Vendor View for MICIS

Vendor User Guide

Version 1.3
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Introduction

Vendor View was designed to **automate some of the communications required between MI-Choice Waiver Agents and Vendors** providing services to waiver participants. Many processes which authorize services, make service changes, stop services, and communications regarding service delivery and participant issues can be replaced with Vendor View functions.

Certain actions in the MI-Choice Information System (MICIS) and PICK systems used by Waiver Agents will trigger notifications of service changes and other pertinent information for participating vendors in Vendor View. For example, a new care plan will trigger a new service notice for a particular vendor. In addition, new assessments or changes to address and phone number will trigger notifications for vendors.

Another feature of Vendor View supports the exchange of messages about participants and services between agents and vendors. Because Vendor View is housed on a secure, limited access web server, the information exchanged in messages is not available for access by non-authorized users.

Participant Privacy and Vendor View

Notices and participant information are available in Vendor View **only for participating vendors that have a MICIS care plan template or scheduled exception** for that participant.

Other privacy issues as addressed in Vendor View:

- Vendor View displays only the **last four digits of the client ID**, to protect privacy
- Vendors can run client reports for **182 days after last care plan closes**; reports are not available indefinitely
- **Vendors can only see information from the time they served that person**; e.g. if a new assessment occurred after the vendor's service, the new assessment is not available to that vendor, who can only see the last assessment from their service time
- **Vendors cannot see services of other vendors** serving their clients
- Each Vendor View user must have **their own User ID and password**

Accessing Vendor View

Each vendor using Vendor View must be registered and assigned a User ID and password to access the Vendor View web site. To connect to Vendor View:

1. Enter the Vendor View URL address in your web browser (URL address is sent to users with the Welcome email on the start date of Vendor View)
2. Enter User ID
3. Enter password. For security purposes, do not click "Remember my password".
4. Click OK or hit enter

Selector Screen for Vendors

Once the system recognizes your User ID and password, the Agent Selector screen is displayed for vendors.

If a vendor is using Vendor View in conjunction with more than one Agent, a drop-down list of the Agents appears on this screen. The vendor user will select the appropriate agent from the drop-down list, and if the correct default Agent and Vendor names are displayed, users can simply click [Next] to continue.

If a vendor user is able to view more than one vendor's records (e.g. program supervisors for more than one Vendor View site), a drop down list of available vendors is displayed under the Agent selection. These users will then select the appropriate vendor to view.

Once a vendor has chosen an agent (and possibly a vendor) to work with, the system displays both the vendor and agent names at the top of all screens. Also, the agent phone number is displayed for vendors.

Notices

The Notices tab is split into two sub-links: Current Notices and Archived Notices. When first signing on to Vendor View, the user is taken to the Current Notices sub-link. The two sub-links displays are similar (note differences below).

The Current Notices screen displays all active notices that have not yet been reviewed and archived by the vendor. **As events occur in the MICIS system, notices are automatically posted on the Current Notices screen**, with the most recently posted notice on the top.

Notice Creation

Notices are only created for clients with scheduled services (care plan templates or scheduled exceptions in MICIS terms) for registered Vendor View vendors. Notices are created from different data entry and editing functions in MICIS, generally including:

- New assessment (triggered by all {re}assessments for vendors receiving assessment reports; Assessment notices are not created until SW and RN certification and SW and RN "completed" boxes are checked)
- Change to client address or phone number
- Any change to the Care Setting status (e.g. enter the hospital or return home), including new, changed or removed statuses
- New, changed, deleted or stopped care plan and/or service schedule
- Care plan service, procedure, and/or standard remark change
- Care plan note change (if desired by agent user)
- New, changed or deleted care plan tasks or times
- Participant at Risk change
- Days/Times may vary
- Client closed

Note that if a stop date is changed in a prior service period and the same service starts again later, a special message appears in the notice indicating that a **"more recent service authorization exists for this service. Run notice report for details**". A service is considered "matched" whether or not the procedure/modifier or standard remark match in the earlier and later services; e.g., a hot and liquid meal would be considered the same service for this test.

Notice Screen Display and Functions

In addition to participant information, the Notice displays include the following columns:

Check box (Current Notices only)	This column is used to **mark the notice(s) to generate the associated report or archive the notice.** Clicking the top checkbox results in all notices being checked (or unchecked). Note that **boxes remain checked after reports are run**, so users are able to archive notices for which reports have been produced without rechecking the boxes.
County	County code of the participant is displayed. A drop down list of counties is available in the County search criteria box on the top of the screen to obtain the associated county name.

