KAMIS II

User Manual

2007

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Limited Manual for KanCare Organizations.
12/21/2012

Chapter 1

Introduction to the Kansas Aging Management Information System (KAMIS)

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.

Description of KAMIS II

Introduction

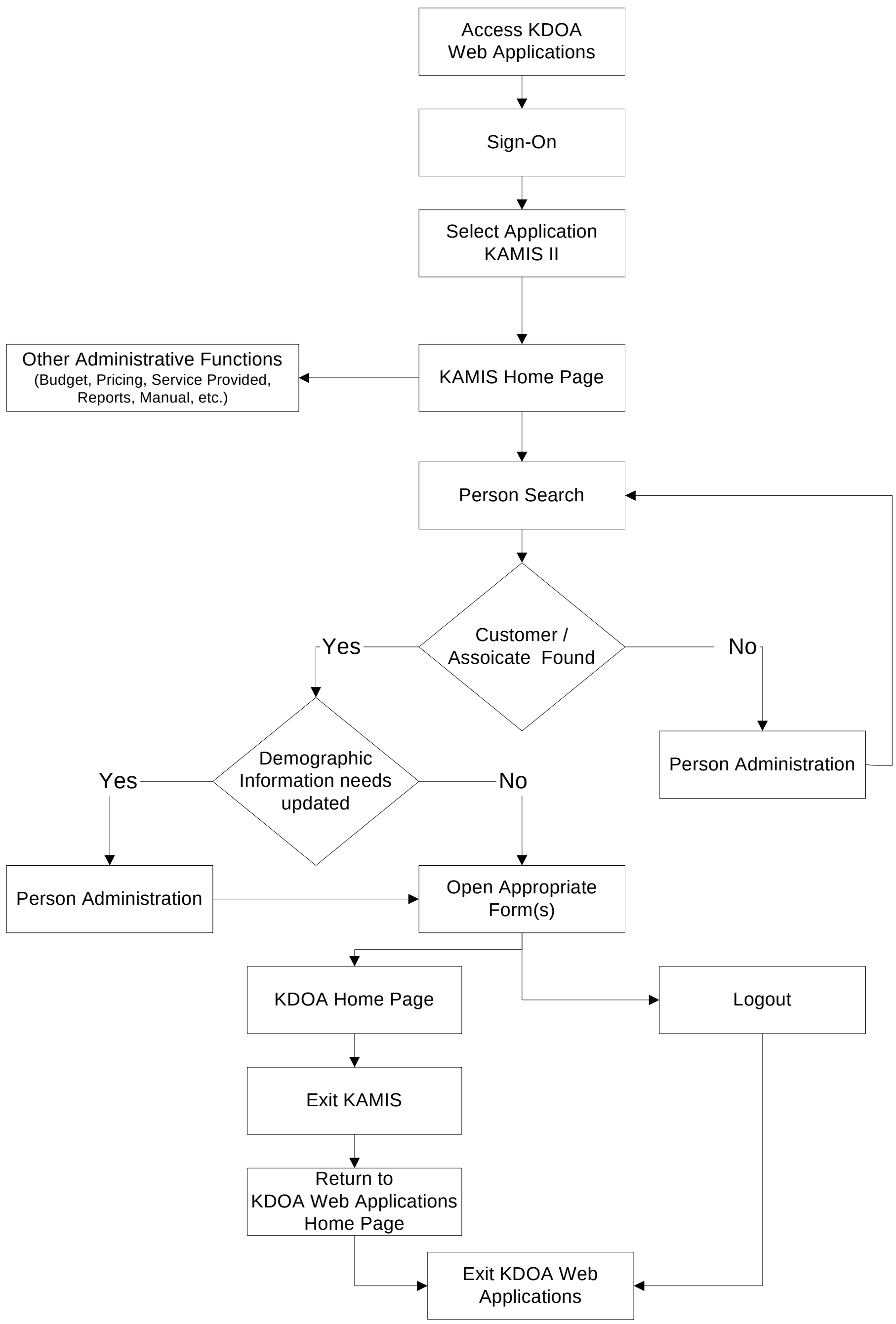
The Kansas Department on Aging (KDOA) developed the Kansas Aging Management Information System (KAMIS) for use by Area Agencies on Aging, service providers for Aging programs, the public, and agency staff. The system will collect and report data on customer assessments, plans of care, and services provided under all Aging programs.

KAMIS replaced the Client Assessment and Referral System (CARS) in July, 2000.

In 2007, KAMIS II will be implemented into production. The primary purpose of KAMIS II is to web enable the KAMIS application. The current implementation of KAMIS requires the downloading of the application to each PC (computer) that needs to run the application. The new web version will allow for the client PC to use a browser (such as Microsoft's Internet Explorer) and with an internet connection, access the KDOA KAMIS web application. Access to the application will require a valid username and password. Unless needed for web enablement, the functions and methods used in KAMIS are repeated in the KAMIS II application.

Work Process Structure Flow

Flow Diagram Below is a Diagram of the KAMIS work process flow.



Technical Support

Introduction

The Kansas Department on Aging Help Desk will provide Technical Support for KAMIS users.

Numbers

Assistance is available Monday through Friday, 7:00am to 5:00pm.

Who to Call for	Number	E-Mail
Technical Assistance	785-296-4987	Helpdesk@aging.state.ks.us
Reporting Assistance	785-296-4987	Helpdesk@aging.state.ks.us
Security Access	785-296-4987	Helpdesk@aging.state.ks.us

KAMIS Hours

Introduction

KAMIS has set business availability hours.

Availability

Assistance is available Monday through Friday, 7:00am to 5:00pm.

Days	Hours
Monday through Friday	7:30am - 10:30pm
Saturday	7:30am - 10:30pm
Sunday	11:00am - 10:30pm
On State of Kansas observed holidays, the system is available; however, ISD staff will not be available for assistance during these holidays, as well as Saturdays and Sundays.	

Chapter 2 – Security

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KDOA Web Applications and KAMIS Security

Background

One of the system objectives for the Kansas Aging Management Information System (KAMIS) is to provide security of KAMIS data from unauthorized or unintentional exposure or damage. This objective continues with KAMIS II.

As we extend system service to users communicating via the Internet, this security objective becomes even more critical. Requiring a user-specific password for access into KAMIS is the starting point for security. Another aspect that users will see is the ability to perform certain functions and view or update certain data, as defined by a predetermined user profile. User profiles will be based on business need for data access, as approved by the Executive Director of the Area Agency on Aging for their employees and service providers, and by KDOA Commissioners for KDOA staff.

Requesting Access

When requesting access for a web application user, two documents will need to be completed, signed and returned to KDOA Helpdesk.

- Information System Resources User Security Agreement
- And the Application Authorization Roles form.

These documents must be approved, in writing, by:

- The cognizant Executive Director of the Area Agency on Aging, or their registered designee for AAA employees and service providers under contract to the AAA;
- The cognizant Commissioner or Deputy Secretary, for KDOA employees; or
- The designated KDOA Program Manager, for service providers under KDOA-direct grant or contract.

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Access Management	All access profiles for KAMIS users will be established and managed by the KDOA Information Services Support Branch staff. The Help Desk will directly notify KAMIS users of their registered user name and initial password. **Note**: The Entrust Profiles that were required on the users computers will no longer be required with KAMIS.
Password Requirements	Users will be required by the system to periodically change their KAMIS passwords. Individual passwords will not be visible to anyone, including KDOA support staff. However, KDOA support staff will be able reinstall a default password for a user who forgets their personal password. Instructions for changing the initial password in covered in the next Chapter.
Discipline	KAMIS will have an extensive internal audit trail for documenting when and by whom data is created and changed. For this reason, logging into KAMIS with another user's name and password is specifically prohibited. Discovered incidents of false identity will be investigated by KDOA, with a potential outcome of permanent denial of KAMIS access for both the person falsely logging in, and the KAMIS user who revealed their password.
Emergency Access Request	Any individual who requires emergency access to KAMIS, or an emergency change in KAMIS privileges, should contact the KDOA Help Desk (785-296-4987) for assistance. The Help Desk will contact the appropriate approving official before making emergency changes, if possible. If that individual is not available in advance, then emergency changes will be approved by the KDOA Administrative Services Commissioner or the KDOA Director of Information Services and the regular approving official will be notified as soon as possible afterward.
User Review / Update	KDOA will periodically validate the list of KAMIS users and their privileges with their agency's official.

User Access Descriptions

Access

Below are the access privilege levels available.

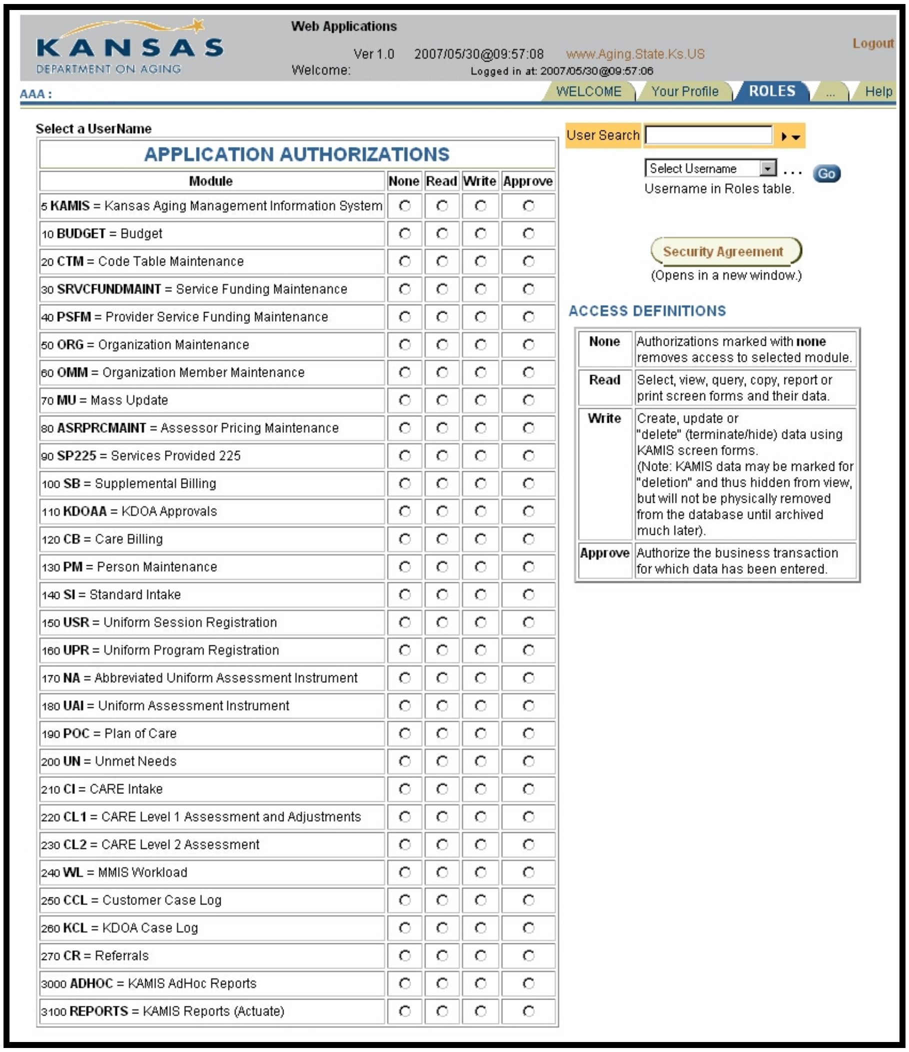
Privileges	Description
Read (View)	Select, view, query, copy, report or print screen forms and their data.
Write (Update)	Create, update or terminate data using KAMIS screen forms.
Full Access (Approve)	Authorize the business transaction for which data has been entered.

Security Request Form

Introduction

This document is available on line at www.aging.state.ks.us at the KDOA Web Application link for only those persons who have been given administration access. The AAA Administrator can either find another employee with the access needed for the new employee and print the form or print the blank form and manual complete the access. The form would then be printed, signed and returned in paper form with the security agreement to KDOA Helpdesk.

Sample Blank Form



KANSAS DEPARTMENT ON AGING

Web Applications

Ver 1.0 2007/05/30@09:57:08 www.Aging.State.Ks.US Logout

Welcome: Logged in at: 2007/05/30@09:57:06

AAA :

WELCOME | Your Profile | ROLES | ... | Help

Select a UserName

APPLICATION AUTHORIZATIONS

Module	None	Read	Write	Approve
5 **KAMIS** = Kansas Aging Management Information System	○	○	○	○
10 **BUDGET** = Budget	○	○	○	○
20 **CTM** = Code Table Maintenance	○	○	○	○
30 **SRVCFUNDMAINT** = Service Funding Maintenance	○	○	○	○
40 **PSFM** = Provider Service Funding Maintenance	○	○	○	○
50 **ORG** = Organization Maintenance	○	○	○	○
60 **OMM** = Organization Member Maintenance	○	○	○	○
70 **MU** = Mass Update	○	○	○	○
80 **ASRPRCMAINT** = Assessor Pricing Maintenance	○	○	○	○
90 **SP225** = Services Provided 225	○	○	○	○
100 **SB** = Supplemental Billing	○	○	○	○
110 **KDOAA** = KDOA Approvals	○	○	○	○
120 **CB** = Care Billing	○	○	○	○
130 **PM** = Person Maintenance	○	○	○	○
140 **SI** = Standard Intake	○	○	○	○
150 **USR** = Uniform Session Registration	○	○	○	○
160 **UPR** = Uniform Program Registration	○	○	○	○
170 **NA** = Abbreviated Uniform Assessment Instrument	○	○	○	○
180 **UAI** = Uniform Assessment Instrument	○	○	○	○
190 **POC** = Plan of Care	○	○	○	○
200 **UN** = Unmet Needs	○	○	○	○
210 **CI** = CARE Intake	○	○	○	○
220 **CL1** = CARE Level 1 Assessment and Adjustments	○	○	○	○
230 **CL2** = CARE Level 2 Assessment	○	○	○	○
240 **WL** = MMIS Workload	○	○	○	○
250 **CCL** = Customer Case Log	○	○	○	○
260 **KCL** = KDOA Case Log	○	○	○	○
270 **CR** = Referrals	○	○	○	○
3000 **ADHOC** = KAMIS AdHoc Reports	○	○	○	○
3100 **REPORTS** = KAMIS Reports (Actuate)	○	○	○	○

User Search

Select Username ... Go

Username in Roles table.

Security Agreement

(Opens in a new window.)

ACCESS DEFINITIONS

None	Authorizations marked with **none** removes access to selected module.
Read	Select, view, query, copy, report or print screen forms and their data.
Write	Create, update or "delete" (terminate/hide) data using KAMIS screen forms. (Note: KAMIS data may be marked for "deletion" and thus hidden from view, but will not be physically removed from the database until archived much later).
Approve	Authorize the business transaction for which data has been entered.

Information System Resources User Security Agreement

This document is available on line at www.aging.state.ks.us at the KDOA Web Application link. The form may be completed on line but does need to be printed, signed and returned in paper form to KDOA Helpdesk.

KANSAS
DEPARTMENT ON AGING

Information System Resources User Security Agreement

Rev. 03/26/2007

I understand that all the client information contained on KDOA computer systems/or any other agency's computer systems to which I have access is confidential. I agree not to copy and/or disclose any information regarding persons who have applied for, have received, or who are receiving public assistance, other benefits or services from KDOA to any unauthorized groups or individual; or to any person for any purpose other than the administration of the KDOA programs using these computer systems.

I also agree to protect all information available to me through interfaces with other agencies, whether the information is on the KDOA computer systems via direct computer access; from hard copy documents; or other means of communication. This includes but is not limited to information from the Internal Revenue Service, the Social Security Administration and the Departments of Employment Security, Revenue and Administration.

I understand that I may only use Information System Resources for those specific functions for which I have been authorized.

I understand that the password(s) I create is or are confidential, may not be shared, and shall be used only by myself. If I suspect anyone else has knowledge of my password, I will report it immediately to my supervisor or to KDOA HELP DESK and will change my password at that time.

I understand whenever I leave my workstation I must sign-off my personal computer or I must invoke a password protected screen saver.

I understand I must change my password(s) at least every sixty days.

I have read this entire document and agree to abide by it's terms. I also understand that any violation of this agreement may result in disciplinary action which may include discharge. Furthermore, I understand that I may be prosecuted if I knowingly and intentionally use any KDOA computer systems/or any other agency's computer systems I access for fraudulent or other unlawful purposes.

PLEASE COMPLETE THE FOLLOWING, CLICK 'PRINT VIEW' THEN PRINT THIS PAGE, ATTACH SIGNATURES, AND MAIL TO THE ADDRESS LISTED BELOW:

◉ Entry View ○ Print View

User

USER NAME ______ Email ______

Function/Job Title ______ Phone Number ______

Office Location ______ Agency ______

Signature of User ______ Date ______

Executive Director (or their designee) or Supervisor

Name ______ Email ______

Job Title ______ Phone Number ______

Office Location ______

Signature of Executive Director (or designee) or Supervisor ______ Date ______

Mail the original or Fax to:

Attn: KDOA HELP DESK, Information Services Division
New England Building
503 Kansas Ave.
Topeka, KS 66603 **Fax: (785)-296-0256**

For assistance: HelpDesk@aging.state.ks.us
Phone: (785) 296-4987

05/30/2007 10:04:08

Chapter 3 – Accessing KDOA Web Applications and KAMIS II

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System Requirements and Browser Settings

Introduction

- Monitor Screen Resolution at 1024 X 768.
- Microsoft Internet Explorer 6.0 or newer.
- **Disable all Pop-Up blockers.**
- **Disable Auto-Complete feature.**

Pop-Up Blocker

Disable the blocker or allow pop-ups for KAMIS sites. Depending upon the pop-up blocker used, the procedures differ. See the specific instructions from the software manufacturer.

Disabling Browser Settings

For the printing capabilities built into KAMIS there is one browser setting that will need to be activated. The other browser setting needing to be disabled, is the Auto-Complete feature.

How to

The following are the steps to set the browser setting in Microsoft Internet Explorer.

Step	Action	Result
1.	Open Microsoft Internet Explorer	The browser will advance to the Organization selection window.
2.	Click on **Tools**	
3.	Click on **Internet Options**	Dialog box will be displayed.
4.	Click on the **Advance Tab**	
5.	Scroll down the listing and locate the **Printing** section.	

