Arise CMS

Provider Management Module

03/25/2024

ISO 9001 QUALITY MANAGEMENT

ISO 20000-1 IT SERVICE MANAGEMENT

ISO 27001 INFORMATION SECURITY MANAGEMENT

CMMIDEV /5

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INTRODUCTION

The purpose of the childcare management system is to assist the childcare centre in providing a professional service to its consumers. It's all about efficiently managing day-to-day tasks so that you have more time for your children and parents. The ARISE CMS will be contributing to better serve OFC's mission of providing services to support, promote, and provide safe, quality early childcare and education for young children. The ARISE CMS will be used primarily by the Childcare Assistance and Referral (CCAR) and Community Education and Provider Services programs to support this mission.

Key business functions that CMS will support include:

- Case Module
- Provider Module
- Tools
- Admin
- Attendance
- Reimbursement
- Integration with Provider Access
- Integration with Family Portal

LOGIN PAGE

Logging onto the CMS portal, user lands on the following login page. Authorized users with their respective credentials can login to the CMS portal and perform the tasks assigned to them.

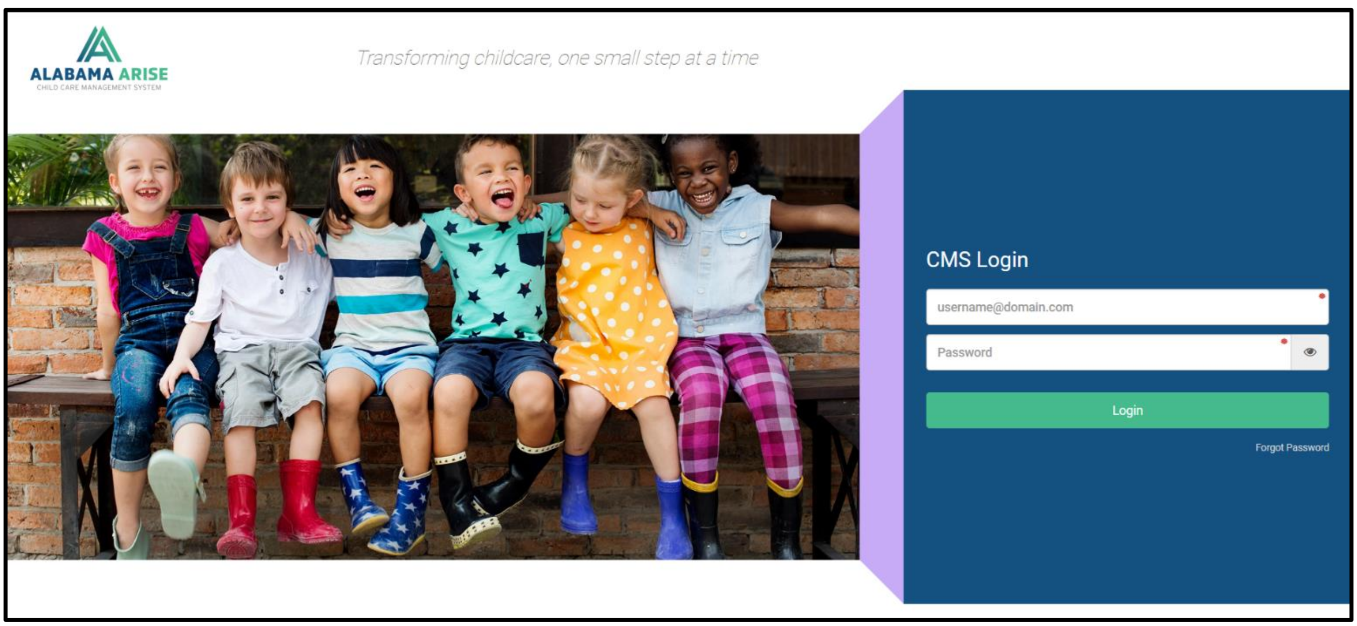

Figure 1: CMS Application Login Page

HOME PAGE

The landing page/ Home Page of the ARISE CMS is the screen displaying dashboard which provides users an overview of the work assignments, notifications, and pending approvals.

The dashboard consists of three blocks:

1. Tasks: Consists of all the tasks assigned to logged in user
2. Notices: Consists of all the notifications from different workflows
3. Recently Cleared: Consists of all items which user cleared.
4. Messages: Consists of all the messages received.

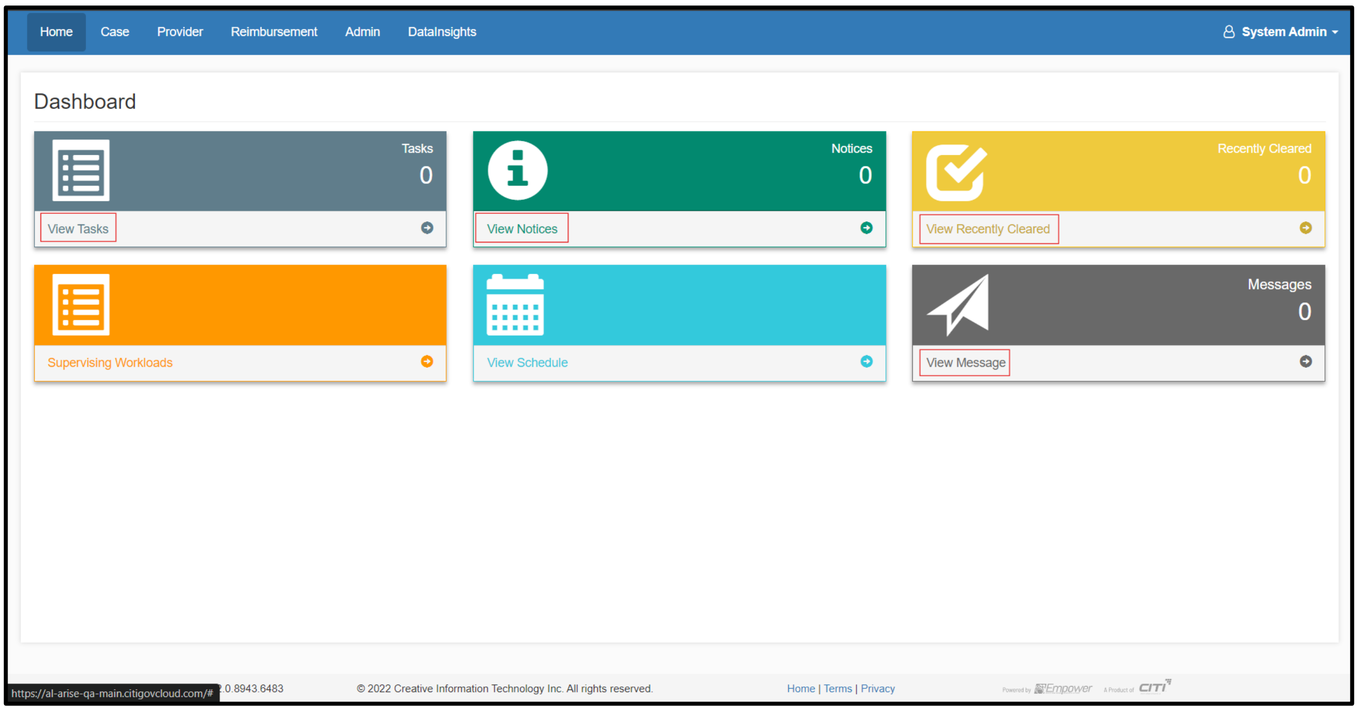

Figure 2: CMS Application Home/Landing Page

PROVIDER MODULE

PROVIDER SUB-MODULE

Provider Search

By clicking on the 'Provider' link in the menu bar, the user will see a search for a provider screen by default. The search page will enable the user to search for a provider using one or more search criteria. Search can be initiated based on various factors such as Last Name or First Name.

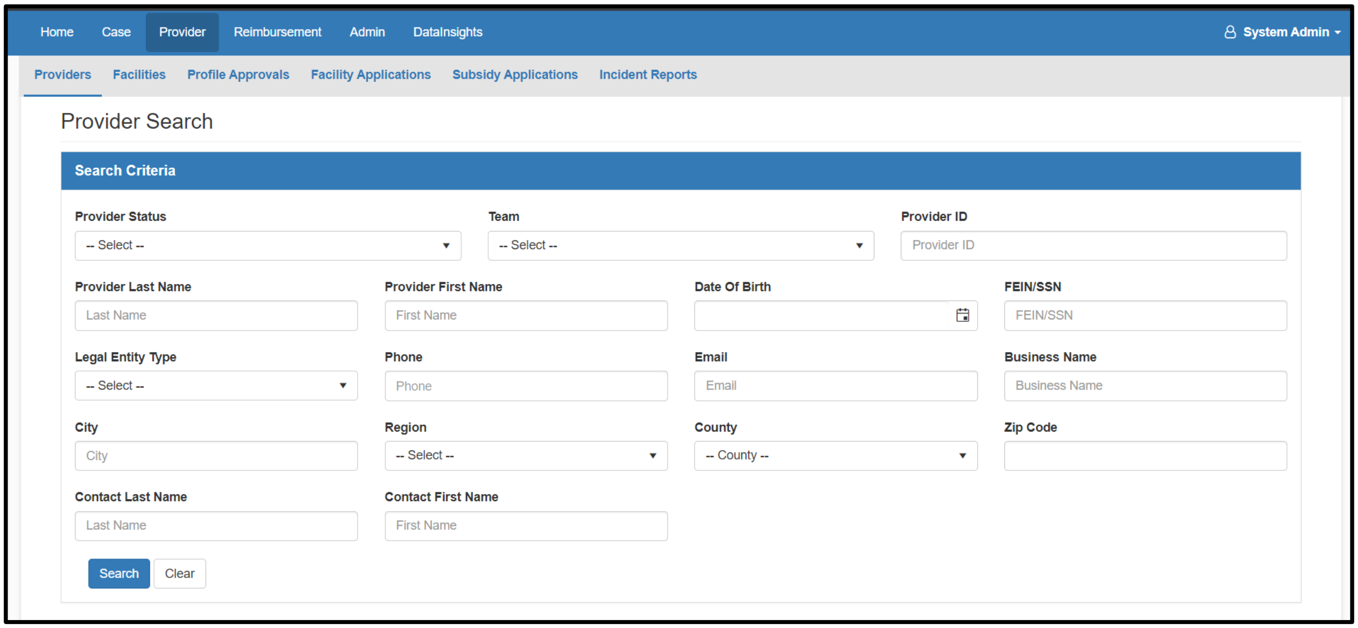

Figure 3: Provider Search Page

Search Page with Provider Record Found

The successful search results will be displayed on the Search Results Summary Grid under the following headers:

- Provider ID
- Name
- Provider Level
- Contact Information
- Address
- Phone
- FEIN#
- Legal Entity
- SSN

The user can click on the appropriate 'Provider ID' hyperlink on the grid to access the Demographic details of the record or follow steps from section – 1.2.1 How to review provider profiles?

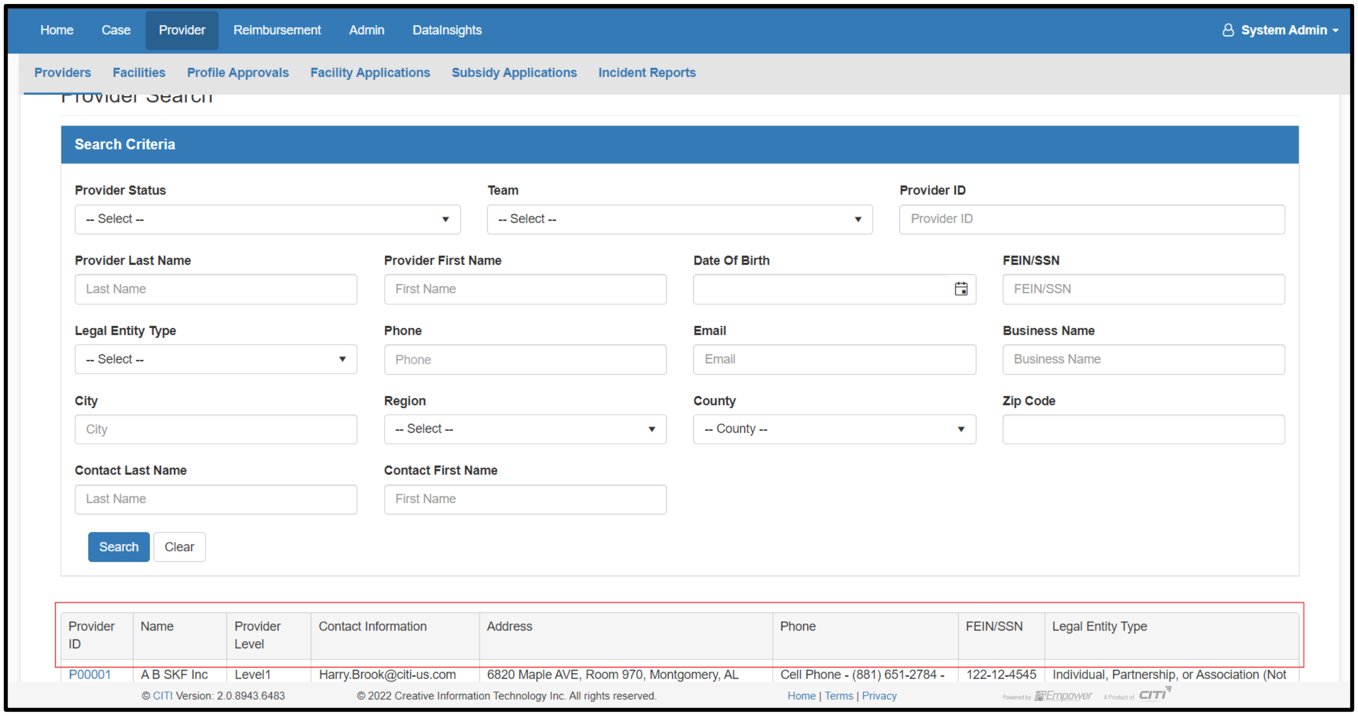

Figure 4: Provider Search Results

Search Page with No Provider Record Found

If a search does not result in any matching records found, the system will display a message indicating that "No Providers Found". The user can dismiss the message and either perform a new search or click the 'Create Provider' button (which would be enabled – refer to Note below) to create the provider.

