Department of Human Services

Client Information and Payment System (CIPS)

Learner Workbook

Education/Training and Organizational Development Area

June 1, 2015

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Objectives

By the end of the module, learners will be able to:

- ☐ Access the system.
- ☐ Navigate the Home page.
- ☐ Navigate from a Splash screen.
- ☐ Access and use the Notification Pane.
- ☐ Perform client searches.
- ☐ Review client results.
- ☐ Complete and review client demographics.
- ☐ Review and complete the MCI Clearance screen.
- ☐ Review diagnosis list and information screens.
- ☐ Complete and review client education and employment information.
- ☐ Complete and review client income information.
- ☐ Complete and review client insurance information.
- ☐ Complete and review client living arrangements.
- ☐ Review and alter your current involvement with a client.
- ☐ Complete and review client relationships.
- ☐ Review service history for the client.
- ☐ Review or complete service offering information for a client.
- ☐ Review provider service offerings.
- ☐ Review the clients authorized for a service.
- ☐ Complete and review Services Rendered screen.
- ☐ Review involvement with a client.
- ☐ Generate reports.

Module Outcomes

By the end of the module, learners will understand:

- [ ] Use the *Client Information and Payment System* (CIPS).

Unit 1: Login

After finishing this unit learners will be able to:

- Access the system.
- Navigate the Home page.
- Navigate from a Splash screen.
- Access and use the *Notification Pane*.

Unit 1: Login

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Accessing

1. Access the training environment, using the internet and the following url:

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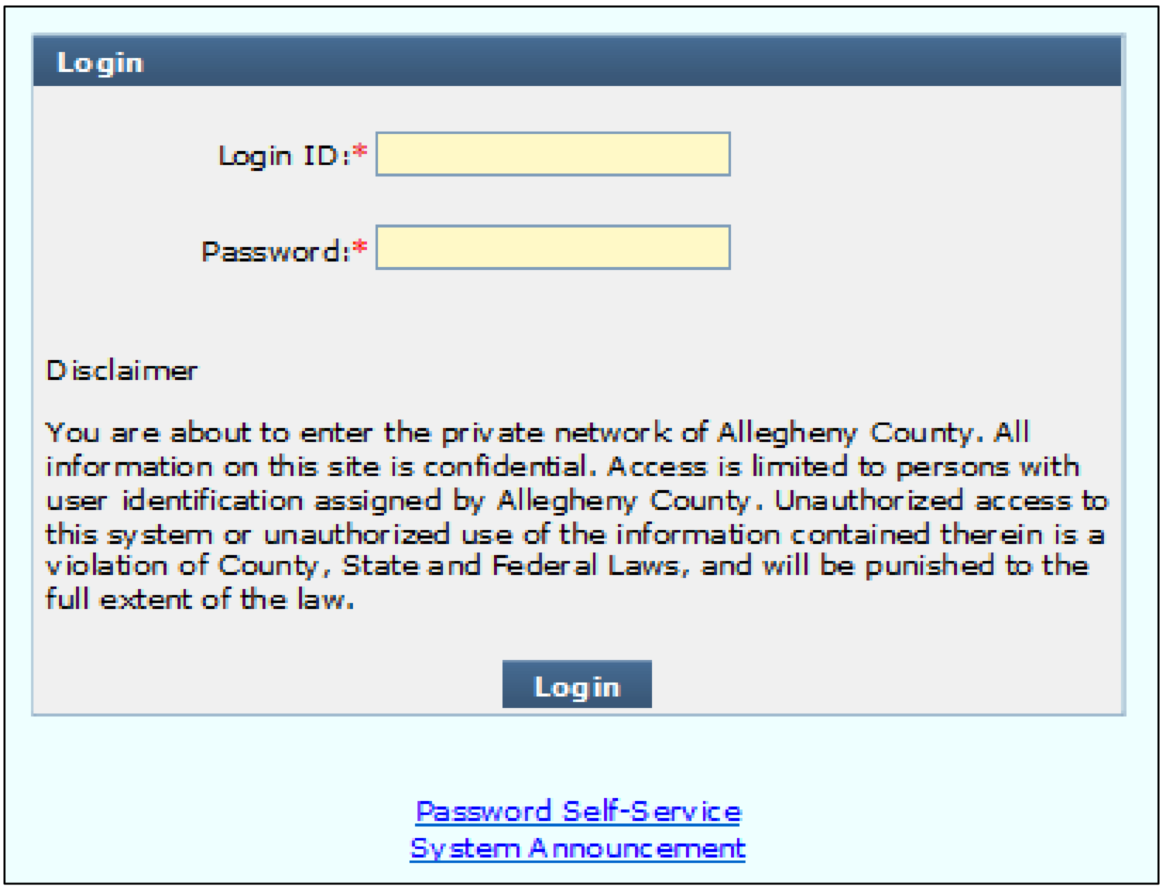
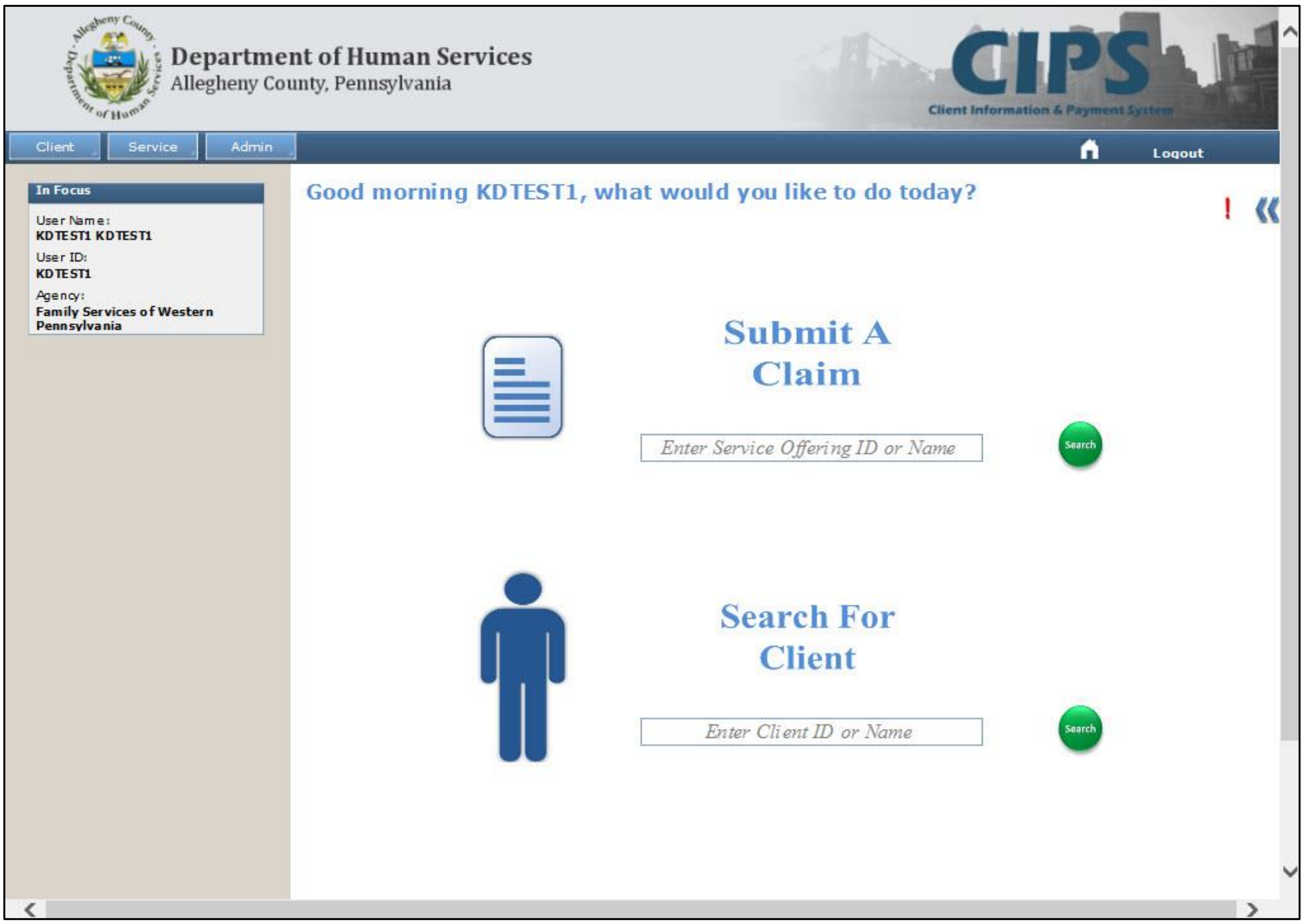
2. Type in the training login ID assigned to you.
3. Type in your training password.



Home

This screen is accessed by logging into the system or by clicking the home icon.

- Screen Overview
  1. **Submit A Claim:** Can enter a service offering ID or name.
     - **Search:** Opens the *Services Rendered Authorized Client List*
  2. **Search For Client:** Can enter a client name or ID.
     - **Search:** Opens the client search and result screen.
  3. **Alert Indicator**
     - **!:** Appears if there are one or more alerts in the notification pane. Opens the right navigation/notification pane.
     - **«:** Opens the right navigation/notification pane.



Unit 1: Login

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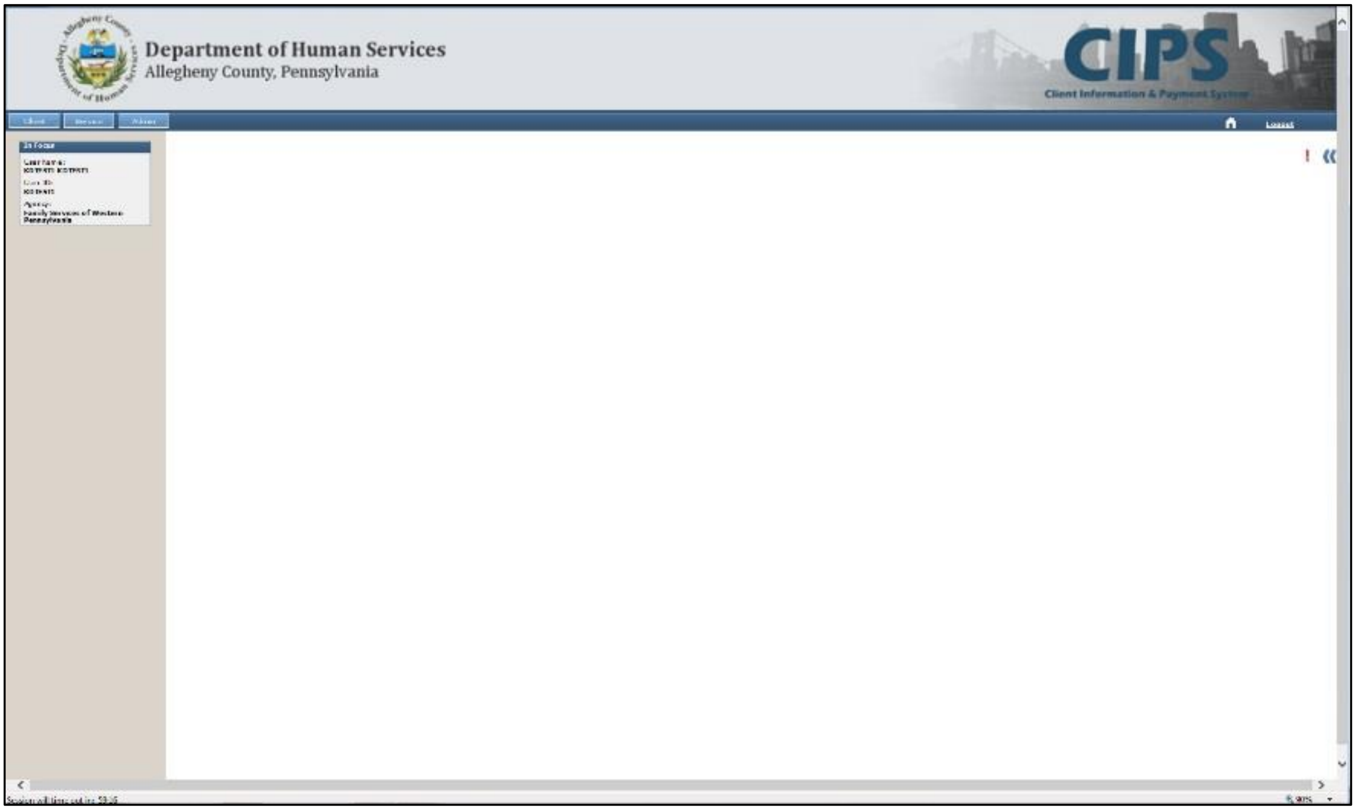
Splash Screen

The *Splash* screen is a blank screen.

Navigation:

1. Click the ***[Cancel]*** button on any screen.



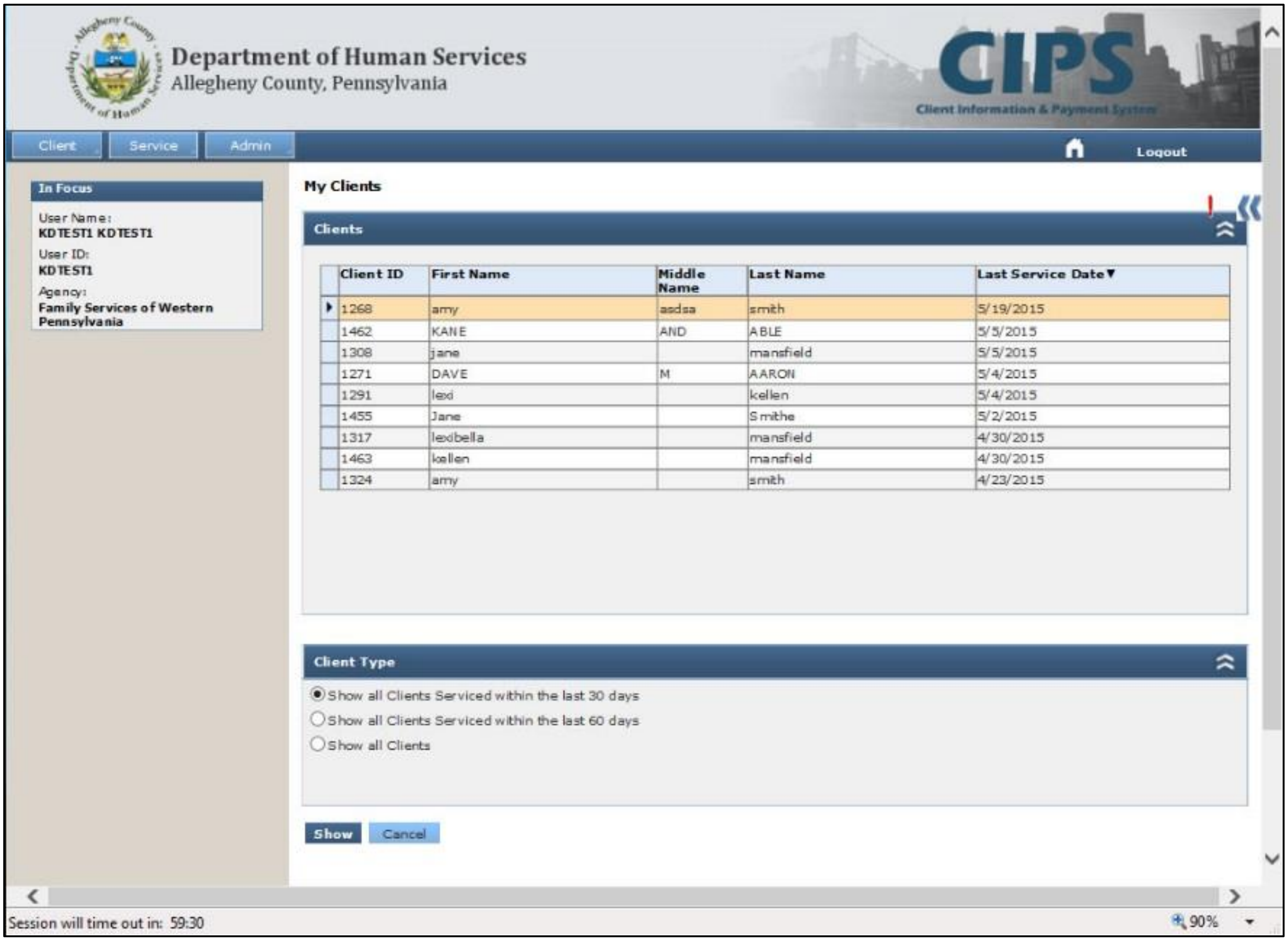
Notification Pane

Contains alerts and access to the *My Active Clients, Services Rendered List, Batch Files* and *Service Desk* screen.