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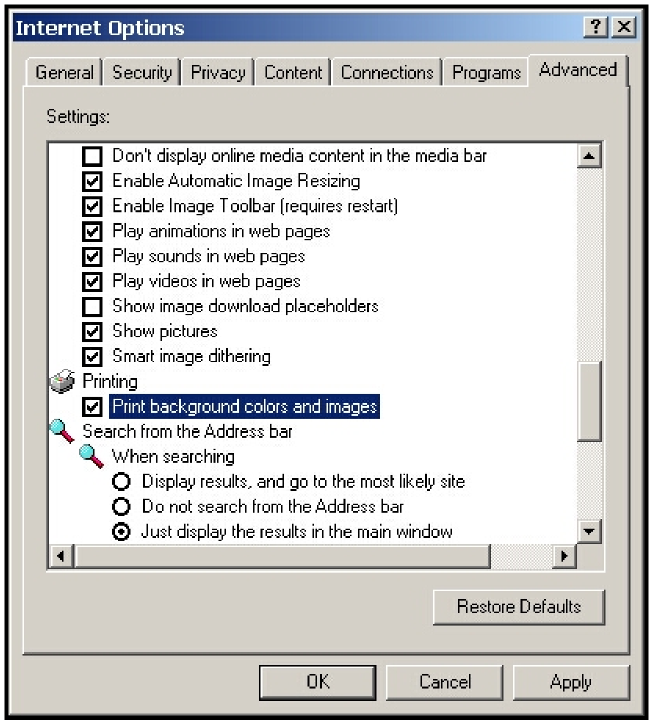
How to (continued)

Step	Action	Result
6.	Select the **Print background colors and images** options.	Check box should be active.



7.	Click on **Apply**	Setting is put into effect.
8.	Click on **OK**	Dialog box will close.

Disable Auto-Complete

Introduction

Due to the nature of the web and the built in internet browser features, the AutoComplete feature will need to be disabled and all entries cleared. If this is not done, it is possible that this feature will cause certain forms to not perform correctly within KAMIS.

How to

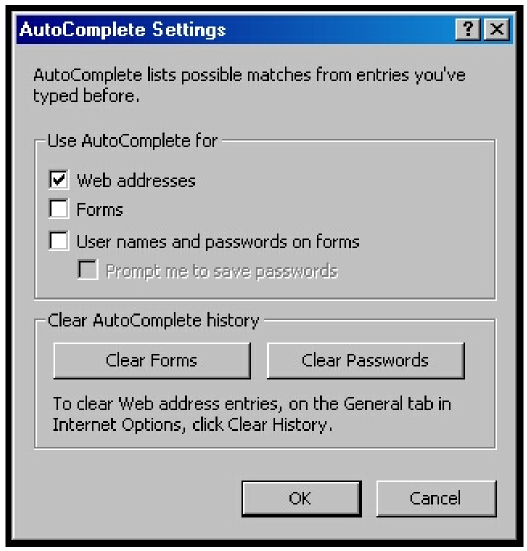
The following are the steps to set the browser setting in Microsoft Internet Explorer.

Step	Action	Result
1.	Open Microsoft Internet Explorer	The browser will advance to the Organization selection window.
2.	Click on **Tools**	
3.	Click on **Internet Options**	Dialog box will be displayed.
4.	Click on the **Content Tab**	

Continued on next page

Disable Auto-Complete, Continued

How to (continued)

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>5.</td><td>Click on the AutoComplete button.</td><td>The AutoComplete Settings dialog box is displayed.</td></tr>
<tr><td colspan="3">


</td></tr>
<tr><td>6.</td><td>Ensure that the check boxes are unselected for the following:
Forms
User names and passwords on forms.</td><td></td></tr>
</table>

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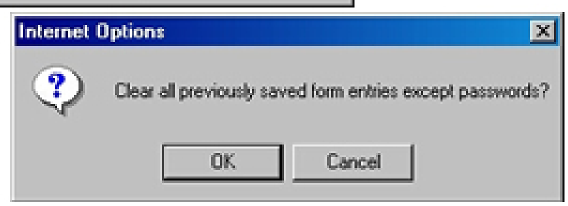
Disable Auto-Complete, Continued

How to (continued)

Step	Action	Result
7.	To clear any entries that may be in the AutoComplete feature, click on the following buttons: • Clear Forms • Clear Passwords	Messages will be displayed. Click on **OK** on both messages. Forms and Passwords will be cleared.



8.	On the AutoComplete Settings dialog box click on **OK.**	Dialog box will close.

Accessing KDOA Web Applications

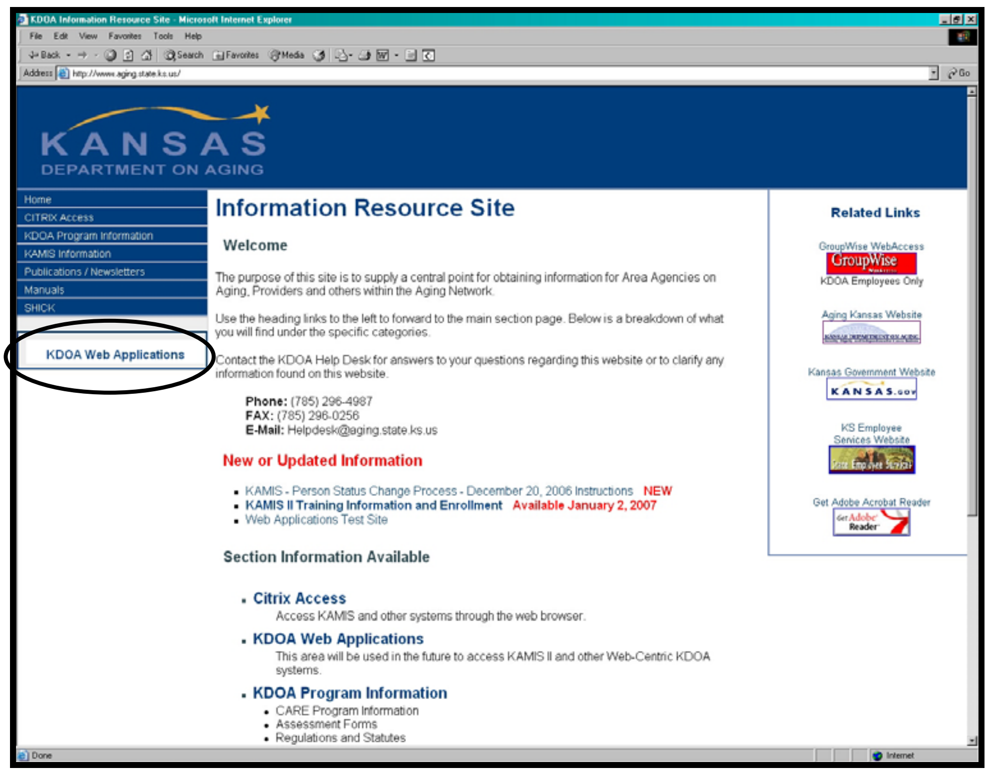
Introduction

The following are steps to accessing the KDOA Web Applications site. KAMIS II is part of the web applications.

How To

The following are the steps to access the Main Menu of KDOA Web Applications.

Step	Action	Result
1.	Connect to the Internet Provider, if necessary.	Obtain TCP-IP (internet) access.
2.	Open Microsoft Internet Explorer. Access the Aging Information Resource Web Site. http://www.aging.state.ks.us	KDOA Web site will be displayed.



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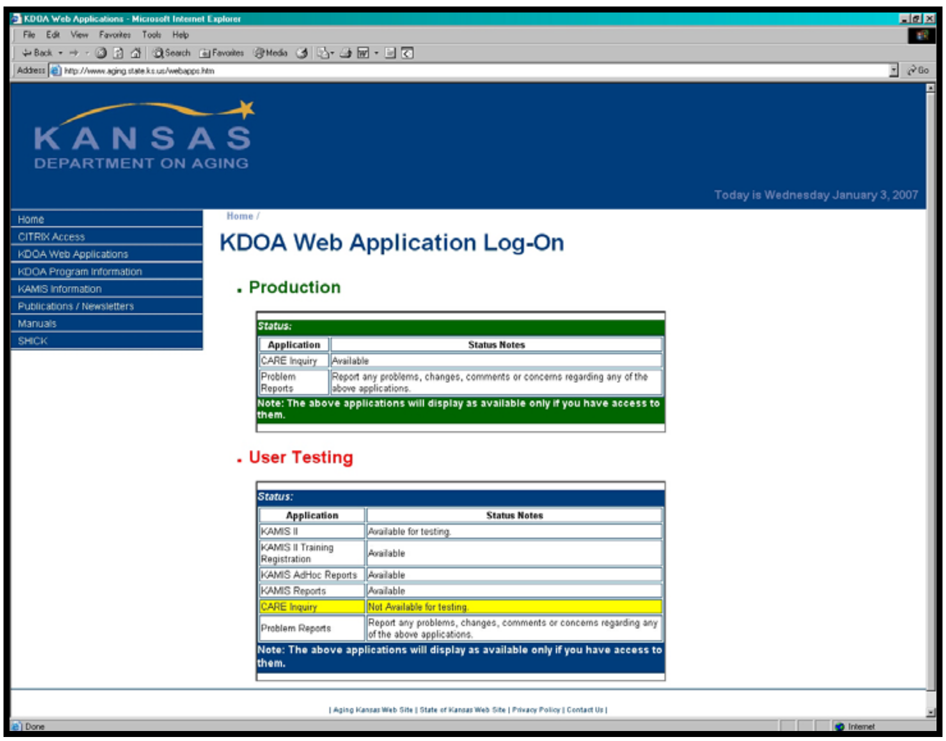
How To **(continued)**

Step	Action	Result
3.	Select the **KDOA Web Applications** Link.	KDOA Web Applications Log On Page will be displayed. <u>Recommended</u>: For ease of use in the future, create a bookmark for this page.



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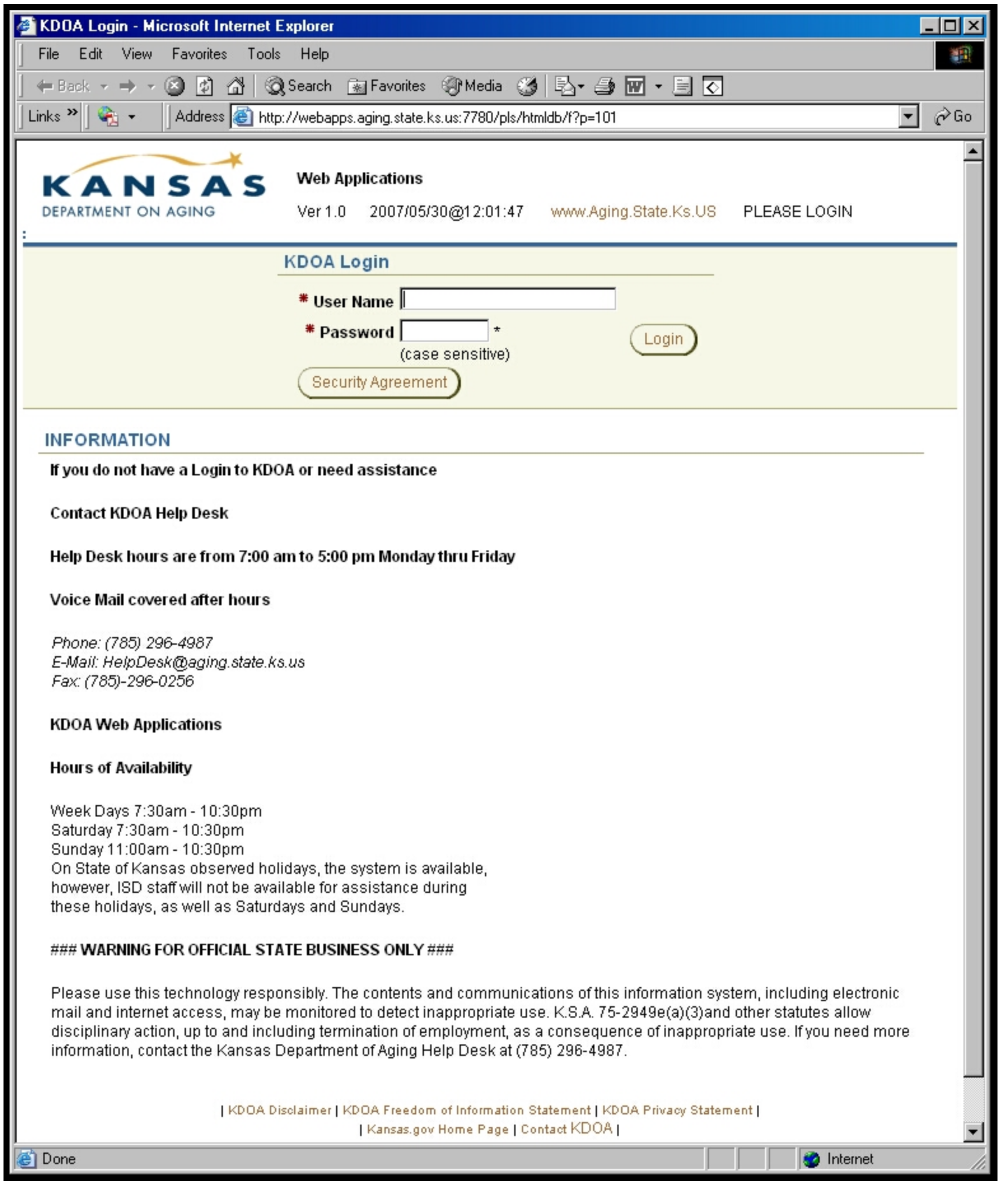
Accessing KDOA Web Applications, Continued

How To (continued)

Step	Action	Result
4.	Select the **Production** Link.	The Production Log On Page will be displayed.



Password

Introduction

A unique User Name and Passwords are required to access KDOA Applications. Additional security software that encrypts data before transferring the information over the Internet is in place. This ensures that unauthorized persons will not intercept data.

Password Requirements

Passwords in Web Applications will expire every 60 days. Individual passwords will not be visible to anyone, including KDOA support staff. However, KDOA support staff will be able reset the password for a user who forgets their personal password. Instructions for changing the password are covered in the next section.

Issuance Procedure

Upon receiving the Security request, the KDOA Help Desk personnel will prepare and issue the appropriate Username and the initial password.

The following are the steps that will be taken by the Help Desk.

Step	Action
1.	The Help Desk personnel will call and speak directly to the user.
2.	The user will be told of their User Name and password. The first time the user logs-on to the system they will be required to change the password, creating their own unique password at that time.

Password Requirements

- Must be at between eight to ten characters long
- Can only be either alpha or numeric characters – no special characters are permitted.
- Can not contain a portion of the user name
- Can not repeat a character more than four times consecutively

Password Recommendations

- Contain at least one uppercase character
- Contain at least one lowercase character
- Contain at least one numeric character

Note: A user should immediately change their password if they believe another person may have discovered their current password.

Changing the Password

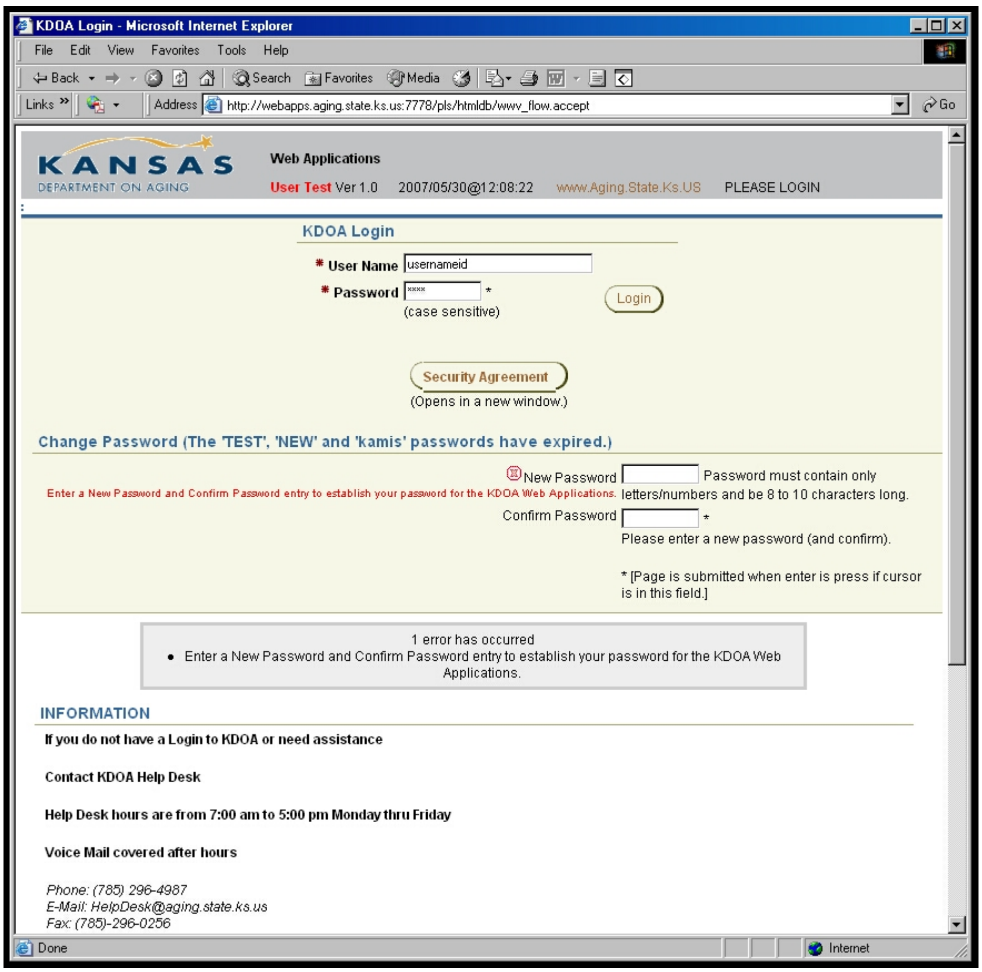
Introduction

Passwords in KAMIS will automatically expire every 60 days. However, the user can change the password at any time manually.