Current Service   For service notices only, this column includes:
- Service name (short service name defined by agent)
- HCPCS code
- Procedure/Modifier code (or dash if none)
- Standard Remark code (or dash if none)

Action Detail   Summarizes the action that resulted in the notice.

Effective Date   Date on which the action takes effect.

Email Date (Current Notices only)   Date the notice reminder email was sent to the vendor. Displayed in current notices only since date is either same or one day after Notice Create date.

Care Mgr   Initials of primary and secondary Care Managers

Notice Create Date   Date the notice was created (entry or edit date in MICIS)

Reviewed By (Archived Notices only)   User ID of person who reviewed and archived the notice.

Reviewed Date (Archived Notices only)   Date notice was reviewed and archived.

Notice Screen Functions

Several functions are available on the Notice screen.

Search   Using left search box, users can search for:
- Last four digits of Client ID
- Last Name string (as many letters as desired)

Using County search box, users can search for:
- County, to limit the search to clients in the selected county

Once the type of search is selected and the value entered, click "Go" (or hit the Enter key) to conduct the search.

Display All   This button returns screen to complete listing of all notices.

Message Notice   A new message is one that has not been marked as "Read". Notice screen will display in red the number of new messages (if any) like this:

Messages: 2 new messages

Generating Notice Reports

The Current Notices Generate Reports button will generate appropriate reports for any checked notices. For example, new services will generate a Service Authorization report, changes to care setting will generate a Care Setting report and a new assessment will generate an Assessment or Assessment Comparison report.

Key Notice Report Generation Information:

- Service reports generated from the Notice page automatically INCLUDE Cost/Unit information. Vendors can generate these same reports without Cost/Unit from the Services Reports tab.
- Report generation from the Notice page has been designed to produce only one report if there are multiple notices pertaining to the same service.
- Action Detail information is printed on reports generated from Current Notices sub-link, but not on reports generated from Service Report tab.

Archiving Notices

The vendor indicates that a notice has been received and will be acted upon by archiving that notice. User ID of the person archiving the notice is saved in the archived record, as well as the date of the archive. At the end of the day, agents will check the "Current Notices" sub-link to see which notices have not yet been archived, and will take appropriate action to be sure the vendor sees the notice information. Notices can be archived as part of or after the report generation process.

Important: The Reviewed/Archive function tells the agent that a notice has been received and will be handled by the vendor. Only vendors can use this button to archive notices. DO NOT archive a notice unless the notice has been reviewed and can be handled.

Archived notices can be found by clicking the Archived Notices sub-link under the main Notice tab.

To Archive a Notice **after** Report Generation:

Step 1:	After reports are generated, check the notice(s) to be archived in the left checkbox column. (Note that checkmarks remain in checkboxes after reports are printed; to archive the same notices, move to step 2. To archive only some of the reported notices, remove checkmarks as necessary).
Step 2:	Click the [Reviewed/Archive] button to move notices to Archive.

To Archive a Notice **with** Report Generation:

Step 1: Check the notice(s) to be reported and archived in the left checkbox column
Step 2: Click the [Generate Reports/Review/Archive] button.

Notice Email to Vendors

Twice each day (at 11:30 a.m. and 3:30 p.m.), the Vendor View system polls new, unarchived notices created since the last email, and sends a generic email to any non-fax vendor with new notices. This email is sent from VendorView@ciminc.com to the email address(es) provided by each vendor at registration.

The subject of the email is "Vendor View: New Notices Available", and the text of the email is:
> *Please log on to Vendor view to review your NEW NOTICE(S). If you have questions or need assistance please contact the CIM Helpdesk at VendorView@ciminc.com or (734) 930-0855.*

No participant information is provided in this email in order to protect participant privacy. Vendor View itself contains the participant information being shared.

Each vendor can have **as many email addresses as needed** to receive emails from Vendor View. CIM suggests that one person is assigned the task of monitoring Vendor View and seeing that appropriate information is delivered within the vendor agency. Other email addresses should be provided as back-up to this assigned person.

Note that it **is not necessary to receive an email to review new notices.** Notices are posted in Vendor View as soon as they are created by actions in MICIS. The purpose of the email is a reminder that there are new notices in case the vendor staff is not monitoring the web site.

Clients

The Clients screen has the same search functions as the Notice Screen – Search last name or last four digits of ID, County selection, and Display All (see Notice Screen Functions above for details).

Clients Tab Information:
- Only active clients are listed, based on a current service being provided by the vendor. A current service is defined in MICIS as a care plan with either a template or scheduled exception.
- The list is sorted alphabetically by last name.