- Navigation Pane
  1. **Alert Indicator**
     - **!:** Appears if there are one or more alerts in the notification pane. Opens the right navigation/notification pane.
     - **»:** Closes the right navigation/notification pane.
  2. **My Clients:** Opens the *My Clients* screen.
  3. **My Claims:** Opens the *Services Rendered List* screen.
  4. **Batch Files:** Opens the *Batch Files* screen.
  5. **Service Desk:** Opens an email addressed to the Service Desk.
  6. **Notifications:** Shows alerts for the signed in user.
  - **On Hold Records (Warning):** Indicates the number of records in that status.
  - **CCRI Information (Warning):** Indicates the number of records missing CCRI information.
  - **Diagnosis Deferred (Warning):** Indicates the client has a status of, "deferred diagnosis".
  - **Open Involvement with clients without service for past 2 years (Warning):** Indicates the number of records in this status.

My Clients

Provides users a listing of active serviced clients.



- Clients grid
  1. **Client ID:** Displays the system generated identification number for the client.
  2. **First Name:** Displays the given name for the client.
  3. **Middle Name:** Displays the secondary name for the client, if applicable.
  4. **Last Name:** Displays the surname for the client.
  5. **Last Service Date:** Displays the maximum services rendered start date for the client.

- Client Type section
  1. **Show all Clients Serviced within the last 30 days:** Only displays records with service records 30 days or less.
  2. **Show all Clients Serviced with the last 60 days:** Only displays records with service records 60 days or less.
  3. **Show all Clients:** Displays all clients that have service records with the provider.

- Buttons
  - **[Show]:** Opens the *Client Registration* screen for the highlighted client.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

My Claims
Will take you to the *Services Rendered List* screen. See page 3.6.

Batch Files
Will take you to the *Batch Files* screen. See page 4.1.

Service Desk
Opens your email and creates a properly addressed email.

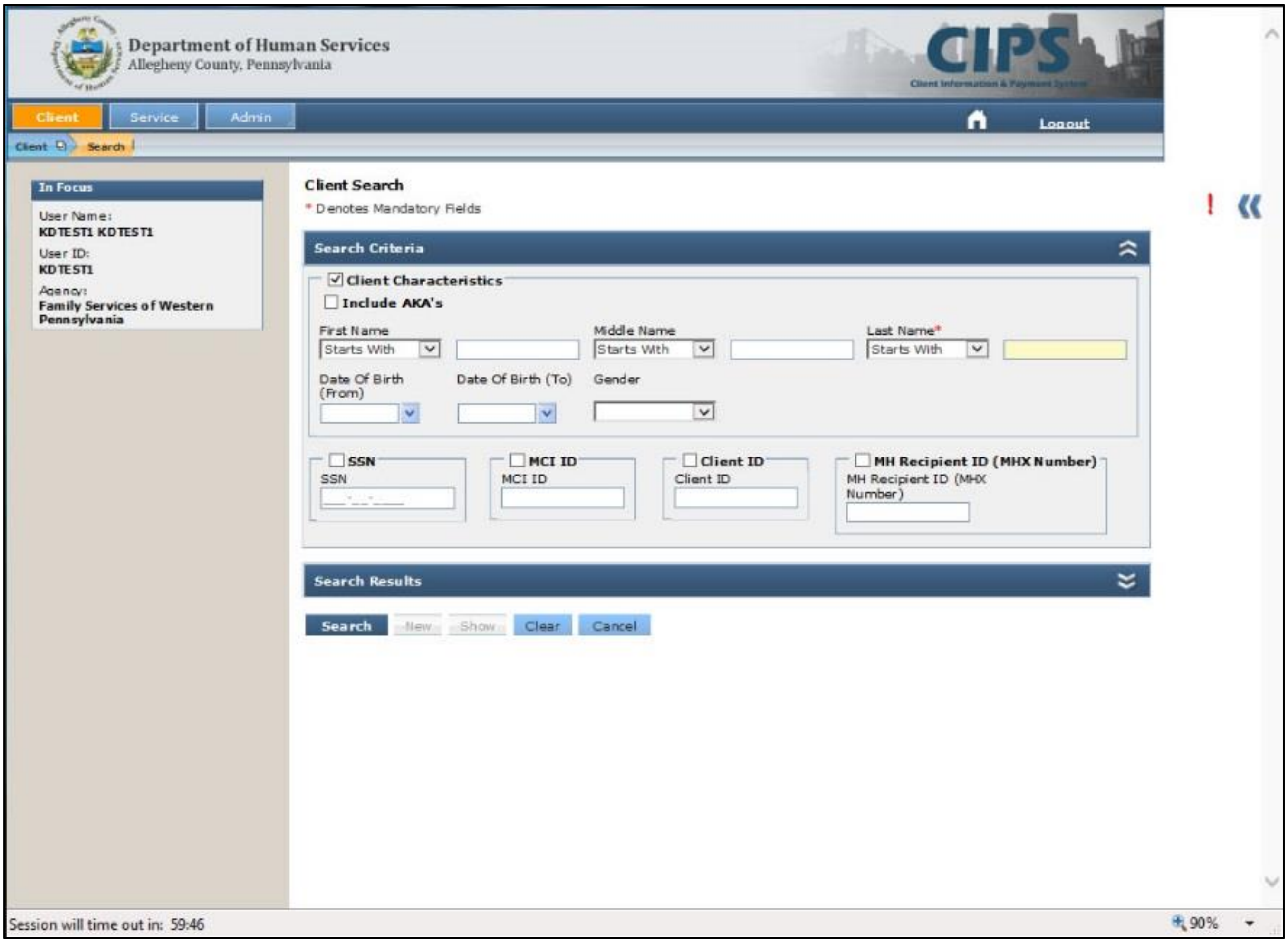
Unit 2: Client

After finishing this unit learners will be able to:

- Perform client searches.
- Review client results.
- Complete and review client demographics.
- Review and complete the *MCI Clearance* screen.
- Review diagnosis list and information screens.
- Complete and review client education and employment information.
- Complete and review client income information.
- Complete and review client insurance information.
- Complete and review client living arrangements.
- Review and alter your current involvement with a client.
- Complete and review client relationships.
- Review service history for the client.
- Review or complete service offering information for a client.

Client Search

Provides the ability to search for clients using various search criteria.



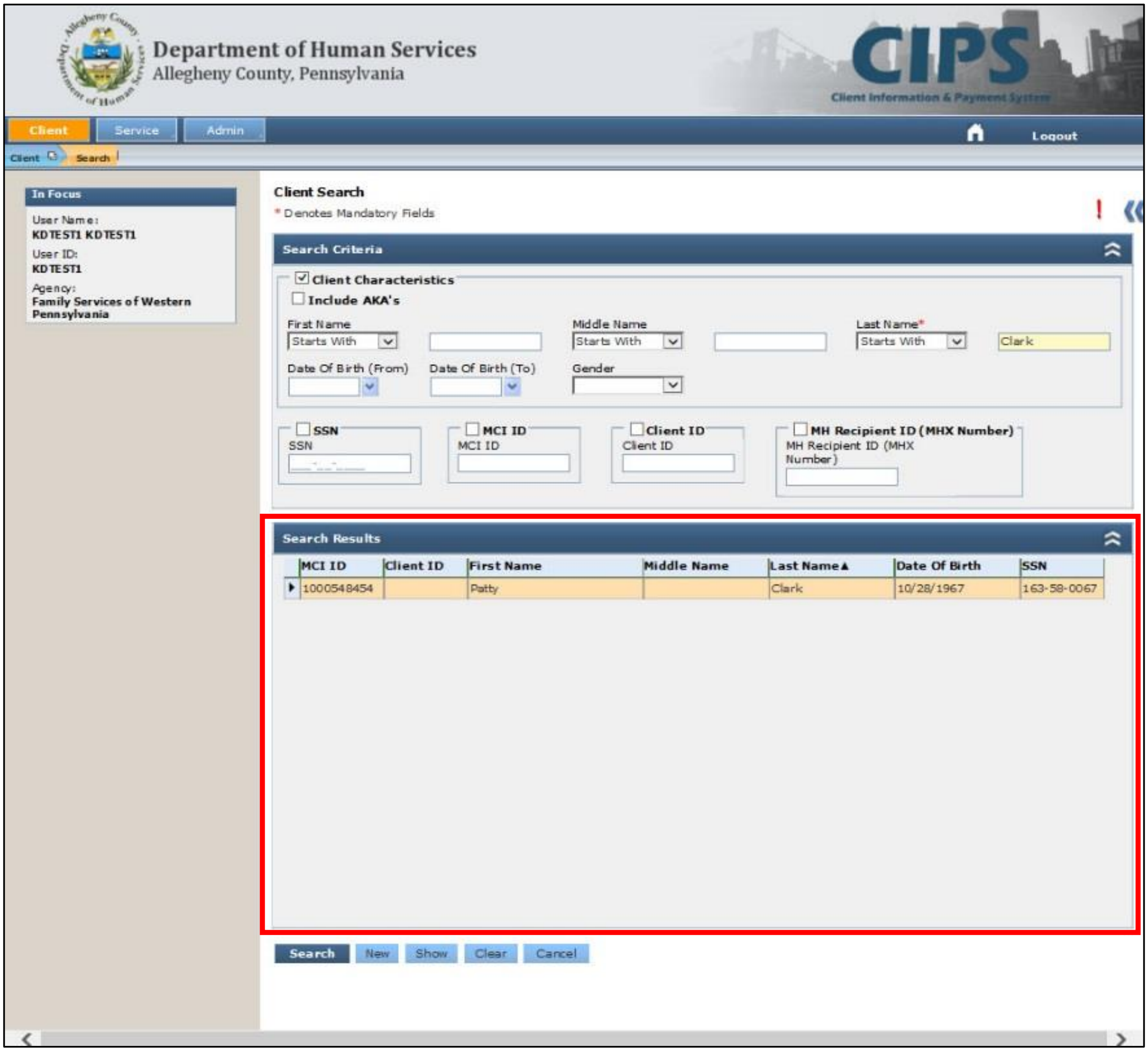
Navigation:
1. ***Client > Search***

Note: It is recommend that you search first using the client's social security number.

- Search Criteria section
  1. **Client Characteristics (check box):** Complete all known fields.
     - **Include AKA's (check box):** Check to include alias name records in the search results.
     - **First Name:** Select a filter.
       a. Starts With = Allows for partial name searches.
       b. Sounds Like = Allows for phonetic searches.
       c. Is = Allows for exact match searches.
     - **First Name <text box>:** Type the client's first name, if applicable.
     - **Middle Name:** Select a filter.
       a. Starts With = Allows for partial name searches.
       b. Sounds Like = Allows for phonetic searches.
       c. Is = Allows for exact match searches.
     - **Middle Name <text box>:** Type the client's secondary name, if applicable.
     - **Last Name:** Select a filter.
       a. Starts With = Allows for partial name searches.
       b. Sounds Like = Allows for phonetic searches.
       c. Is = Allows for exact match searches.
     - **Last Name <text box>:** Type the client's surname. This is a mandatory field.
     - **Date of Birth (From):** Enter or select a beginning date range for the birth date from the drop down menu.
     - **Date of Birth (To):** Enter or select an ending date range for the birth date from the drop down menu.
     - **Gender:** Select an orientation from the drop down menu.
  2. **SSN (check box):** Check to search by the client's social security number.
     - **SSN <text box>:** Type the client's 9 digit social security number.
  3. **MCI ID (check box):** Check to search by the client's Master Client Index number.
     - **MCI ID <text box>:** Type the Master Client Index number for the client.
  4. **Client ID (check box):** Check to search by the client's system generated number.
     - **Client ID <text box>:** Type the client identification number for the client.
  5. **MH Recipient ID (MHX Number) (check box):** Check to search by the client's mental health identification number.
     - **MH Recipient ID (MHX Number) <text box>:** Type the mental health identification number for the client.

Client Search results

Search Results section: Will populate with results once a search is conducted.



<u>Navigation:</u>

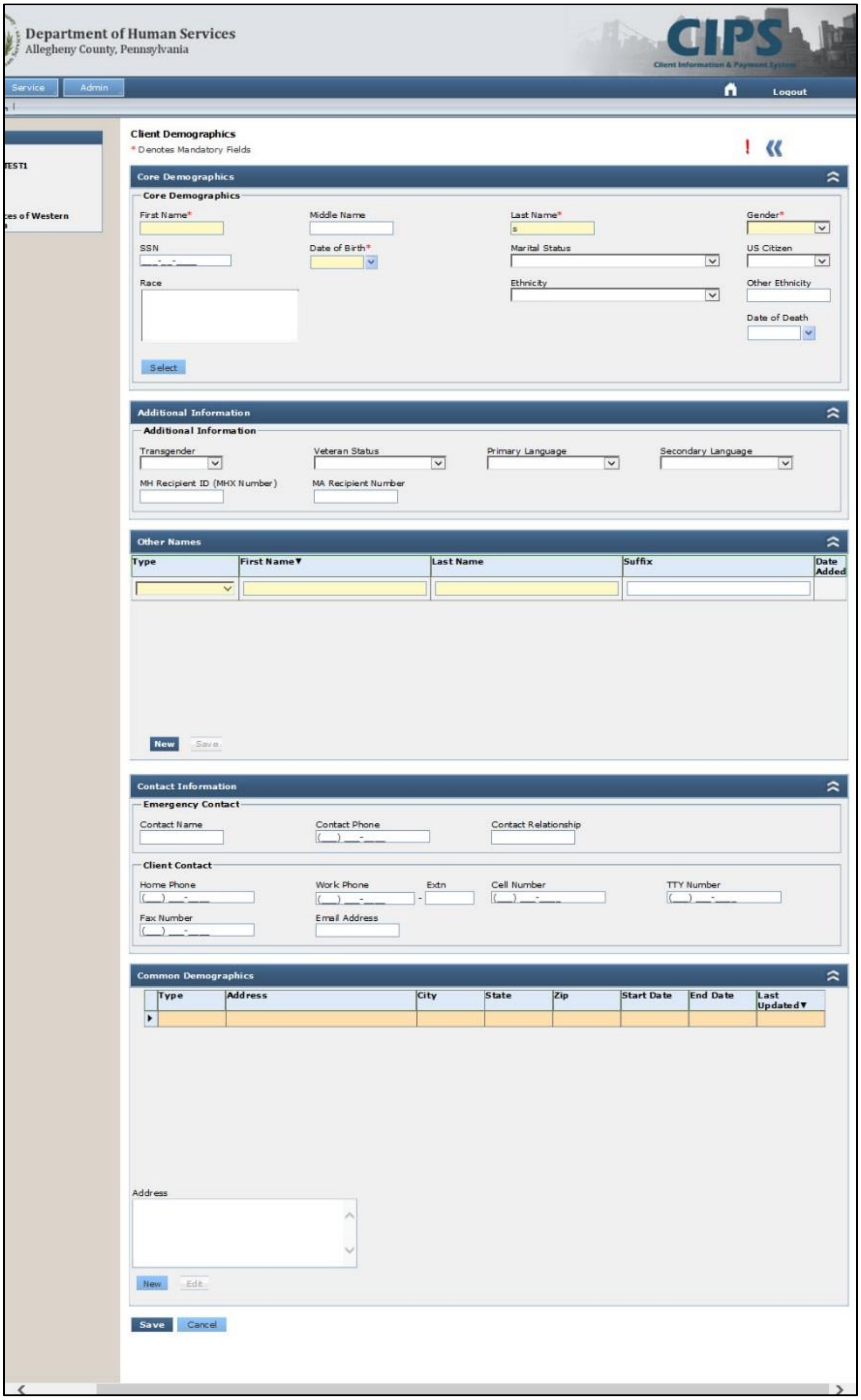
1. Complete the *Client Search* screen and click the **[Search]** button.