How to

The following are the steps to manually change the password to access KAMIS:

Step	Action	Result
1.	Complete the login fields of User Name and Password.	A message will display an error and asking for a password change



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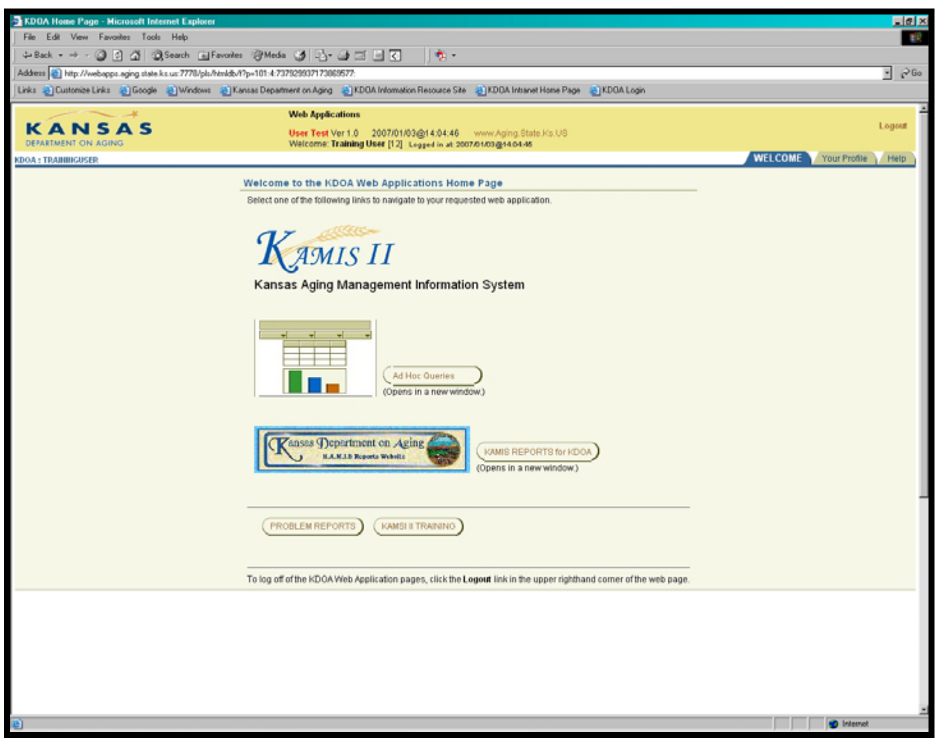
Changing the Password, Continued

How to (continued)

Step	Action	Result
2.	Type in the **new password**, press the tab key.	Insertion point advances.
3.	Type in the new password once again to **confirm** the change.	Insertion point advances.
4.	Press the **Login button**. The username and the original password will be authenticated then the password will be changed.	The page will forward to the Welcome Navigation Tab on the KDOA Web Application Home Page. (Depending upon the access give, this page may appear differently)



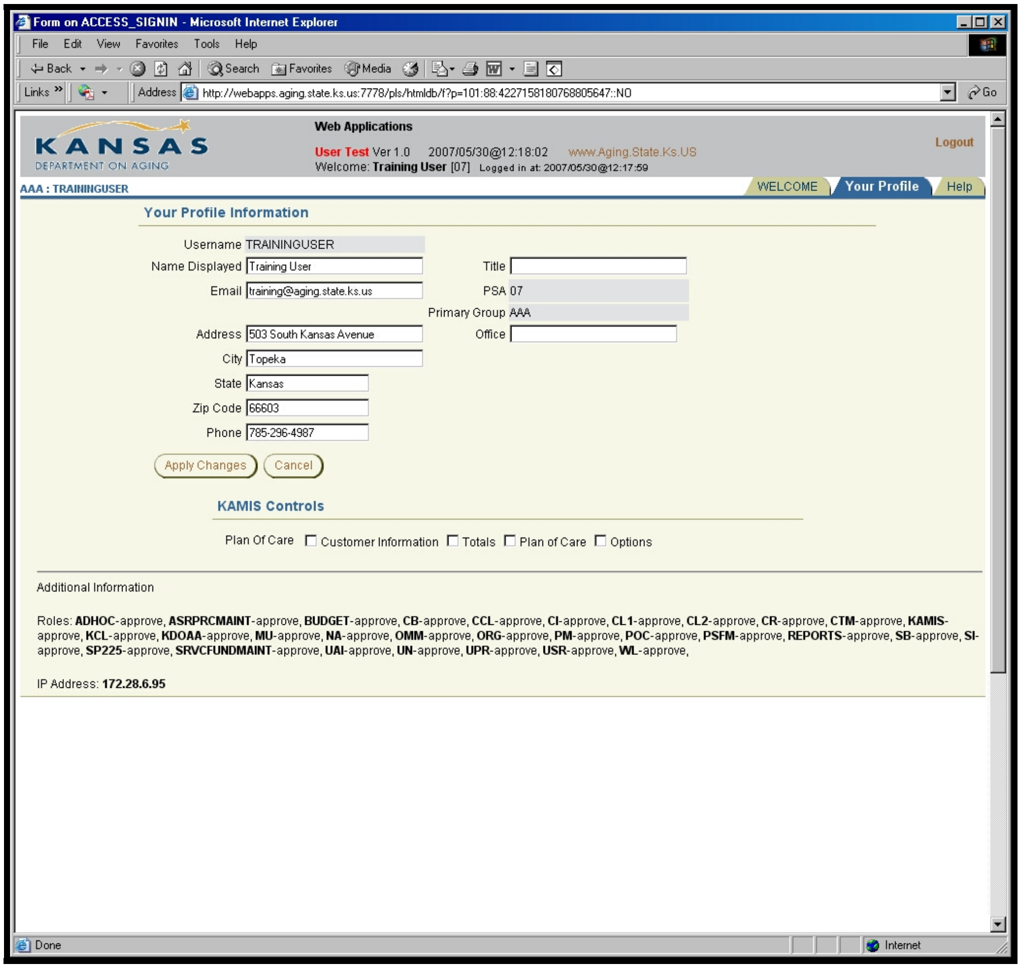
User Profile

Overview

Your Profile is an option where you can edit your personal information that is associated with your KDOA Web Application Sign-on.

Click on the Your Profile Navigation Tab to access this area.

Your Profile Page



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Items Available for Edit

The following fields are available for edit:

Your Profile Information Region:

- The **Name Displayed** in the header of the KDOA Web Application pages.
- **Title**
- **E-mail**
- **Address** (this should be your business address)
- **Phone** (this should be your business phone)
- **Office –** If you work in a field or satellite office this field could be completed.

KAMIS Controls Region:

This region is under development. When deployed additional information will be available.

Additional Information Region:

This region is at the bottom of the page, displays the access rights currently granted within the KDOA Web Application.

Logging-In to KAMIS

Before you begin …

Users will need to obtain a user name and initial password from the KAMIS Security Administrator. See security request instructions in Chapter 2. The Security Request form is also located in the Appendix.

Security Requirements

- DO NOT share the User Name or Password.
- Only one sign-on is permitted to be active within KAMIS at one time.

Breech of Security

KAMIS has an extensive internal audit trail for documenting when and by whom data is created and changed. For this reason, logging into KAMIS with another user's name and password is specifically prohibited. Incidents of false identity will be investigated by KDOA. This may result in revoking access for both the person falsely logging in, and the KAMIS user who revealed their password.

Security Lockout

If a KAMIS user tries to log-in unsuccessfully 5 times, the user's account will be lock-out for a specific time. At this time the lockout is between 15 and 30 minutes. The user will be required to wait during this time frame.

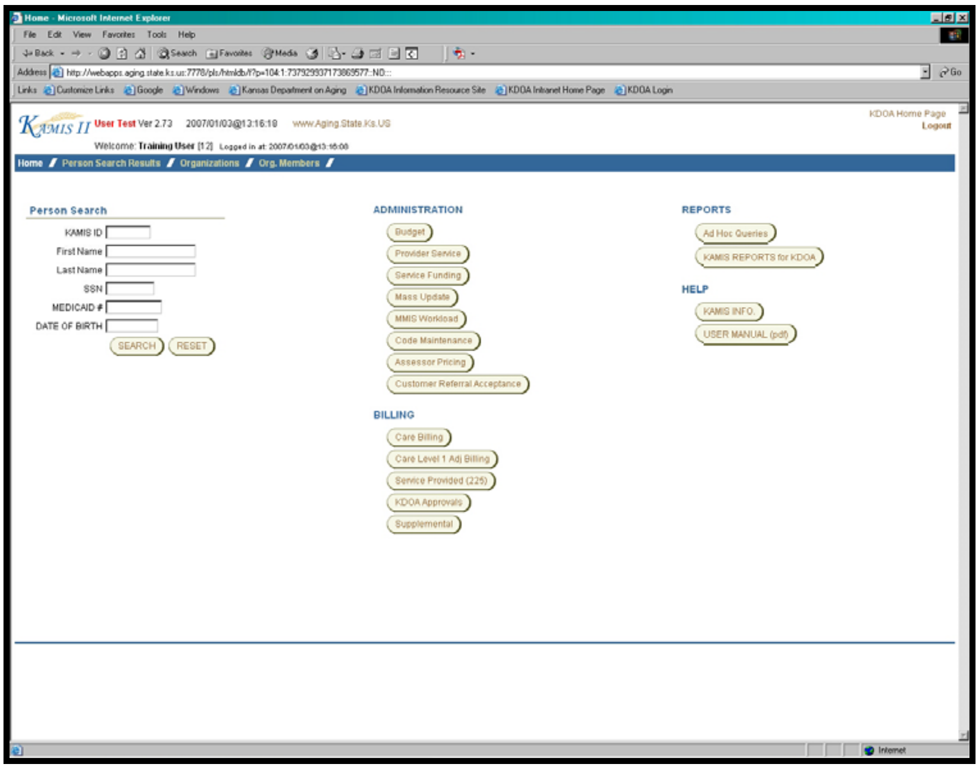
Continued on next page

Logging-In to KAMIS, Continued

How To

Follow the steps in the table below to complete the KAMIS sign-on process.

Step	Action	Result
1.	Once the KDOA Web Application Home page is displayed. Click in the KAMIS II Link.	KAMIS II Log-in page will be displayed.



Logging-Out of KAMIS

Introduction

There are two options to exit the KAMIS web application.

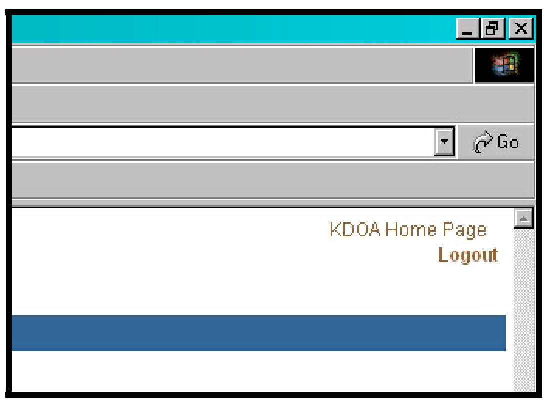
- Logout – Will exit KAMIS and return the user to the Sign-on Screen
- KDOA Home Page – Will return the page to the KDOA Application selection page so that another application can be selected.

The user should logout of KAMIS if they are going to be absent from their work area for an extended period. This is for security reasons**. If there is no activity by the user for 20 minutes KAMIS will automatically Log-out the user.**

How to

Follow the steps in the table below to logout of KAMIS.

Step	Action	Result
1.	Click on the **Logout** Link at the top right of any page within KAMIS.	The browser window will be returned to the appropriate window.



Exiting KAMIS

Introduction

When the user will not be using KAMIS for a period of time, the program should be closed in order to release the computers memory resources.

How To

Follow the steps in the table below to exit KAMIS.

Step	Action	Result
1.	Logout of KAMIS as instructed in the previous section then in the upper right corner of the browser window, click on the exit button. ☒	The browser will close.

If this action is taken with KAMIS not logged-out first, KAMIS will automatically log-out the user at the system level.

Chapter 4 – Standards and Navigation Methods

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Data Entry Standards

Introduction

Since KAMIS follows the paper forms, data entry is simplified.

Data Entry Standard

Type in all CAPS

No Punctuation

Exceptions:

- If a person has just initials as the first or middle name (i.e. A J Smith) enter the name with a period (A**.** J**.** Smith)
- If Last Name is O'Neil - use the apostrophe (')
- If Last Name is Hyphenated - use the hyphen (-)

First Name field - Use Legal Name, not Nickname or Preferred Name

Middle Name field - If only Initial is given, use a period.

Last Name field - Include Jr., III, IV, etc.

Hint

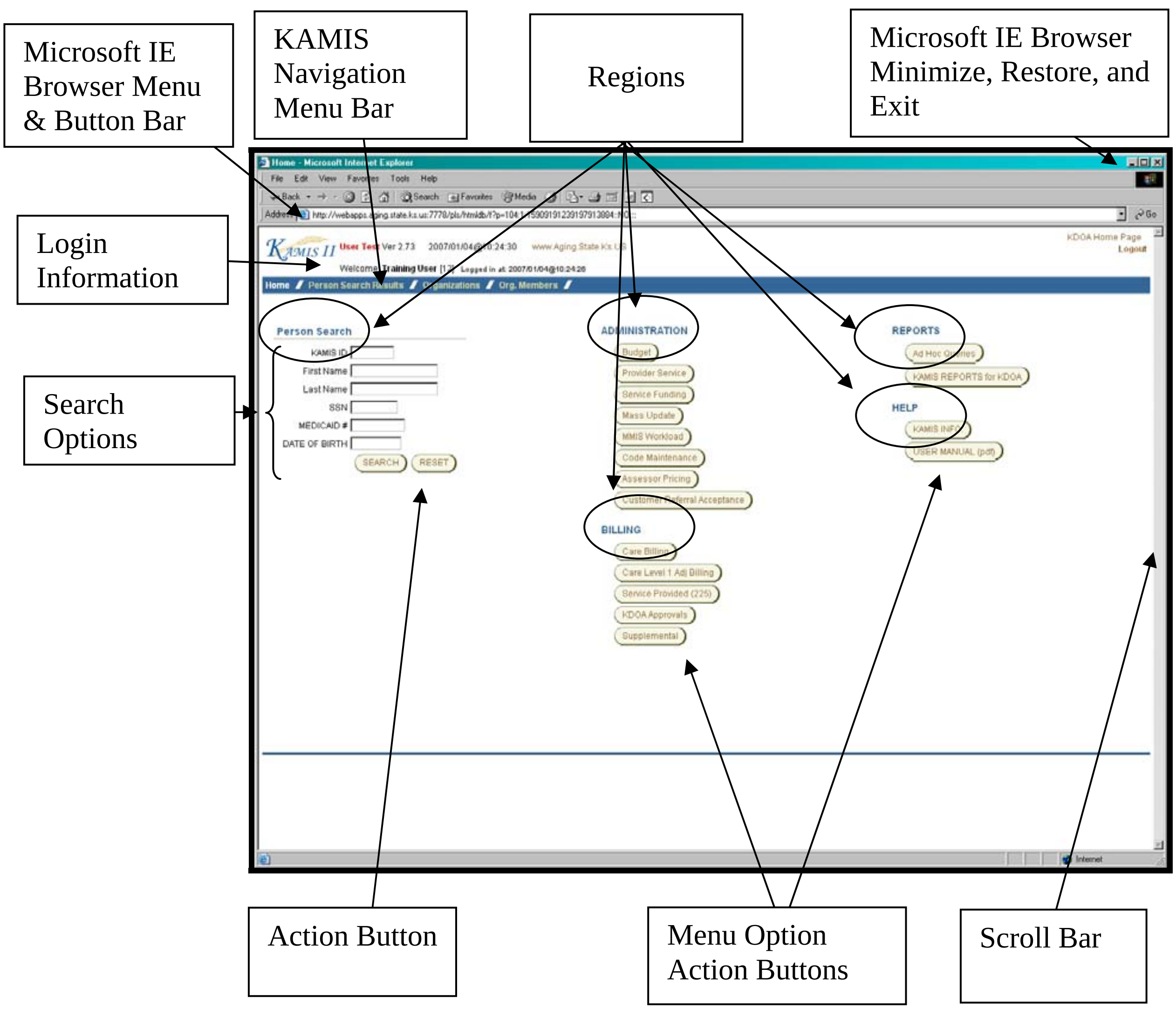
When possible, maximize the browser. This will ensure that all fields are easily accessed.

Be patient, numerous clicks will re-start the request and slow the response time. Also, errors may be experienced which will necessitate the user to restart KAMIS. Beware that at peak Internet usage times, the performance of the system may vary.

Home Page

Introduction	The Home Page of KAMIS carries all the program options and commands.
Page Components	Below are the Home Page components.

Home Page



Search Page

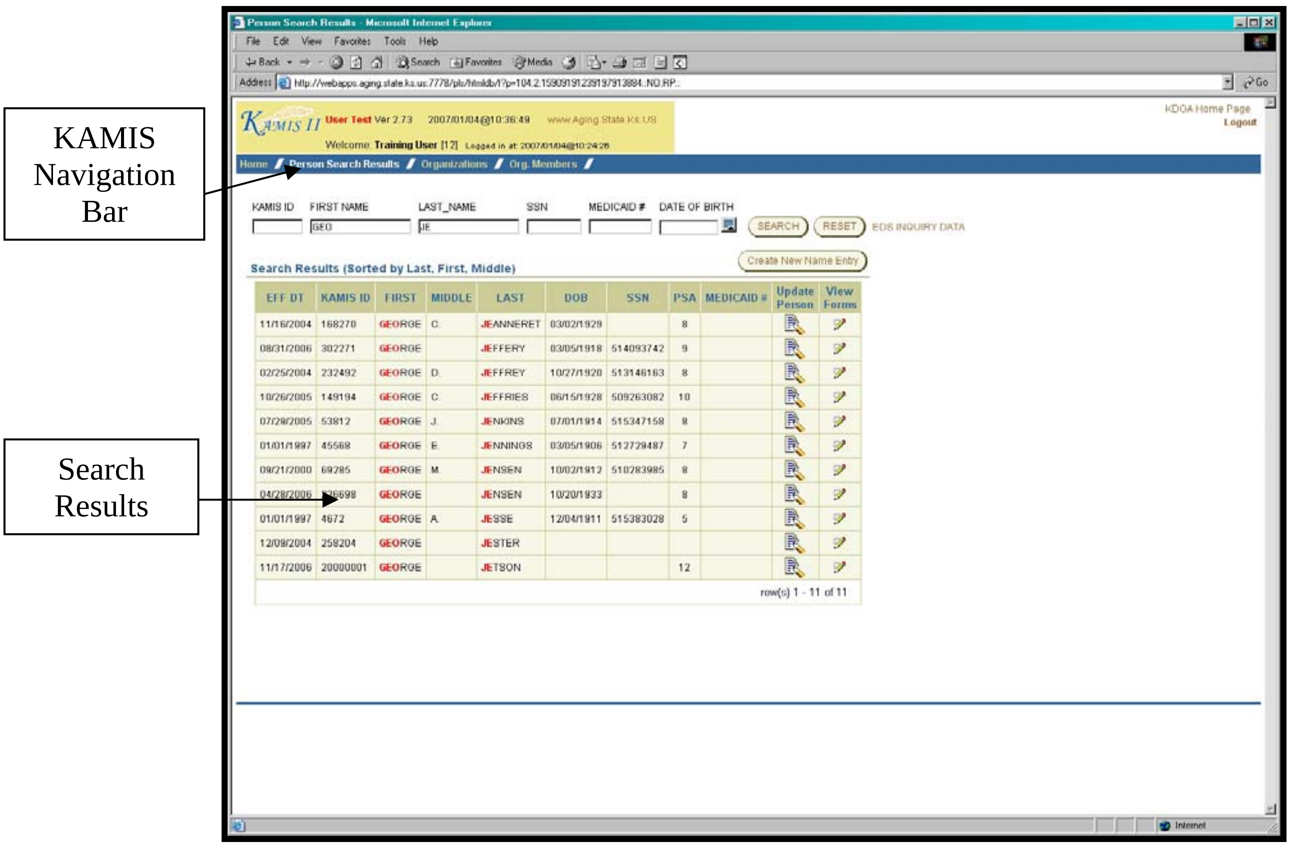
Introduction

The person search page of KAMIS allows full or partial searches.