<u>Note</u>: The 'Create Provider' button will be enabled when a user searches for a provider by entering the following details (in no order) and the application returns zero matches:

- Last Name
- DOB

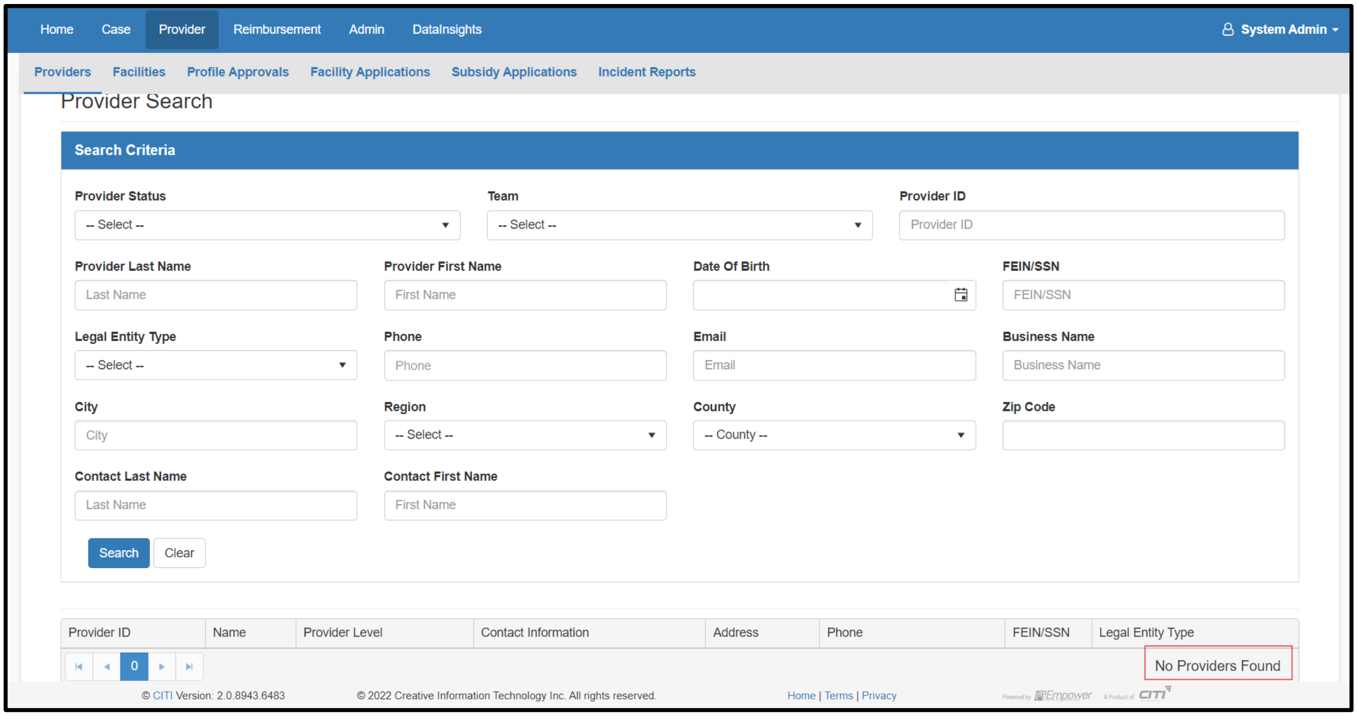

Figure 5: No Provider Results

How to review provider profiles?

1. Log in as an Authorized User, which has role-based access for the initial approval process for provider license applications.
2. Click on Provider Module
3. Click on Profile Approvals sub-module. You will be navigated to a screen displaying Submitted Provider Profiles for approval:

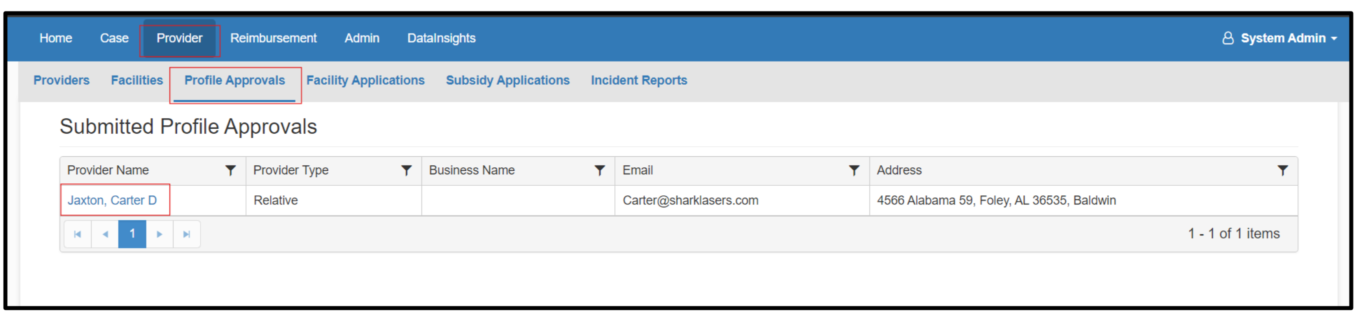

Figure 6: Submitted Provider Profiles

4. Click on Provider name hyperlink, to review the respective provider profile. You will be navigated to screen displaying Provider Details
5. Click on 'Action Needed' hyperlink displayed under 'Profile Approval' in navigation checklist
6. Review the information submitted by visiting all left navigation tabs
7. Click on 'Approve' if the submitted information is relevant

OR

8. Click on 'Send for Correction' in case the information needs any updates from the provider

1. PROVIDER DETAILS SCREEN

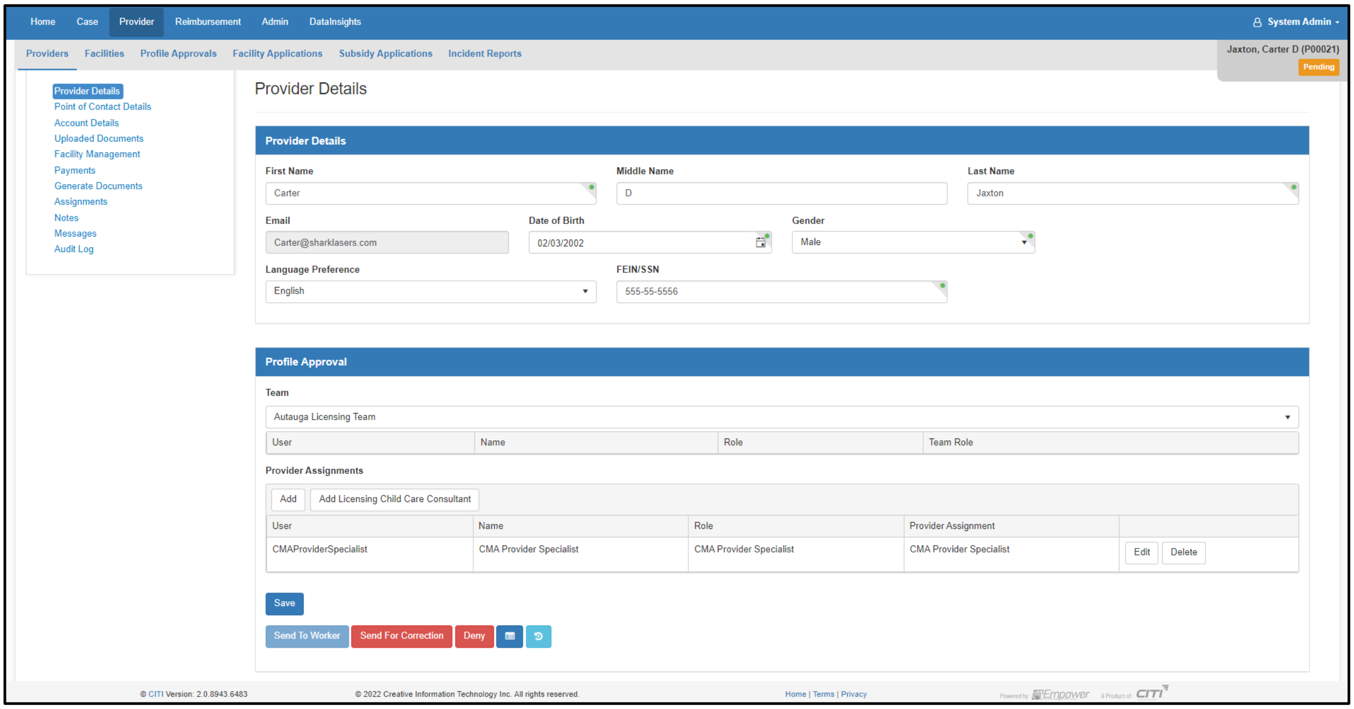

Figure 7: Provider Details Screen

On the 'Provider Details' screen, the user will be able to see an application wizard, where the status for the sections of the application will be displayed: i.e. **Creation of account, Profile approval, License application, Classrooms, Staff, Capacity, Background Checks, Facility Inspection** and **License Approval**:

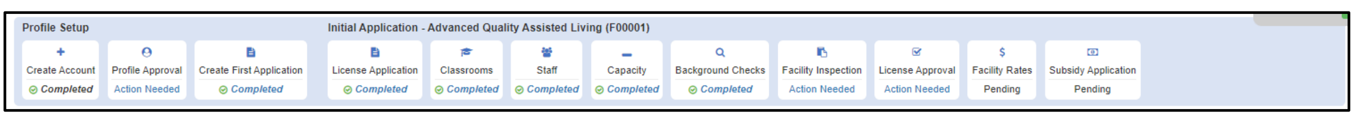

Figure 8: Application Wizard

Changing ‘Provider Status’ on ‘Provider Details’ screen:

Users are also able to change the provider status on the Provider Details page by following below steps:

1. If the user's status is ‘Active’ they can be made ‘**Inactive’** by clicking the ‘Inactive’ button under Provider Status tab.

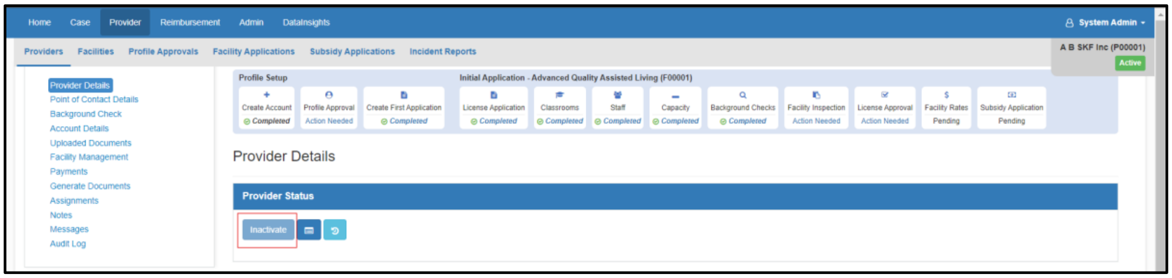

Figure 9: Inactive Button

2. If the user’s status is ‘Inactive’ they can be made ‘**Active’** by clicking the ‘Reactivate’ button under the Provider Status tab.

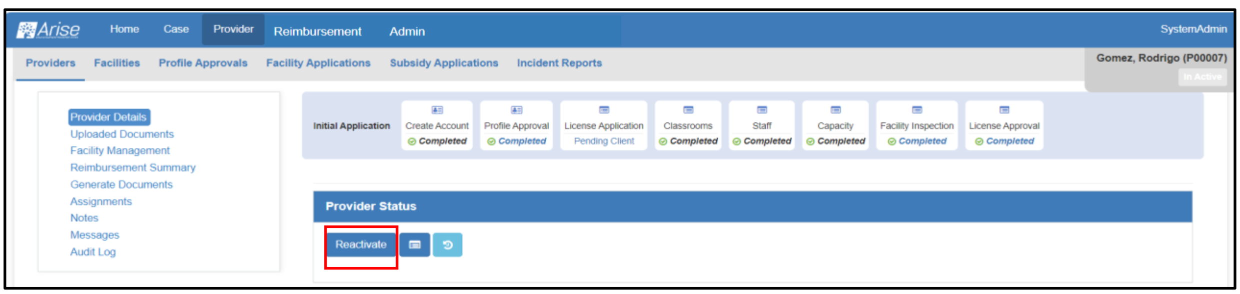

Figure 10: Reactivate Button

3. If the user's status is ‘Pending’ then they can be made ‘**Active’** or **‘Inactive’** by clicking the ‘Activate’ or the ‘Inactivate’ button under Provider Status tab.