- Search Results section
  1. Grid:
     - **MCI ID:** Displays the Master Client Index number for the client.
     - **Client ID:** Displays the system generated identification number for the client.
     - **First Name:** Displays the client's first name.
     - **Middle Name:** Displays the client's secondary name.
     - **Last Name:** Displays the client's surname.
     - **Date of Birth:** Displays the birthdate for the client.
     - **SSN:** Displays the social security number for the client.

- Buttons
  - **[Search]:** Searches the system for a record matching the entered criteria.
  - **[New]:** Disabled until search results appear. Navigates to the *Client Registration* screen when results are present.
  - **[Show]:** Disabled until search results appear. Navigates to the *Client Registration* screen for the highlighted record.
  - **[Clear]:** Clears the selected search criteria.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Client Demographics

Allows new clients to be registered and displays demographic information for existing clients.



Navigation:

1. ***Client > Demographics***

- Core Demographics section
  1. **First Name:** Type a new client's given name. Will display the given name for an existing client. This is a mandatory field.
  2. **Middle Name:** Type a new client's secondary name, if applicable. Will display the secondary name for an existing client, if applicable.
  3. **Last Name:** Type a new client's surname. Will display the surname for an existing client. This is a mandatory field.
  4. **Gender:** Select a gender for a new client. Will display a gender for an existing client. This is a mandatory field.
  5. **SSN:** Type the social security number for the new client, if known. May display the number for an existing client, if it was input
  6. **Date of Birth:** Enter or select a birthdate for a new client. Will display the birthdate for an existing client. This is a mandatory field.
  7. **Marital Status:** Select a relationship standing for a new. May display a relationship standing for an existing client.
  8. **Us Citizen:** Select a status for a new client. May display a status for an existing client.
  9. **Race:** Select a nationality for a new client. May display a nationality for an existing client.

Note: The *Race* field is activated by using the **[Select]** button below it.

Completing the *Race* field.
Complete the **Mulit-Select Race** pop up box:

1) Select a race from the *Available Values* list.
2) Press the double right pointing arrow, in the middle of the pop up. The selection(s) will appear in the *Selected Values* column.
3) Click the **[Ok]** button.

Note: The same method can be used in reverse to remove items for the *Selected Values* field and return them to the *Available Values* field. Use the double left arrow to remove them.

The **[Cancel]** button will close the pop up screen without making changes.

10. **Ethnicity:** Select a race origin for a new client. May display a race origin for an existing client.
    - Not Hispanic, Latino or Spanish Origin
    - Did Not Ask
    - Mexican, Mexican American, Chicano
    - Puerto Rican
    - Cuban
    - Another Hispanic, Latino or Spanish Origin
    - Declined to Answer
11. **Other Ethnicity:** Type in an origin for a new client, when *Another Hispanic, Latino or Spanish Origin* is selected from the previous list. May display an origin for an existing client.
12. **Date of Death:** Enter or select a date of passing for a new client. May display a date of passing for an existing client.

- Additional Information section
  1. **Transgender:** Select an answer from the drop down list, for a new client. May display an answer for an existing client.
  2. **Veteran Status:** Select a status for a new client. May display a status for an existing client.
  3. **Primary Language:** Select a native tongue for a new client. May display the native tongue for an existing client.
  4. **Secondary Language:** Select a known language for a new client. May display a known language for an existing client.
  5. **MH Recipient ID (MHX Number):** Type the mental health number for a new client. May display a mental health number for an existing client.
  6. **MA Recipient Number:** Type the medical assistance number for a new client. May display a medical assistance number for an existing client.
- Other Names section
  1. **Type:** Select an alias name category for a new client. Will display a category for an existing client. This is a mandatory field.
  2. **First Name:** Type a given alias name for a new client. Will display a given name for an existing client. This is a mandatory field.
  3. **Last Name:** Type a surname for a new client. Will display a surname for an existing client. This is a mandatory field.
  4. **Suffix:** Type a name ending for a new client. May display an ending for an existing client.
  5. **Date Added:** Displays the date the alias name record was created.

Note: The date will populate after the **[Save]** button will has been activated.

- Buttons
  - **[New]:** Click to add an alias name for the client.
  - **[Save]:** Preserves the alias name information.

- Contact Information section
  1. Emergency Contact:
     - **Contact name:** Type a full name for a new client. May display a full name for an existing client.
     - **Contact Phone:** Type a phone number for a new client. May display a phone number for an existing client.
     - **Contact Relationship:** Type a connection type for a new client. May display a connection type for an existing client.
  2. Client Contact:
     - **Home Phone:** Type a contact number for a new client. May display a contact number for an existing client.
     - **Work Phone:** Type an employment contact number for a new client. May display an employment contact number for an existing client.
     - **Extn**: Type a work phone extension for a new client, if applicable. May display a work phone extension for an existing client, if applicable.
     - **Cell Number**: Type a mobile contact number for a new client. May display a mobile contact number for an existing client.
     - **TTY Number**: Type a teletypewriter contact number for a new client, if applicable. May display a teletypewriter contact number for an existing client, if applicable.
     - **Fax Number**: Type a facsimile contact number for a new client, if applicable. May display a facsimile contact number for an existing client, if applicable.
     - **Email Address**: Type an electronic mail address for a new client, if applicable. May display an electronic mail address for an existing client, if applicable.

- Common Demographics section
  1. Grid
     - **Type:** Displays the category of address for the client.
     - **Address:** Displays the given location for the client.
     - **City:** Displays the municipality for the given address.
     - **State:** Displays the state for the given address.
     - **Zip:** Displays the postal code for the given address.
     - **Start Date:** Displays the starting date the address was used by the client.
     - **End Date:** Displays the date the address was no longer relevant for the client.
     - **Last Updated:** Displays the date the record was last updated.
     - **Address:** Complete an address for the client.

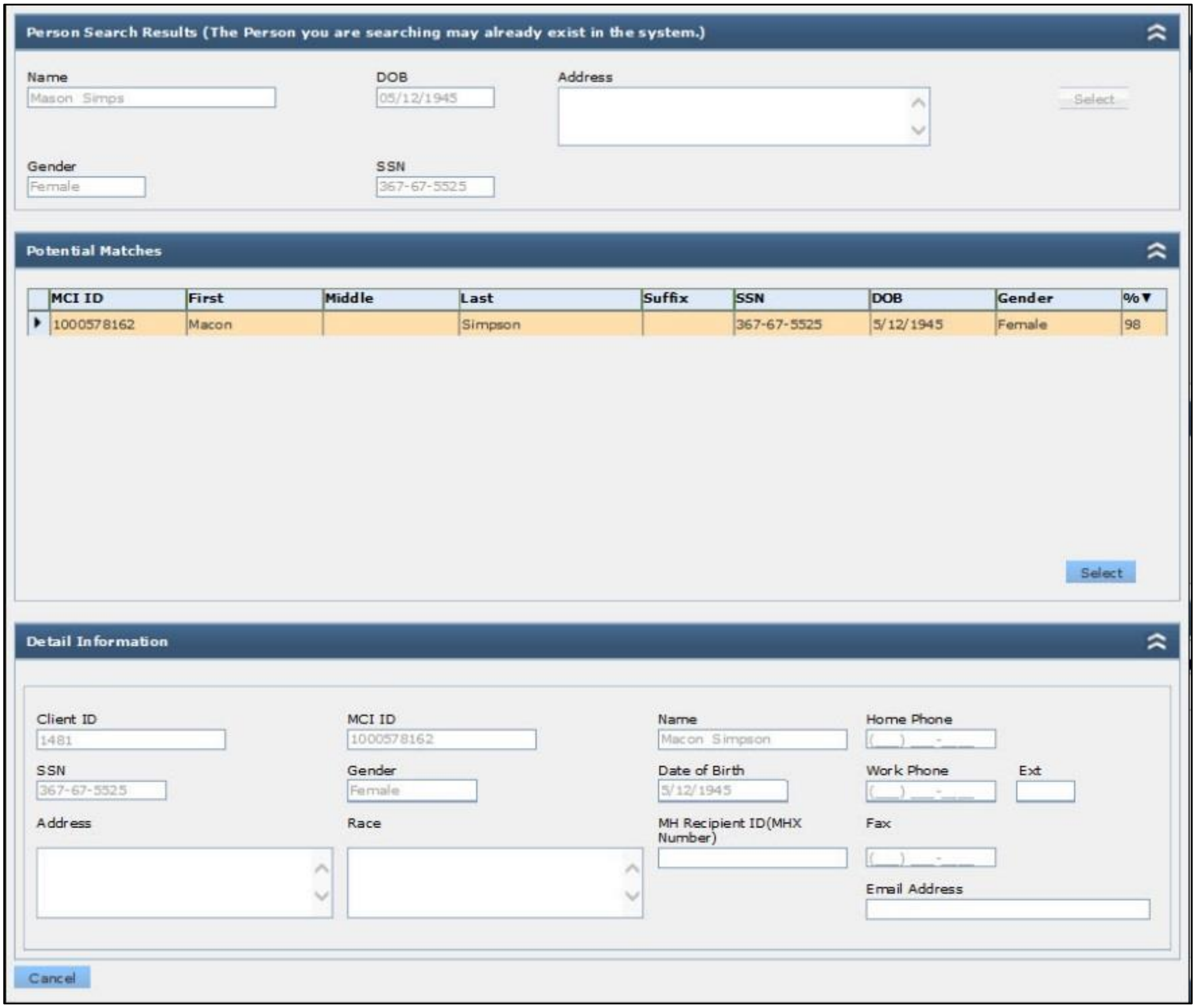
Note: The *Address* field is activated by using the **[New]** button below it.

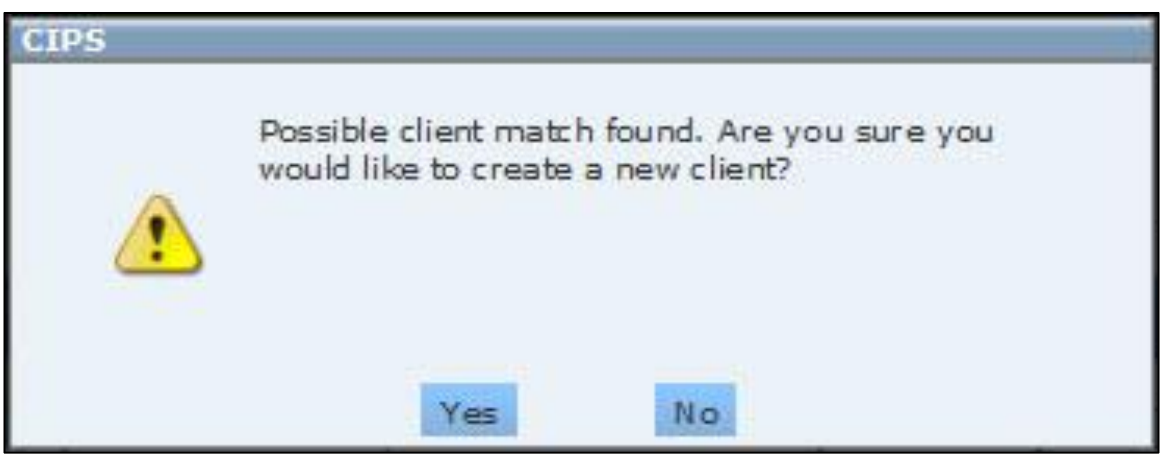
Completing the *Address* field. The address control has the ability to search and verify the address entered by the user. Complete the *Enter Address* pop up box: 1. Select either the *Domestic Address* or *Foreign Address* radio button. 2. Select an *Address Type* from the drop down list. • Home • Mailing • Other 3. Use the *Address Line 1* field to type the address. 4. Use the *Address Line 2* field type additional address information, if applicable. 5. Type a name in the *City* field. 6. The *State* field defaults to Pennsylvania. Change the state if applicable. 7. Type a postal code in the *Zip* field. 8. Check the *Current Residence* check box, if applicable. 9. Click the **[Search]** button. 10. Review the *Search Results.* Select the alternate address, if applicable. If the address does not appear verified or modified, review the previous fields or use the *Save Without Verification* check box. 11. Click the **[OK]** button. **Note:** Check the *Save Without Verification* check box, if applicable. Only use if you know the address is correct. After the screen refreshes, click the **[OK]** button.

- Buttons
  - **[New]:** Opens the *Address pop* screen, to input a new address for the client.
  - **[Edit]:** Opens the *Address pop up* screen to edit an existing address for the client.
  - **[Save]:** Preserves entered information for the entire screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

MCI Clearance screen

The screen appears when a user click on the **[Save]** button, while registering a new client.





- Person Search Results section
  1. **Name:** Displays the full name of the client for whom you searched.
  2. **DOB:** Displays the date of birth of the client for whom you searched.
  3. **Address:** Displays the location of the client for whom you searched.
  4. **Gender:** Displays the orientation of the client for whom you searched.
  5. **SSN:** Displays the social security number of the client for whom you searched.

- Section Button
  - **[Select]:** Use to select the search information in the section. This will create a new MCI ID.

Note: A pop up will appear when this option is selected. Click the appropriate button to continue and close the pop up.

- Potential Matches grid
  1. **MCI ID:** Displays the identification number assigned to the resulting record.
  2. **First:** Displays the given name for the resulting record.
  3. **Middle:** Displays the secondary name for the resulting record.
  4. **Last:** Displays the surname for the resulting record.
  5. **Suffix:** Displays the title for the resulting record.
  6. **SSN:** Displays the social security number for the resulting record.
  7. **DOB:** Displays the date of birth for the resulting record.
  8. **Gender:** Displays the orientation for the resulting record.
  9. **%:** Displays the percentage match for the resulting record.

- Section Button
  - **[Select]:** Connects the search information to the existing highlighted record.

- Detailed Information section
  1. **Client ID:** Displays the system generated identification number assigned to the highlighted *Potential Match*.
  2. **MCI ID:** Displays the master client index identification number assigned to the highlighted *Potential Match*.
  3. **Name:** Displays the full name for the highlighted *Potential Match*.
  4. **Home Phone:** Displays the household contact number for the highlighted *Potential Match*.
  5. **SSN:** Displays the social security number for the highlighted *Potential Match*.
  6. **Gender:** Displays the orientation for the highlighted *Potential Match*.

7. **Date of Birth:** Displays the birthdate for the highlighted *Potential Match*.
8. **Work Phone:** Displays the employment contact number for the highlighted *Potential Match*.
9. **Ext.**: Displays the employment contact number extension for the highlighted *Potential Match,* if applicable.
10. **Address:** Displays the location for the highlighted *Potential Match*.
11. **Race:** Displays the nationality for the highlighted *Potential Match*.
12. **MH Recipient ID (MHX Number):** Displays the mental health number for the highlighted *Potential Match,* if applicable.
13. **Fax:** Displays the facsimile number for the highlighted *Potential Match,* if applicable.
14. **Email Address:** Displays the electronic mail address for the highlighted *Potential Match*.