Page Components

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

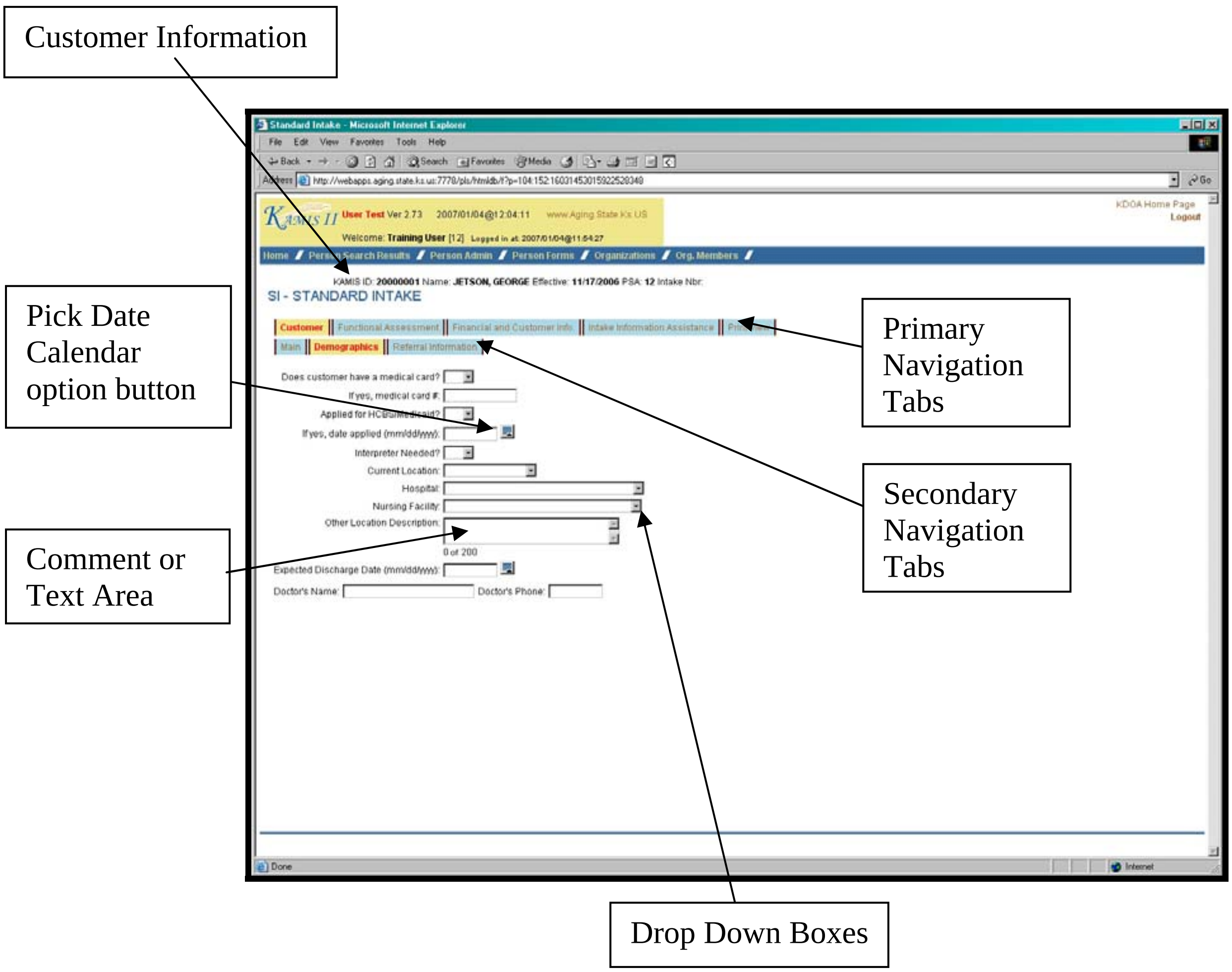
Search Results Page



Form Pages

The example used is the Standard Intake form

Form Pages

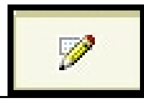
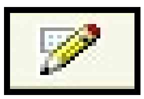


<u>**Note:**</u> There will be a **Save** action button on the first tab of the form, this will save the form to the database. Once this is done as the form is completed page by page, the form will automatically save then advance to the next tab.

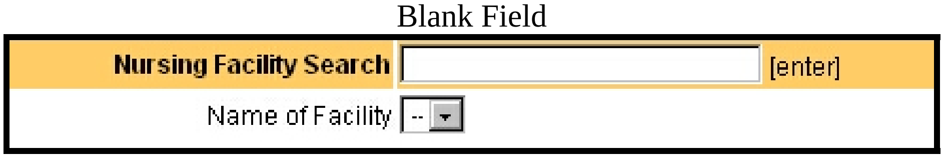
Navigational Icons and Buttons

Introduction

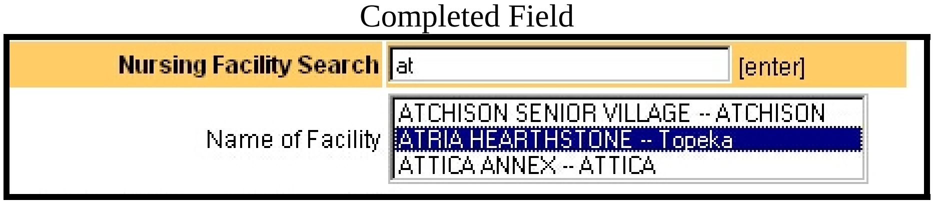
Icons are used in KAMIS II as visual aids to indicate certain actions.

Icon	Action
	**View Icon.** Clicking on this icon will open the corresponding form. Forms that are in Approved status can be viewed only.
	**Access Icon.** Clicking on this icon will perform the action as indicated in the column heading, i.e. open the corresponding form.
	**Modify Icon.** Clicking on this icon will perform the action as indicated in the column heading, i.e. open the corresponding form for modification. Modifications can only be made to forms that are in the Work in Progress status or the Plan of Care.
*	**Work in Progress Required Field icon.** This field is required in order to save the form in a Work in Progress status.
REQ	**Approved Required Field icon.** This field is required in order to save the form in an Approved status.
See below	**Search fields.** The field above the listing area is a search field, type the name or criteria in the yellow highlighted field then press enter. A listing will display in the bottom area. Once the appropriate option is displayed, click on it once to highlight the option and it is selected.

Blank Field



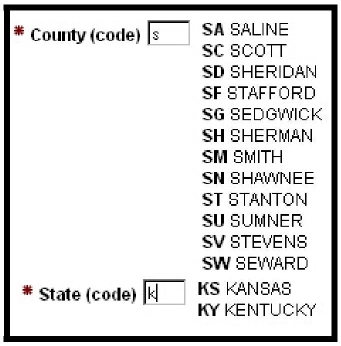
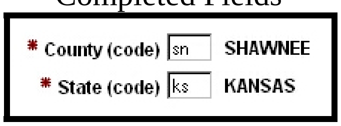
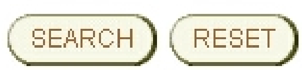
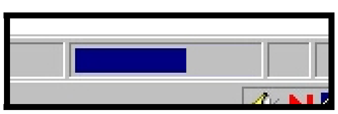
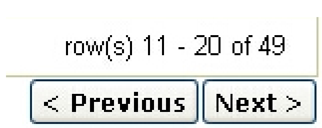
Completed Field



Continued on next page

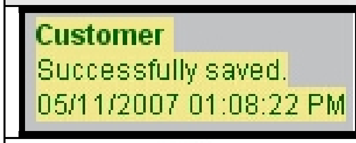
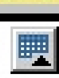
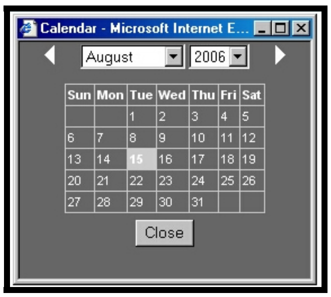
Navigational Icons and Buttons, Continued

Introduction (continued)

Icon	Action
Select Fields  Completed Fields 	**County and State Code Fields.** Start typing the County or State Abbreviation Code and a reference listing will be displayed. This will ensure that the correct county code will be used.
	**Expand Arrow Indicator**. The arrow with a plus indicates that there could be additional information available to view. Click on the arrow and the subsequent region will expand.
	**Action Button.** The buttons are labeled accordingly to the action they will perform.
	**Status Indicator.** The browser status indicator bar will be displayed at any time there is a request made to the KAMIS database to either save or to bring back information.
	**Page Advance Indicators**. KAMIS allows a certain number of lines of data to be seen at a time. When there is more information to be displayed, page advance indicators with previous and next buttons will be displayed.

Continued on next page

Introduction (continued)

Icon	Action
	**Save Notice.** A notice will appear in green in the heading area. If there is an error it will display in the same area but in the color red.
	**Date Picker Icon and Calendar**
	**Comment Box:** Has a count down option under the box that indicates how many characters are available.

KAMIS Navigation Bars

Navigation Bar Options

Below are the two examples of the Navigation Bar. The top is the navigation bar on the Home Page of KAMIS and the second one is the navigation bar on a form after a person search and selection has been completed.

These options act as links back to the area with the last person search results displaying. Once a person is selected from the search area, the links will access the person administration area or the persons form listing.

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

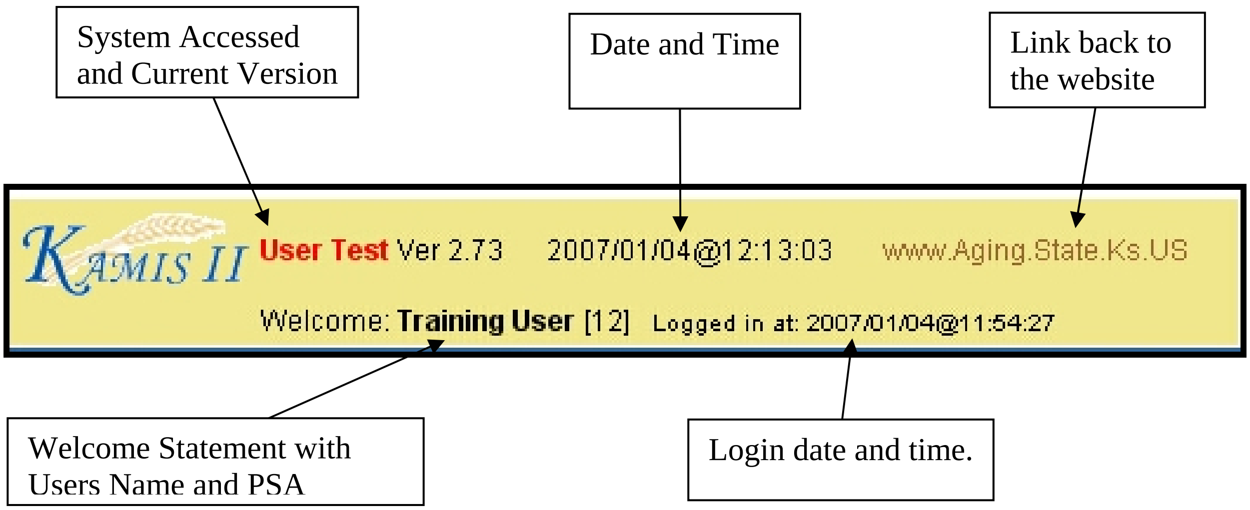
Log-In Information

Introduction

At the top left corner of the pages will be displayed a Log-In status information area.

KAMIS Heading

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



Pages Components

Introduction

All pages follow the corresponding paper forms in most cases. However, some fields differ from those on the form in location only. In those cases, the tab order has been changed to follow the form.

Page Components:

The following is the breakdown of the Components. The example page used in this section is the Uniform Assessment Instrument (UAI).

Component	Description
Navigational Links	Links on the page which when clicked will forward the page to another feature within KAMIS.
Navigational Primary Tabs	Tabs at the top portion of the form. Corresponds with the forms page sections.
Navigational Secondary Tabs	Tabs within the form which provides additional navigation. Corresponds with the forms page sections.
Text Fields	Fields where the data may be typed and entered.
Drop Down Boxes	Fields with an arrow on the right side. When selected appropriate options are displayed. Type the 1st letter of the selection desired and the list will be forward to the first entry that starts with the character. To select the desired entry: • Continue to press the same character and the listing will forward down the list. • Use the mouse to scroll down the listing. • Use the down arrow key.
Check Boxes	Fields that are small boxes. When selected the field will indicate a check mark ☑ or ☒. When selected, the answer indicates "yes". Check boxes are use when there are several options that can be selected.
Radio Buttons	Fields that are a circular ●. When selected the field will darken. When selected, the answer indicates "yes". Radio buttons are use when there is only one option that can be selected.

Continued on next page

Field Navigation

Introduction

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

Data Selection

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

Type of Field	Navigation Methods	Result
Single entry fields	• Tab • Double Mouse Click • Click and drag to select	Highlights data

Keyboard

The following are the navigation methods by keyboard combinations.

Key	Action
Tab	Move to next field
Shift + Tab	Go back one space
Space Bar	Checks or unchecks a check box
Arrow Keys	Moves through and selects the radio button
Enter	Submits the entry – Must tab to the action button.

Field Advance

For Data Entry there are several ways to advance to the next field.

Type of Field	Navigation Methods	Result
All single entry fields	• Tab • Mouse Click	Advances
	• Shift + tab • Mouse Click	Backs up one field

Continued on next page

Data Entry Navigation

For Data Entry there are several ways to enter data into fields.

Type of Fields	Data Entry Methods	Action
Text or Comment Fields	• Keyboard	Data entered.
Check Boxes	• Space Bar • Mouse Click	Will select or de-select the check box.
Radio Buttons	• Mouse Click • Arrow keys	Will forward the insertion point down the listing. Tab will jump to the next input field.
Drop Down Boxes	• Mouse Click • Type the first letter of the option.	Option will be displayed.

Printing

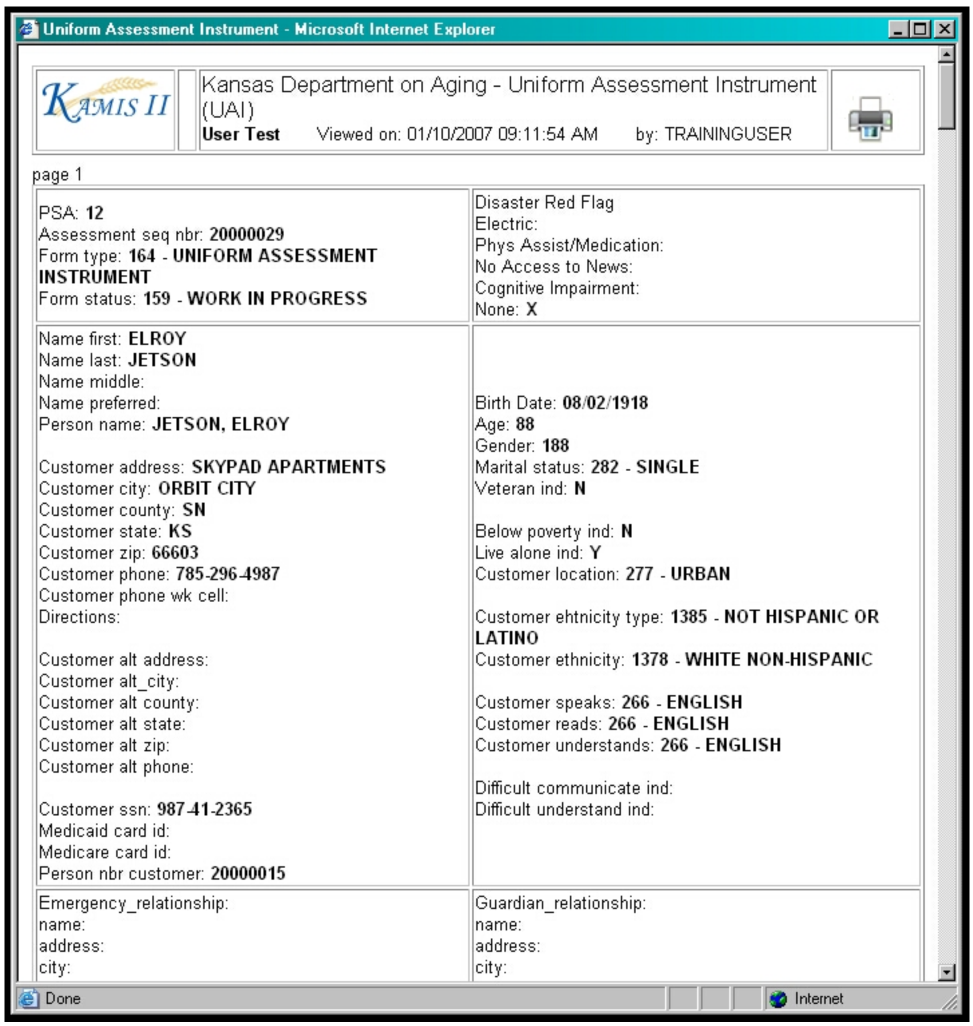
Introduction

There are three options for printing from KAMIS. They are:

- Use the Print View link of KAMIS on the forms page
- Use the Print Icon on the Forms List page
- Use KAMIS Reports

Print from the Form Link

Opens in a separate browser window


Uniform Assessment Instrument - Microsoft Internet Explorer

KAMIS II

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

page 1

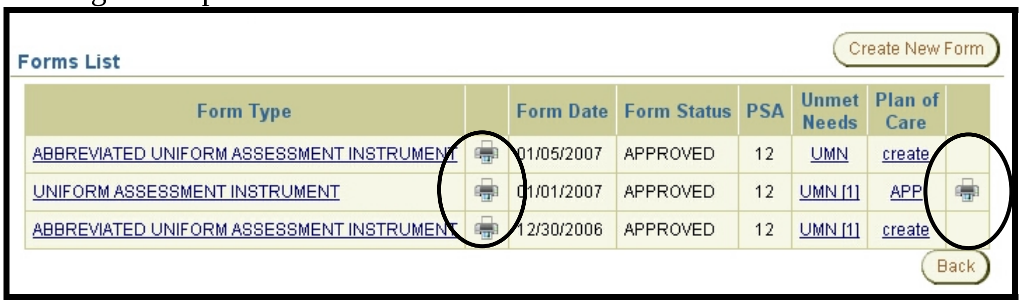
PSA: 12 Assessment seq nbr: 20000029 Form type: 164 - UNIFORM ASSESSMENT INSTRUMENT Form status: 159 - WORK IN PROGRESS	Disaster Red Flag Electric: Phys Assist/Medication: No Access to News: Cognitive Impairment: None: X
Name first: ELROY Name last: JETSON Name middle: Name preferred: Person name: JETSON,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

Done Internet

Continued on next page

Print from the Form List Page

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



KAMIS Reports Option

Print the Assessment forms and the Plans of Care from the KAMIS Reports Option.