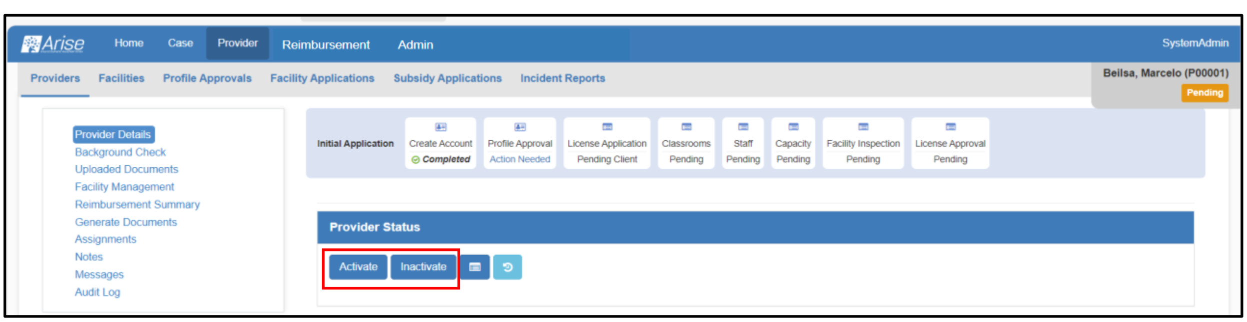

Figure 11: Active/Inactive Buttons

4. The workflow as well as the history is detailed in this section.

Workflow:

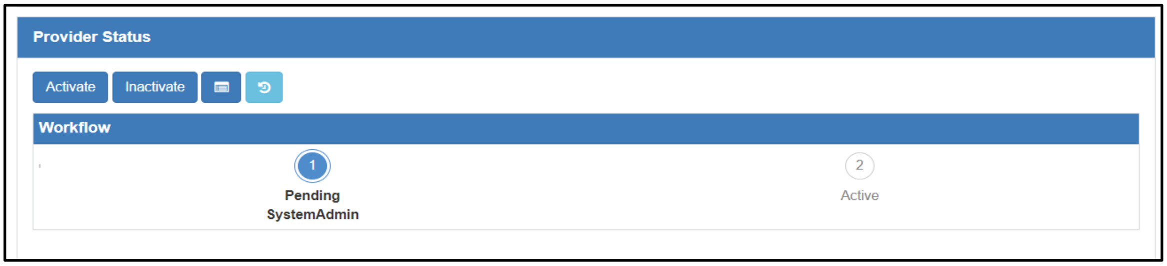

Figure 12: Workflow

History:

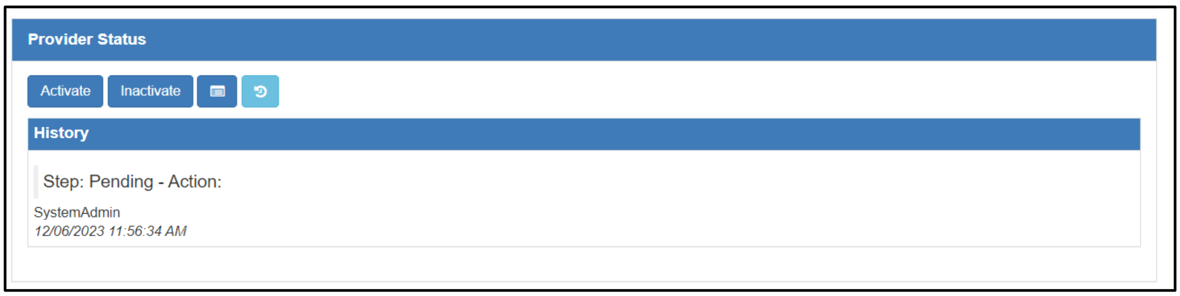

Figure 13: History

Profile Approval:

Authorized logged in user shall be able to select a 'Team' which would automatically pre-populate the details of the team. Viz., User, Name, Role and Team Role.

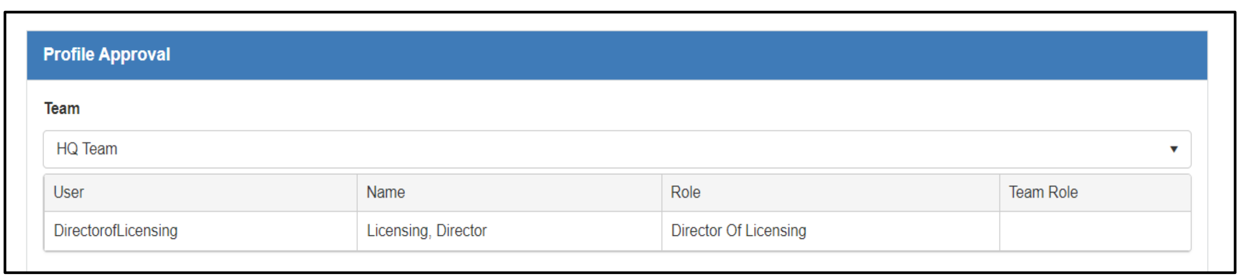

Figure 14: Profile Approval

They may also be able to add a Provider Assignment by selecting a ***User*** and ***Provider Assignment*** from the dropdown list.

Regarding profile approval, the user can click on 'Send for Correction' button and add comments for the provider. This would trigger a notification for the provider to make required changes for profile approval.

Send for Correction:

1. Enter the required changes in comments text box (Refer Figure 15: Send for Correction)
2. Click on 'Send for Correction' button.

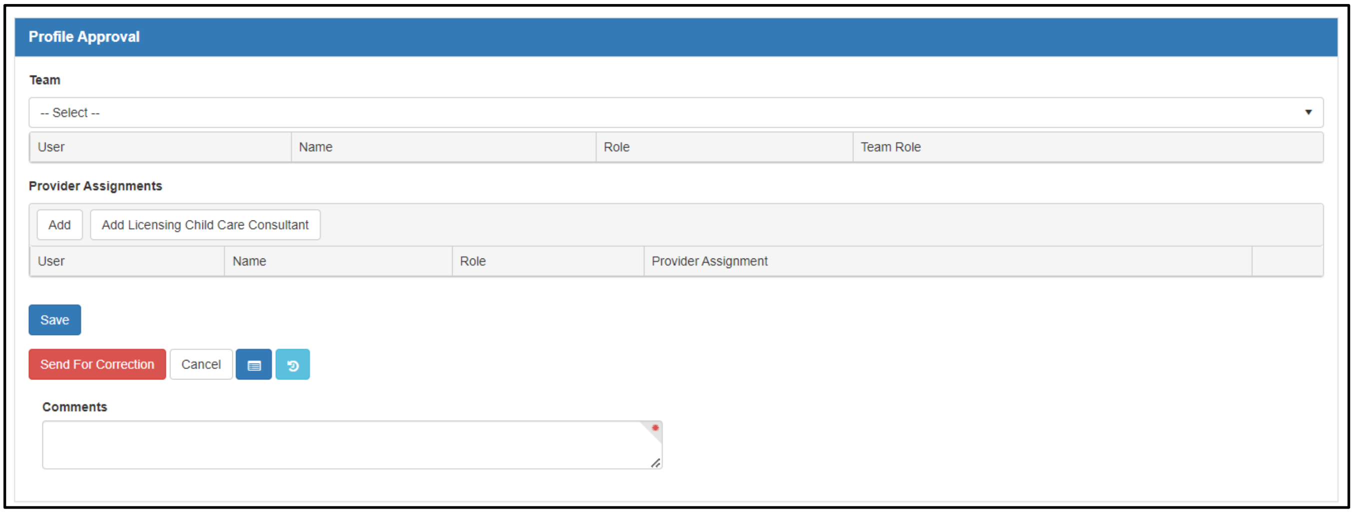

Figure 15: Send for Correction

2. BACKGROUND CHECK

This screen captures the background check information about the Provider.

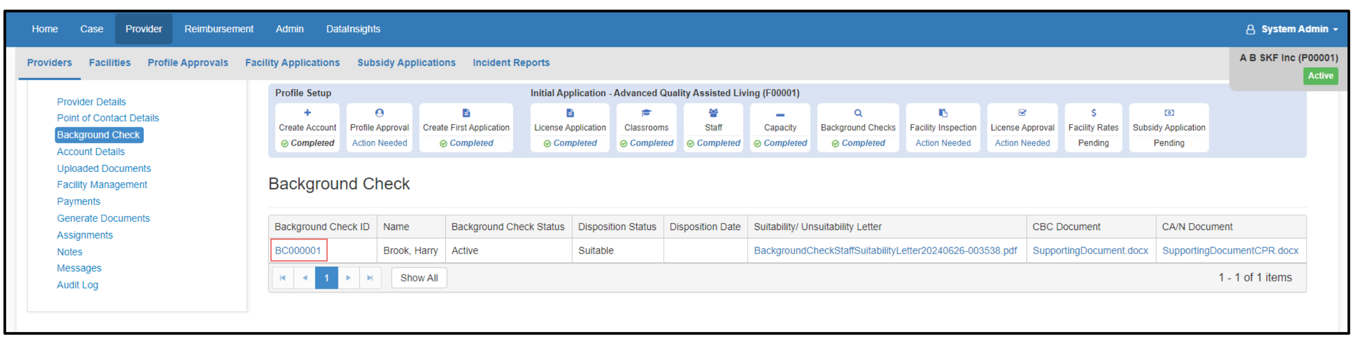

Figure 16: Background Check Page

Clicking on background check ID navigates the user to additional information regarding the Background Check:

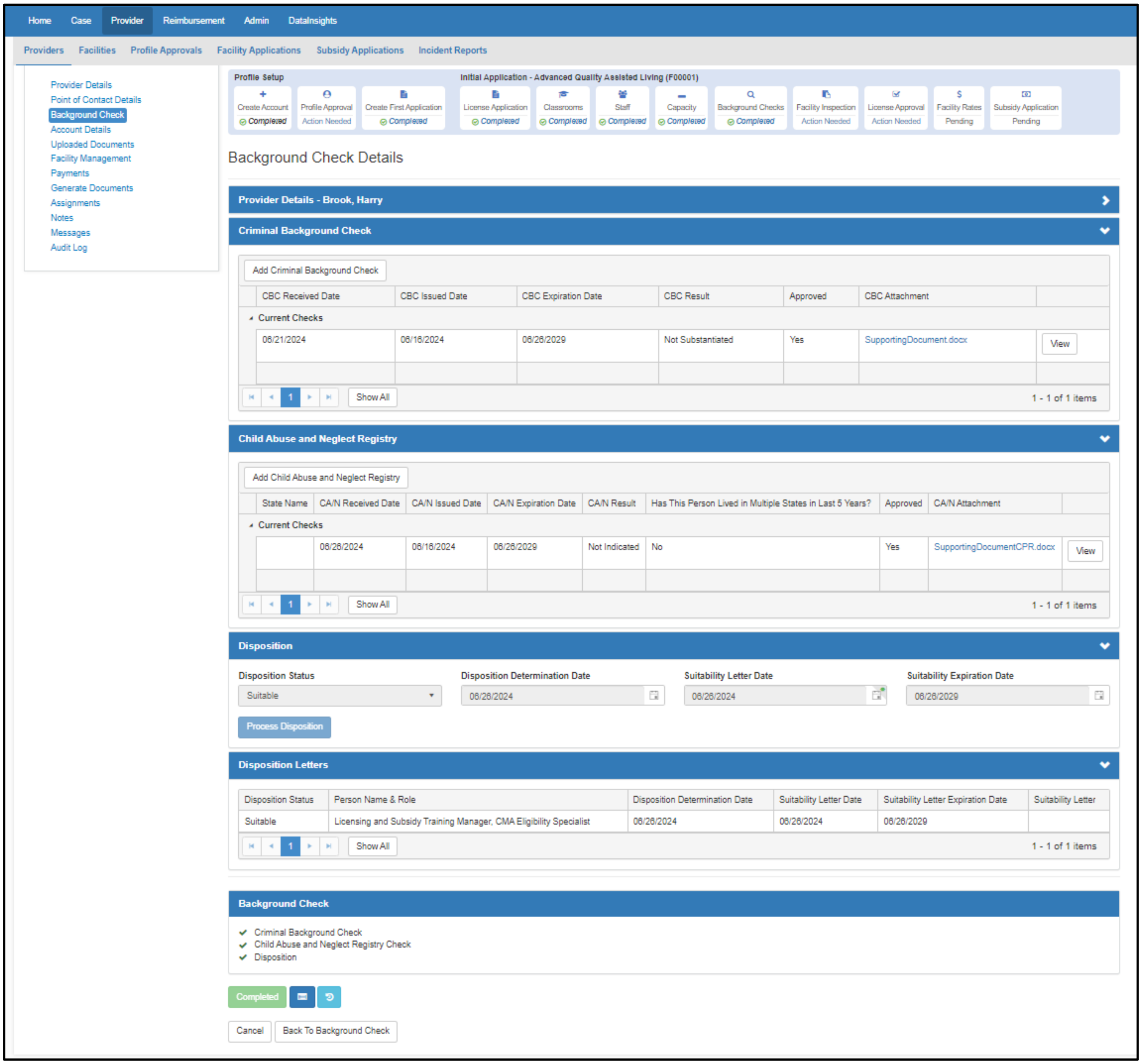

Figure 17: Background Check Details

3. POINT OF CONTACT DETAILS

This screen has the Point of Contact Details

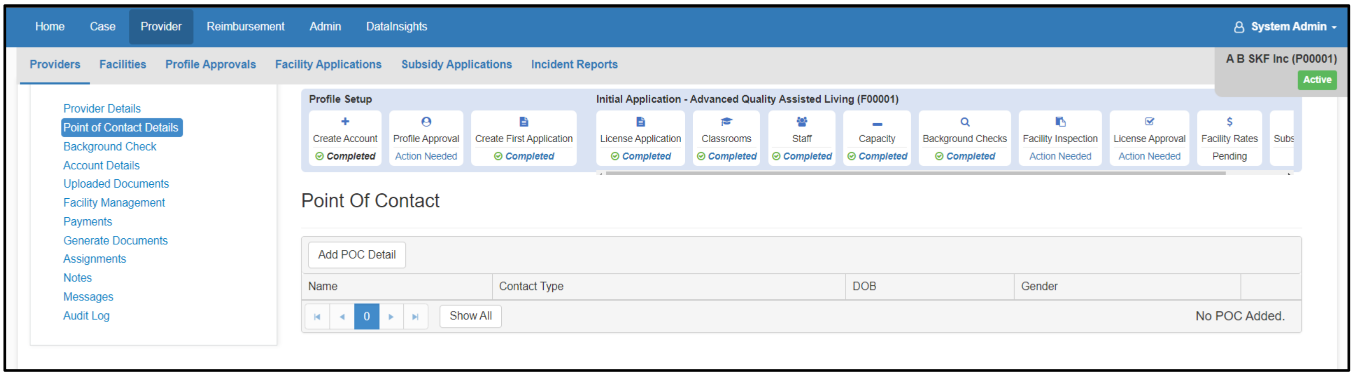

Figure 18: Point of Contact Details

4. ACCOUNT DETAILS

This screen details out the Provider's account details.