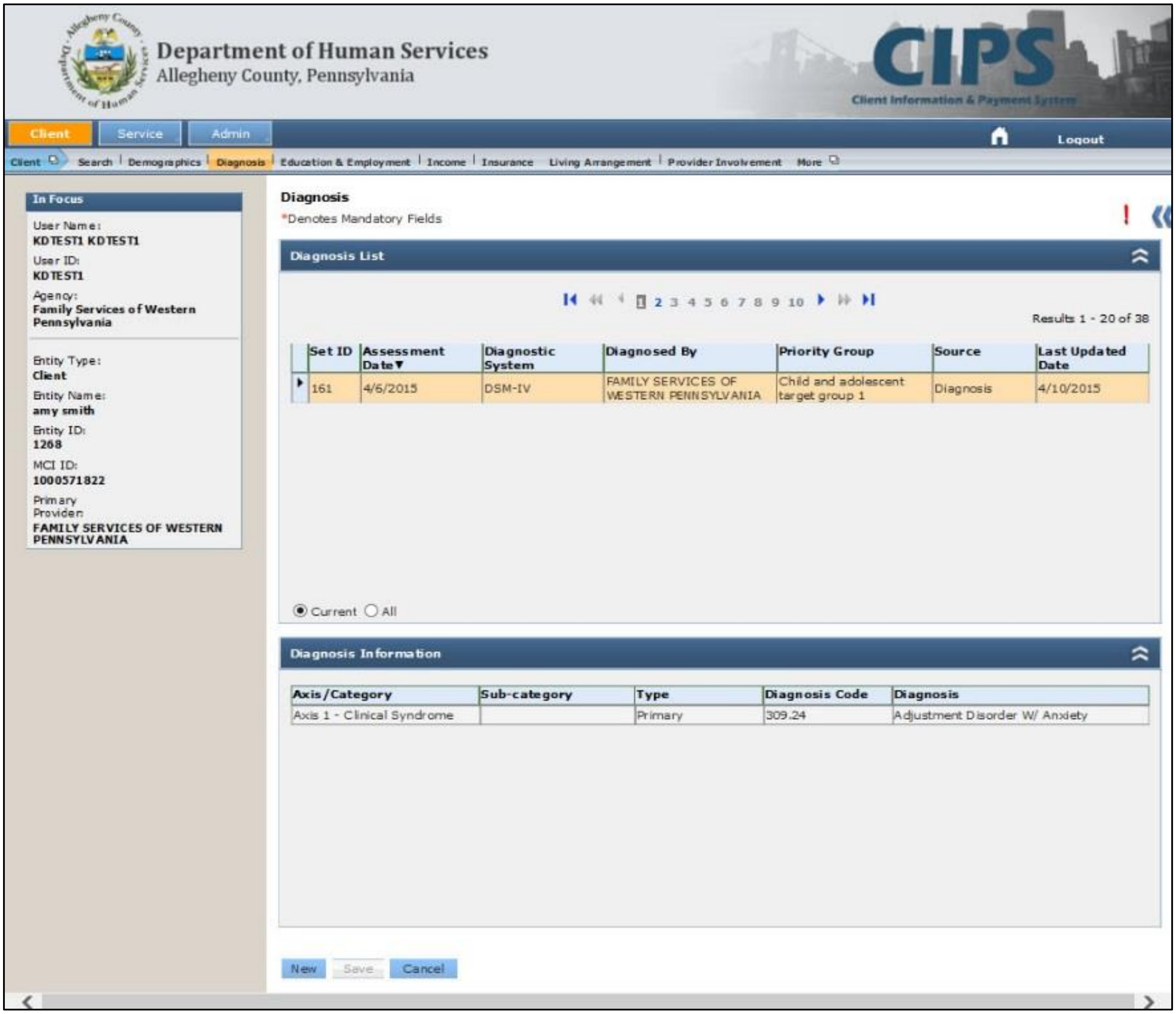
- Button
  - **[Cancel]:** Closes the screen and navigates to the previous screen.

Registered pop up
The pop up appears when the client has been registered successfully.

- Button
  - **[OK]:** Closes the screen and navigates to the previous screen.

Diagnosis

This screen provide the users the ability to view a list of client's medical diagnoses.



Navigation:
1. ***Client > Diagnosis***

- Diagnosis List section
  1. Grid
     - **Set ID:** Displays the system generated identification number for the record.
     - **Assessment Date:** Displays the date the diagnostic was run.
     - **Diagnostic System:** Displays the method used to check the record.
     - **Diagnosed By:** Displays the name of the provider associated with the user.
     - **Priority Group:** Displays the highest group associated with the user.
     - **Source:** Displays from where the information was obtained.
     - **Last Updated Date:** Displays the date the record was last updated.
  2. **Current [radio button]:** Select to view the diagnosis with the most present creation dates.

Note: If there are 2 assessments, the one with the most present assessment and creation date will display.

  3. **All [radio button]:** Select to view all diagnosis entered for the client.

- Diagnosis Information section

Note: This section will only display when a diagnosis exist.

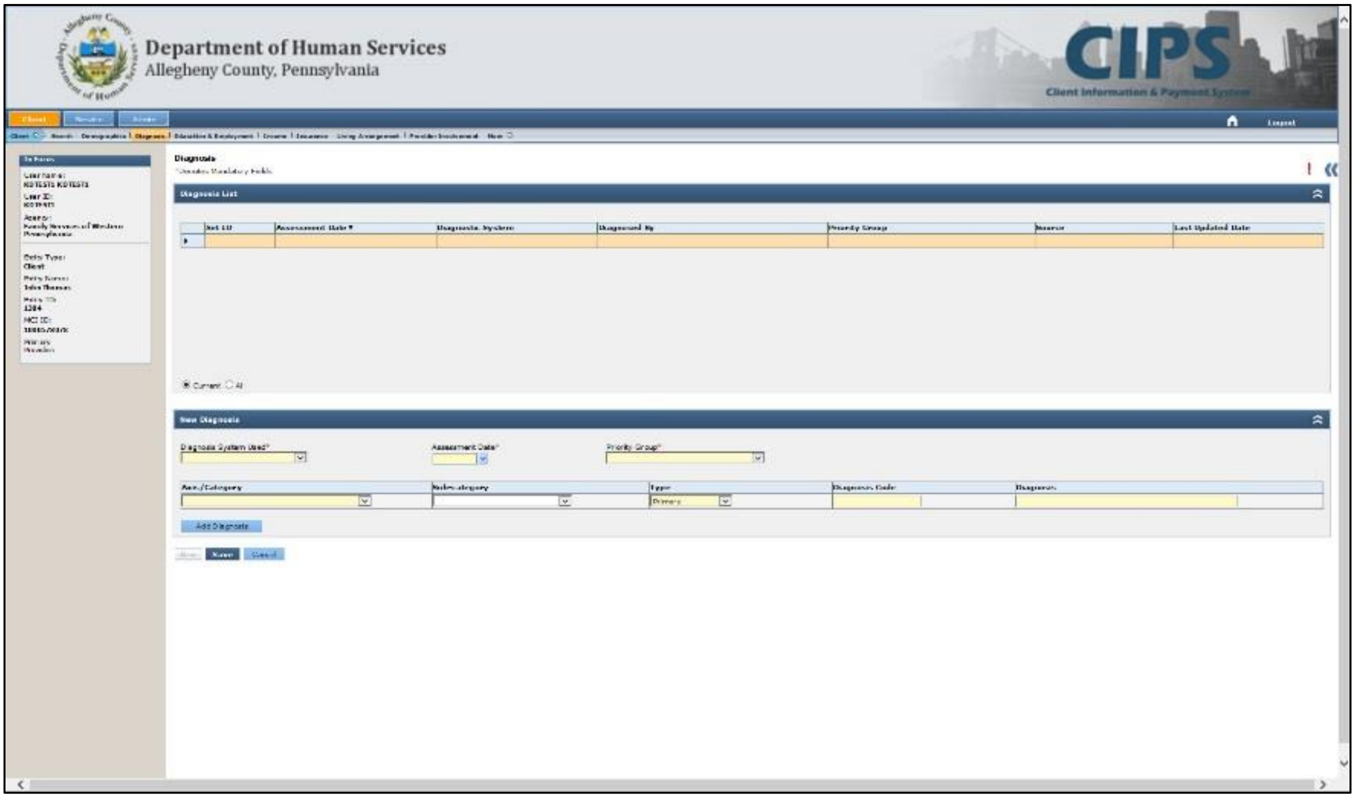
1. **Axis / Category:** Displays the type of disorder.
2. **Sub-Category:** Displays a secondary disorder type, if applicable. (Mental, Behavioral and Neurodevelopmental Disorders only.)
3. **Type:** Displays the category for the *Axis*.
4. **Diagnosis Code:** Displays the code associated with the *Axis* and *Type.*
5. **Diagnosis:** Displays the findings associated with the *Axis*, *Type* and *Diagnosis Code*.

- Buttons
  - **[New]:** Clears the screen in order to add an additional record.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Diagnosis (New)

This screen provide the users the ability to view and edit a client's diagnosis information.

Navigation:



1. ***Client > Diagnosis > [New]***

- Diagnosis List section
  1. Grid
     - **Set ID:** Displays the system generated identification number for the record.
     - **Assessment Date:** Displays the date the diagnostic was run.
     - **Diagnostic System:** Displays the method used to check the record.
     - **Diagnosed By:** Displays the name of the provider associated with the user.
     - **Priority Group:** Displays the highest group associated with the user.
     - **Source:** Displays from where the information was obtained.
     - **Last Updated Date:** Displays the date the record was last updated.

2. **Current [radio button]:** Select to view the diagnosis with the most present creation dates.

Note: If there are 2 assessments, the one with the most present assessment and creation date will display.

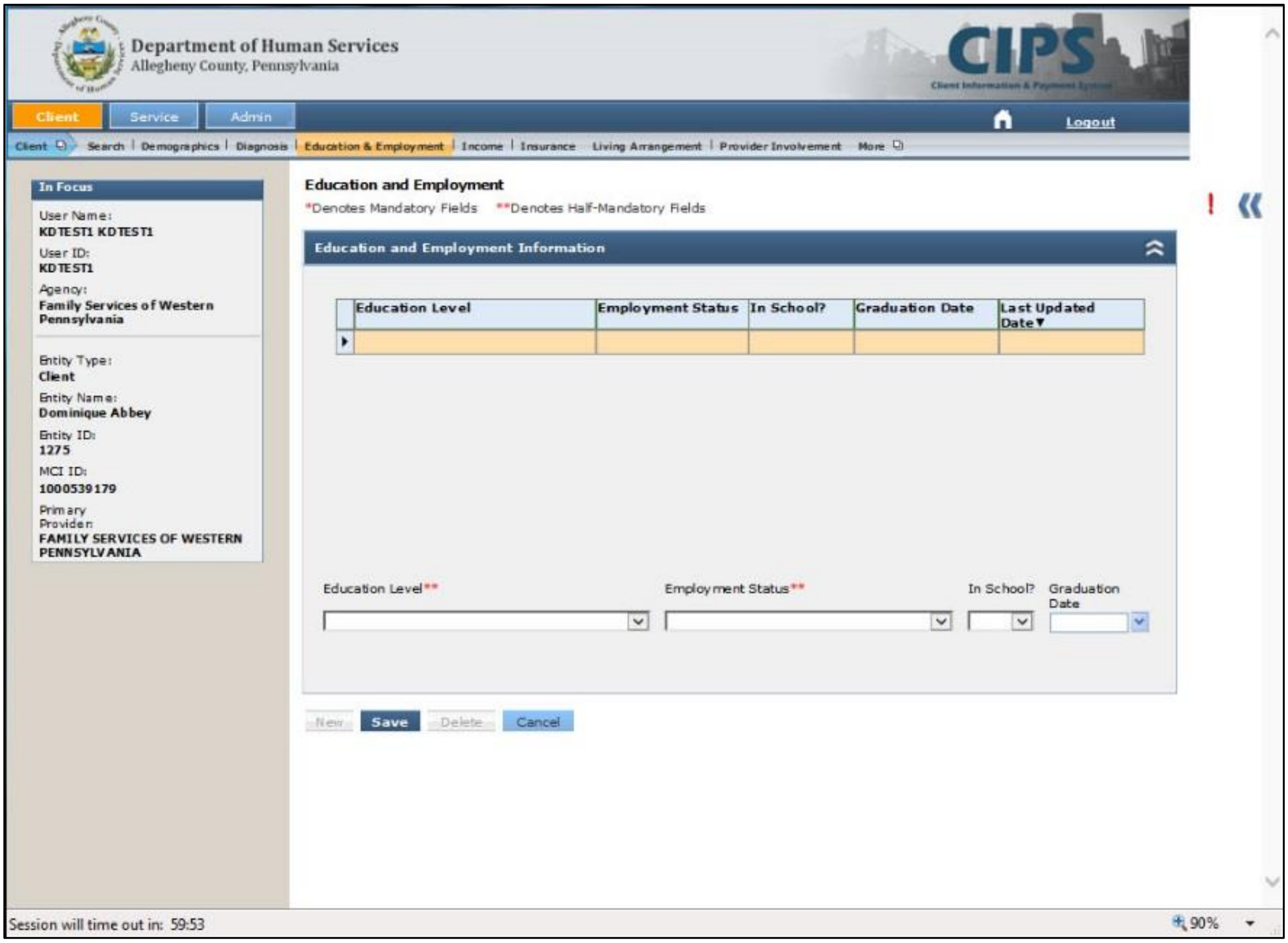
3. **All [radio button]:** Select to view all diagnosis entered for the client.

- New Diagnosis section
  1. **Diagnostic System:** Select the method used for the findings. This is a mandatory field.
  2. **Assessment Date:** Enter or select the date for the diagnostic. This is a mandatory field.
  3. **Priority Group:** Select the group associated with the diagnostic. This is a mandatory field.
  4. **Axis / Category:** Select type of disorder.
  5. **Sub-Category:** Select a secondary disorder type, if applicable. (Mental, Behavioral and Neurodevelopmental Disorders only.)
  6. **Type:** List the category for the *Axis*.
  7. **Diagnosis Code <text box>:** Click in the field and select the code associated with the *Axis* and *Type.*
  8. **Diagnosis:** Populates based on the findings associated with the *Axis*, *Type* and *Diagnosis Code*.

- Buttons
  - **[Add Diagnosis]:** Clears the screen in order to add an additional record.
  - **[New]:** Greyed out.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Education and Employment

This screen provides users the ability to view and edit a client's education and employment information.



Navigation:

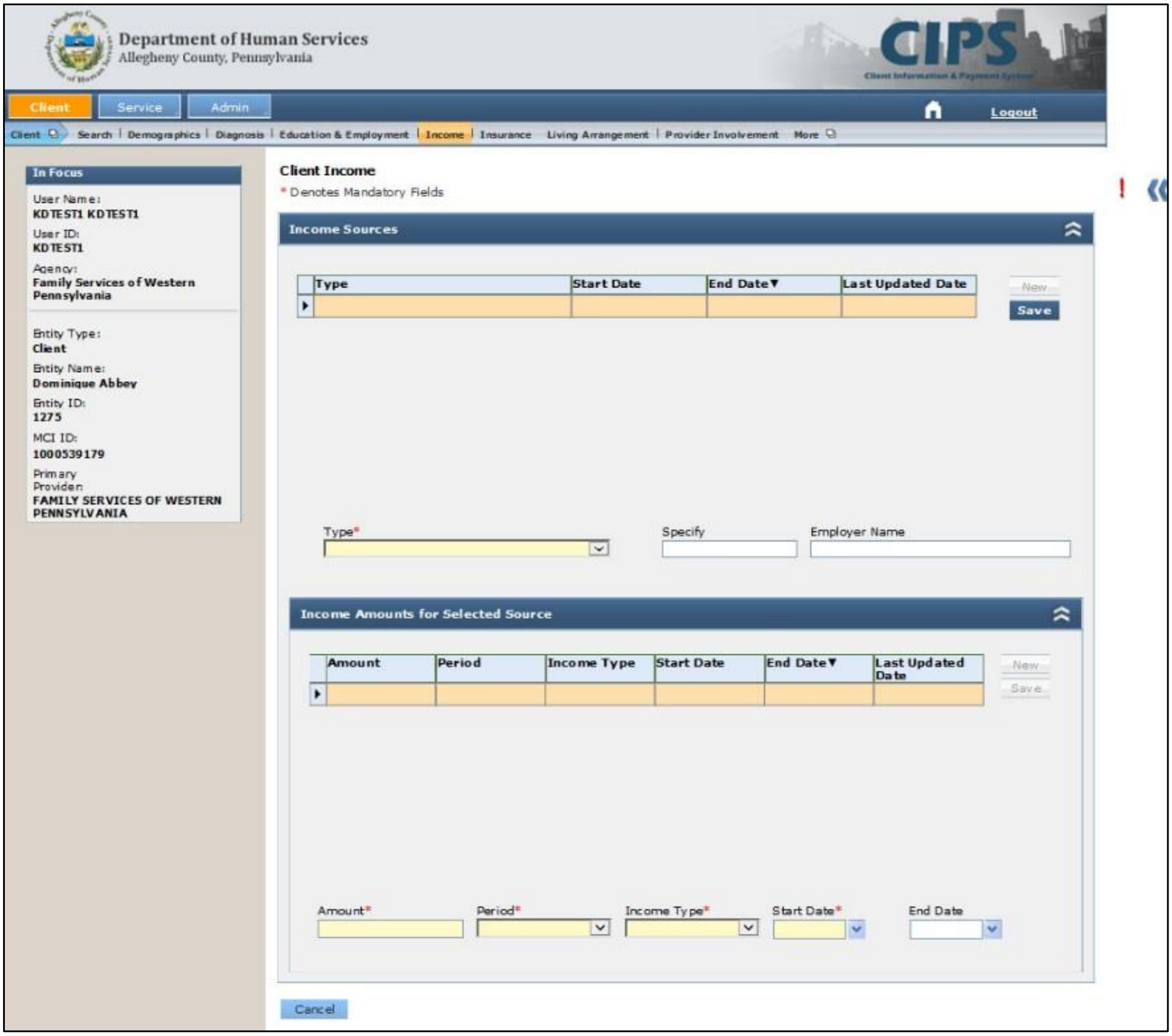
1. ***Client > Education and Employment***

- Education and employment Information section
  1. Grid
     - **Education Level:** Displays the client's level of education.
     - **Employment Status**: Displays the client's working situation.
     - **In School?:** Indicates if the client is currently attending school.
     - **Graduation Date:** Displays education completion date, if applicable.
     - **Last Updated Date:** Displays the date the record was last updated.
  2. **Education Level:** Select the client's level of education. This is a half mandatory field with *Employment Status.*
     - **{See page 2.27 for possible selections.}**
  3. **Employment Status:** Select the client's employment status. This is a half mandatory field with *Education Level.*
  4. **In School?:** Select an answer to the question.
  5. **Graduation Date:** Enter or select a day for education completion, if applicable.