Chapter 5 – Person Search

Table of Contents

Person Search Requirements

Introduction

The search function is the basis for ensuring data integrity within KAMIS. Customers should not be duplicated within the system. Therefore, person search is where all functions in KAMIS begin.

How it Works

Each person is entered into KAMIS through the Person Administration function. Adding a person to KAMIS is explained in Chapter 6, Person Administration.

Search Options

To protect the customer information, the Person Search function has been changed to display only certain information. Below are the different search criteria options and what will be displayed.

1. KAMIS ID = Statewide
2. Name (First & Last or Partial) = PSA only
3. Name (First & Last or Partial) + Date of Birth = Statewide
4. SSN = Statewide
5. Date of Birth = Not available alone, must be in conjunction with the Name.

When using the search criteria for statewide results, the listing will display with all matches regardless of the PSA/iTCM. However, the Person Administration icon/link, Social Security Number and/or Date of Birth will be unavailable (unless used in the criteria) for any customer whose PSA/iTCM does not match the person performing the search. Persons with no associated PSA/iTCM will display regardless of the criteria used.

The following pages will review the different search options and what search results will display.

Exception

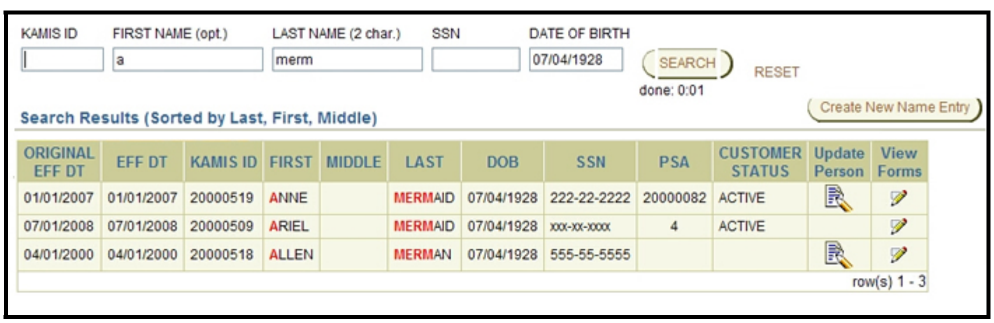
If a person has just initials as the first or middle name (i.e. A J Smith) enter the name with a period (A**.** J**.** Smith).

Person Search

How To Follow the steps in the table below to complete a person search.

Step	Action	Result
1.	On either the KAMIS Home Page or on the Person Search Page, enter the **Search Criteria**	
2.	Press **Search** button	When complete, a list of the names found and/or a no data found message will display.

If Person…	Then…
Is returned	Proceed with a new or existing form. **<u>NOTE</u>**: A limit of 100 records will be returned. A statement will indicate that there are more available. The criteria will need to be adjusted to narrow the search. See Form Selection Chapter for detailed instructions.


KAMIS ID | FIRST NAME (opt.) a | LAST NAME (2 char.) merm | SSN | DATE OF BIRTH 07/04/1928 | SEARCH | RESET
done: 0:01
Create New Name Entry
Search Results (Sorted by Last, First, Middle)

ORIGINAL EFF DT	EFF DT	KAMIS ID	FIRST	MIDDLE	LAST	DOB	SSN	PSA	CUSTOMER STATUS	Update Person	View Forms
01/01/2007	01/01/2007	20000519	ANNE		MERMAID	07/04/1928	222-22-2222	20000082	ACTIVE		
07/01/2008	07/01/2008	20000509	ARIEL		MERMAID	07/04/1928	xxx-xx-xxxx	4	ACTIVE		
04/01/2000	04/01/2000	20000518	ALLEN		MERMAN	07/04/1928	555-55-5555				

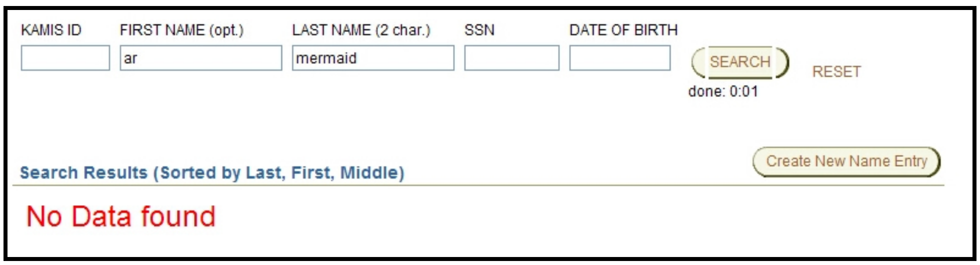
row(s) 1 - 3

Continued on next page

How To (continued)

Step	Action	Result

If Person…	Then…
Not returned	A new person will need to be entered into KAMIS. See Person Administration Chapter for detailed instructions.



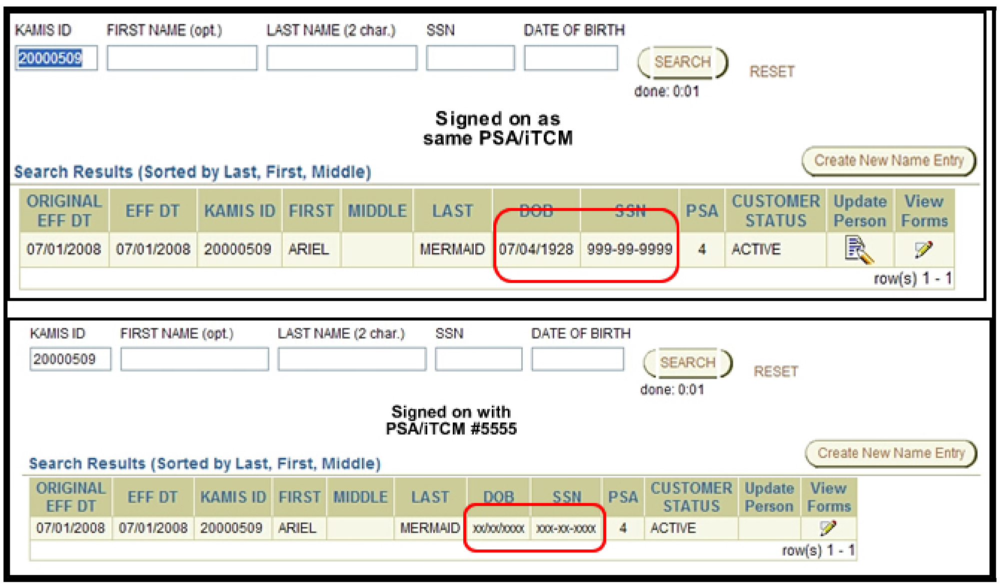
Search Results – KAMIS ID Number Only

Introduction

This search will return the customer regardless of the associated PSA/iTCM.

However, for the customers whose PSA/iTCM number is NOT the same as the person performing the search, the social security number and date of birth will be unavailable. The link to the Person Administration Page is also unavailable.

To have a person referred to your PSA/iTCM click on the View Forms link and Request the Referral. See the Referrals documentation for instructions.

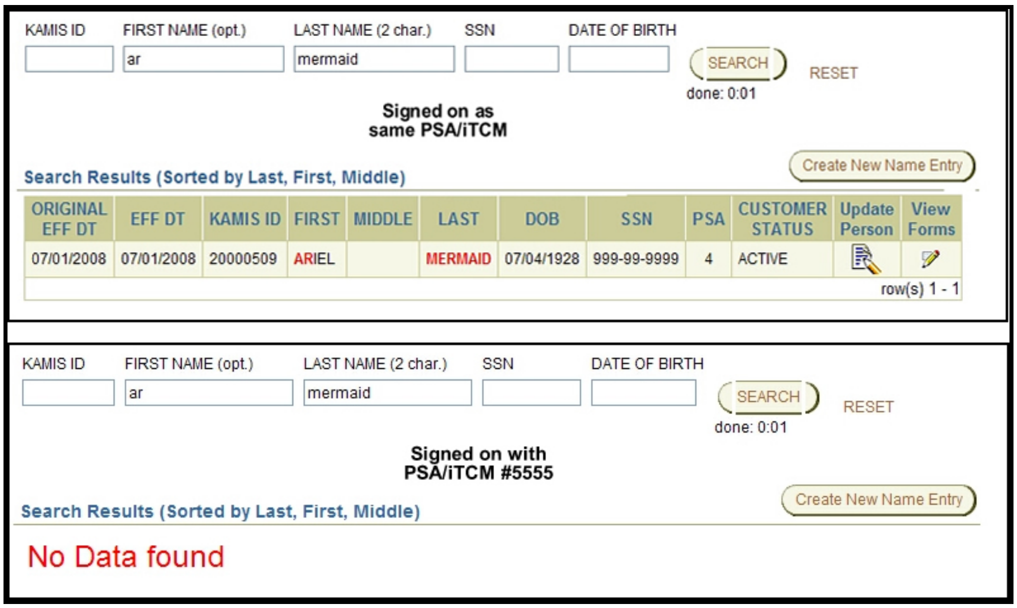


Search Results – Name Only

Introduction

This search will return only the customers whose PSA/iTCM number is the same as the person performing the search. The Name Search results will be returned with the criteria selection in red for easy reference.

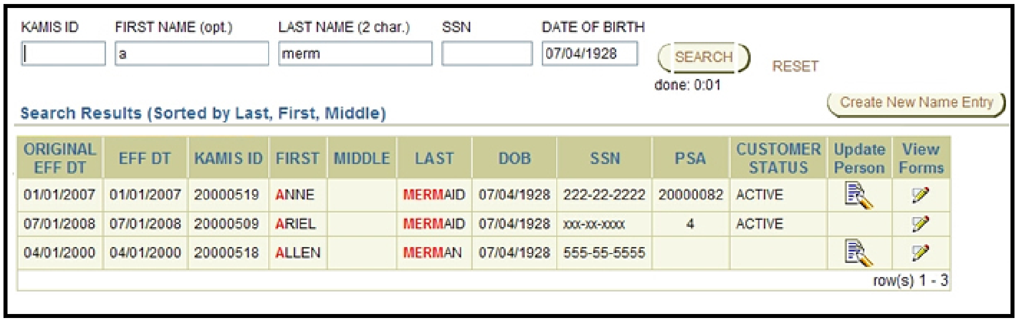
- Partial Name Searches – Entry in the First Name field is optional but at least two characters must be typed in the Last Name field.



Search Results – Name and Date of Birth

Introduction

This search will return only the customers whose Name and Date of Birth match. This search will return the customer regardless of the associated PSA/iTCM.



KAMIS ID | FIRST NAME (opt.) a | LAST NAME (2 char.) merm | SSN | DATE OF BIRTH 07/04/1928 | SEARCH | RESET

done: 0:01

Create New Name Entry

Search Results (Sorted by Last, First, Middle)

ORIGINAL EFF DT	EFF DT	KAMIS ID	FIRST	MIDDLE	LAST	DOB	SSN	PSA	CUSTOMER STATUS	Update Person	View Forms
01/01/2007	01/01/2007	20000519	ANNE		MERMAID	07/04/1928	222-22-2222	20000082	ACTIVE		
07/01/2008	07/01/2008	20000509	ARIEL		MERMAID	07/04/1928	xxx-xx-xxxx	4	ACTIVE		
04/01/2000	04/01/2000	20000518	ALLEN		MERMAN	07/04/1928	555-55-5555				

row(s) 1 - 3

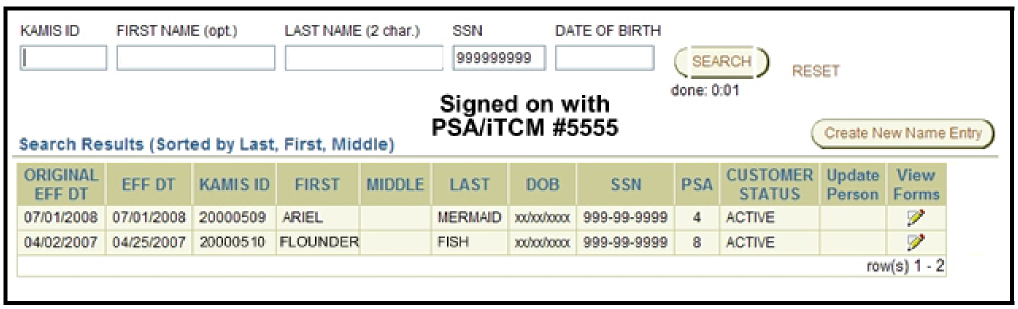
Search Results – Social Security Number

Introduction

This search will return all customers whose Social Securty Number matches the entry, regardless of the associated PSA/iTCM.

However, for the customers whose PSA/iTCM number is NOT the same as the person performing the search, the social security number will display as it was entered into the search criteria but the date of birth will be unavailable. The link to the Person Administration Page is also unavailable.

To have a person referred to your PSA/iTCM click on the View Forms link and Request the Referral. See the Referrals documentation.



KAMIS ID | FIRST NAME (opt.) | LAST NAME (2 char.) | SSN 999999999 | DATE OF BIRTH | SEARCH | RESET

done: 0:01

Signed on with PSA/iTCM #5555

Search Results (Sorted by Last, First, Middle)

Create New Name Entry

ORIGINAL EFF DT	EFF DT	KAMIS ID	FIRST	MIDDLE	LAST	DOB	SSN	PSA	CUSTOMER STATUS	Update Person	View Forms
07/01/2008	07/01/2008	20000509	ARIEL		MERMAID	xx/xx/xxxx	999-99-9999	4	ACTIVE		
04/02/2007	04/25/2007	20000510	FLOUNDER		FISH	xx/xx/xxxx	999-99-9999	8	ACTIVE		

row(s) 1 - 2

Chapter 6 – Person Administration

Table of Contents

Important

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

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

General Information

Introduction	This section explains how to enter a new person into KAMIS.
Requirement	A person search must be done to ensure that the person has not been previously entered into the KAMIS System.
Background	All persons entered into KAMIS are located in the same database table but different roles can be assigned depending upon why the person is in the system. A person can have multiple roles assigned (customer, associate, case manager, etc.). Therefore, no one person should be entered more than once into the system.
Duplicate Records	If duplicates records are found, determine which KAMIS number has the most actuate information in person administration and notify the KDOA Help Desk of the duplicate record. The Help Desk will need the following information: • Customer Name • All KAMIS Numbers involved • Indicate if there are assessment forms on both KAMIS Numbers • Indicate the KAMIS Number should be retained.

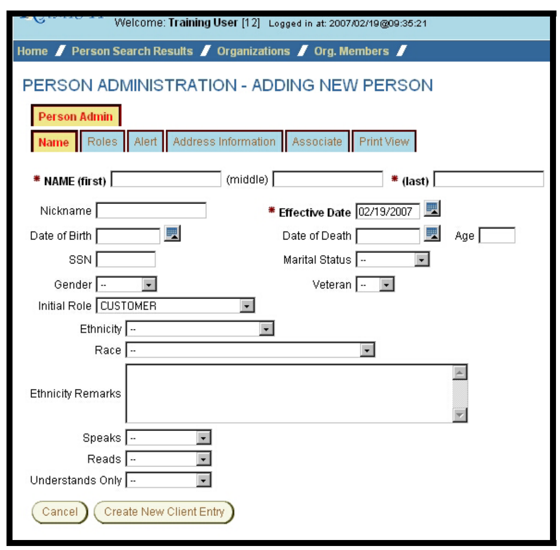
Adding a New Person

Important

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

How To

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

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

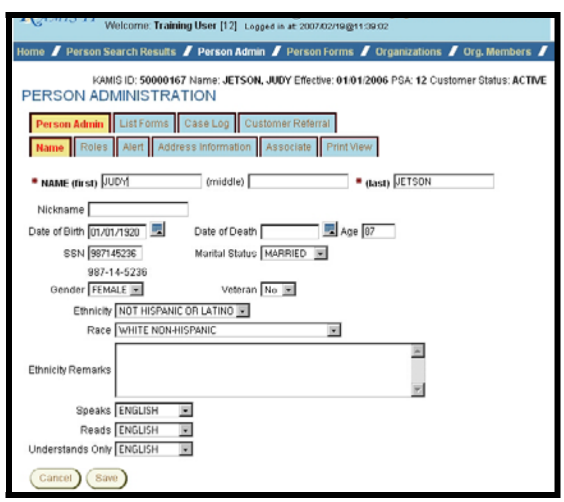
Adding a New Person, Continued

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.