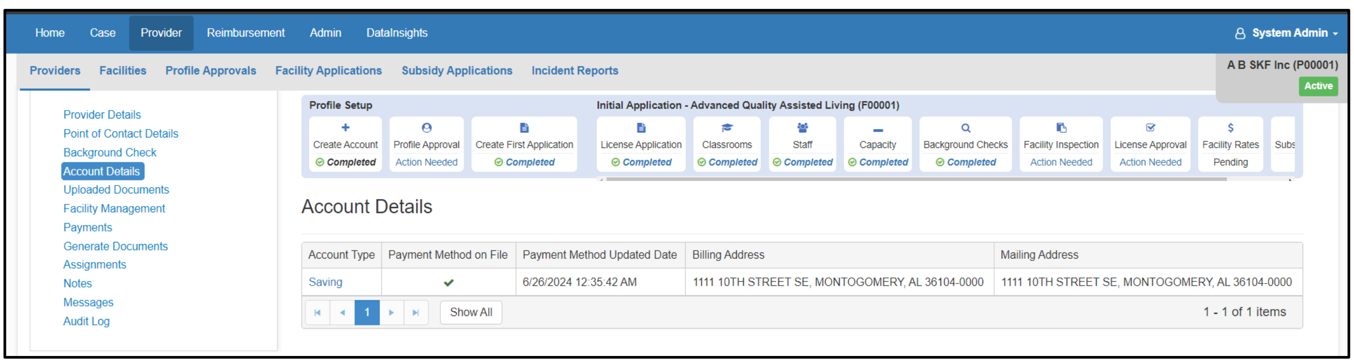

Figure 19: Account Details

5. UPLOADED DOCUMENTS

The Uploaded Documents section lets the user view documents uploaded by the provider for their application.

How to view a document?

1. Click on the respective document name hyperlink.
2. The document will be downloaded for user's viewing.

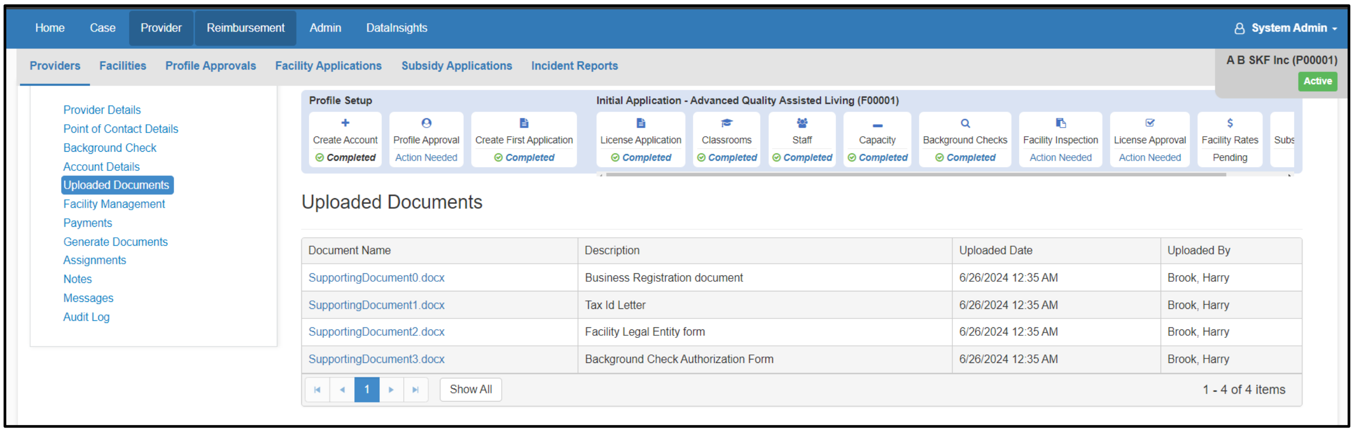

Figure 20: Uploaded Documents

3. Facility Management

The facility management screen displays all facilities under the selected provider.

How to view a facility?

1. Click on the respective Facility ID hyperlink.
2. User is taken to the Facility Details screen under Facilities sub-module (Under Provider Module)

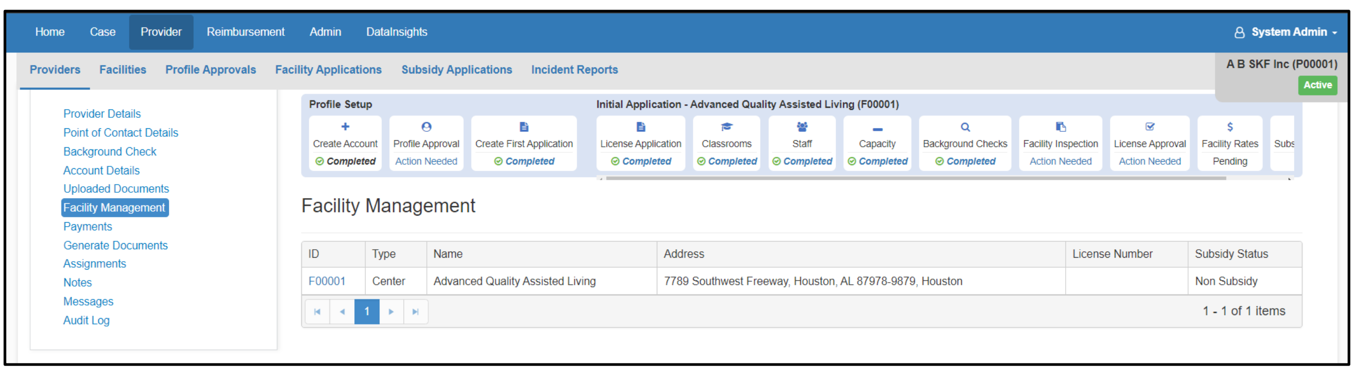

Figure 21: Facility Management

4. PAYMENTS

This section displays Provider's Past and Pending payments, along with the Adjustments.

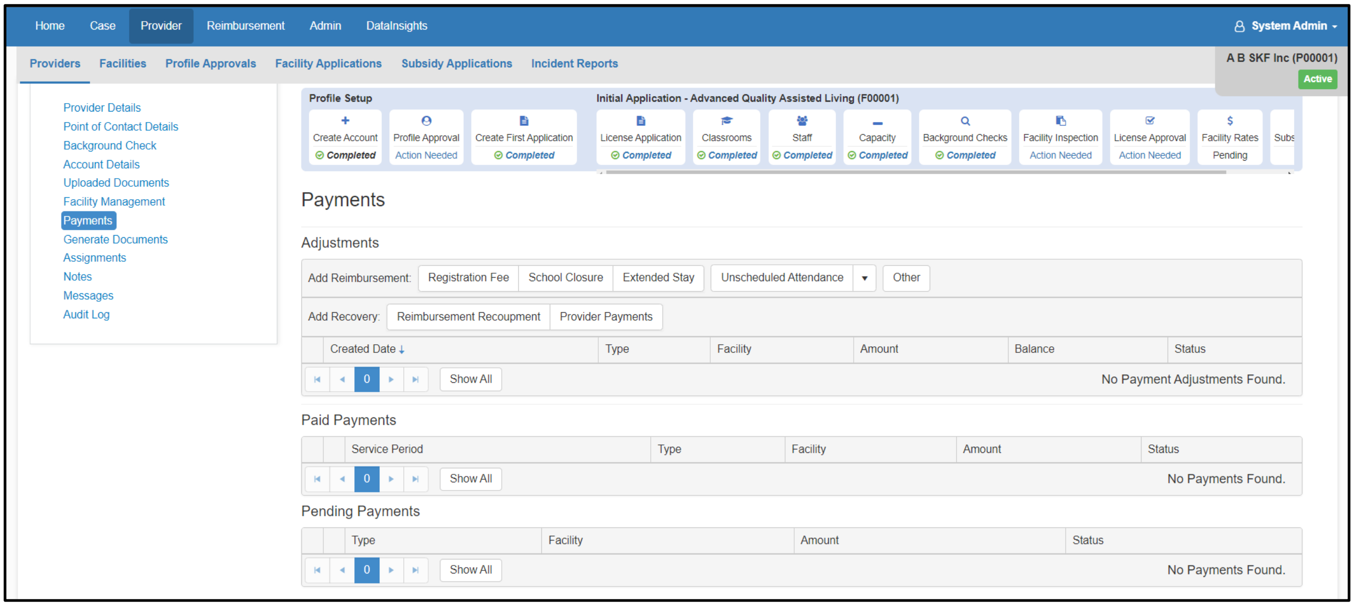

Figure 22: Provider Payments

5. GENERATE DOCUMENTS

The 'Generate Documents' screen allows user to generate provider related documents and download it.

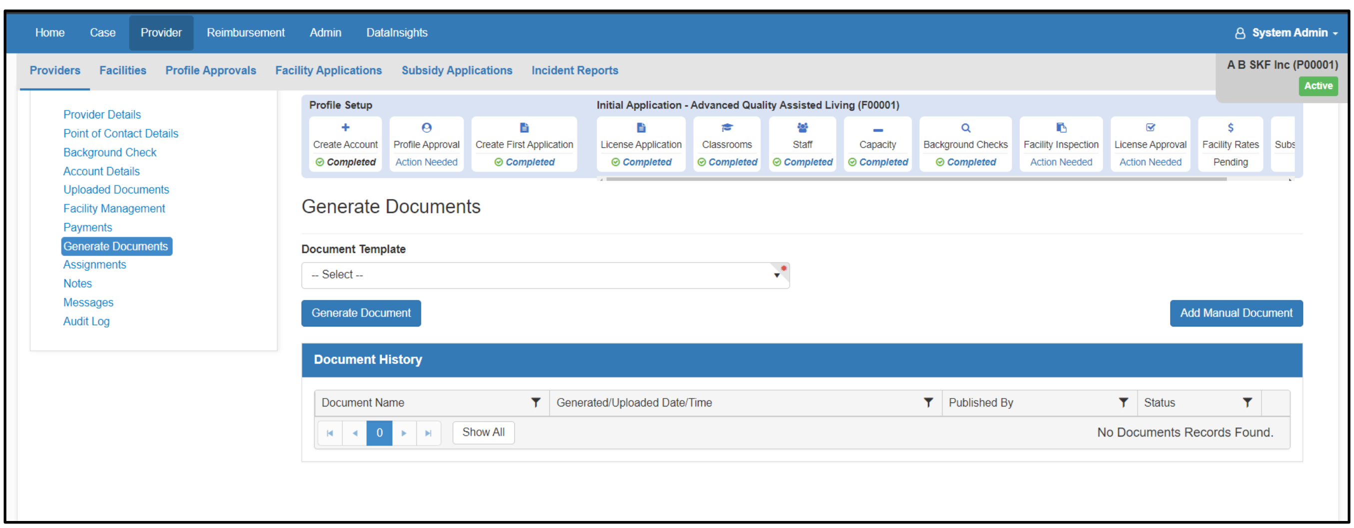

Figure 23: Generate Documents

How to Generate Documents?

1. Click on 'Generate Documents' on left navigation pane.
2. Select a document to be generated from the list of documents in the dropdown
3. Click on 'Generate Document'. Generated document will be displayed in the 'Document History' grid
4. Click on Document Name hyperlink to download the document

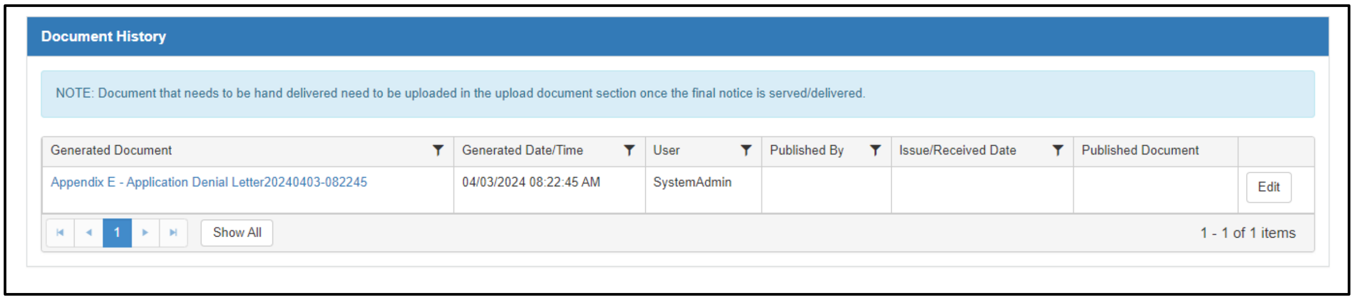

Figure 24: Document History

6. ASSIGNMENTS

The assignments screen displays the following details:

1. Team: The team grid displays the Team Name, Users in the team, Name of the users and Role assigned to individual team members
2. Provider Operator Assignments: The case assignment grid displays the user and their roles in the reviewing an assigned case.
3. Workflow Process Assignments: This section represents the workflow steps, Assignment and Assigned User
4. Workflow Instances: This section represents the workflow instances, and the steps within each workflow along with their status.

