



## 4.1.5.3 CMIPS II User's Manual Version 4 (Release 0.3)

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# 1 DOCUMENT CONTROL

## 1.1 AMENDMENT RECORD

Version	Date	Status	Author	Comments
1.0	05/11/2010	Release	Erica Mafnas	Release
1.1	06/22/2010	Updated	Erica Mafnas	Incorporate comments OSI
1.2	10/08/2010	Release	Jessica Dwyer	Incorporate CAP updates
1.3	10/12/2010	Updated	Jessica Dwyer	Incorporate comments OSI
1.4	11/29/2010	Updated	Jessica Dwyer	Incorporate comments OSI
1.5	01/21/2011	Release	Jessica Dwyer	Release
1.6	01/31/2011	Release	Jessica Dwyer	Release
1.7	02/22/2011	Release	Jessica Dwyer	Incorporated comments from OSI
1.8	03/03/2011	Release	Jessica Dwyer	Incorporated comments from OSI
1.9	03/10/2011	Release	Paul Hunt	Response to comments from OSI
2.0	05/09/2011	Release	Jessica Dwyer	Release
2.1	05/16/2011	Updated	Jessica Dwyer	Incorporate Advantage
2.2	06/24/2011	Updated	Jessica Dwyer	Incorporate OSI comments
2.3	08/02/2011	Updated	Jessica Dwyer	Incorporate OSI comments
2.4	08/08/2011	Updated	Jessica Dwyer	Incorporate OSI comments
3.0	09/20/2011	Updated	Jessica Dwyer	Release 1.0. Updates include changes for CRs 473, 497, 498, 499, 500, 507, 515, 570, and 584.
3.1	10/14/2011	Updated	Jessica Dwyer	Incorporate OSI comments
4.0	03/07/2012	Release	Jessica Dwyer	Release 0.3
4.1	03/27/2012	Updated	Jessica Dwyer	Incorporate OSI comments
4.2	04/25/2012	Updated	Jessica Dwyer	Incorporate OSI comments
4.3	05/03/2012	Updated	Jessica Dwyer	Incorporate OSI comments

Version	Date	Status	Author	Comments
4.4	05/10/2012	Updated	Jessica Dwyer	Incorporate OSI comments

## 1.2 REFERENCES

Document	Author	Status	Version
CMIPS II Words, Terms and Acronym Usage Guide	HP	Active	6.0
CMIPS II Master Screen List	HP	Draft	
Exhibit 1 - Statement of Work	OSI	Active	1.0
4.1.4 Detailed System Design	HP	Active	6.1
4.1.5.3.a Help Desk Procedures	HP	In Progress	2.0
4.4.1 Operations Plan	HP	Active	2.1
4.5.4.4.1.1 Training Materials	HP	In Progress	4.3
4.5.4.4.4 Self-Paced (WBT) User Training Solution	HP	Active	5.1

## 1.3 TERMINOLOGY

Please refer to the IHSS\_CMIPSII\_Words Terms and Acronym Usage Guide.doc. You can find this document in the CMIPS II Project Workbook.

Term	Definition
APD	Adult Programs Division
CAPA	California Association of Public Authorities
CDPH	California Department of Public Health
CDSS	California Department of Social Services
DHCS	Department of Health Care Services
DSD	Detailed System Design
HRM	Human Resource Management
IHO	In-Home Operations
IHSS	In-Home Supportive Services
OSI	Office of Systems Integration
PA	Public Authority
PDF	Portable Document Format
QA	Quality Assurance
SCO	State Controller's Office
TOC	Table of Contents
WPCS	Waiver Personal Care Services

## 2 INTRODUCTION/INFORMATION FOR USE OF THE DOCUMENTATION

For ease of use, the manual is organized into separate documents with instructions for CMIPS II users. Each document is a separate chapter.

- Chapter 1 – Overview of CMIPS II
- Chapter 2 – Case Management Basic Navigation
- Chapter 3 – Recipient Management
- Chapter 4 – Provider Management
- Chapter 5 – Program Oversight
- Chapter 6 – Time and Attendance
- Chapter 7 – Payroll
- Chapter 8 – Forms, Reports and Data Download
- Chapter 9 – System Security
- Chapter 10 – CMIPS II Adult Programs Division
- Chapter 11 – CDSS Accounting Procedures

Within each chapter there are screen shots of the “main” CMIPS II workspaces and homepages to provide a reference point for where users are in the system. These main screens are typically the starting point for many procedures. The procedures are documented based on the screen flow of CMIPS II.