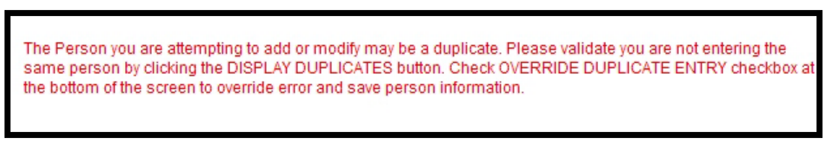
Possible Duplicate Record Found

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

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

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

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

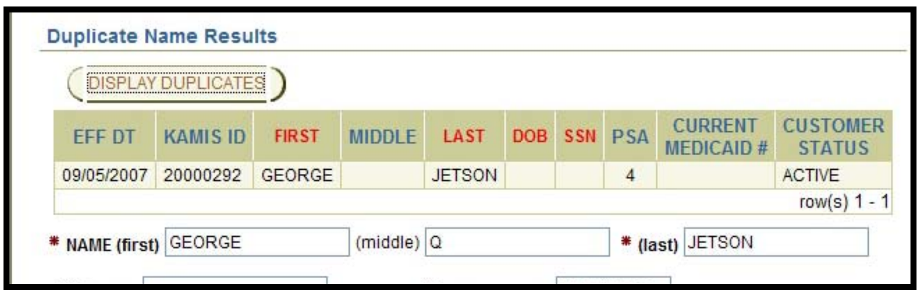
If a duplicate is found the following occurs:</td></tr>
<tr><td></td><td colspan="2">
<table>
<tr><td>A Duplicate Name Results message is displayed.</td><td>See below</td></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>A Display Duplicates button is displayed.</td><td>
</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Possible Duplicate Record Found, Continued

How To (continued)

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

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

Continued on next page

Possible Duplicate Record Found, Continued

How To (continued)

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

Adding Person Roles

Introduction

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

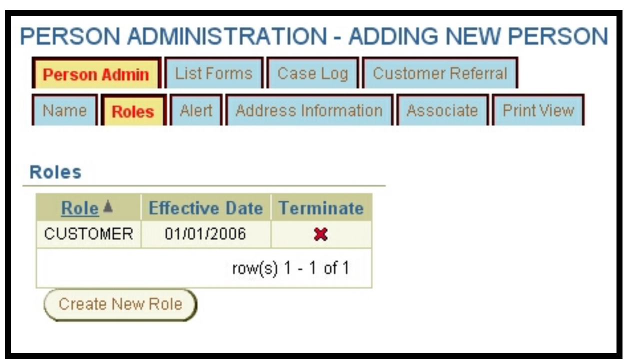
<u>Example</u>: Elroy Jetson may be a customer but also an associate on his sisters record.

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

How to

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

Step	Action	Results
1.	On the **Roles** tab.	Role assigned page will be displayed.

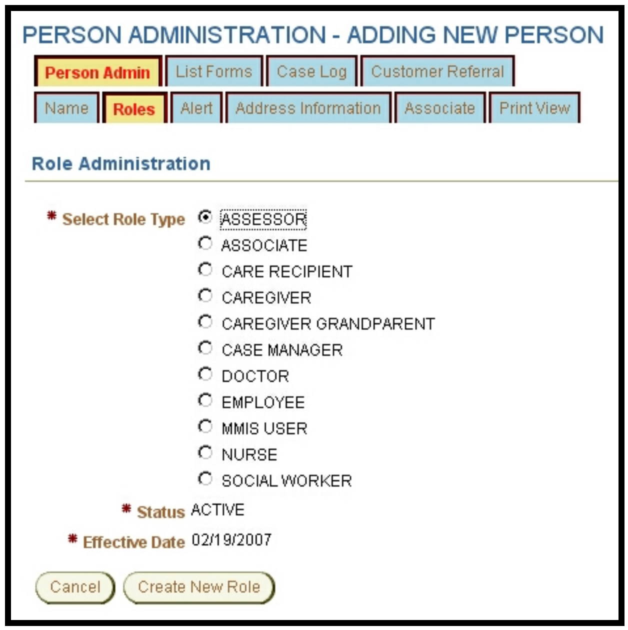


Step	Action	Results
2.	Click on **Create New Role** button.	Role Administration page will be displayed.

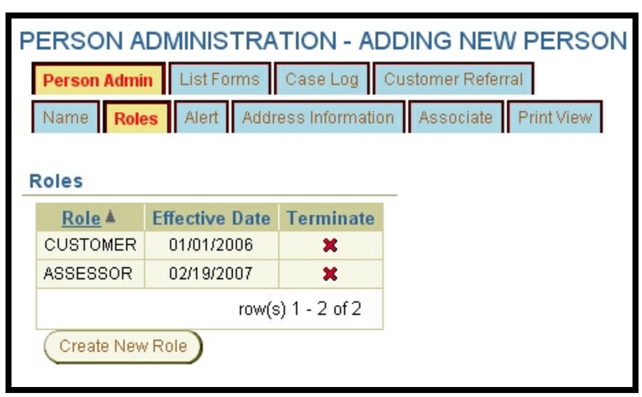
Continued on next page

How to (continued)

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



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



Alert

Introduction

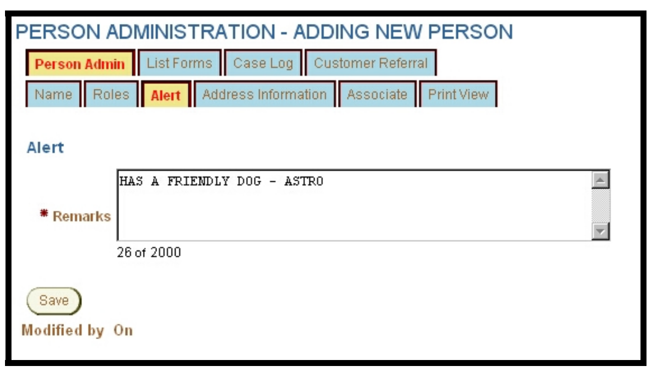
The alert is a tool to convey an immediate informational notice regarding a customer. After a search is done and the forms list is accessed for the person the alert will be displayed in red.

Important

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

How To

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

<table>
<tr><th>Step</th><th>Action</th><th>Results</th></tr>
<tr><td>1.</td><td>In the Alert Remarks field, complete the information that pertains to the customer.</td><td></td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>2.</td><td>Click on the Save button</td><td>Information is saved and the page is forwarded to the Address Information tab.</td></tr>
</table>

Adding Address Information

Introduction

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

Address Types

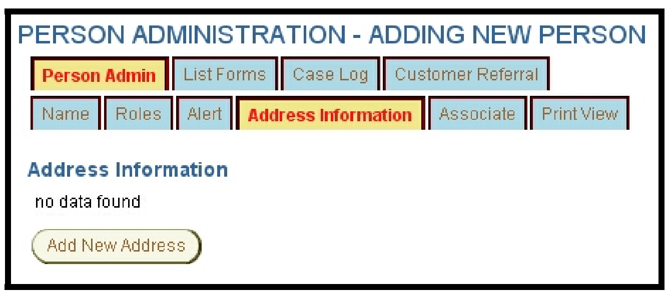
A person may have several different types of addresses.

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.

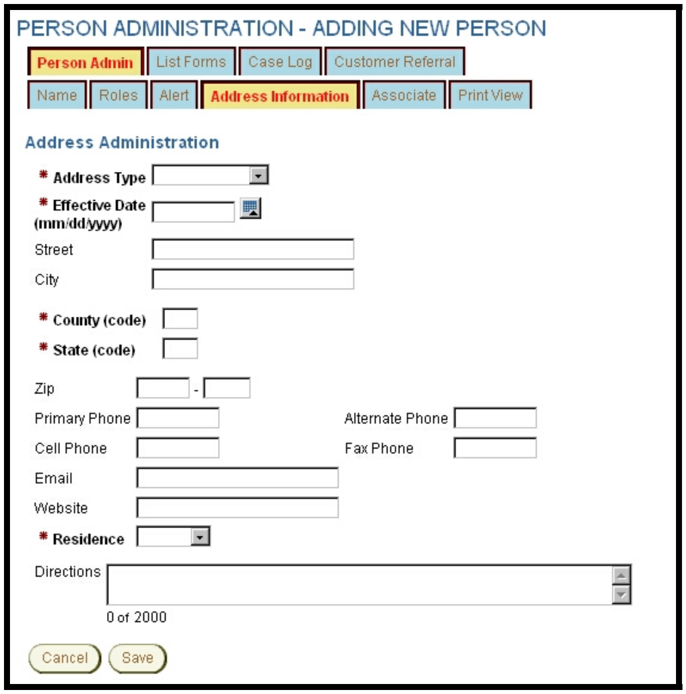


Continued on next page

Adding Address Information, Continued

How To (continued)

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

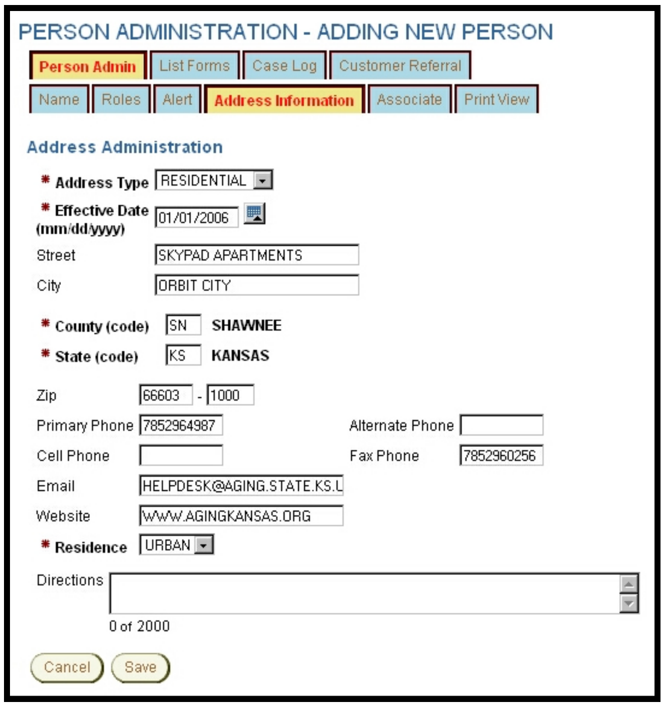


3.	Select **Address Type**.	Required field. The Residential address is required for all assessment forms.
4.	Enter **Address Effective Date**.	Required field
5.	Enter address details.	County and State fields are required.

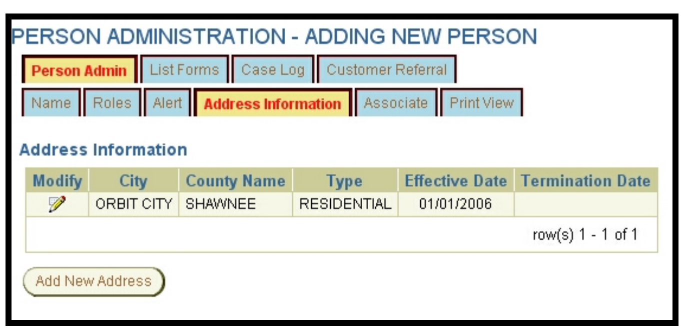
Continued on next page

How To (continued)

Step	Action	Results
6.	Verify that the correct option is selected in the **Residence** field.	Required field



Step	Action	Results
7.	Click on the **Save** button.	Page is returned to Address Information table.



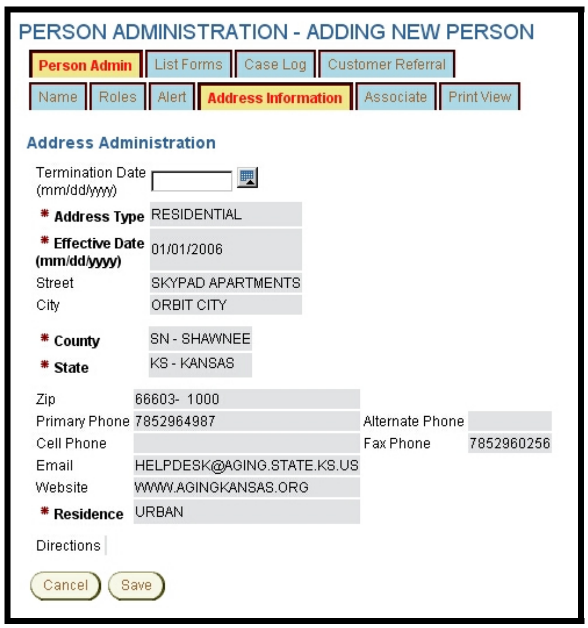
Updating Address Information

Introduction

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

How To

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

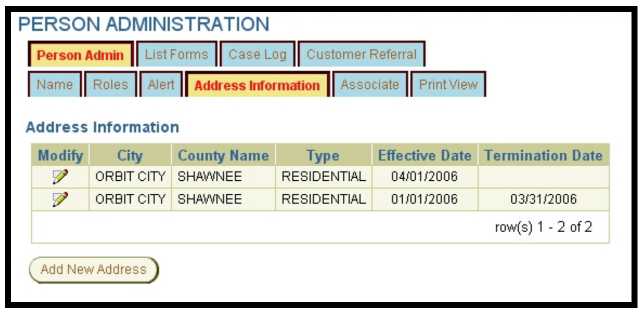
Step	Action	Result
1.	Click on the **Modify** icon next to the address to be terminated.	Address Administration page is displayed.
		
2.	Enter the **Termination Date**	

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.



Step	Action	Result
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

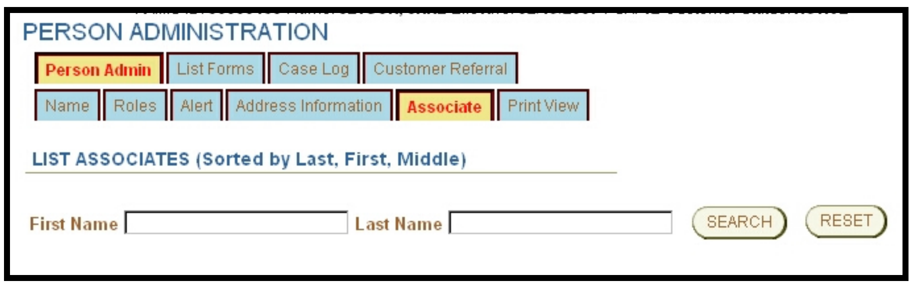
Available Associate Types	
Caller / Referred By	Friend / Acquaintance
Emergency Contact	Legal Guardian
Family Member	Present at Assessment
Financial Contact	Primary Caregiver
Financially Responsible	Primary Contact

Associate Search

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

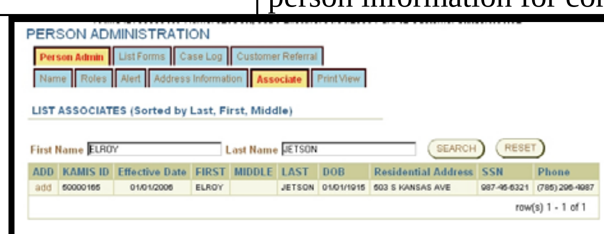
How To Follow the steps in the table below to search for an associate in KAMIS.

Step	Action	Results
1.	The **Associates** tab is active.	An Associate List table (if available) will be displayed along with the Search option.

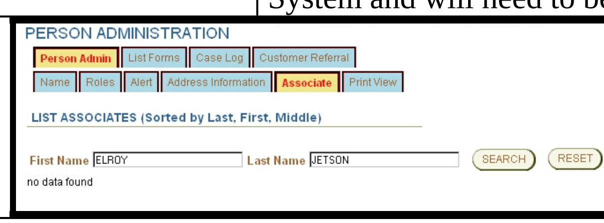


Step	Action	Results
2.	In the search area, enter in the name of the associate.	Use the same search requirements as in person search.
3.	Click on the **Search** button.	A search will be performed.

If	Then
Person is found	Table will be displayed with the person information for comparison.



If	Then
Person is not found	The person is new to the KAMIS System and will need to be added.



Person Not Found - Adding a New Person as an Associate

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

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

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

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

Adding an Associate to a Customer

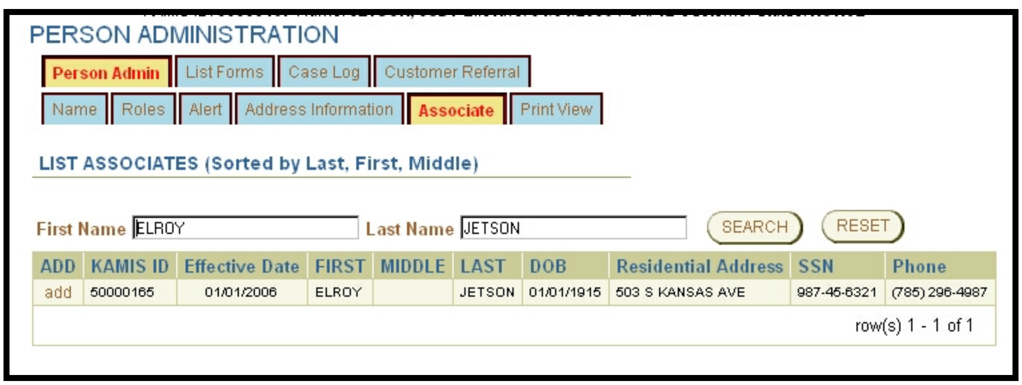
Introduction

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

How To

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

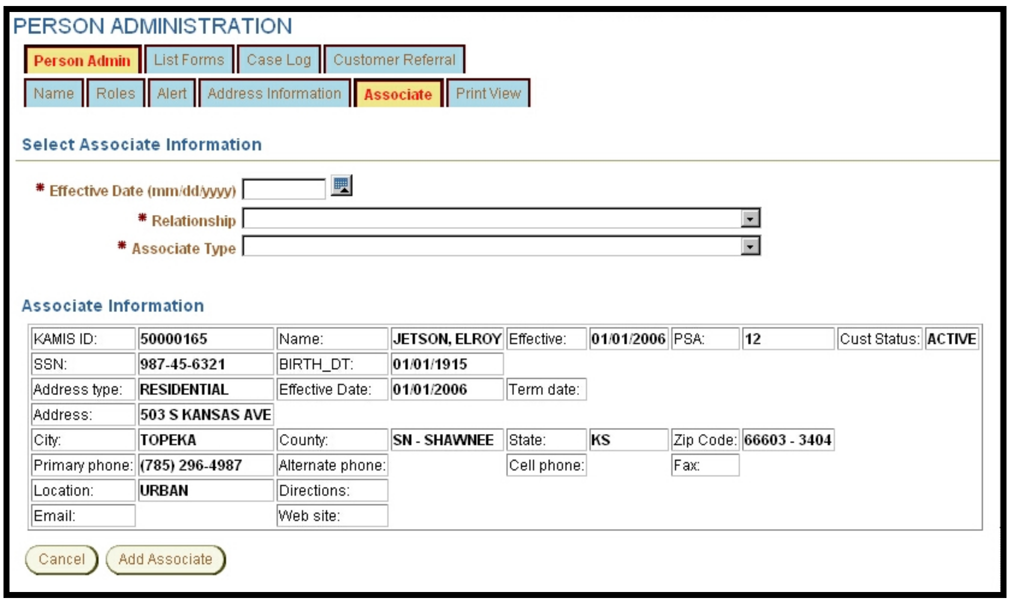
Step	Action	Results
1.	Customer's Person Administration page is displayed.	
2.	Click on the **Associate** navigation tab if not already displayed.	Associate page will be displayed.
3.	Complete the **Search** for Associate, if not already displayed.	Search Results table will be displayed.