The screen appears, as seen below:

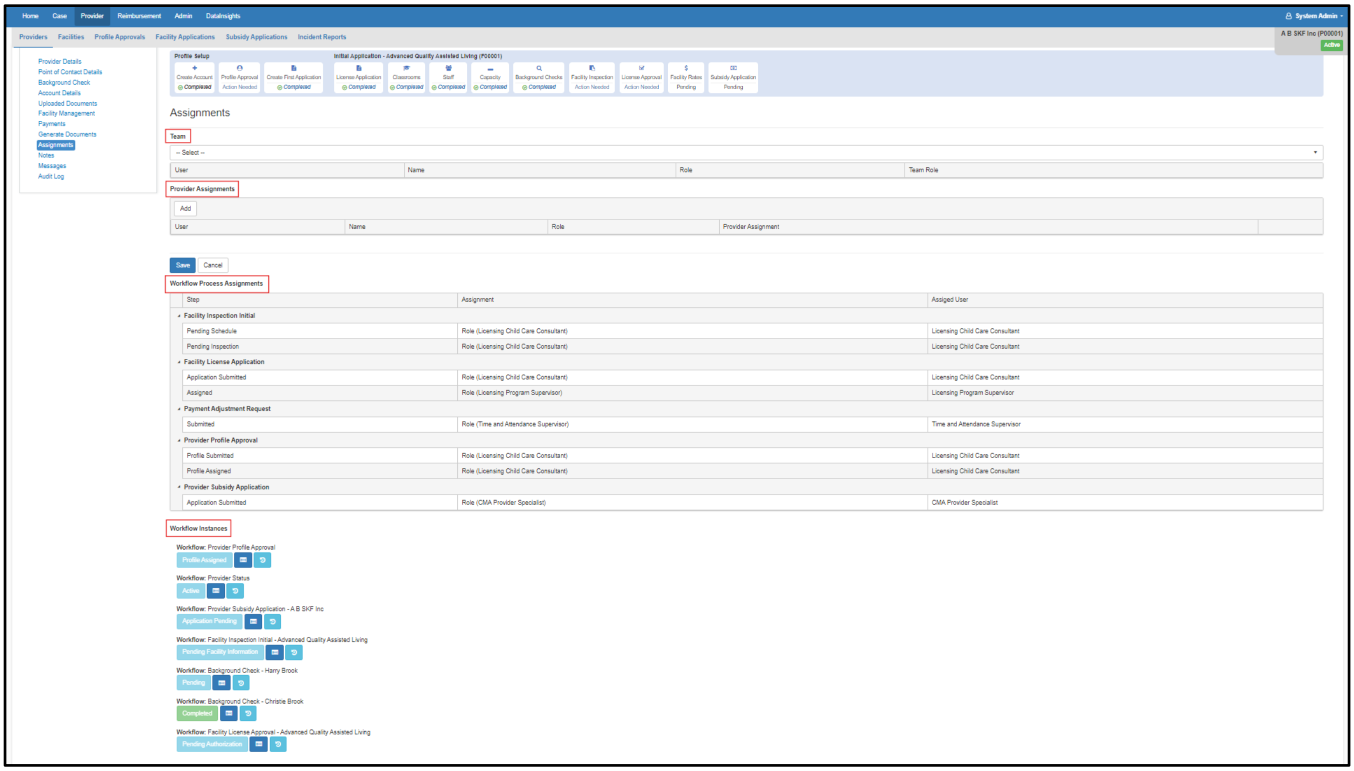

Figure 25: Assignments

7. NOTES

How can a user create notes?

1. Click on 'Notes' tab from left navigation. You will be navigated to the screen displaying notes summary
2. Click on 'Add new Note'
3. Select Note Subject LOV from the drop down
4. Enter the description/ elaboration the subject
5. Click on update

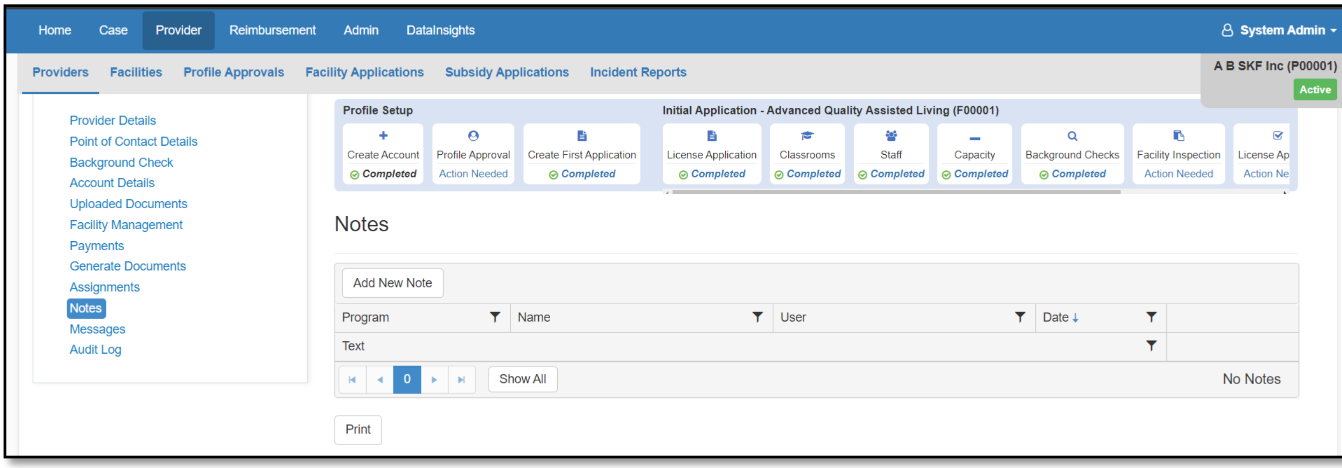

Figure 26: Adding a New Note

8. MESSAGES

The messages screen consists of two sub tabs:

- Internal Messages: In which user can create manual tasks with the due date and assign it to users.
- Provider Messages: This tab displays the requests received from the provider portal and tasks for the provider.

Internal Messages:

How to create manual tasks?

1. Click on 'Messages' from the left navigation
2. Click on 'Add Manual Message' button from the tasks container
3. Set the 'Severity'
4. Enter 'Due Date'
5. Select the user to assign the message/tasks from 'Distributed To' drop down
6. Click on 'Update'

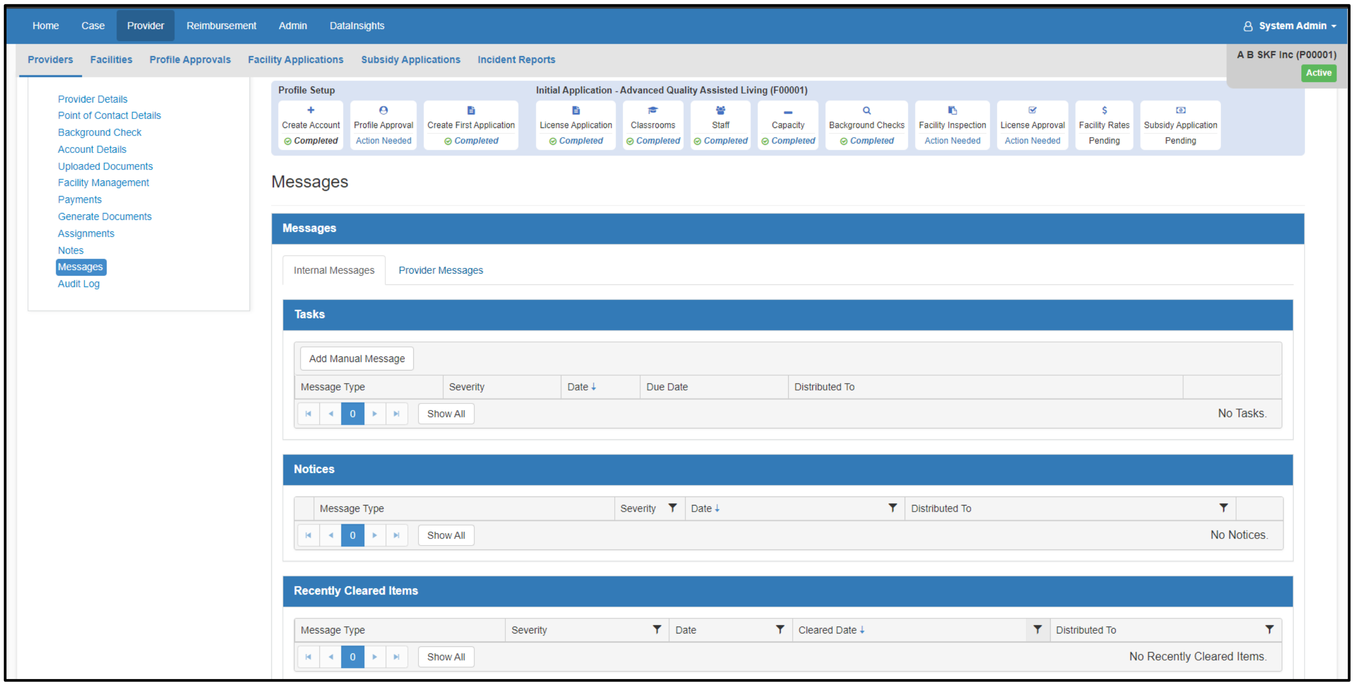

Figure 27: Internal Messages

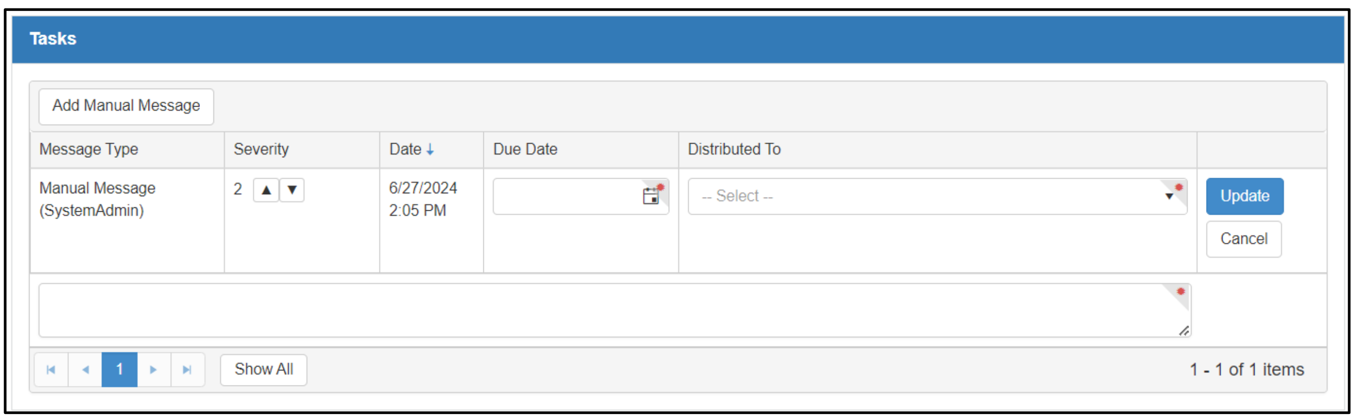

Figure 28: Internal Message Severity

Provider Messages:

How to create provider tasks?

1. Click on 'Provider Messages' tab under 'Messages'
2. Click on 'Add Provider Message' button from the tasks container
3. Set the 'Severity'
4. Enter 'Due Date' and comments for the provider
5. Click on 'Update'