- Buttons
  - **[New]:** Disabled until an initial record is saved. Clears the screen in order to add an additional record.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Delete]:** Clears the selections for the screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Client Income

The screen provides the user the ability to view and edit client income information.



Navigation:

1. ***Client > Income***

- Income Sources section
  1. Grid
     - **Type:** Displays the income category.
     - **Start Date:** Displays the first date the income was received.
     - **End Date:** Displays the last date the income was received.
     - **Last Updated Date:** Displays the date the record was last altered.

- Grid Buttons
  - **[New]:** Greyed out until a record exists. Used to add additional income to the grid. The button is only enabled for users with edit access.
  - **[Save]:** Preserves the information entered in the *Income Sources* section.

2. **Type:** Select a source for the income. This is a mandatory field.
3. **Specify:** Type a source for the income when *Other* is selected from the *Type* field. This is a mandatory field when *Other* is selected.
4. **Employer Name:** Type an employer name when *Employer* is selected for the *Type* field. This is a mandatory field when *Employer* is selected.

- Income amounts for Selected Source

1. Grid
   - **Amount:** Displays the entered income total for the record.
   - **Period:** Displays the time frame selected for the record.
   - **Income Type:** Displays the category for the earning period.
   - **Start Date:** Displays the first date of employment.
   - **End Date:** Displays the last date of employment.
   - **Last Updated Date:** Displays the date the record was last updated.

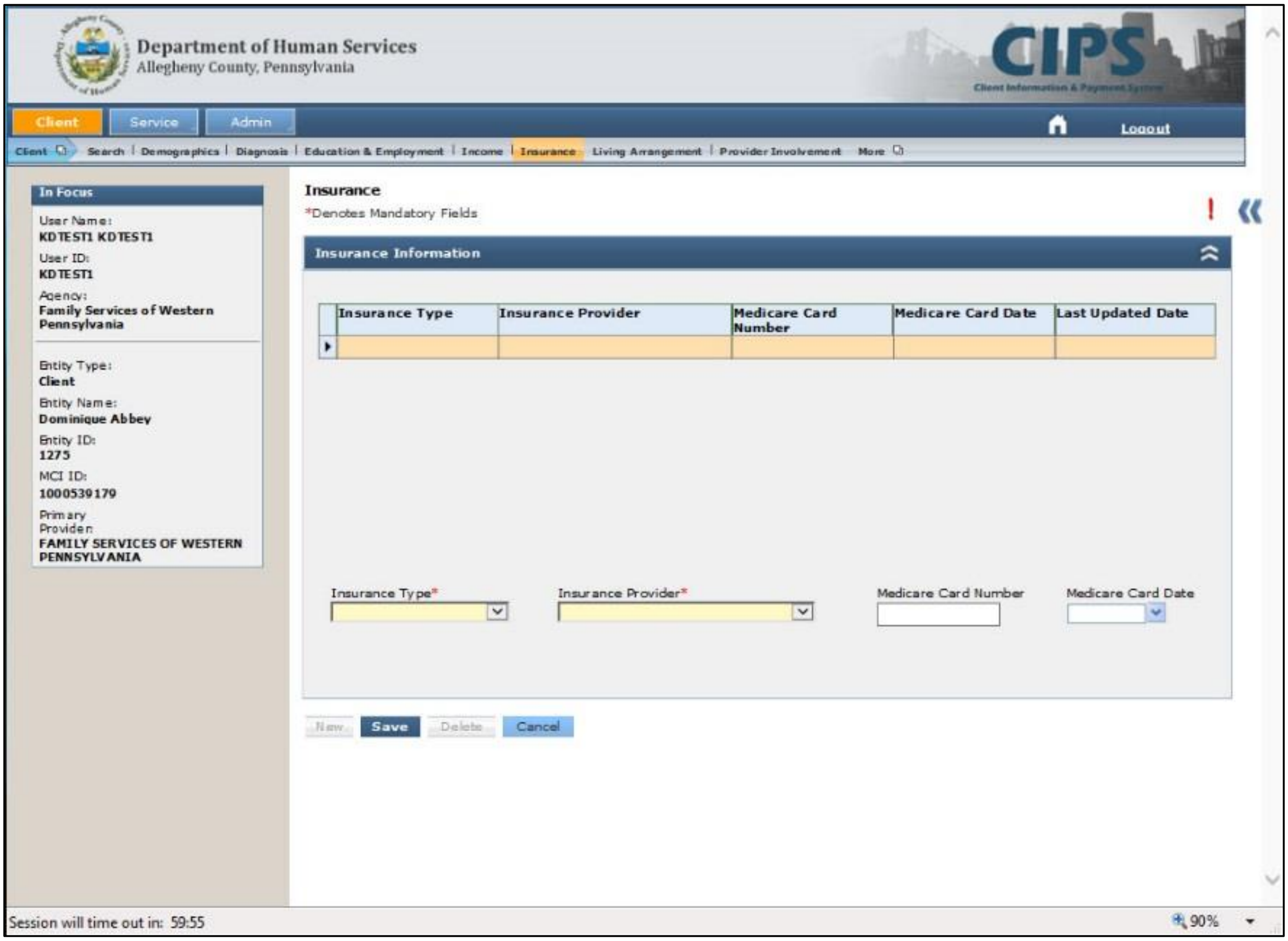
- Grid Buttons
  - **[New]:** Greyed out until a record exist. Used to add additional income to the grid. The button is only enabled for users with edit access.
  - **[Save]:** Preserves the information entered in the *Income Amounts for Selected Source* section.

2. **Amount:** Type an income dollar amount. This is a mandatory field.
3. **Period:** Select a time frame for the record. This is a mandatory field.
4. **Income Type:** Select a category for the earning period. This is a mandatory field.
5. **Start Date:** Enter or select the first date of employment. This is a mandatory field.
6. **End Date:** Enter or select the last date of employment.

- Button
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Insurance

This screen provides the user the ability to view and edit client insurance information.



Navigation:

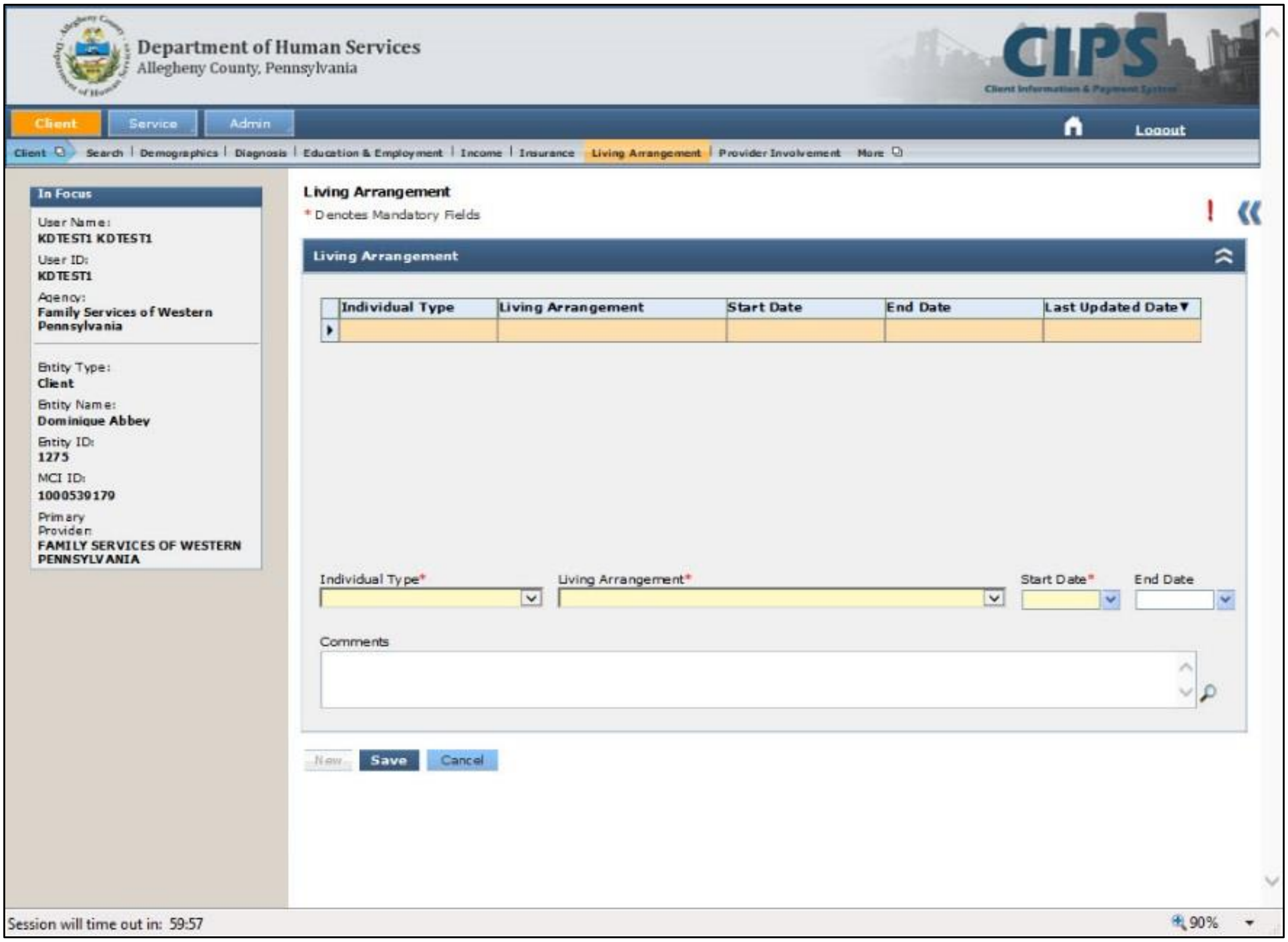
1. ***Client > Insurance***

- Insurance Information section
  1. Grid
     - **Insurance Type:** Displays the category of insurance.
     - **Insurance Provider:** Displays the pay order for the insurance record.
     - **Medicare Card Number:** Displays the card number for the governmental insurance.
     - **Medicare Card Date:** Displays the start date for the governmental insurance.
     - **Last Updated Date:** Displays the date the record was last updated.
  2. **Insurance Type:** Select a category of insurance. This is a mandatory field.
  3. **Insurance Provider:** Select the pay order for the insurance record. This is a mandatory field.
  4. **Medicare Card Number:** Type the card number for the governmental insurance, if applicable.
  5. **Medicare Card Date:** Enter or select the start date for the governmental insurance, if applicable.

- Buttons
  - **[New]:** Disabled until an initial record is saved. Clears the screen in order to add an additional record.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Delete]:** Clears the selections for the screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Living Arrangement

This screen provides users the ability to view and edit a client's living arrangement.



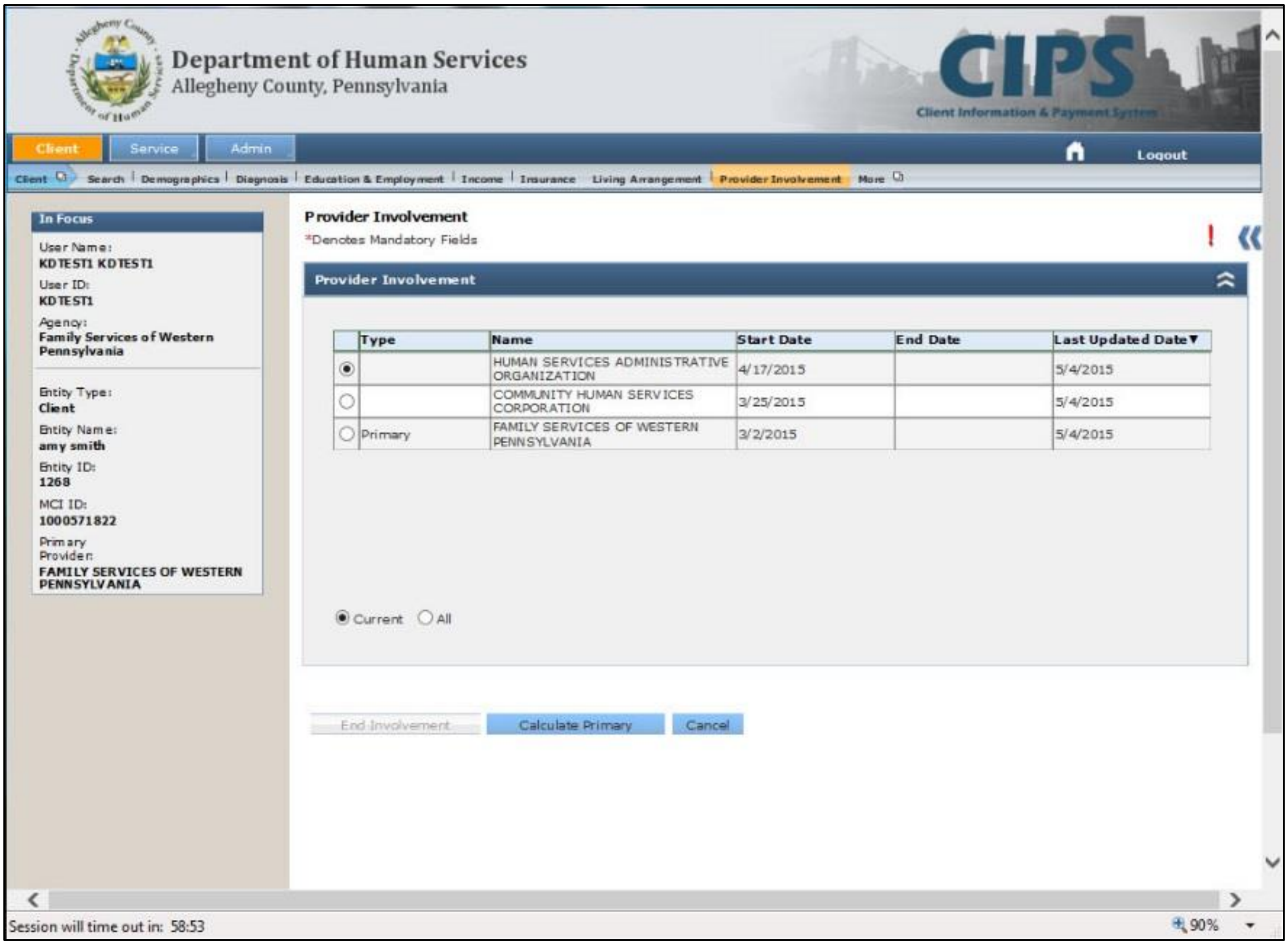
Navigation:
1. ***Client > Living Arrangements***

- Living Arrangement section
  1. Grid
     - **Individual Type:** Displays the client category.
     - **Living Arrangements:** Displays the housing category for the type.
     - **Start Date:** Displays the first date for the housing.
     - **End Date:** Displays the last date for the housing.
     - **Last Updated Date:** Displays the date the record was last updated.
  2. **Individual Type:** Select a category for the client. This is a mandatory field.
  3. **Living Arrangements:** Select a housing category for the housing. This is a mandatory field.
     - **{See pages 2.24 and 2.25 for possible selections.}**
  4. **Start Date:** Enter or select the start date for the housing. This is a mandatory field.
  5. **End Date:** Enter or select the end date for the housing, if applicable.
  6. **Comments:** Type a narrative regarding the client's living arrangements.