Continued on next page

How To (continued)

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



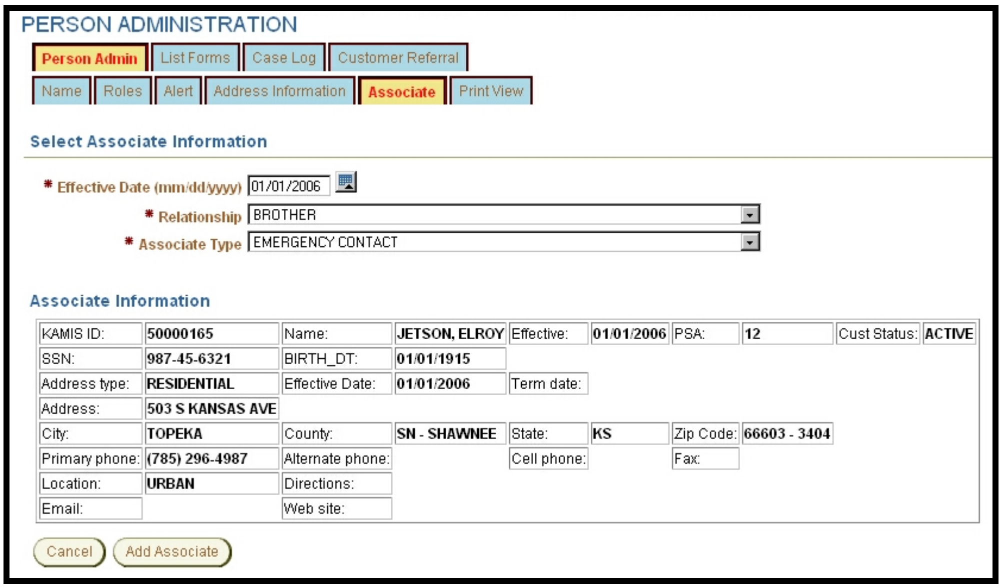
Step	Action	Results
5.	Enter the **Effective Date**	Required field
6.	Select **Relationship**	Required field
7.	Select **Associate Type**	Required field

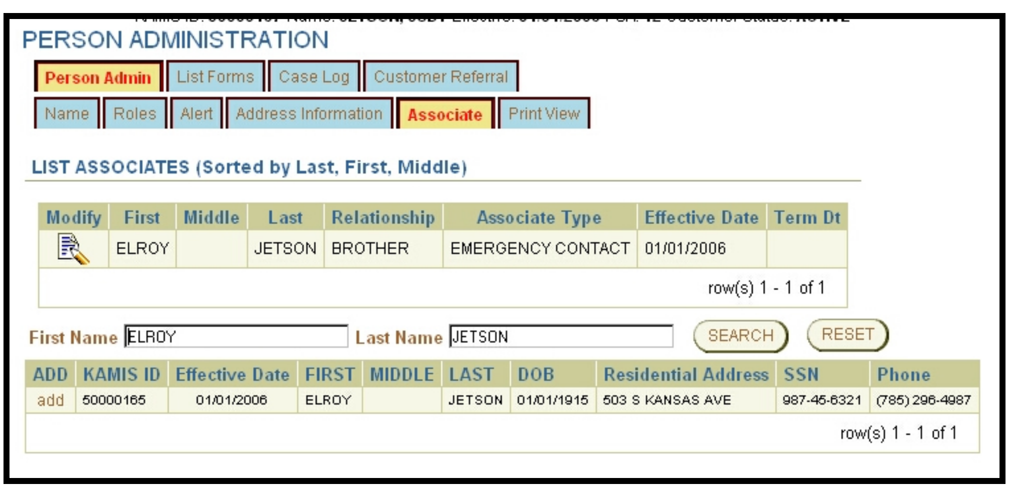
Continued on next page

Adding an Associate to a Customer, Continued

How To (continued)

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





Displaying Addresses for Associates

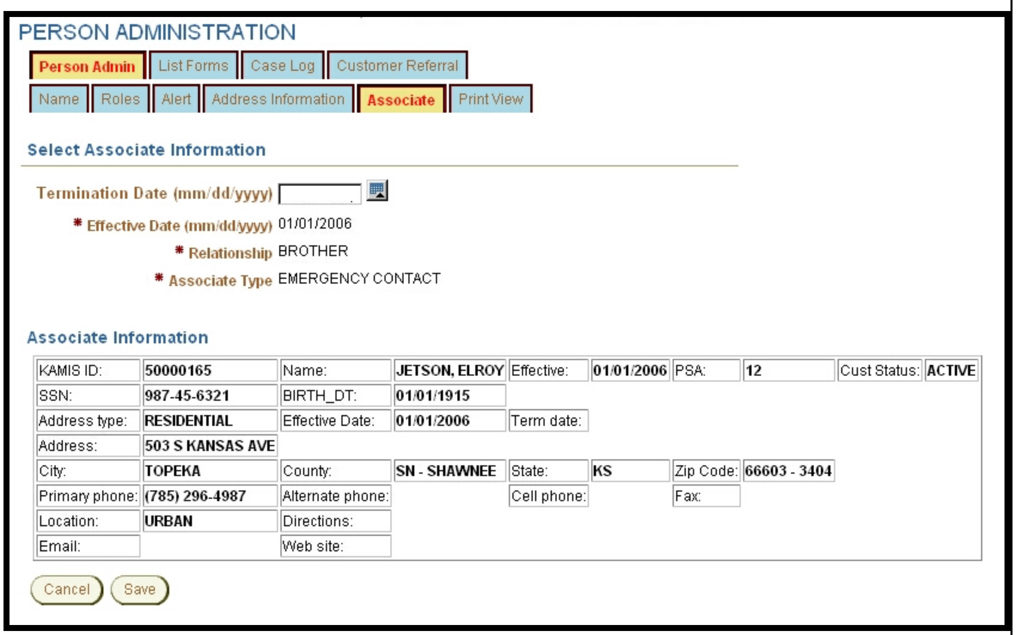
Introduction

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

How To

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

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


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:							

Cancel | Save

Terminating an Associate and Customer Association

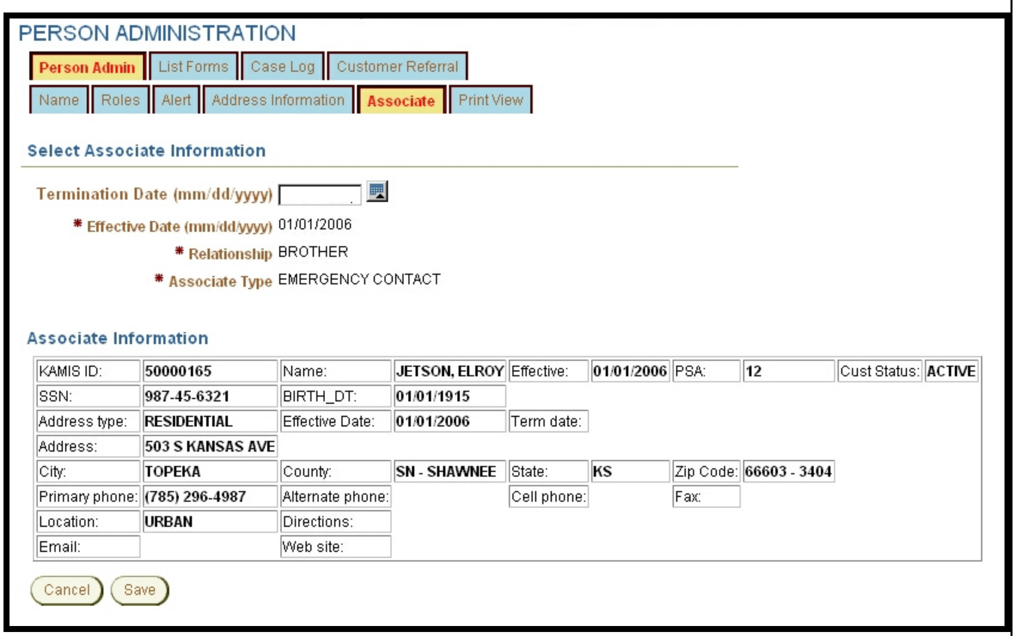
Introduction

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

How To

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

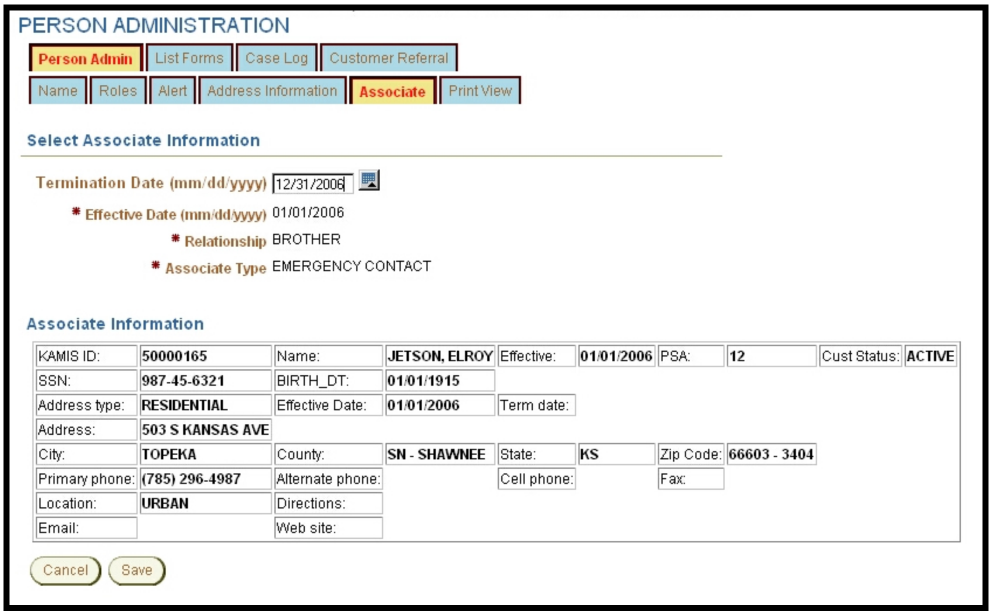
Step	Action	Result
1.	Click on the **Modify** icon next to the associate to be terminated.	Associate Information page is displayed.



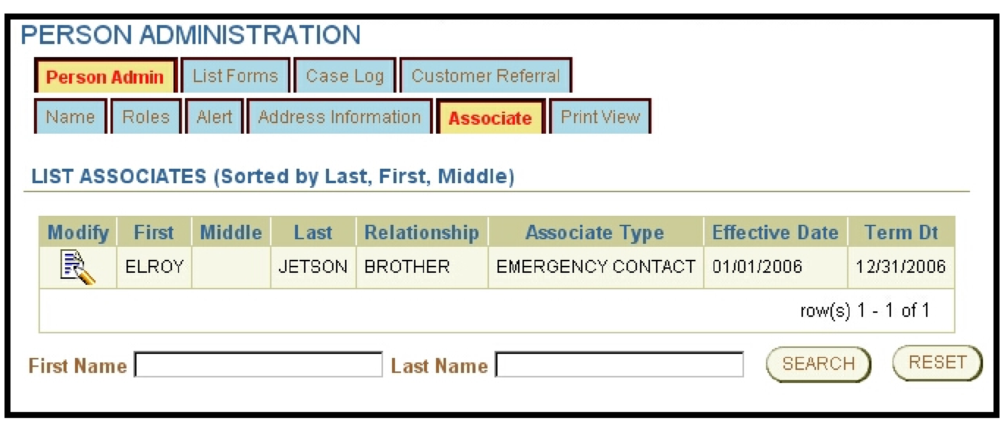
Continued on next page

How To (continued)

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



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



Changing a Person’s Status

Introduction

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

Important:

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

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

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

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

Open Service Line Items

HCBS/FE Funded services –

- Open end dates
- Future dated service line items

Other Funded services –

- Open discharge codes
- Future dated service line items

Switching a Customer back to Active

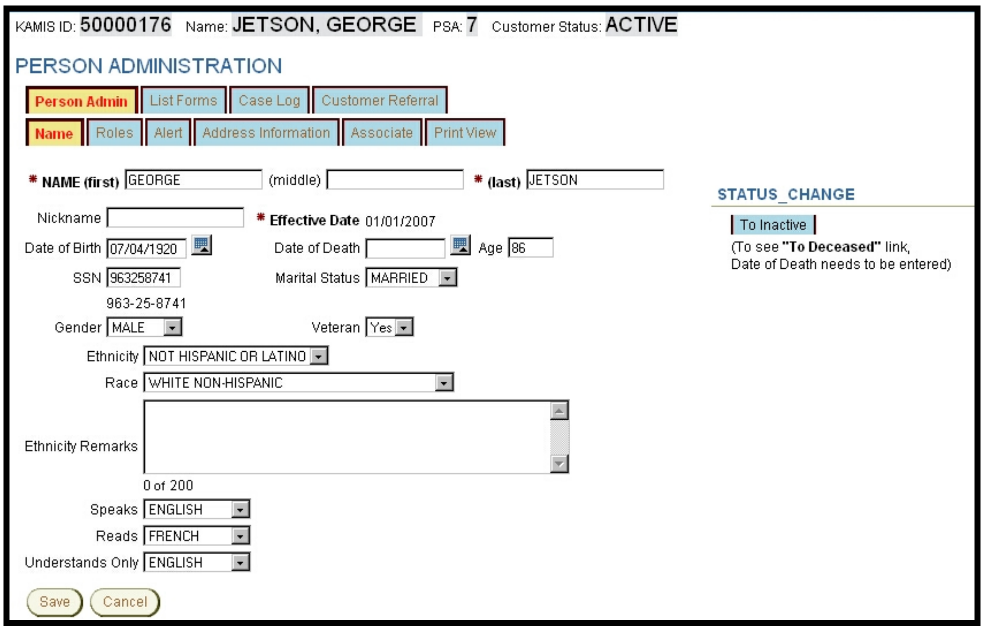
It is now an option to change a customer's status back to active from either the inactive or deceased status.

Changing a Customer's Status – Line Item Search

How To

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

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



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

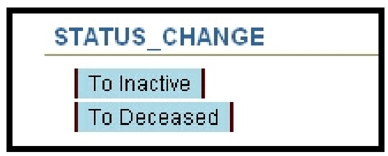
Continued on next page

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

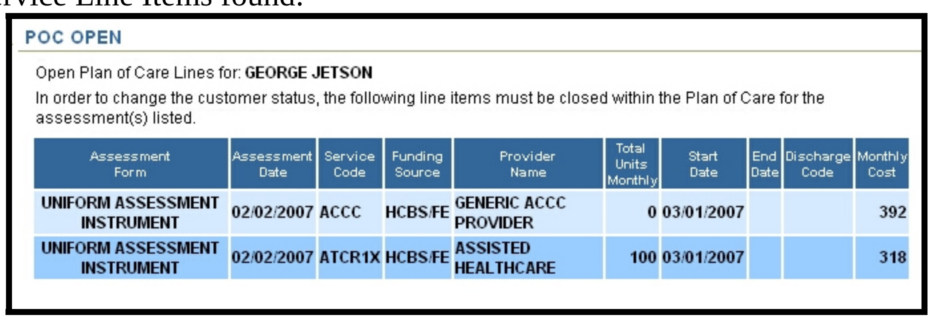
How To (continued)

Step	Action	Result

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



Service Line Items found:



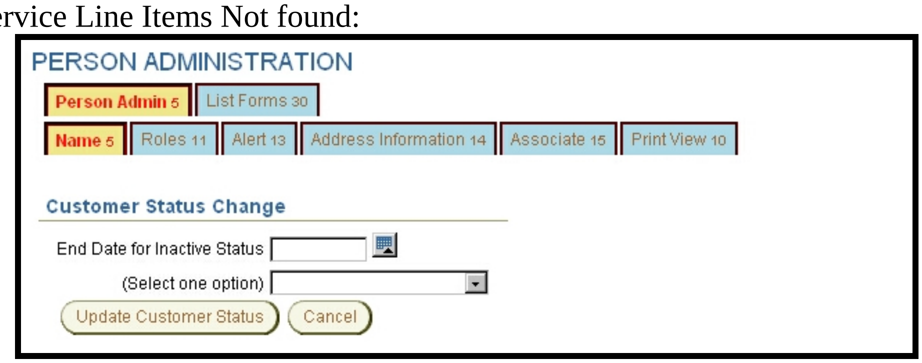
POC OPEN

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

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

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

Service Line Items Not found:



Changing a Customer's Status – Inactive

How To

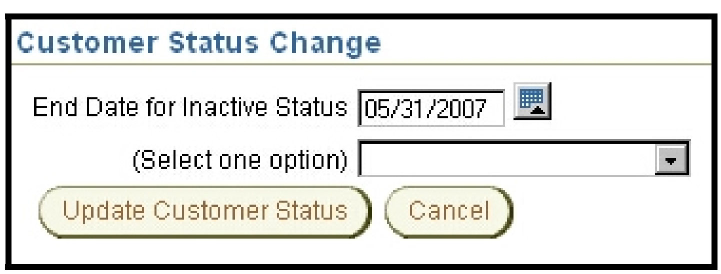
Follow the steps in the table below to change a customer's status to inactive in KAMIS through the Person Administration function.

Step	Action	Result
1.	Complete the line item system search.	Instructions in the previous section. One of two options will occur.

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.

Step	Action	Result
2.	There are three options for selection.	