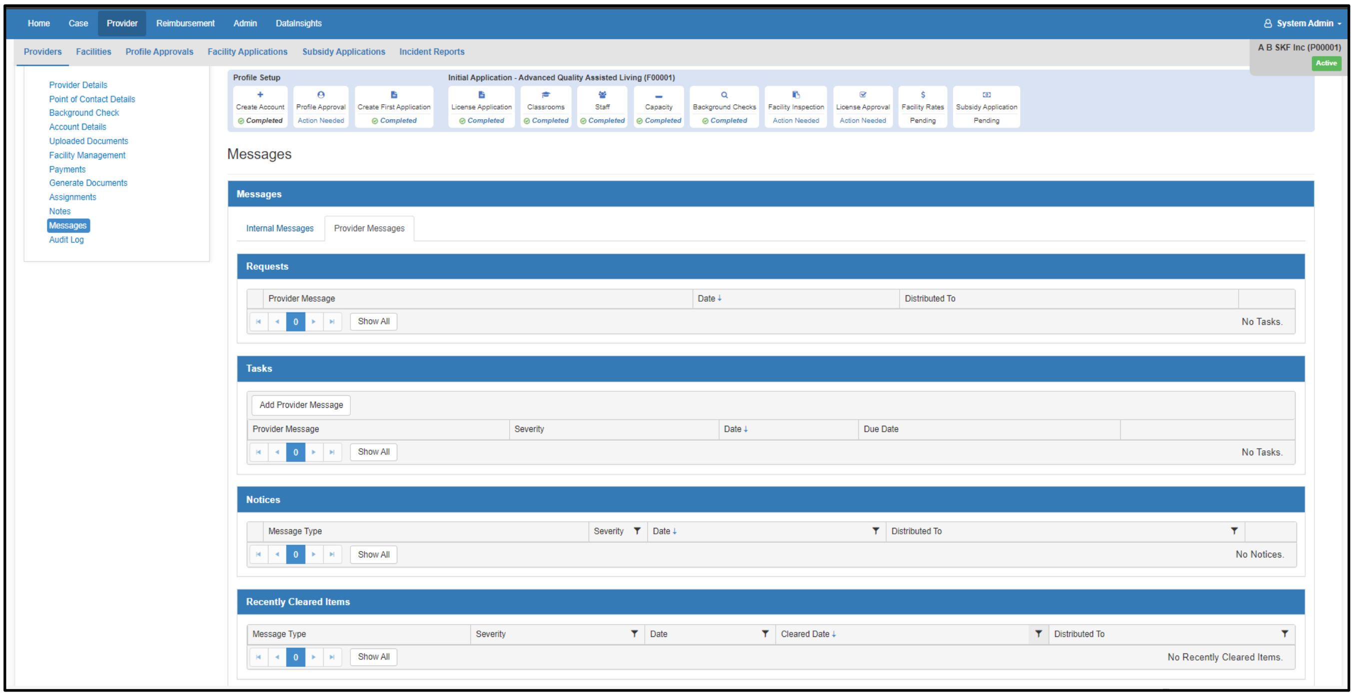

Figure 29: Provider Messages

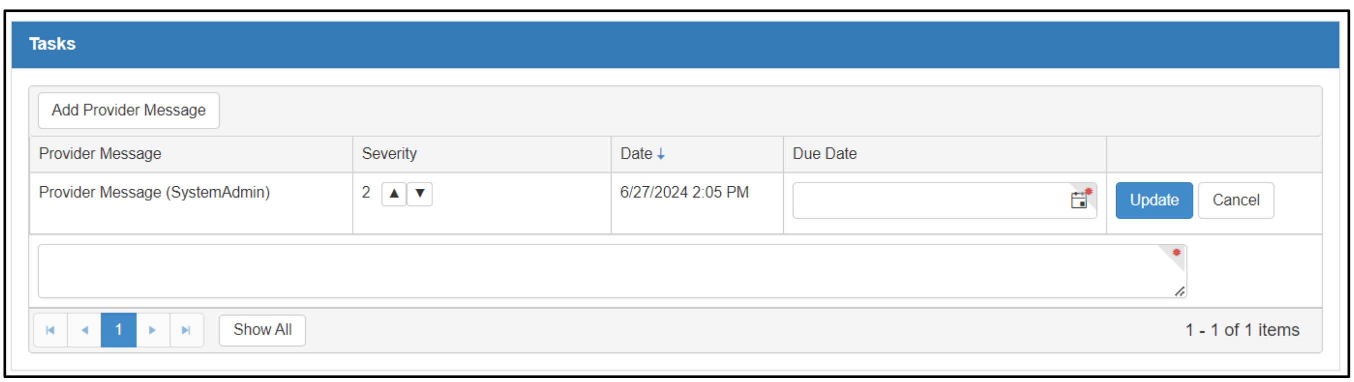

Figure 30: Provider Message Severity

9. AUDIT LOG

The level of information you can view in the audit trail includes 'Username', 'Log Date', 'Module', 'Page',' Message'. The audit log screen represents the user who logged into the system and the associated module that the user accessed, as well as the actions performed on the different pages of the module.

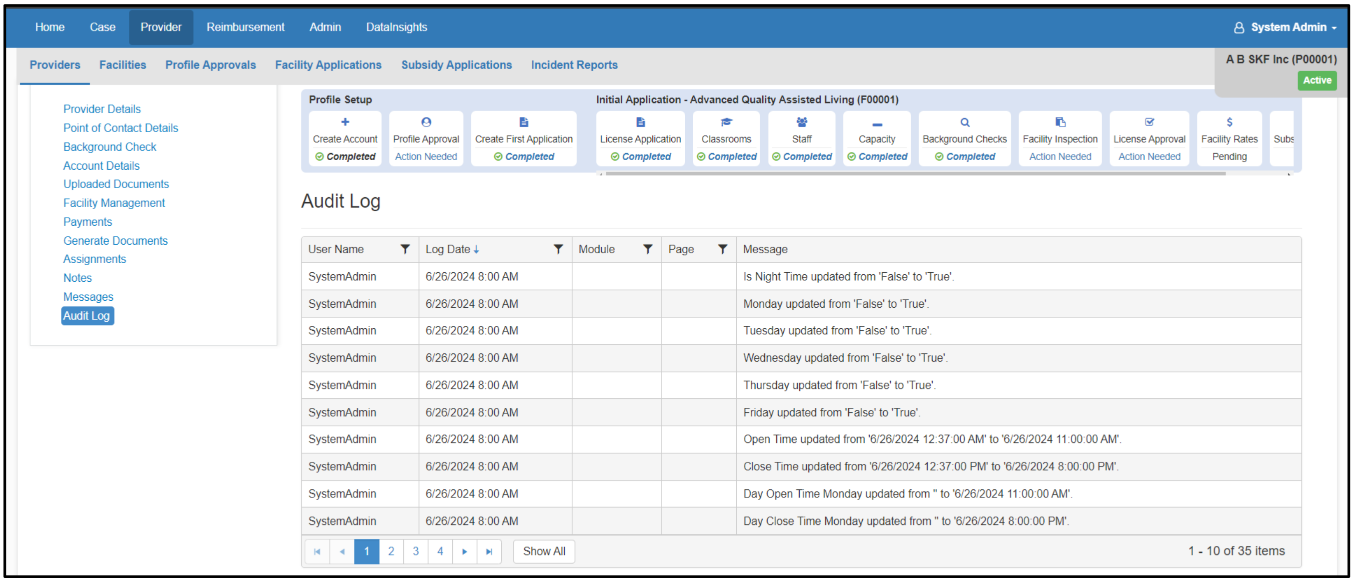

Figure 31: Audit Log

FACILITIES SUB-MODULE

FACILITY SEARCH

Authorized users shall be able to search for a Facility in the system by clicking on:

1. Provider > Facilities
2. Under Status > Select an option
3. Results gets displayed.
4. By Default, when no selection is made, then all Facilities get displayed.

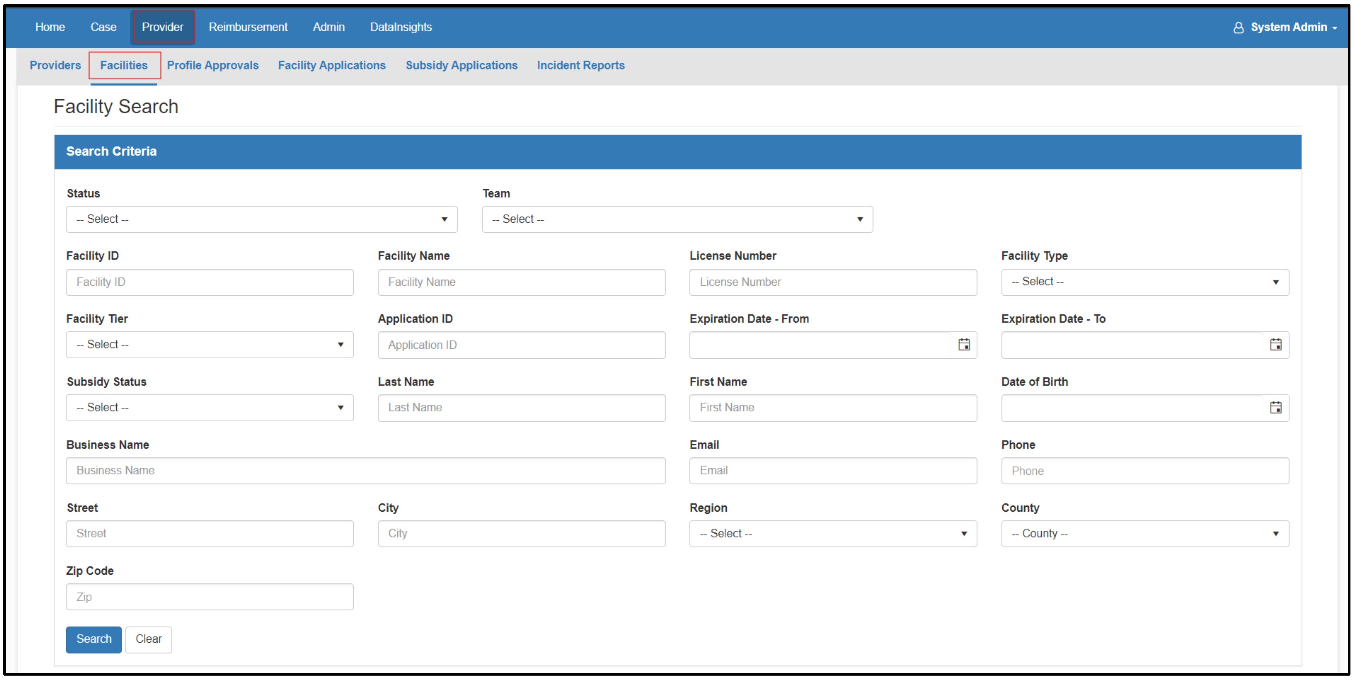

Figure 32: Facility Search

Results Grid:

Facility ID	Facility Name	Facility Type	Provider ID	Provider Name	Facility Address	Phone	License Status	Facility Tier
F00001	Willowbrook01	Faith-Based	P00006	Johnson Inc	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00002	Willowbrook11	Faith-Based	P00006	Johnson Inc	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00003	Willowbrook21	Faith-Based	P00006	Johnson Inc	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00004	Gomez, Rodrigo	Relative	P00007	Gomez, Rodrigo	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00005	Tomball House01	Faith-Based	P00008	Corporate Inc	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00006	Tomball House11	Faith-Based	P00008	Corporate Inc	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00007	Tomball House21	Faith-Based	P00008	Corporate Inc	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00008	Joseph, Emi	Family Home	P00009	Joseph, Emi	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00009	Olang, Mitchel	Family Home	P00010	Olang, Mitchel	1111 10TH STREET SE, MONTGOMERY, AL 36104-0000	(451) 216-1234	Full License	
F00010	Green Care	Center	P00012	Seed care	123 William Street, New York, NY 10038, Baldwin	(989) 898-9898	Full License	

1 - 10 of 10 items

Figure 33: Facility Search Results

To view a Facility:

1. Click on Facility ID hyperlink from the results grid, to review the respective Facility profile. You will be navigated to screen displaying Facility Details.

1. FACILITY DETAILS

This screen displays the details of the respective Facility selected.

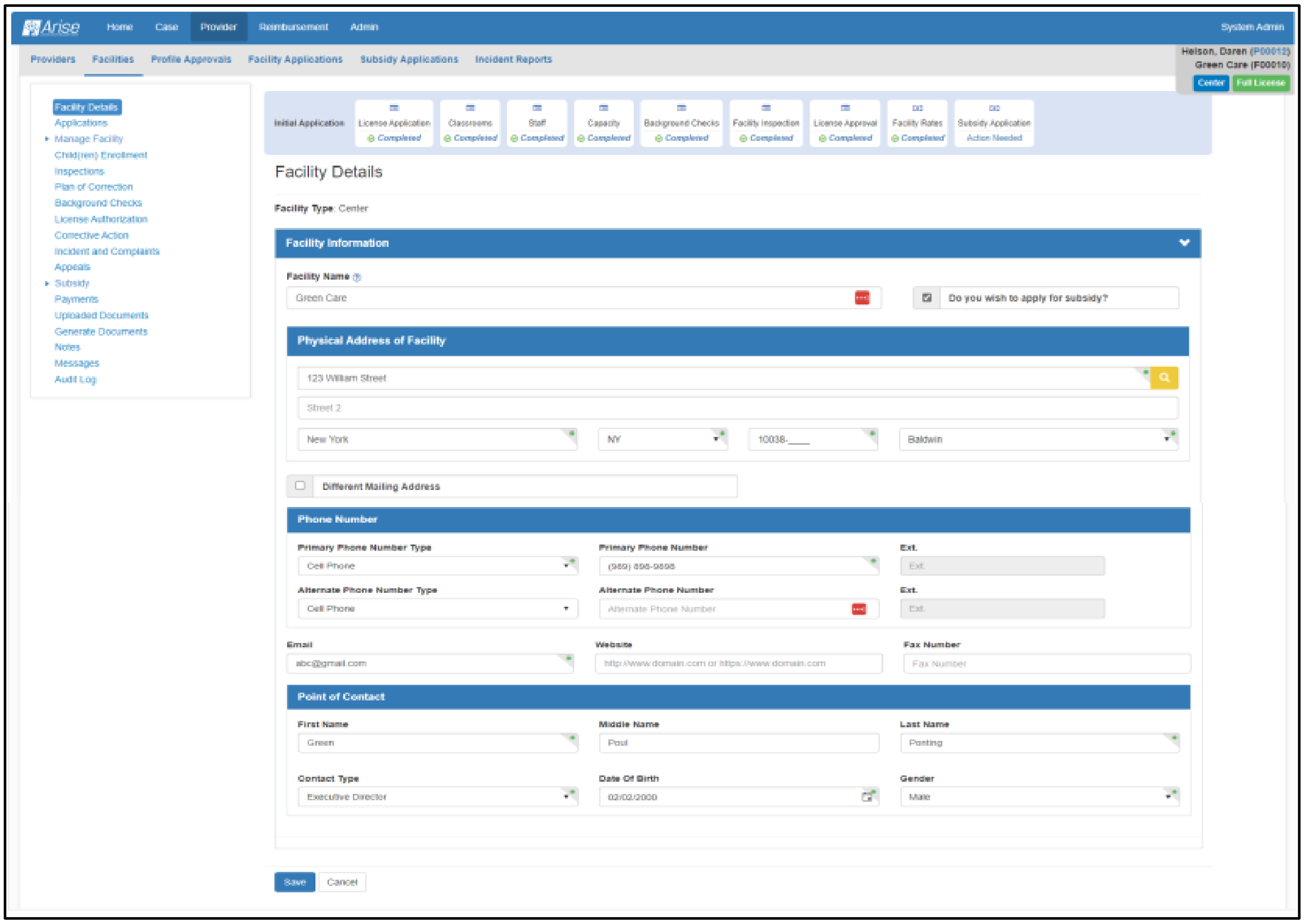

Figure 34: Facility Details Page

On the 'Facility Details' screen, the user will be able to see an application wizard, where the status of their 'Initial Application' will be displayed, with the following sections: **License Application, Classrooms, Staff, Capacity, Background Checks, Facility Inspection, License Approval and Subsidy Application.**

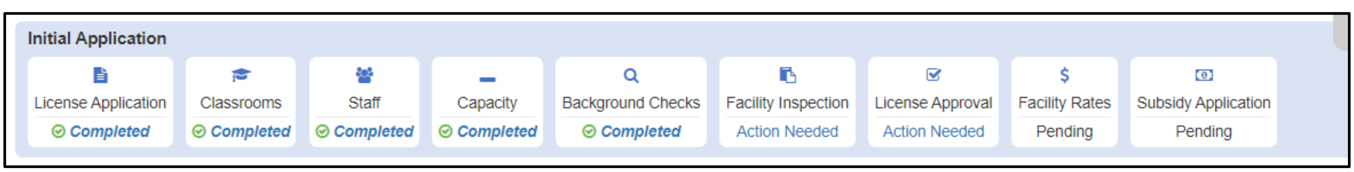

Figure 35: Application Wizard

2. APPLICATIONS

The 'Applications' screen consists of all Applications created by a Provider. It lists details of the application and displays a grid consisting of Provider, Application ID, Type of Application, License ID, Date of Application, Status, Application Submitted Date, Application Approved Date, and Application Approved By.