- Buttons
  - **[New]:** Disabled until an initial record is saved. Clears the screen in order to add an additional record.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Provider Involvement

This screen provides users the ability to view provider involvement with a client. Providers can end their involvement.



Navigation:

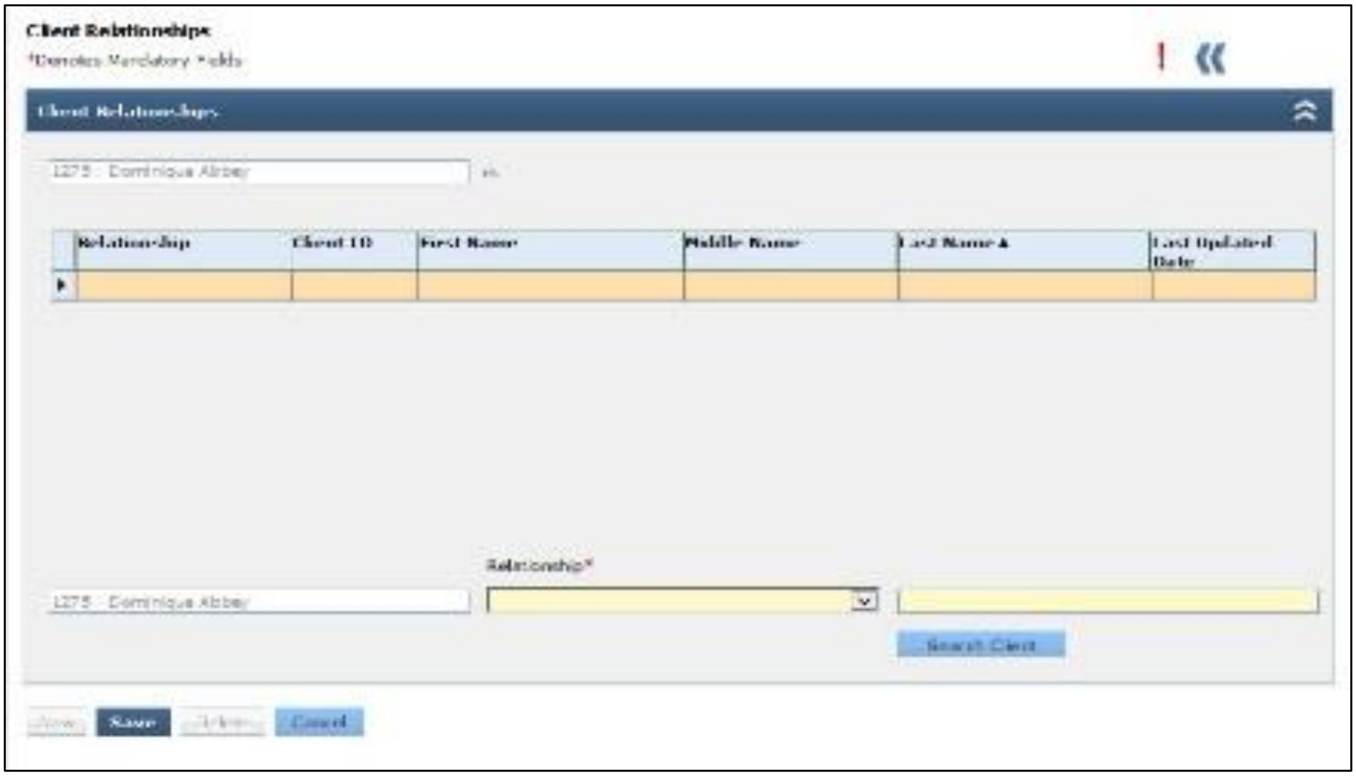
1. ***Client > Provider Involvement***

- Provider Involvement section
  1. Grid
     - **Type:** Displays the primary involvement category.
     - **Name:** Displays the provider name associated with the client.
     - **Start Date:** Displays the day the involvement began.
     - **End Date:** Displays the day the involvement terminated.
     - **Last Updated Date:** Displays the date the record was last updated.
  2. **Current [radio button]:** Select to view open involvements.
  3. **All [radio button]:** Select to view all open and closed involvements.

- Buttons
  - **[End Involvement]:** Disabled until an initial record is saved. Places an end date for an involvement, when activated.
  - **[Calculate Primary]:** Determines the primary provider for the client.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Client Relationships

This screen provides users the ability to view and edit a client's relationship information.



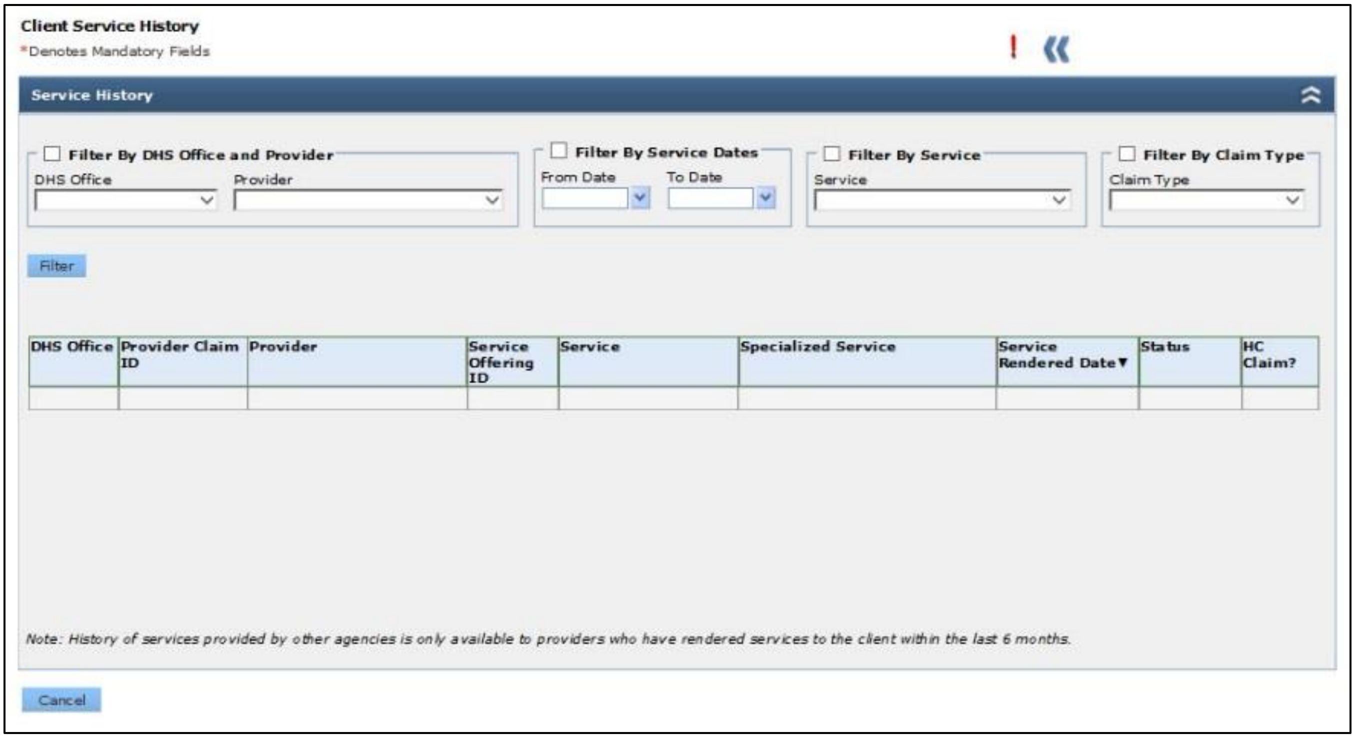
Navigation:
1. ***Client > Relationships***

- Client Relationships section
  1. **Client <text box> is:** Displays the name of the client in focus.
  2. Grid
     - **Relationships:** Displays the connection between the client in the text box and the searched client.
     - **Client ID:** Displays the system generated number for the searched client.
     - **First Name:** Displays the given name for the searched client.
     - **Middle Name:** Displays the secondary name for the searched client.
     - **Last Name:** Displays the surname for the searched client.
     - **Last Updated Date:** Displays the date the record was last updated.
  3. **Client <text box>:** Displays the name of the client in focus.
  4. **Relationship:** Select a connection between the client in focus and the searched client. This is a mandatory field.
  5. **Related to <text box>:** Displays the name of the searched client.

- Buttons
  - **[Search Client]:** Opens the *Client Search* pop up.
  - **[New]:** Disabled until an initial record is saved. Clears the screen in order to add an additional record.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Delete]:** Clears the selections for the screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Client Service History

This screen provides users the ability to view client's history.



<u>Navigation:</u>

1. ***Client > Service History***

- Service History section
  1. **Filter By DHS Office and Provider (check box):** Check to narrow the history.
     - **DHS Office:** Select the appropriate office.
     - **Provider:** Select the name of the provider. Providers will load based on the selection made in the *DHS Office* field.
  2. **Filter By Service Dates (check box):** Check to narrow history by date.
     - **From Date:** Enter or select a beginning by which to narrow the history.
     - **To Date:** Enter or select an ending date by which to narrow the history.
  3. **Filter By Service (check box):** Check to narrow history by service.
     - **Service:** Select a service from the list.
  4. **Filter By Claim Type:** Check to narrow history by category of claim.
     - **Claim Type:** Select a category from the list.

- Section Button
  - **[Filter]:** Searches for the filtered criteria.

5. Grid
   - **DHS Office:** Displays the appropriate office.
   - **Provider Claim ID:** Displays the identification number associated with the claim.

Note: Will display the provider claim ID entered for MH claims. Will display the assigned number for other claim programs.

   - **Provider:** Displays the name of the provider.
   - **Service Offering ID:** Displays the identification number for the offering.

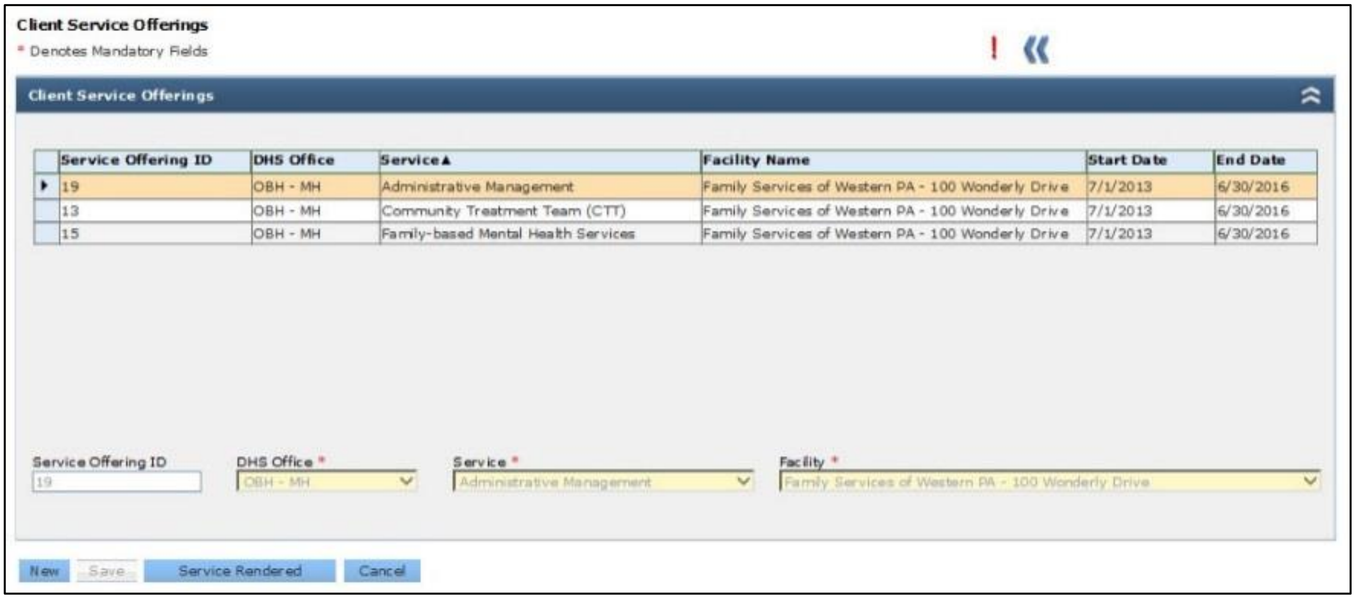
Note: Will display the eCAPS service offering identification number for MH claims. Will be blank for all other offerings.

   - **Service:** Displays the service name that corresponds to the *Service Offering ID* field or other corresponding claims.
   - **Specialized Service:** Displays a specialized service name for MH claims. Is blank for all other claims.
   - **Service Rendered Date:** Displays the rendered start date from the corresponding program claim.
   - **Status:** Displays the service rendered category for the corresponding claim.
   - **HC Claim?**: Indicates if the claim is for HealthChoices.

- Buttons
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Client Service Offerings

This screen provides users the ability to view the list of service offerings associated to a client or to associate a new service offering.



<u>Navigation:</u>

1. ***Client > Service Offerings***

- Client Service Offerings section
  1. Grid
     - **Service Offering ID:** Displays the eCAPS service offering identification number.
     - **DHS Office:** Displays the Department of Humans Services office name.
     - **Service:** Displays the service name corresponding to the *Service Offering ID*.
     - **Facility Name:** Displays the name of the corresponding provider.
     - **Start Date:** Displays the first date the service was provided.
     - **End Date:** Displays the termination date for the service.
  2. **Service Offering ID:** Type the number associated with the service.
  3. **DHS Office:** Select the Department of Human services location associated with the service. This is a mandatory field.
  4. **Service:** Select or review the service offering. This is a mandatory field.

Note: The field will populate automatically if the *Service Offering ID* field is completed.

  5. **Facility:** Select a program location for the provider. This is a mandatory field.

- Buttons
  - **[New]:** Clears the screen in order to add an additional record.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Service Rendered]:** Opens the *Services Rendered List* screen.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

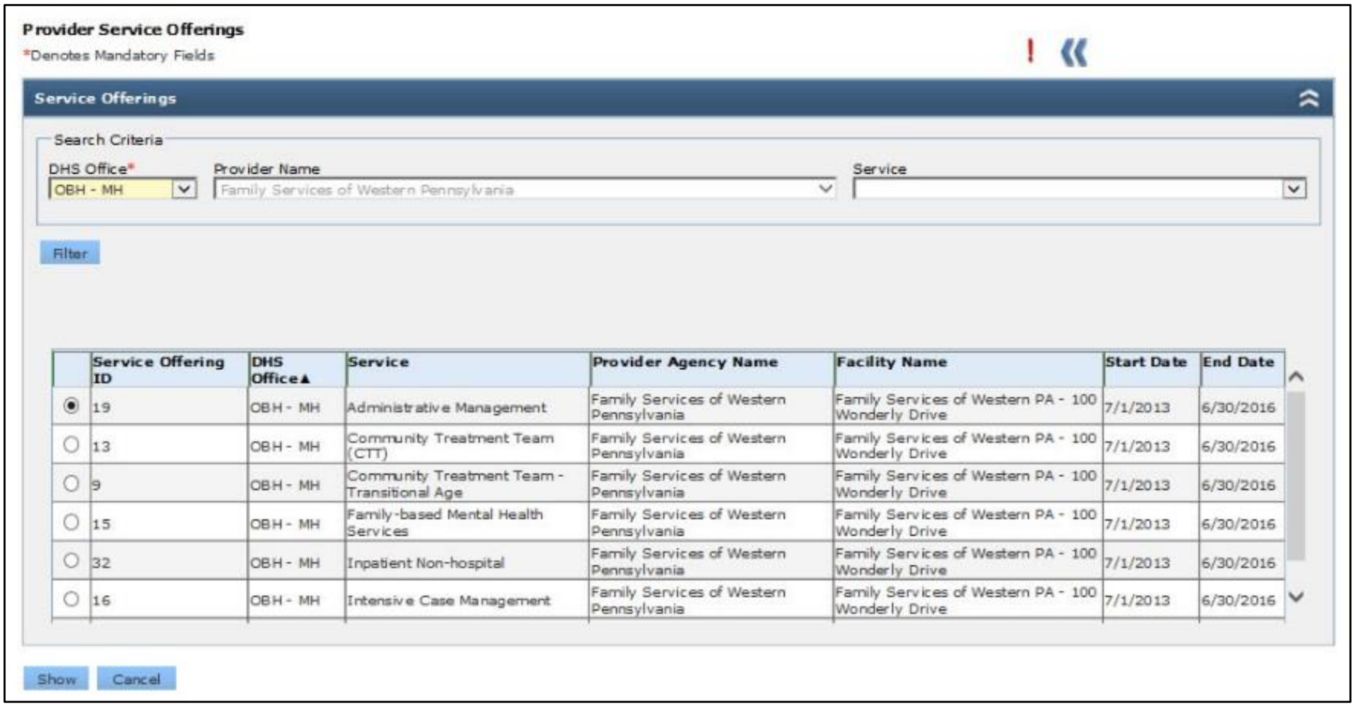
Unit 3: Service (30 minutes)

After finishing this unit learners will be able to:

- Review provider service offerings.
- Review the clients authorized for a service.
- Complete and review Services Rendered screen.