- "Printer Friendly" button on the top right of the screen will produce a printable copy of the displayed Clients list. On the printer friendly pop-up, there is a link to "Print this Page" or "Exit" back to Vendor View.

Client and Service Reports

The Client and Service Reports pages are used to generate reports at any time, independent of notices. Any clients served by the vendor **in the past six months** or **scheduled for the future** are available on the Reports pages.

Clients are identified on the left, and columns on the right side of the screen with checkboxes are used to generate reports. Clicking the top checkbox will result in the generation of that report for all participants, while individual checkboxes are used to generate reports for selected participant(s).

Reports generated from either of the Reports screens <u>do not</u> include notice information on the top, as do the same reports generated from the notice page.

Client Reports

Client Reports include (samples at end of document):

- **Assessment** (full assessment without financials; available to vendors set up by agents to receive an assessment report; report is <u>most recent</u> assessment completed for time vendor served client)
- **Assessment Comparison** (available if the vendor has served the client for the time covering the two assessments; displays only fields that have changed since prior assessment)
- **Care Settings** (e.g times at home, in hospital, etc.)
- **Current Medications/Allergies**
- **Current Caregivers**
- **Current Medical Providers/Pharmacies**

Key client report information:

- Vendors not set up to receive assessment reports will have an "X" in those report columns, as well as in the Medications, Caregivers and Medical Providers/Pharmacies reports
- Medications, Caregivers, and Medical Providers/Pharmacies reports are automatically produced with an Assessment or Assessment Comparison report generated from the Notices screen, but NOT from the Client Reports screen
- Vendors will receive a message "No data to report" on the initial assess report until the SW and RN certification and SW and RN "completed" boxes are checked on the PICK SW and RN assessment. New assessments

will not be available until they are "completed"; vendors will continue to view older assessments until the new one is "completed".
- Reports only display information for the time period of the vendor service

Service Reports

Service Reports include (samples at end of document):
- **Service Authorization** (different format for each template type)
- **Service Summary** (combined service authorizations for date range)
- **Scheduled Exceptions** (all exceptions, even ones that did not create notice, with any posted notes)
- **Care Plan Calendar** (all patterns in month but only tasks and times for last pattern are displayed; see Service Authorization for details about other schedules in month)
- **Notice Report** (all notices for person, with reviewer ID and date of review

On the Service Reports tab, selection criteria for reports are on the top of the screen. Users can select:
- a time period (in months)
- to include or exclude Cost/Unit information (exclude is default)

Key service report information:

- **Reporting period defaults to 3 months**: current, prior, and next
- **A report will print "No Data to Report"** if there is no template or scheduled exception in the month
- **"Times may vary" or "Days may vary"** appear under the service schedule if appropriate
- Any **notes pertaining to the service, tasks or service times** will appear on the Service Authorization, Service Summary, and the Care Plan Calendar reports.
- **Participant at Risk appears on top of the service reports if applicable**
- **Care Plan Calendar Report will not print any data if there is:**
  - no template for the month
  - no service scheduled in the month
  - template stops before the scheduled event (e.g. template stops on the 15th for a service scheduled to occur on the last date of month)
- On Care Plan Calendar Report**, if multiple service schedules in the month,** each schedule will be shown, but only the times and tasks associated with the last schedule (template) for the service in the month are displayed.   See Service Authorization report for details about all schedules.

Report Download

The Report Download tab includes all pending and completed reports that have been requested by your agency. Reports remain in the Report Download list for two days.

Key Reports Download information:
- When reports are requested, system moves to Reports Download page
- Page displays three statuses: Pending (not done yet), Report Download (ready to open), or Previously Viewed (reports stay on list for two days)
- Click on report name to link to display a "File Download" page which gives option to "Open", "Save," or "Cancel" the report.
- If "Open" is selected, report is displayed in pdf format, from which report can be printed or saved. Users can change assigned file name (series of letters and numbers) to a recognizable name.

Messages

Agents and internet vendors are able to communicate about services and participants in a secure fashion that will prevent unauthorized access to participant protected health information by using Vendor View messages.

Vendor View does not currently support posting messages to a specific staff person at either agent or vendor; the staff monitoring Vendor View messages must distribute them within the organization. Each agency must decide how the messages system will be used internally.

Note that **fax vendors will not be listed as available vendors in the Messages list**, since they will not be able to see posted messages.

New and Read/Sent Messages Display

There are two sub-links that display messages: New Messages and Read/Sent Messages. Clicking on either sub-link will display the appropriate messages.