The application type column populates the 'Initial and Renewal Applications record, the application ID is a hyperlink.

Clicking on the respective hyperlink navigates user to its respective summary.

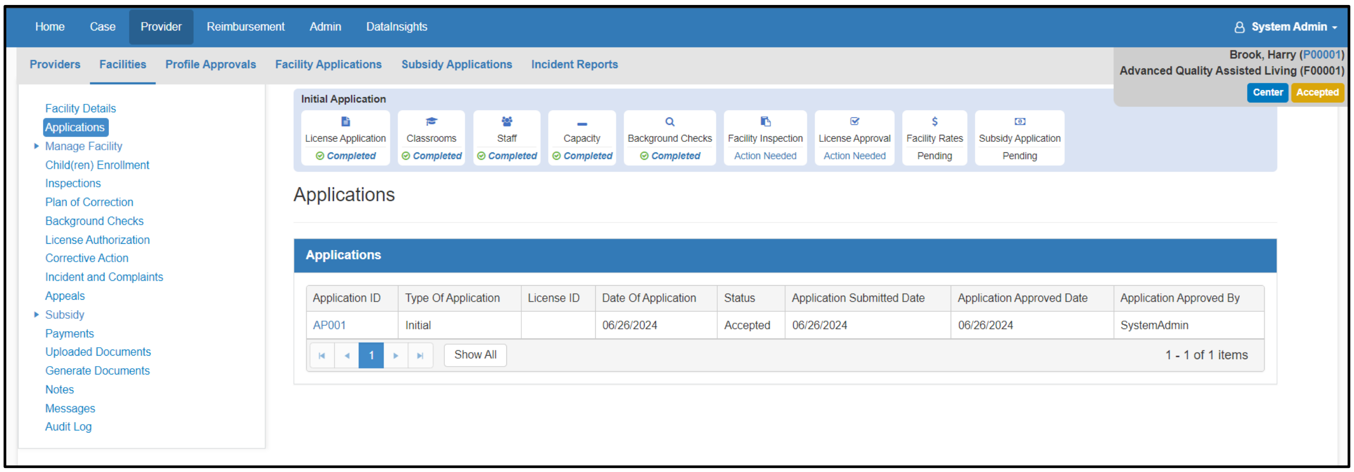

Figure 36: Applications

3. MANAGE FACILITY

3.1. Characteristics

Characteristics screen consists of the Provider Details and Acknowledgement sections. The Acknowledgement section lists the responses answered by the Provider.

The Characteristics screen appears as seen below:

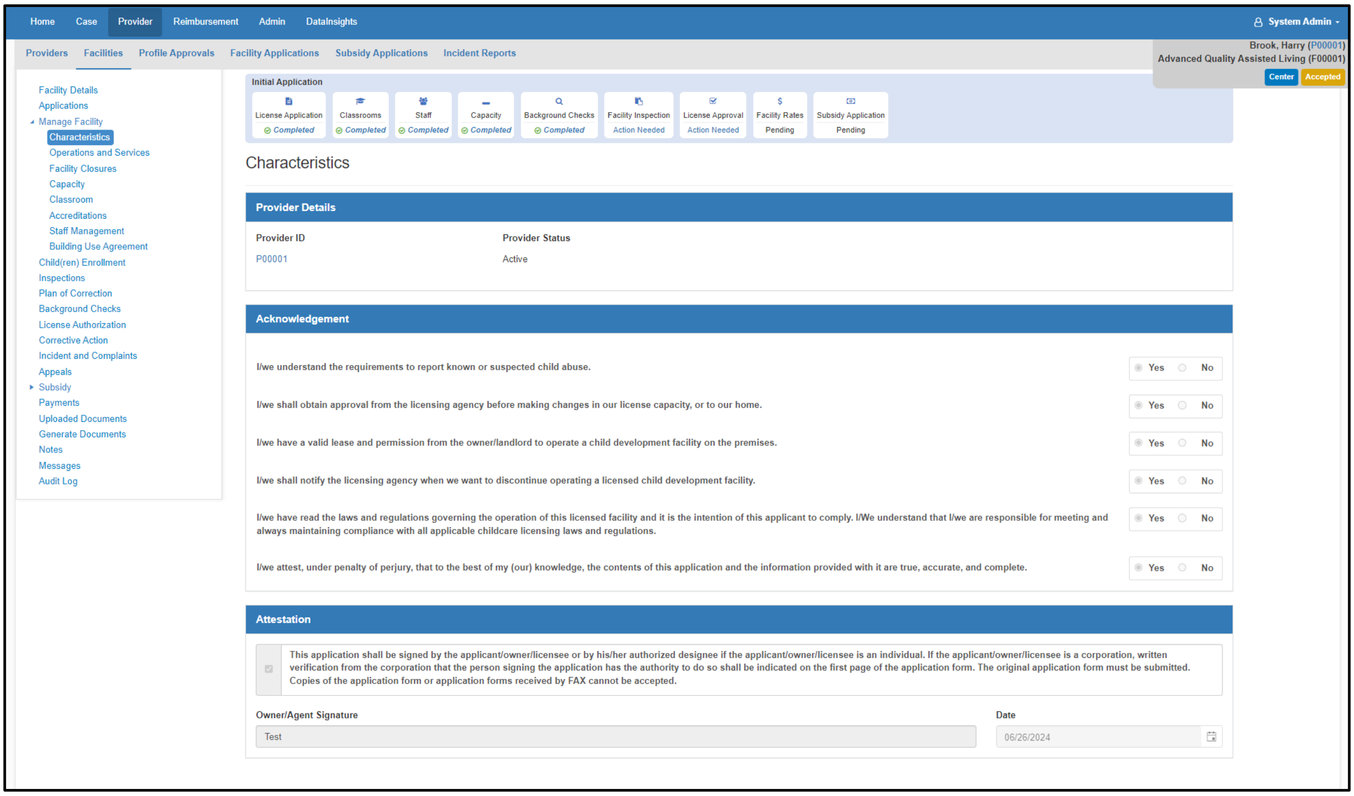

Figure 37: Facility Management - Characteristics

3.2. Operations and Services

The operations and services screen describes the Facility service operation details, as seen below:

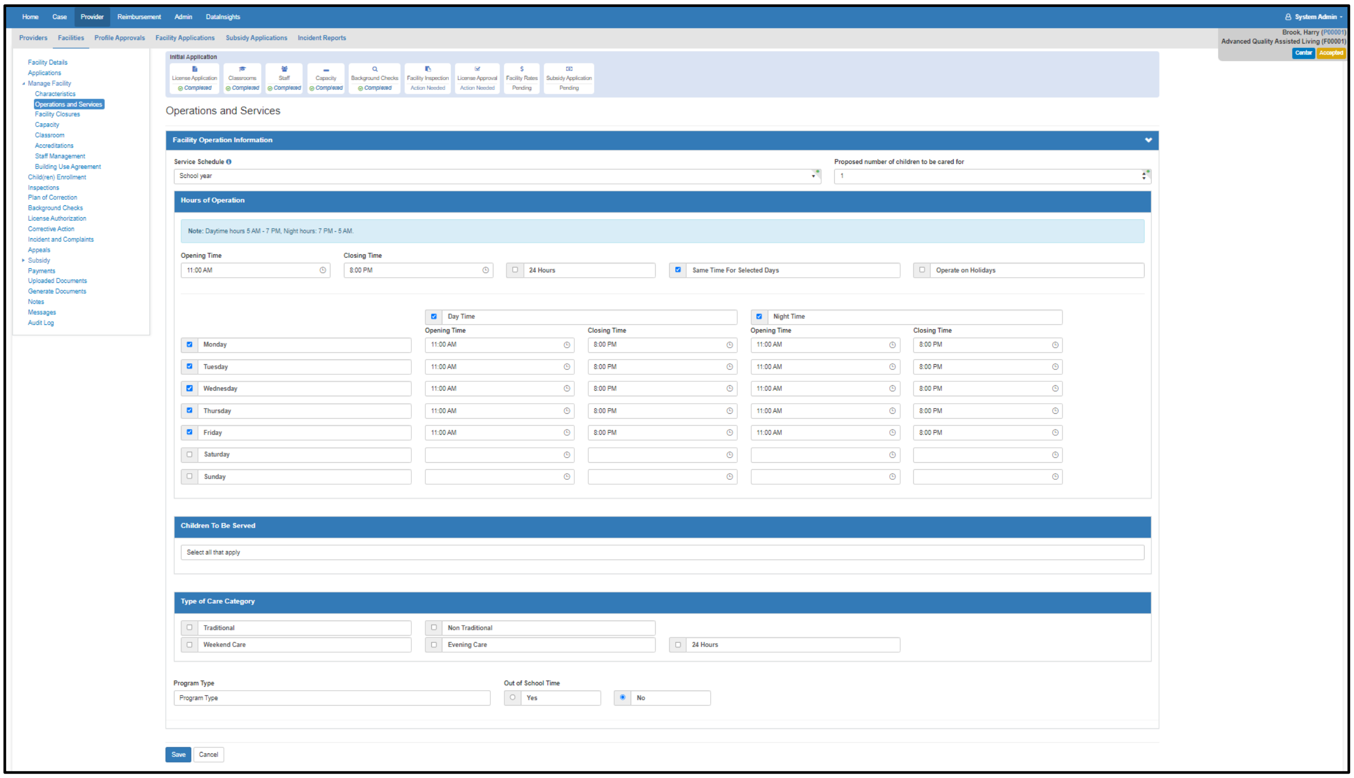

Figure 38: Facility Management – Operations and Services

3.3. Facility Closures

The Facility Closures screen displays all dates (if any) where the Provider has mentioned that the facility will be closed.

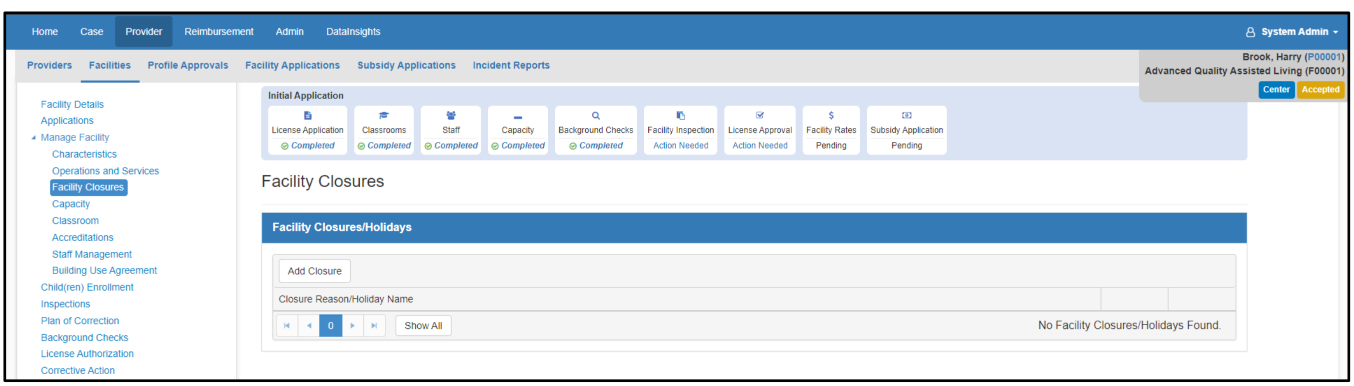

Figure 39: Facility Management – Facility Closures

3.4. Capacity

Capacity screen describes about the number of children allowed vs. assessed for the respective facility.

