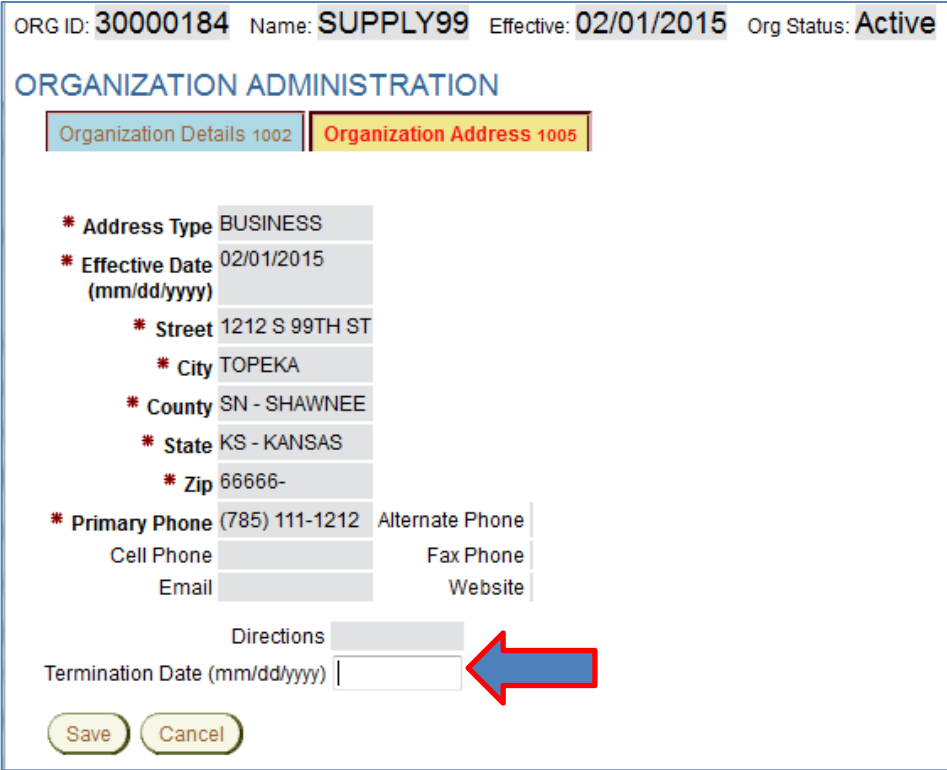| City	County	State	Type	Effective Date	View/Terminate
TOPEKA	SHAWNEE	KS	BUSINESS	06/24/2015	✎
TOPEKA	SHAWNEE	KS	BUSINESS	02/01/2015	✎

1 - 2

Add Address

Newer effective date

◉ADDRESS HISTORY

Continued on next page

Change an Organization Address, continued

How To
(continued)

Now that the new address has been added, the old one can be terminated.

Step	Action	Result
9.	Click on the **View/Terminate** icon of the old address.	The address details display and the Termination Date field is active.

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

Continued on next page

Change an Organization Address, continued

How To   (continued)

Step	Action	Result
11.	Click the **Save** button.	The updated Active Addresses table displays.
12.	Click on the 'open region' icon to the left of the ADDRESS HISTORY region heading.	The Address History region displays the newly terminated address.

Terminate an Organization

Introduction   If an Organization is no longer in business, it should be terminated in KAMIS. If an organization is found to be a duplicate entry, it should be terminated so it is not used in place of the original organization.

Important   Before a Provider organization is terminated the following steps need to be completed:
- Make sure that the Provider is *not* doing business with another PSA (ADRC, CDDO, CMHC, etc.) Terminating a Provider organization should only be done if the Provider is out of business or is found to be a duplicate of another active organization.
- Terminate all Service/Funding pricing for this organization through the Provider Service function.
- Complete a Mass Update to change all customers who have services under the provider to a new provider or the active provider of which this is a duplicate, or have all the services under this provider ended.

How To   Follow the steps in the table below to terminate an Organization after the above steps have been completed or confirmed.

Step	Action	Result
1.	Use Organization Search to find the organization	The Active Organizations table displays the results
2.	Click on the organization name link in the Org. Name field	The Organization Detail page displays.
3.	Enter the **Organization Termination Date**	The Termination Date can be no earlier than the last day of the previous month. Example: Today is June 24. The termination date can be no earlier than May 31.

Continued on next page

Terminate an Organization, continued

How To   (continued)

Step	Action	Result
	ORG ID: **30000184** Name: **SUPPLY99** Effective: **02/01/2015** Org Status: **Active** **ORGANIZATION ADMINISTRATION** [Organization Details 1002] [Organization Address 1005] **✱ Org. Number** 30000184 **✱ Organization Name** SUPPLY99 **✱ Organization Effective Date** 02/01/2015 Parent Organization MMIS Provider Id MMIS Agency Id MMIS EDS Agency Id Date MMIS Last Updated Organization Comment 0 of 2000 Minority Owned? Yes USDA Eligible? FEIN National Provider Id Number National Provider Id Location Organization Status Active **Organization Termination Date 06/24/2015** KOTA State ID **[Save]** Added By JOBAUER on 06/23/2015 14:43:17 Changed By on (View Org. Members) **ACTIVE ROLES** <table><tr><td>Role</td><td>Effective Date</td></tr><tr><td>SERVICE PROVIDER</td><td>02/01/2015</td></tr></table> 1 - 1 (Add Role) ◉ROLE HISTORY **ACTIVE COUNTIES** <table><tr><td>County</td><td>Effective Date</td></tr><tr><td>DOUGLAS</td><td>06/23/2015</td></tr><tr><td>SHAWNEE</td><td>02/01/2015</td></tr></table> 1 - 2 (Add County) ◉COUNTY HISTORY **NPI#s** NPI# Eff. Date Term. Date	
4.	Click on the **Save** button	• The Organization Details information changes to read only. • The header changes to show Org Status of **Inactive**

Terminate an Organization, continued

How To   (continued)

Step	Action	Result
1.	Click on the **Organizations** button in the navigation menu bar.	The Organization Search page displays, showing the terminated organization in the **Organization History** table.

View Organization Members

Introduction   Some organizations will have Organization Members associated with it. Before an Organization can be terminated, all Organization Members need to be terminated from the Organization first. Organization Membership is required for some functions in KAMIS, and is covered in detail in Chapter 23 – Organization Member.

A link is provided on the Organization Administration page to view all Organization Members associated with an Organization.

How To   Follow the steps in the table below to view a list of Org Members associated with an Organization.

Step	Action	Result
1.	Use Organization Search to find the organization.	The Active Organization table displays the results.
2.	Click on the organization name link in the Org. Name column.	The Organization Details page displays.

Step	Action	Result
1.	Click on the **View Org. Members** button.	The Organization Member Search page displays and all active members display in the Active Members table. .

Note: The Member History table populates once at least one member's organization membership is terminated.