**Note:** If there is more than one path to follow to perform a procedure, then the most common way is documented. Depending on where a user is in the system and what task is being performed, the paths may differ for the same procedure.

The user can choose which chapter is needed based on his or her role. For example, if a Caseworker needs to know how to enroll a provider, the Provider Management chapter can be consulted.

The User's Manual organization follows the logical business process flow incorporated into the approved Detailed System Design (DSD) document. Each chapter will have an overview of the chapter's content and introductions for each section, followed by the procedures.

## 3 EXECUTIVE SUMMARY

The In-Home Supportive Services/Case Management Information and Payrolling System (IHSS/CMIPS II) User's Manual is provided as a reference document for CMIPS II users. CMIPS II is accessed through a Web Portal that provides a single logon location for users to access the various components and functionality associated with CMIPS II. These components and functionality include Case Management, Reporting, Advantage Financial and Advantage Human Resource Management (HRM).

In addition to the items mentioned above, the User's Manual also contains overviews and summaries of CMIPS II functionality. A comprehensive glossary and chapter-specific index is also included for reference.

The audience for this User's Manual includes:

- California Office of Systems Integration (OSI) staff
- County In-Home Supportive Services (IHSS) program staff
- County Public Authority (PA) staff
- California Department of Social Services (CDSS) Accounting and Adult Programs Division (APD) staff
- Department of Health Care Services In-Home Operations (DHCS IHO) staff

## 4 OVERVIEW

The User's Manual is a comprehensive document created from information contained in the DSD, Online Help system, Training Materials and the Self-Paced User Training Solution.

The User's Manual follows the logical business process flow incorporated into the approved DSD.

Contents of each of these sections will be described in Sections 9–12 of this document. Please see those sections for more information.

## 5 GENERAL ROLES AND RESPONSIBILITIES

This section contains the roles and responsibilities of various stakeholders related to the User's Manual. The User's Manual is one large document to be used in all counties.

Role	Responsibilities
HP CMIPS II Training Team	Develops and maintains User's Manual over the life of the project  Makes hard copy User's Manual available to users
HP CMIPS II Operations Team	Puts a link to User's Manual on the web portal
Office of Systems Integration (OSI)	Reviews and approves documents

## 6 CONCEPT OF OPERATIONS

The CMIPS II User's Manual provides support, in addition to training materials for IHSS staff in the use of CMIPS II more effectively and efficiently.

The information in the CMIPS II User's Manual contains information grouped in topic areas and may be used as a reference tool at users' desks while using CMIPS II.

The CMIPS II system stakeholders include the following:

- California Department of Social Services (CDSS)
- Office of Systems Integration (OSI)
- California Department of Health Care Services (DHCS)
- IHSS staff in all 58 California Counties
- California Association of Public Authorities (CAPA)
- Public Authority Staff

## 7 NAVIGATION

The User's Manual has been divided into the separate chapters as mentioned in Section 2. Each chapter will be a in a printable portable document format (PDF) that will be available on the Web Portal.

Each county site will be provided one printed version of the manual. If there are more than 20 users per site, then the county will receive one User's Manual per each 20 users. The printed version has the same organization as the online version except it is contained in binders. With each software release, a new version of the User's Manual will be placed on the Web portal and printed updates delivered to the counties at each release.

## 8 PROCEDURES

This section will define what is in each chapter.

- Chapter 1 – Overview of CMIPS II
- Chapter 2 – Case Management Basic Navigation
- Chapter 3 – Recipient Management
- Chapter 4 – Provider Management
- Chapter 5 – Program Oversight
- Chapter 6 – Time and Attendance
- Chapter 7 – Payroll
- Chapter 8 – Forms, Reports, and Data Download
- Chapter 9 – System Security
- Chapter 10 – CMIPS II Adult Programs Division
- Chapter 11 – CDSS Accounting Procedures

### 8.1 OVERVIEW OF CMIPS II

Chapter 1 of the User's Manual addresses introductory information for CMIPS II, including: Getting started, navigating in the system, online help and resetting passwords.

### 8.2 CASE MANAGEMENT BASIC NAVIGATION

Chapter 2 of the User's Manual contains basic navigation procedures within Case Management. These include: Accessing the Case Management system, navigating in Case Management, conducting searches, working with tasks, work queues and notifications.