Provider Service Offerings

This screen allows providers the ability to view all service offerings associated with their agency.



Provider Service Offerings

*Denotes Mandatory Fields

Service Offerings

Search Criteria

DHS Office* OBH - MH

Provider Name Family Services of Western Pennsylvania

Service

Filter

	Service Offering ID	DHS Office▲	Service	Provider Agency Name	Facility Name	Start Date	End Date
◉	19	OBH - MH	Administrative Management	Family Services of Western Pennsylvania	Family Services of Western PA - 100 Wonderly Drive	7/1/2013	6/30/2016
○	13	OBH - MH	Community Treatment Team (CTT)	Family Services of Western Pennsylvania	Family Services of Western PA - 100 Wonderly Drive	7/1/2013	6/30/2016
○	9	OBH - MH	Community Treatment Team - Transitional Age	Family Services of Western Pennsylvania	Family Services of Western PA - 100 Wonderly Drive	7/1/2013	6/30/2016
○	15	OBH - MH	Family-based Mental Health Services	Family Services of Western Pennsylvania	Family Services of Western PA - 100 Wonderly Drive	7/1/2013	6/30/2016
○	32	OBH - MH	Inpatient Non-hospital	Family Services of Western Pennsylvania	Family Services of Western PA - 100 Wonderly Drive	7/1/2013	6/30/2016
○	16	OBH - MH	Intensive Case Management	Family Services of Western Pennsylvania	Family Services of Western PA - 100 Wonderly Drive	7/1/2013	6/30/2016

Show Cancel

Navigation:

1. ***Service > Service Offerings > Service Offerings***

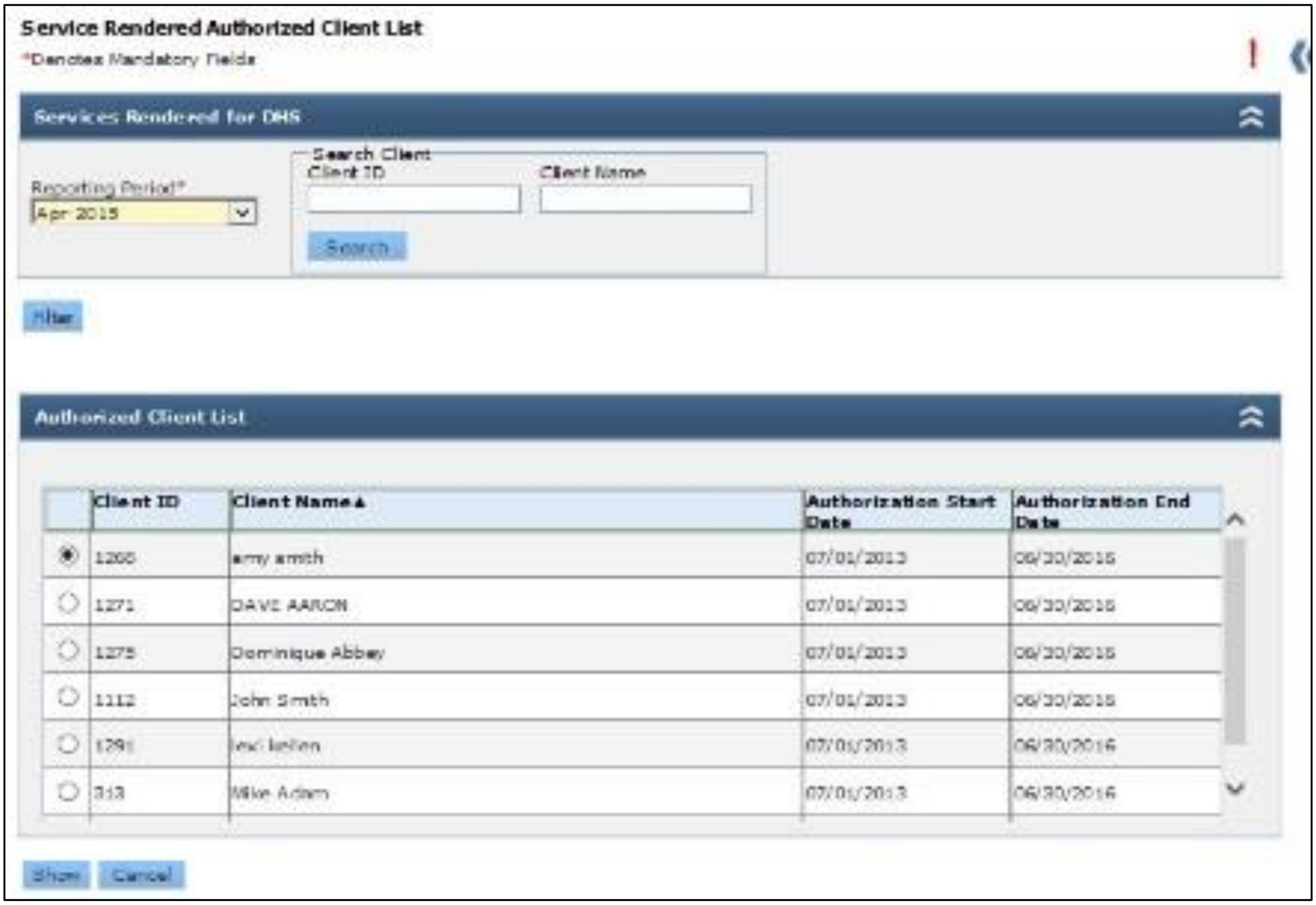
- Service Offerings section
  1. Search Criteria
     - **DHS Office:** Select the Department of Human services location associated with the service. This is a mandatory field.
     - **Provider Name:** Displays the name of the signed in provider's agency.
     - **Service:** Select or review the service offering. This is a mandatory field.

- Grid
  1. **[Radio button] /column/:** Select the button for the offerings to review.
  2. **Service Offering ID:** Displays the CIPS service offering identification number.
  3. **DHS Office:** Displays the Department of Humans Services office name.
  4. **Service:** Displays the service name corresponding to the Service Offering ID.
  5. **Provider Agency Name:** Displays the agency name for the signed in user.
  6. **Facility Name:** Displays the name and location of the service offering.
  7. **Start Date:** Displays the first date the service was provided.
  8. **End Date:** Displays the termination date for the service.

- Buttons
  - **[Show]:** Opens the *Services Rendered Authorized Client List* screen, for the selected record.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Service Rendered Authorized Client List

This screen shows all the clients receiving the selected service.



Navigation:
1. ***Service > Service Rendered > [Show]***

- Services Rendered For DHS section
  1. **Reporting Period:** Select the month and year by which to filter the list. This is a mandatory field.
  2. **Search Client**
     - **Client ID:** Type a client identification number by which to filter the list.
     - **Client Name:** Type a client full name by which to filter the list.

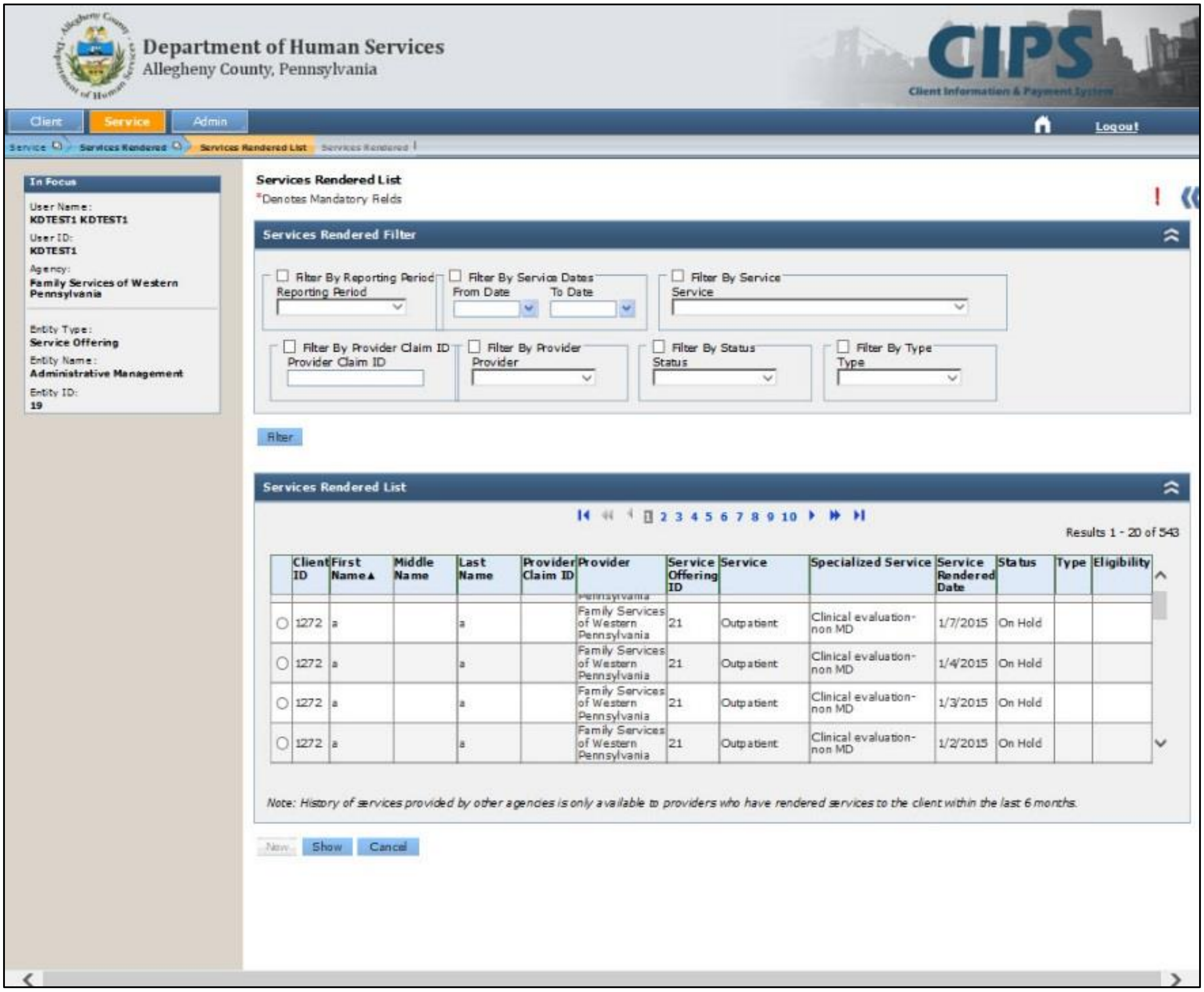
- Section Button
  - **[Filter]:** Narrows the *Authorized Client List* by the filtered criteria.

- Authorized Client List
  1. Grid
     - **[Radio Button] /Column/:** Radio buttons used to indicate the client to place in focus.
     - **Client ID:** Displays the system assigned client identification numbers for the client in the row.
     - **Client Name:** Displays the full name for the client.
     - **Authorization Start Date:** Displays the date the service was sanctioned.
     - **Authorization End Date:** Displays the last day for which the service is sanctioned.

- Buttons
  - **[Show]:** Opens the *Services Rendered List* screen, for the selected client.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Services Rendered List

This screen provides users the ability to view the list of services rendered for a client.



Navigation:

1. ***Service > Service Rendered > Service Rendered List***

- Services Rendered Filter section
  1. **Filter By Reporting Period (check box):** Check to narrow the search.
     - **Reporting Period:** Select a month and year to by which to narrow the search.
  2. **Filter By Service Dates (check box):** Check to narrow search by date.
     - **From Date:** Enter or select a beginning by which to narrow the search.
     - **To Date:** Enter or select an ending date by which to narrow the search.

3. **Filter By Service (check box):** Check to narrow search by service.
   - **Service:** Select a service from the list.
4. **Filter By Provider Claim ID (check box):** Check to narrow search by claim identification number.
   - **Provider Claim ID:** Type in a claim identification number.
5. **Filter By Provider (check box):** Check to narrow search by provider name.
   - **Provider:** Select a provider from the list.
6. **Filter By Status (check box):** Check to narrow search by the standing of the service record.
   - **Status:** Select a service rankings.
7. **Filter By Type (check box):** Check to narrow search by claim standing.
   - **Type:** Select a claim standing.

- Section Button
  - **[Filter]:** Searches for the filtered criteria.

- Services Rendered List section
  1. Grid
     - **[Radio button] /column/:** Select the button for the service to review.
     - **Client ID:** Displays the client's CIPS identification number.
     - **First Name:** Displays the client's given name.
     - **Middle Name:** Displays the client's secondary name, if applicable.
     - **Last Name:** Displays the client's surname.
     - **Provider Claim ID:** Displays a claim identification number, if applicable.
     - **Provider:** Displays the name of your agency.
     - **Service Offering ID:** Displays the CIPS service offering identification number.
     - **Service:** Displays the name of the corresponding service offering.
     - **Specialized Service:** Displays the specified service name.
     - **Services Rendered Date:** Displays the date the provided services began.
     - **Status:** Displays the claim processing status. Statuses will are not processed until the mid-month batch runs.
  2. **Type:** Displays the claim category.
  3. **Eligibility:** Displays the entitlement category for the record.

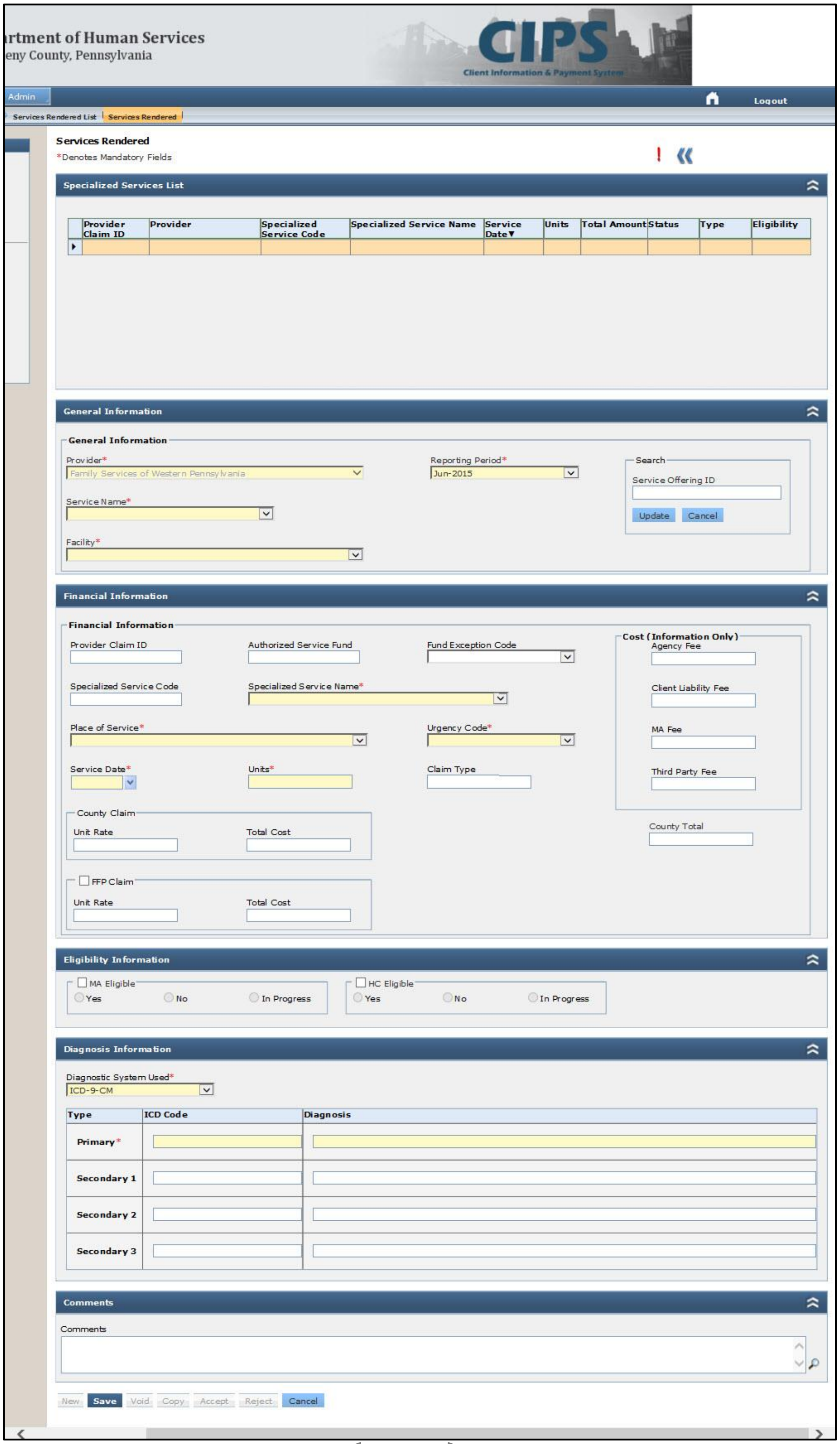
- Buttons
  - **[New]:** Opens the *Services Rendered* screen for the highlighted record.