The Vendor View message screens display the following columns:

Checkbox   Used to either mark message as read or create a printer friendly version

Type   In, out or internal message (click on heading to sort)

Sent   Date message was sent (click on heading to sort)

Sender   Agency creating message (click on heading to sort)

Sender ID   User ID of person sending message (click on heading to sort)

Recipient   Agency receiving message (click on heading to sort)

Subject   Whatever was typed by message sender

Body   The message itself

Read by*   User ID of person who marked message as read

Read Date &   Date and time message was marked as read
Time*

*Found on Read/Sent Messages sub-link only

Send New Message

Step 1:   Click the Messages tab, and then click the Send New Message sub-link.
                "From" defaults to the sender vendor (or agent) name)
Step 2:   Select the recipient(s) from the displayed list. Multiple recipients can be
                highlighted by using [Ctrl] or [Shift] [Click].   **Note that only Vendor
                View agents will appear for a vendor, and only Vendor View
                registered internet vendors will appear for an agent.**
Step 3:   Enter the subject line (either a participant name or other issue)
Step 4:   Enter the message text
Step 5:   Click [Send] to send the message or [Cancel] to clear out the information.
                Either option will return to a blank Send New Message screen

To Print a Message

Use the check box column to mark message(s) to be printed, and click the Print Friendly
button to create a printer friendly version of the checked Message(s). This can be done
on either the New or Read/Sent messages sub-links. Links are available on this pop-up to
either "Print this Page" or "Exit".

Message(s) in the "Print Friendly" display can be copied and pasted into another
application, such as an automated progress notes file. To do this, highlight the message
to be copied, press <Ctrl> <C>, move to the other application, and press <Ctrl> <V>.

To Archive a Message

Step 1:   Check the message(s) to be archived in the left checkbox column
Step 2:   Click the [Mark Checked as Read] button.

Any checked messages are moved to the Read/Sent messages list found on the Read/Sent Messages sub-link. The user ID and date "read" is saved with the message for future tracking.

Important: The "Mark Checked as Read" function tells the sender that a message has been received by the vendor. DO NOT click "Mark Checked as Read" for a message unless it has been read, or the sender will assume that the message has been received and can be acted upon.

Message Reminder Email Sent to Recipient Agency

Twice each day (at 11:30 a.m. and 3:30 p.m.), the Vendor View system polls new messages created since the last email, and sends a generic email to the recipient vendor or agency. This email is sent from <u>VendorView@ciminc.com</u> to the email address(es) provided by the vendor or agent.

The subject of the email is "Vendor View: New Messages are Available", and the text of the email is:

Please log on to Vendor View to review your NEW MESSAGE. If you have questions or need assistance please contact the CIM Helpdesk at <u>VendorView@ciminc.com</u> or (734) 930-0855.

No participant information is provided in this message in order to protect participant privacy.

Change Password

The Change Password tab allows a user to change their Vendor View password by entering the new password twice, and clicking the "Submit" button.

Change Role

The Change Role tab moves the vendor user to the initial screen, where user can choose another agent and/or vendor (if they are registered to more than one agent and/or vendor).

Contact Us

Contains contact information for technical assistance from the Center for Information Management, Inc. (CIM). CIM's email link and phone number are displayed.

Care Managers

The Care Managers tab in provides a reference to Care Manager names, and optional phone numbers. The list can be sorted by Care Manager initials or last names; vendors can print the page to obtain a paper copy of Care Manager names.

FAX Vendors

Vendor View can be used by vendors that do not have access to the internet. These vendors are set up to receive faxed notices from Vendor View. When an action in MICIS would create a notice for an internet vendor, fax report(s) will be created for fax vendors.

Key FAX Information:
- Fax reports are created to send when a notice event occurs in MICIS
- System polls for notices to be faxed once an hour, and submits reports to the report creation process.
- Assessment report is faxed when first service is established for the vendor
- Assessment Comparison report is faxed for each subsequent assessment
- Medications, Caregivers and Medical Providers/Pharmacy reports are all faxed with assessment reports to appropriate vendors
- Faxes are attempted 6 times 10 minutes apart, and successful faxes are archived with the fax date
- Failed faxes are entered to Agents Failed Fax web page, with email notification

Help Link

The Help link on the top right hand corner of each Vendor View page connects the user to the Help file. Using the Help link, users have access to:

- Vendor View FAQ's (Frequently Asked Questions)

  The first item in the FAQ's is a link to the Release Notes, which lists all changes made to Vendor View with each release, listed with most recent release first. Other FAQ's are included as they are created.

- Help file can be searched by topic or keyword as needed.