### 8.3 RECIPIENT MANAGEMENT

Chapter 3 of the User's Manual addresses Recipient Management including: Online Searches for persons, cases, and state hearings; the functions necessary to record an Initial Contact and process an Intake Application, Service Eligibility, Final Determination on a case, Modes of Service and ongoing Case Maintenance.

## **8.4 PROVIDER MANAGEMENT**

Chapter 4 of the User's Manual addresses Provider Management including: General information about Provider Management, how to search for or create a provider and how to view provider details. It describes the steps to enroll a provider, how to create and modify a provider's benefits deduction, assign providers to cases, modify case providers and create, modify and view provider hours. How to add a WPCS provider to a case is discussed. It also details how to put a provider on leave and how to terminate a provider.

## **8.5 PROGRAM OVERSIGHT**

Chapter 5 of the User's Manual addresses activities for overseeing and managing IHSS programs and services by supporting Quality Assurance (QA) and other related functions. These include: Recording QA assessment reviews and case investigation referrals, reviewing paid claim information, viewing death match information received from the California Department of Public Health (CDPH) and the State Controller's Office (SCO).

## **8.6 TIME AND ATTENDANCE**

Chapter 6 of the User's Manual addresses activities for processing timesheets. This includes: manual entry, entering legacy timesheets, timesheet issuance and viewing history, searching for legacy timesheets and viewing timesheets.

## **8.7 PAYROLL**

Chapter 7 of the User's Manual addresses Payroll activities. This includes Forged Endorsement Affidavits, Overpayments – including: Occurrences, Collections and Recoveries, Payment Corrections, Special Transactions, Warrants, Advance Pay, as well as handling Cancel/Void/Replacement Requests, Payment Void/Re-issue Replacement, Hours by Service Month and Paid hours.

## **8.8 FORMS, REPORTS AND DATA DOWNLOAD**

Chapter 8 of the User's Manual includes information about creating, modifying, inactivating and viewing forms. General information about reports is also included.

## **8.9 SYSTEM AND SECURITY ADMINISTRATION PROCEDURES**

Chapter 9 of the User's Manual will address certain high-level system and security administration procedures. These procedures will include the functions performed by County System and Security Administration staff for the setup and administration of user access within their county.

## **8.10 CMIPS II - CDSS ADULT PROGRAMS DIVISION**

Chapter 10 of the User's Manual addresses introductory information for Advantage Financial and Advantage Human Resource Management, including: Advantage features, chart of account tables, budget inquire tables, balance sheet detail, journal voucher, lien holders, public authority wage rate, CMIPS II processes and reports available to APD staff.

## **8.11 CMIPS II - CDSS ACCOUNTING**

Chapter 11 of the User's Manual addresses introductory information for CDSS Accounting, including: Advantage features, chart of account tables, balance sheet detail, CMIPS II processes and reconciliation steps and reports available to CDSS Accounting staff.

## **9 HELP DESK PROCEDURES**

Originally requested to be included in the User's Manual, the Help Desk Procedures have become a separate document. Refer to the Help Desk Procedures deliverable.

## **10 INFORMATION ABOUT SOFTWARE COMMANDS**

This section was originally requested to be included in the User's Manual if such software commands existed in the system. As they do not, this section is not in the current document. The system is accessed through a Web portal and is Web browser-based. Users will be led into the system through the Web portal via links. There will be no software commands that users need to use.

## **11 ERROR MESSAGES AND PROBLEM RESOLUTION**

Originally requested to be part of the User's Manual for this new system, an agreement was made with OSI and HP that the error messages noted in the DSD would not be included in the final User's Manual. Unlike older system error messages, those that appear in CMIPS II provide immediate basic help in resolving a problem. The error messages are written in a business context and are understandable by the user. If a user is unable to resolve the error, the CMIPS II Help Desk should be contacted.

## **12 GLOSSARY**

The User's Manual is divided into 11 chapters. The entire User's Manual glossary is included in each chapter so the user does not have to go to another document to look at a glossary.

## **13 INDEX**

The index is created from key words that a user may use to search for a topic or concept. A chapter-specific index resides in each chapter of the User's Manual allowing users to read only what applies to their job function and to save on printing as they can print out only the sections that apply to them.