Note: When the **[New]** button is used the *General Information* section of the *Services Rendered* screen will be pre-populated and all other fields blank for a new record entry.

- **[Show]:** Opens the *Services Rendered* screen for the highlighted record.
- **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Services Rendered

This screen provided users the ability to view, adjust and/or enter services for a client.



Navigation:

1. ***Service > Service Rendered > Service Rendered List > [Show]***

or

2. ***Client > Service Offerings > [Services Rendered] > [Show]***

- Specialized Services List
  1. Grid
     - **Provider Claim ID:** Displays the providers claim identification number, if applicable.
     - **Provider:** Displays the agency name.
     - **Specialized Service Code:** Displays the specified service code for the record.
     - **Specialized Service Name:** Displays the specified service name.
     - **Service Date:** Displays the day the services were provided.
     - **Units:** Displays the number of time components provided for the record.
     - **Total Amount:** Displays the monetary sum for the service.

Note: The *Total Amount* field will display the *Total Cost* from the *County Claim* section if the *FFP Claim* check box is not checked. It will display the *Total Cost* from the *FFP Claim*, if the *FFP Claim* check box is checked.

- **Status:** Displays the claim processing category
- **Type:** Displays the claim category

- General Information section
  1. **Provider:** Displays the agency name. This is a mandatory field.

Note: The field is pre-populated for new records, if user navigates from the *Client Service Offering* screen or the *Provider Service Offering* screen.

2. **Reporting Period:** Select or review the reporting time frame. This is a mandatory field.

Note: Displays as month and year.

3. **Service Name:** Select or review the agency name. This is a mandatory field.

Note: The field is pre-populated for new records, if user navigates from the *Client Service Offering* screen or the *Provider Service Offering* screen.

4. **Facility:** Select or review the location name and address. This is a mandatory field.

Note: The field is pre-populated for new records, if user navigates from the *Client Service Offering* screen or the *Provider Service Offering* screen.

5. Search
   - **Service Offering ID:** Enter or review the specific service identification number.

Note: The field is pre-populated for new records, if user navigates from the *Client Service Offering* screen or the *Provider Service Offering* screen.

- Section Buttons
  - **[Update]:** Preserves the field when a number has been entered.
  - **[Cancel]:** Clears any changes to the section.

- Financial Information section

1. **Provider Claim ID:** Type a claim identification number.

Note: The field is read only if the record status is *Processed* or the type is *Adjusted*.

2. **Authorized Service Fund:** Displays the sanctioned accounting source.
3. **Fund Exception Code:** Select an accounting code, if applicable.
4. **Specialized Service Code:** Displays the specified service code for the record.
5. **Specialized Service Name:** Select or review the specified service name. This is a mandatory field.
6. **Place of Service:** Select or review the location for the service. This is a mandatory field.
7. **Urgency Code:** Select or review the categorization for the record. This is a mandatory field.
8. **Service Date:** Enter or select the day the services were provided. This is a mandatory field.
9. **Units:** Type or review the number of time components provided for the record. This is a mandatory field.
10. **Claim Type:** Displays the category for the claim

11. County Claim
    - **Unit Rate:** Displays the applicable unique rate from the rate card for the corresponding service, specialized service, and provider combination.
    - **Total Cost:** Displays the monetary sum based on the calculation of *Units* X *Unit Rate*.
12. **FFP Claim (check box):** Check for *FFP* claims.
    - **Unit Rate:** Enter the FFP unit rate responding to the claim.
    - **Total Cost:** Displays the monetary sum based on the calculation of *Units* X *Unit Rate* for FFP claims.
13. Cost (Information Only)
    - **Agency Fee:** Type a charge for the provider, if applicable.
    - **Client Liability Fee:** Type a charge for responsibility, if applicable.
    - **MA Fee:** Type a charge for medical assistance, if applicable.
    - **Third Party Fee:** Type a charge for a go-between, if applicable.
14. **County Total:** Type a total based on input charges.

- Eligibility Information section
  1. **MA Eligible (check box):** Check if the client qualifies for medical assistance.
     - **Yes [radio button]:** Select if it is documented that the client qualifies for medical assistance.
     - **No [radio button]:** Select if the client is not qualified for medical assistance.
     - **In Progress [radio button]:** Select if the client is in the process of securing medical assistance.
  2. **HC Eligible (check box):** Check if the client qualifies for Health Choice.
     - **Yes [radio button]:** Select if it is documented that the client qualifies for Health Choice.
     - **No [radio button]:** Select if the client is not qualified for Health Choice.
     - **In Progress [radio button]:** Select if the client is in the process of securing Health Choice.

- Diagnosis Information section
  1. **Diagnostic System Used:** Select method for findings. This is a mandatory field.
  2. Grid
     - **Type /column/:** Displays the categories of diagnoses.
     - **ICD Code:** Click in the field and select the appropriate code. This is a mandatory for the *Primary* field.
     - **Diagnosis:** Populates with the type. This is a mandatory for the *Primary* field.

- Comments section
  1. **Comments:** Type any comments for the record.

- Buttons
  - **[New]:** Disabled until a record exist. Clears the screen in order to add an additional record.
  - **[Save]:** Preserves the information selected for the screen.
  - **[Void]:** Voids the highlighted record.
  - **[Copy]:** Duplicates record information in to a new record so that it can be updated and resaved.
  - **[Accept]:** Greyed out. For Fiscal use only.
  - **[Reject]:** Greyed out. For Fiscal use only.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

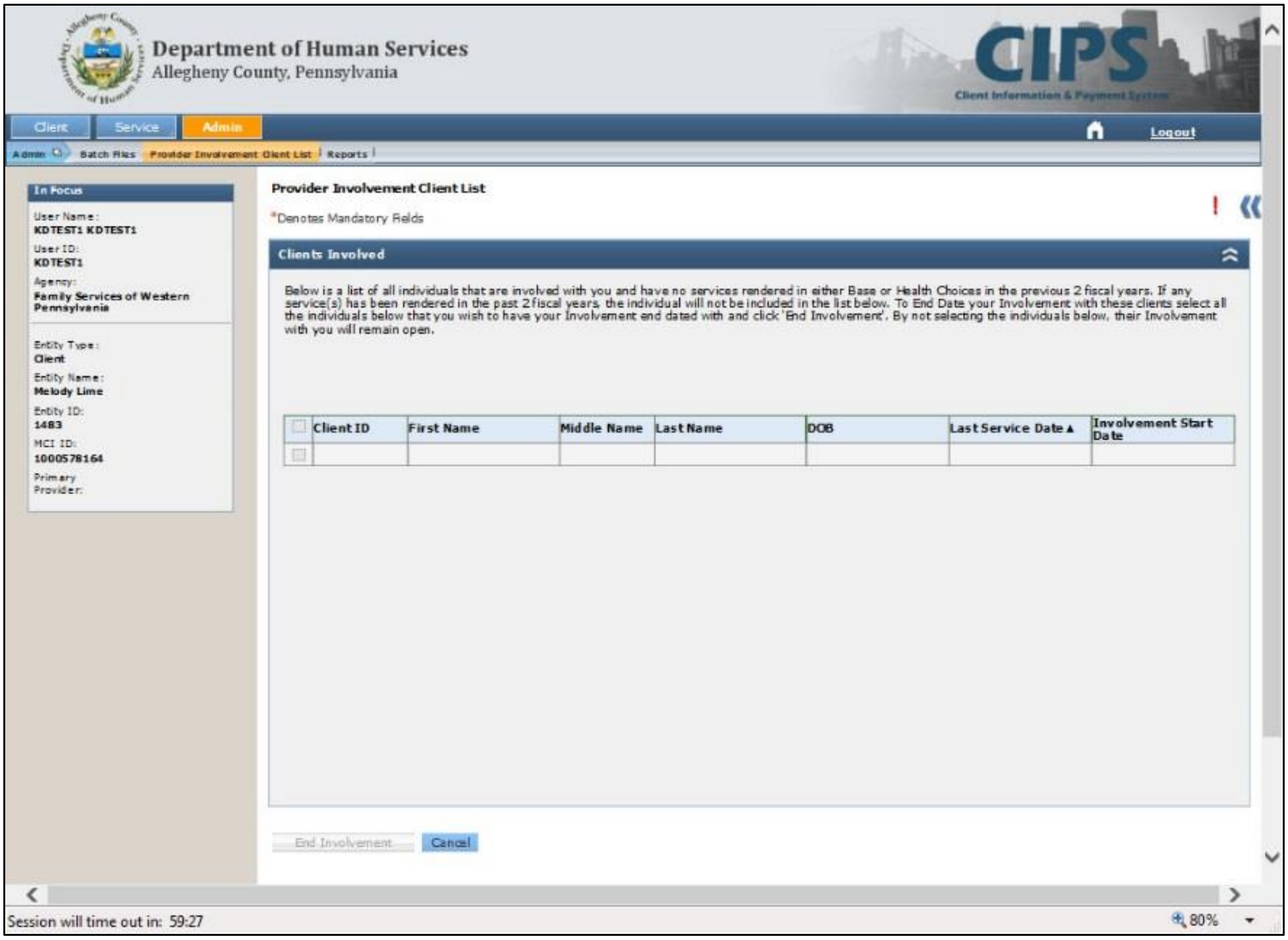
Unit 4: Admin (20 minutes)

After finishing this unit learners will be able to:

- Review involvement with a client.
- Generate reports.

Provider Involvement Client List

This screen provides users the ability to view provider involvement with a client.



Navigation:

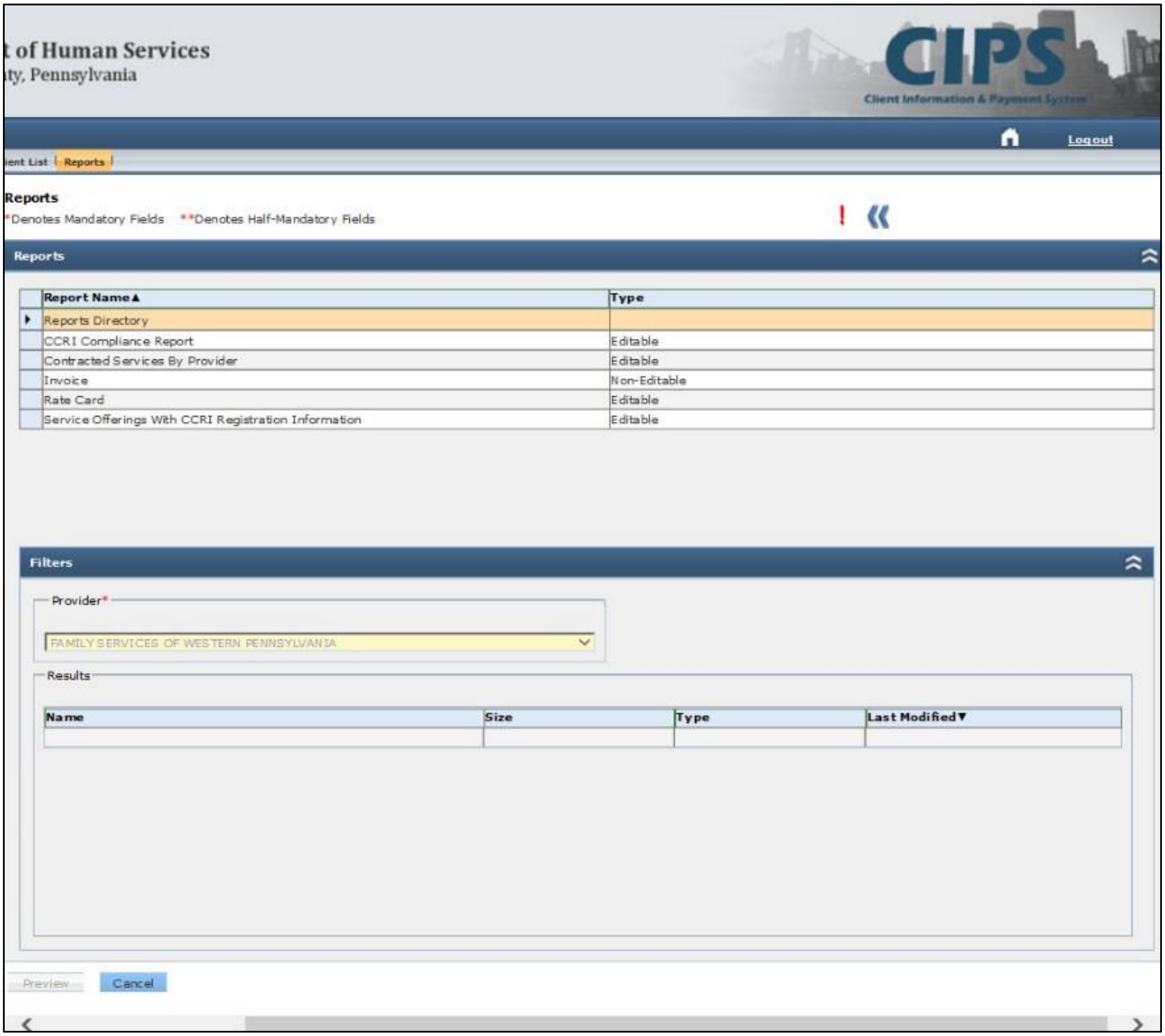
1. ***Admin > Provider Involvement Client List***

- Clients Involved section
  1. Grid
     - **Client ID:** Displays the system generated identification number assigned to the client.
     - **First Name:** Displays the client's given name.
     - **Middle Name:** Displays the client's secondary name.
     - **Last Name:** Displays the client's surname.
     - **DOB:** Displays the birthdate for the client of record.
     - **Last Service Date:** Displays the day the record was last modified.
     - **Involvement Start Date:** Displays the date the association between the client and agency began.

- Buttons
  - **[End Involvement]:** Disabled until an initial record is saved. Places and end date for an involvement, when activated.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.

Reports

This screen provides users the ability to generate reports.



Navigation:

1. ***Admin > Reports***

- Reports section
  1. Grid
     - **Report Name /column/:** Displays the name assigned to the report.
     - **Type /column/:** Displays the report category.

- Filters section
  1. **Provider:** Select or review the agency name. This is a mandatory field.

Note: The field is pre-filled when the user is a provider.

  2. Results
     - **Name /column/:** Displays the name of the file that corresponds to the selected provider.
     - **Size /column/:** Displays the space needed to view the file.
     - **Type /column/:** Displays the category of report for the corresponding provider.
     - **Last Modified:** Displays the date the report was last updated.

- Buttons
  - **[Preview]:** Generates the highlighted report based on the selected report criteria.
  - **[Cancel]:** Closes the screen and navigates to a *Splash* screen.