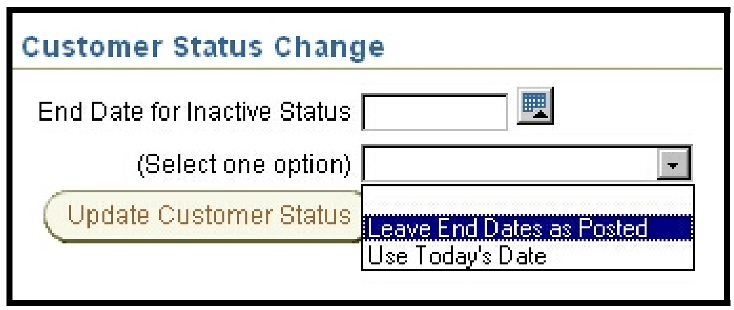
Option	Action
End Date for Inactive Status	Type in the date for the customer to be inactive. The end dates in all Plans of Care will change to that date.



Continued on next page

Changing a Customer's Status – Inactive, Continued

How To (continued)

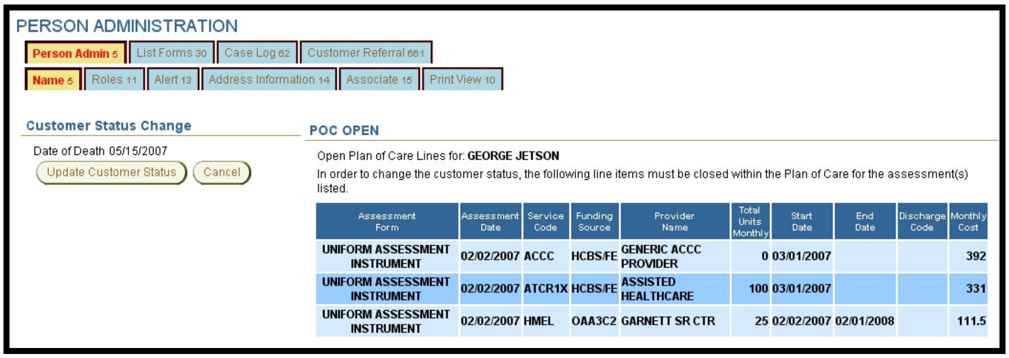
<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td></td><td colspan="2">
<table>
<tr><th>Option</th><th>Action</th></tr>
<tr><td>Leave End Dates as Posted</td><td>The end dates in all Plans of Care will remain unchanged.</td></tr>
<tr><td>Use Today's Date</td><td>The end dates in all Plans of Care will change to today's date.</td></tr>
</table>


</td></tr>
<tr><td>3.</td><td>Click on the Update Customer Status button.</td><td>The following will occur:
Customer status will be changed to inactive and reflect in the Customer Heading area.
The end dates on service line items that were past the entered date is changed.
The discharge code is changed to 25 in any service line item where the end date was changed.</td></tr>
<tr><td colspan="3">
</td></tr>
</table>

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.



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

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

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

How To

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

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

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

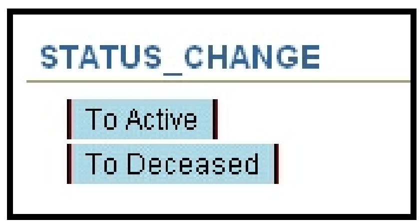
Change Customer Status to Active

How To

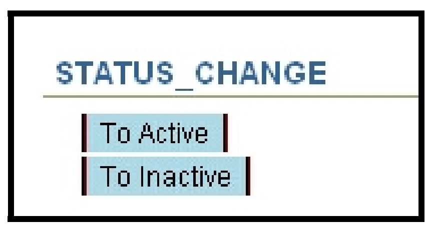
Follow the steps in the table below to change a customer's status back to active in KAMIS through Person Administration.

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

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



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



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

Continued on next page

How To (continued)

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

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

Continued on next page

How To (continued)

Step	Action	Result

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

Print View

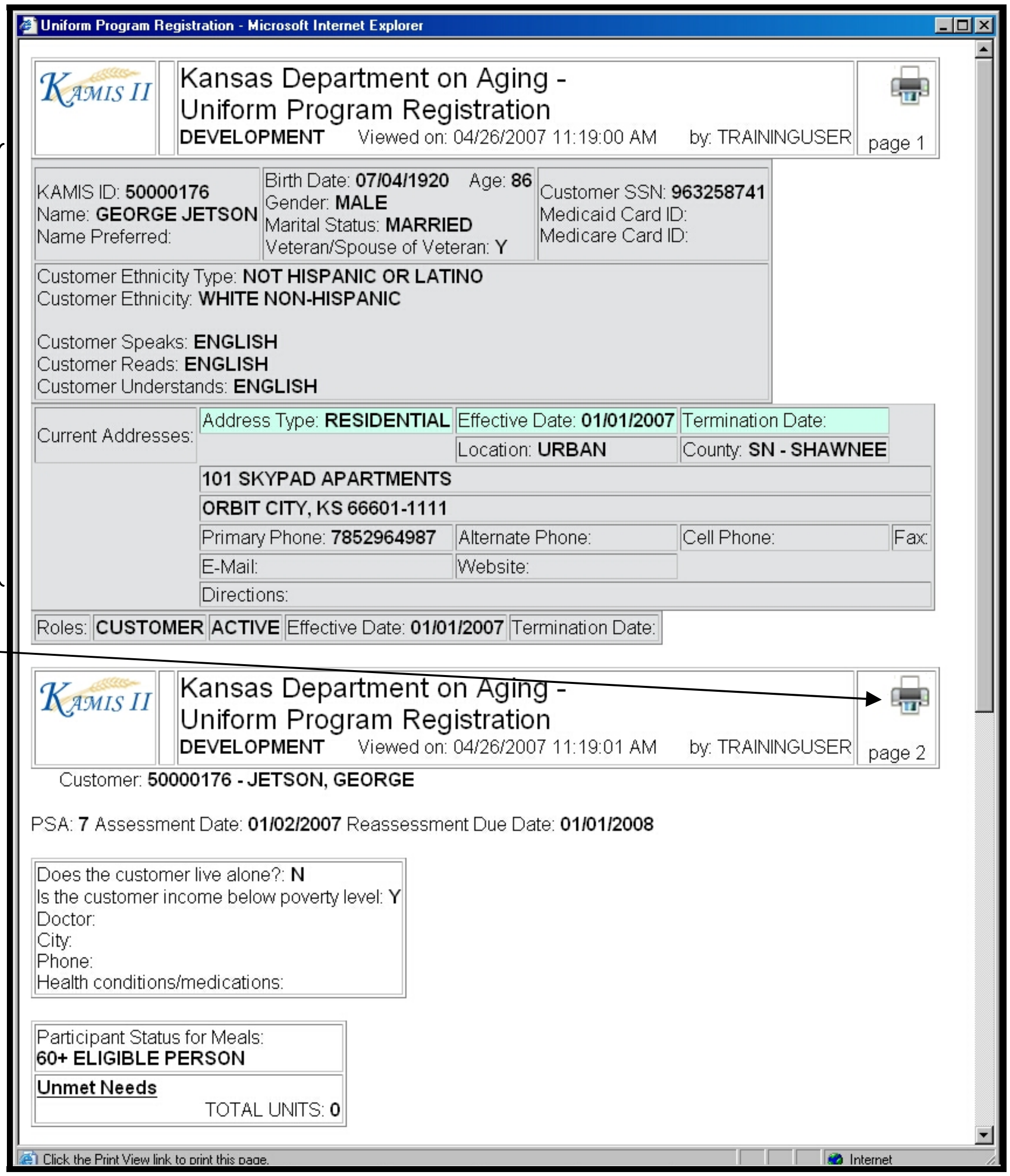
Form Reference

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

Print View

The grayed background area indicates the information is from Person Administration

When printing the pages will separate as indicated.


Uniform Program Registration - Microsoft Internet Explorer

KAMIS II

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

KAMIS ID: 50000176
Name: GEORGE JETSON
Name Preferred:
Birth Date: 07/04/1920 Age: 86
Gender: MALE
Marital Status: MARRIED
Veteran/Spouse of Veteran: Y
Customer SSN: 963258741
Medicaid Card ID:
Medicare Card ID:

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

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

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

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

KAMIS II

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

Customer: 50000176 - JETSON, GEORGE

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

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

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

Click the Print View link to print this page. Internet

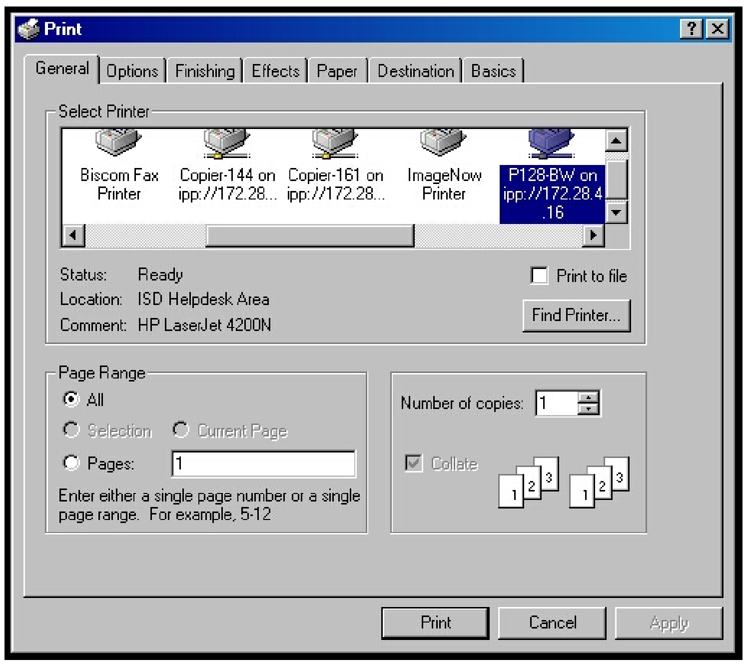
Continued on next page

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.)



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

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

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

To Close

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

Chapter 7 – Forms Selection

Table of Contents

Form Status

Introduction

All forms have a status.

Status

The table below lists the available form status and the purpose and use of each status:

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	All required fields are checked for completion. No changes can be made after the approved status is saved successfully. Allows payment to be released for processing in case of the POC and Care Assessments.
Incomplete - Follow-up Needed	Indicates that the form has been returned to the Assessor, Case Manager, etc. Information was illegible or incomplete. Enables the form to be saved without all the required fields completed.
Projected	Budget status
Submit for Approval	Form is ready to be approved. User does not have approval security rights.
Work In Progress	Indicates that the form is being worked. 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.

Requirement

Add or update all customer and associate information first before you begin.

How To

Follow the steps in the table below to select a form:

Step	Action	Result
1.	Locate customer through Person Search.	Customer is displayed.

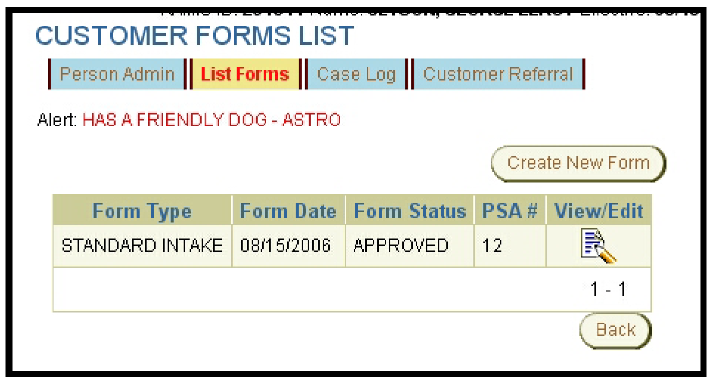
Continued on next page

Selecting a New Form, Continued

How To (continued)

Step	Action	Result
2.	In the Members Found table, in the appropriate customer row, Single click on the view form icon. 	If previously entered forms exist, a listing will be displayed. If forms do not exist, a message of no data form will be displayed.

Forms:



No Forms:

Continued on next page

Selecting a New Form, Continued

How To (continued)

Step	Action	Result
3.	Click on the **Create New Form**	In addition, all form options are displayed in the navigational panel.

Step	Action	Result
4.	Click on the button of the desired form.	Blank form will automatically open.

Selecting an Existing Form

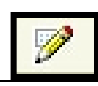
Introduction

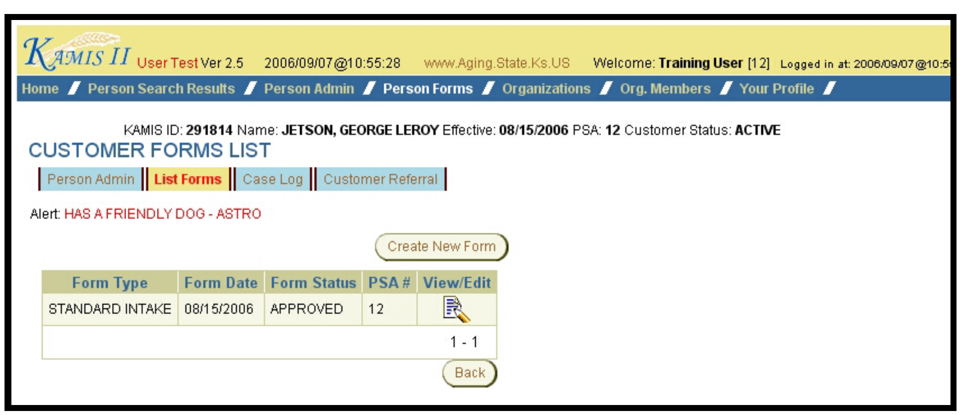
A form may be accessed at any time after it has been saved. However, if the form status is approved, no information can be changed.

How To

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

Step	Action	Result
1.	Locate customer through Person Search.	Customer is displayed.

Step	Action	Result
2.	In the Members Found table, in the appropriate customer row, Single click on the View/Edit icon. 	If previously entered forms exist, a listing will be displayed.



Continued on next page

Selecting an Existing Form, Continued

How To (continued)

Step	Action	Result
3.	Single click on the View/Edit icon. 	Form opens with previously entered information displayed. If the form is in the approved status, the fields will not be editable. If the form is in work in progress status, all the fields will be editable.

Selecting Care Level 1 - 30 Day and 90 Day Follow-up Forms

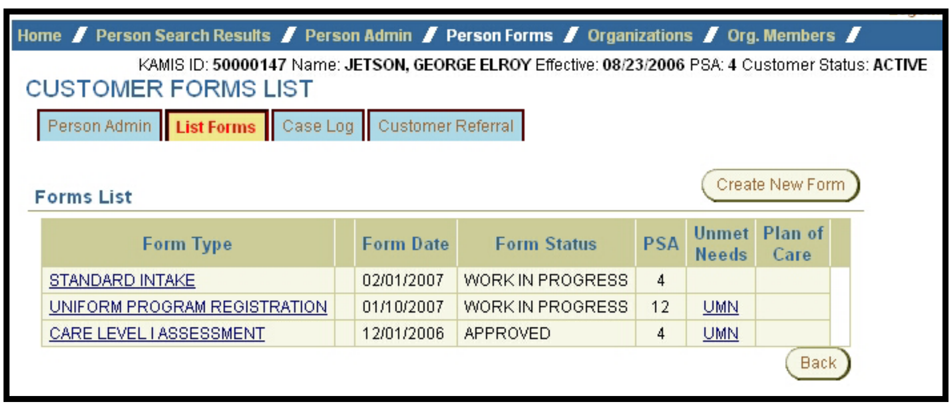
Introduction

Most forms can be accessed from the forms list dialog box, with the exception of the 30 and 90 Follow-up forms for Care Level I Assessments. The reason for this is that there needs to be an approved Care Level I Assessment form entered prior to the follow-up.

How To

Follow the steps in the table below to open a Care Level I 30 or 90 day Follow-up form:

Step	Action	Result
1.	Locate customer through Person Search.	Customer is displayed.
2.	Single click on the view form icon.	List of all forms associated to the customer will be displayed in the lower portion of the window.


Home / Person Search Results / Person Admin / Person Forms / Organizations / Org. Members /

KAMIS ID: **50000147** Name: **JETSON, GEORGE ELROY** Effective: **08/23/2006** PSA: **4** Customer Status: **ACTIVE**

CUSTOMER FORMS LIST

Person Admin | List Forms | Case Log | Customer Referral

Create New Form

Forms List

Form Type	Form Date	Form Status	PSA	Unmet Needs	Plan of Care
STANDARD INTAKE	02/01/2007	WORK IN PROGRESS	4		
UNIFORM PROGRAM REGISTRATION	01/10/2007	WORK IN PROGRESS	12	UMN	
CARE LEVEL I ASSESSMENT	12/01/2006	APPROVED	4	UMN	

Back

Step	Action	Result
3.	In the Forms List table, locate the CARE Level I Assessment. Single click on the form link.	The assessment form will be displayed. The 30 day or 90 day form options are displayed at the bottom of the form.

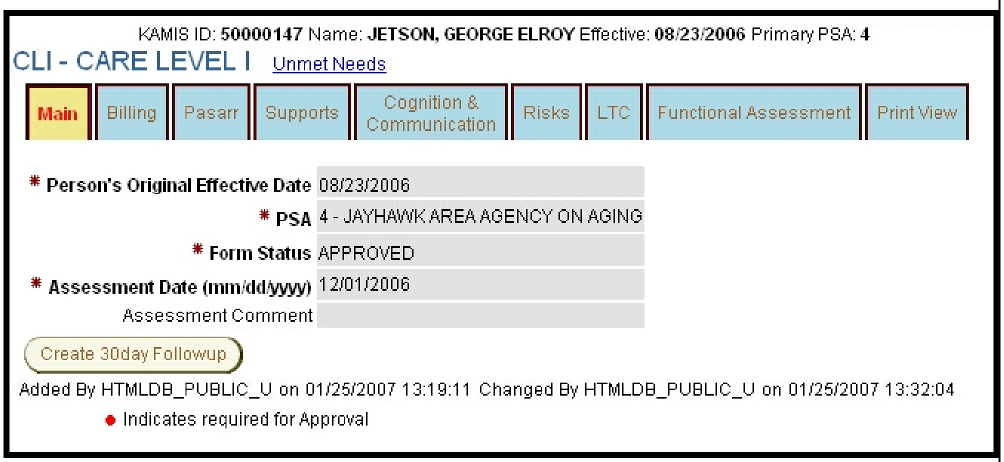
Continued on next page

Selecting Care Level 1 - 30 Day and 90 Day Follow-up Forms,
Continued

How To (continued)

Step	Action	Result
4.	Select the desired Follow-Up Form link.	Opens blank form.

30 Day Follow-Up:



90 Day Follow-Up:

Note: The 30 day follow-up button will not display unless the CARE Assessment form is in approved status. Likewise, the 90 day follow-up button will not display if a 30 day follow-up does not exist.