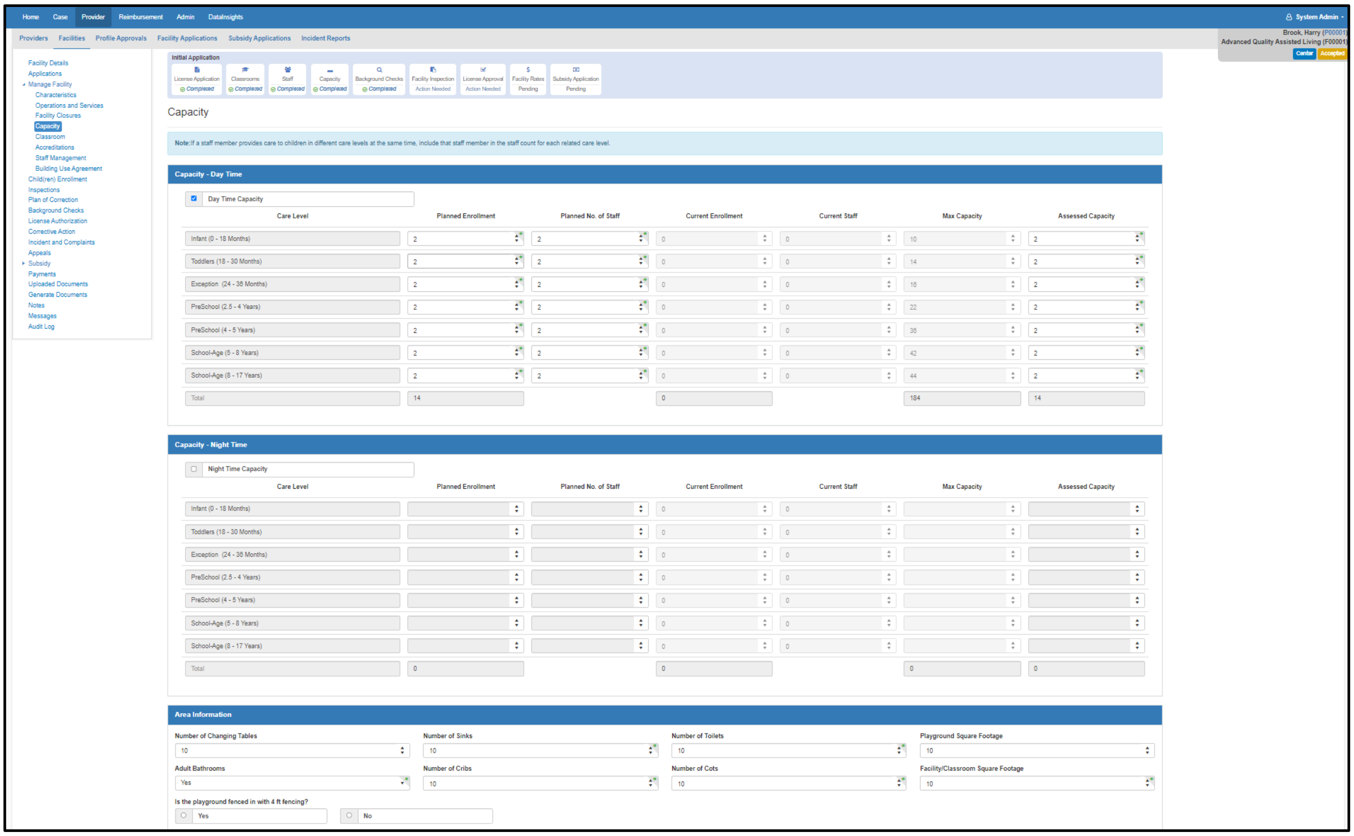

Figure 40: Facility Management – Capacity

3.5. Classrooms

This screen displays all 'Classrooms' added for the respective facility in the system. The grid displays Classroom ID, name, care level, teacher, and assistant teacher. Clicking on the Classroom ID, displays the Classroom Details which is also an editable screen.

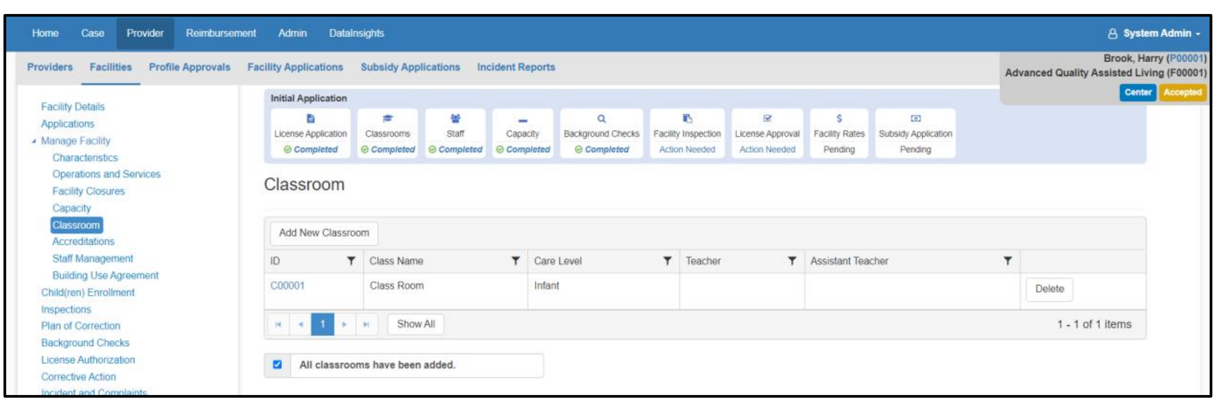

Figure 41: Facility Management – Classroom

Clicking on Classroom ID presents below screen:

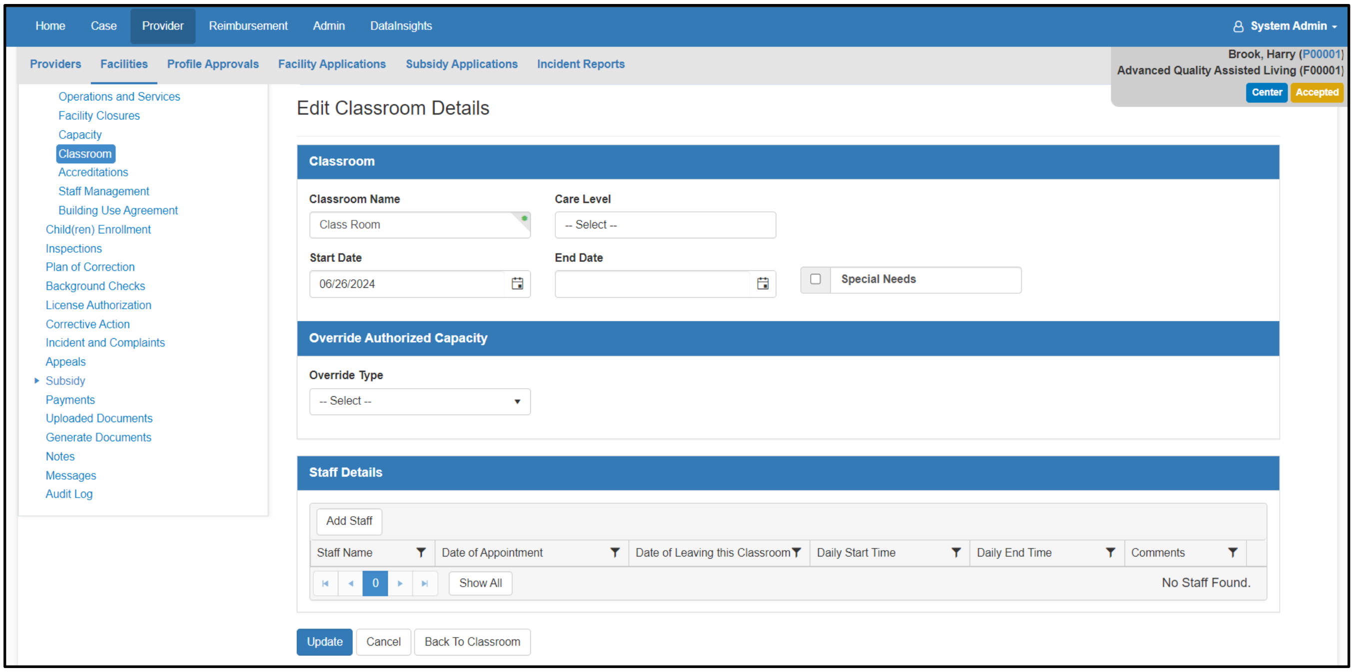

Figure 42: Facility Management – Classroom Details

3.6 Accreditations

This screen displays the accreditations received by the Provider.

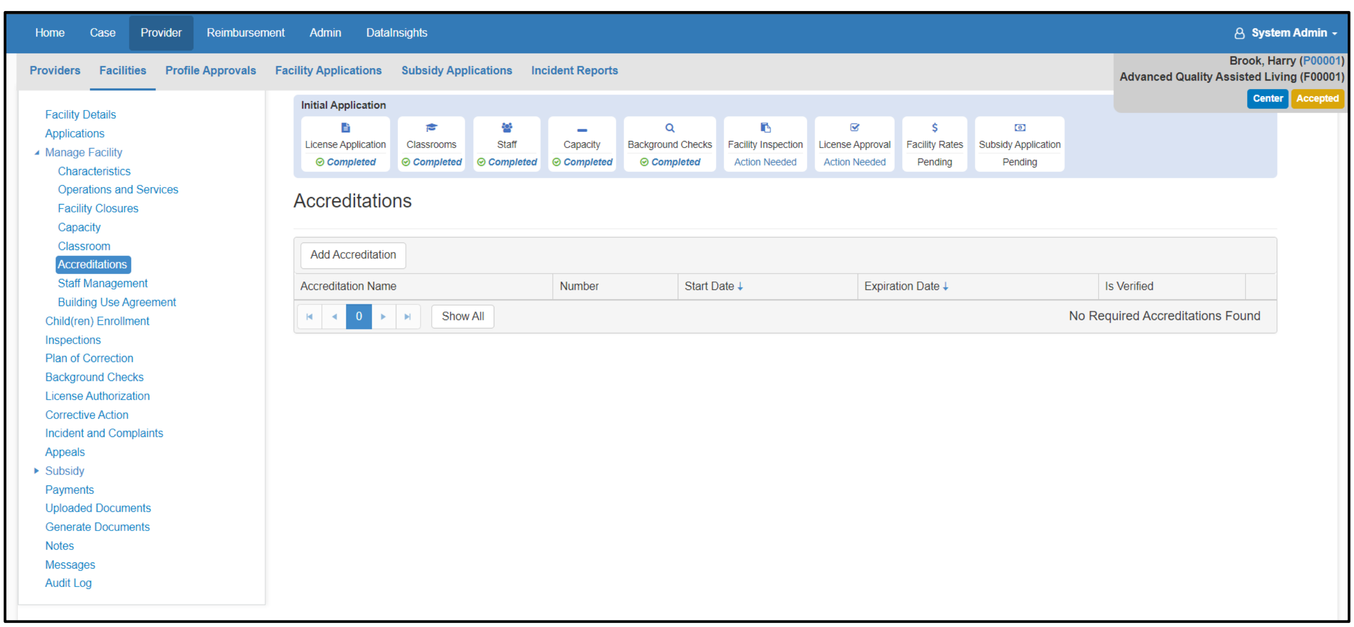

Figure 43: Facility Management – Certification and Accreditations

3.7 Staff Management

This screen displays a grid with all the Staff members for that facility.

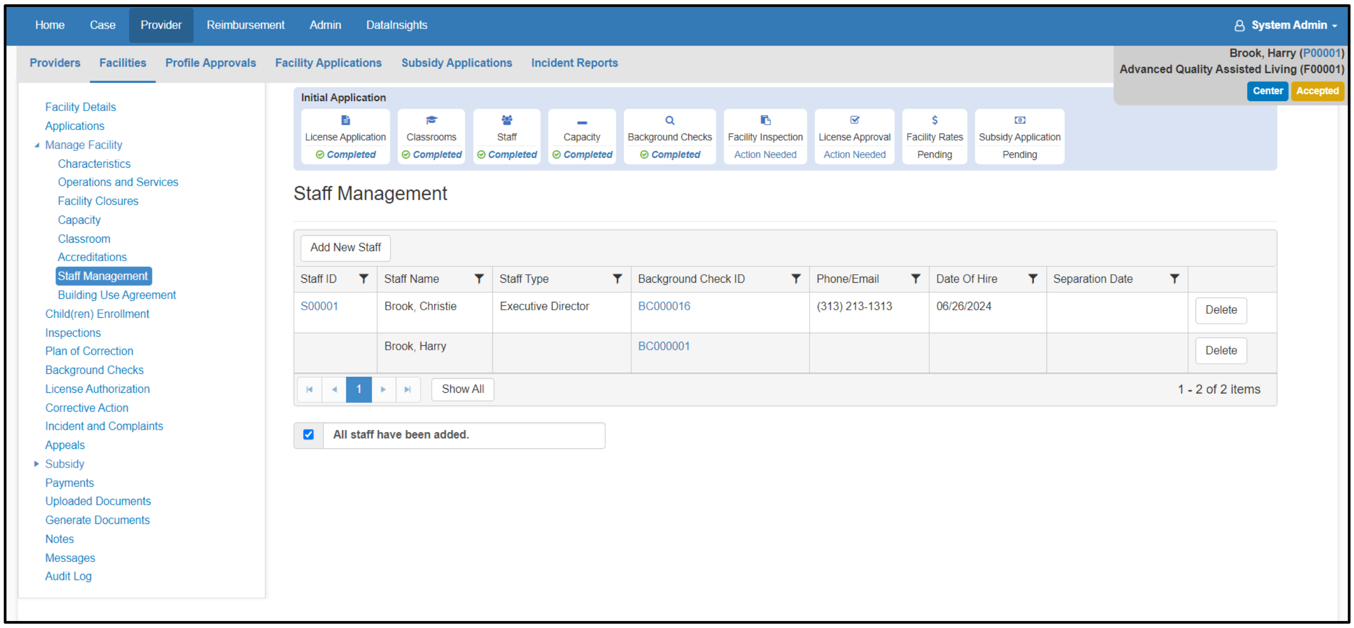

Figure 44: Facility Management – Staff Management

How to view Staff details?

1. Click on the Staff ID hyperlink. You will be navigated to the respective staff summary.
2. Click on each tab to view detailed information, as follows:

Demographics

This screen allows authorized users to view and make appropriate updates to the Staff demographics. This includes identifying and linking existing provider IDs to avoid duplication as well.

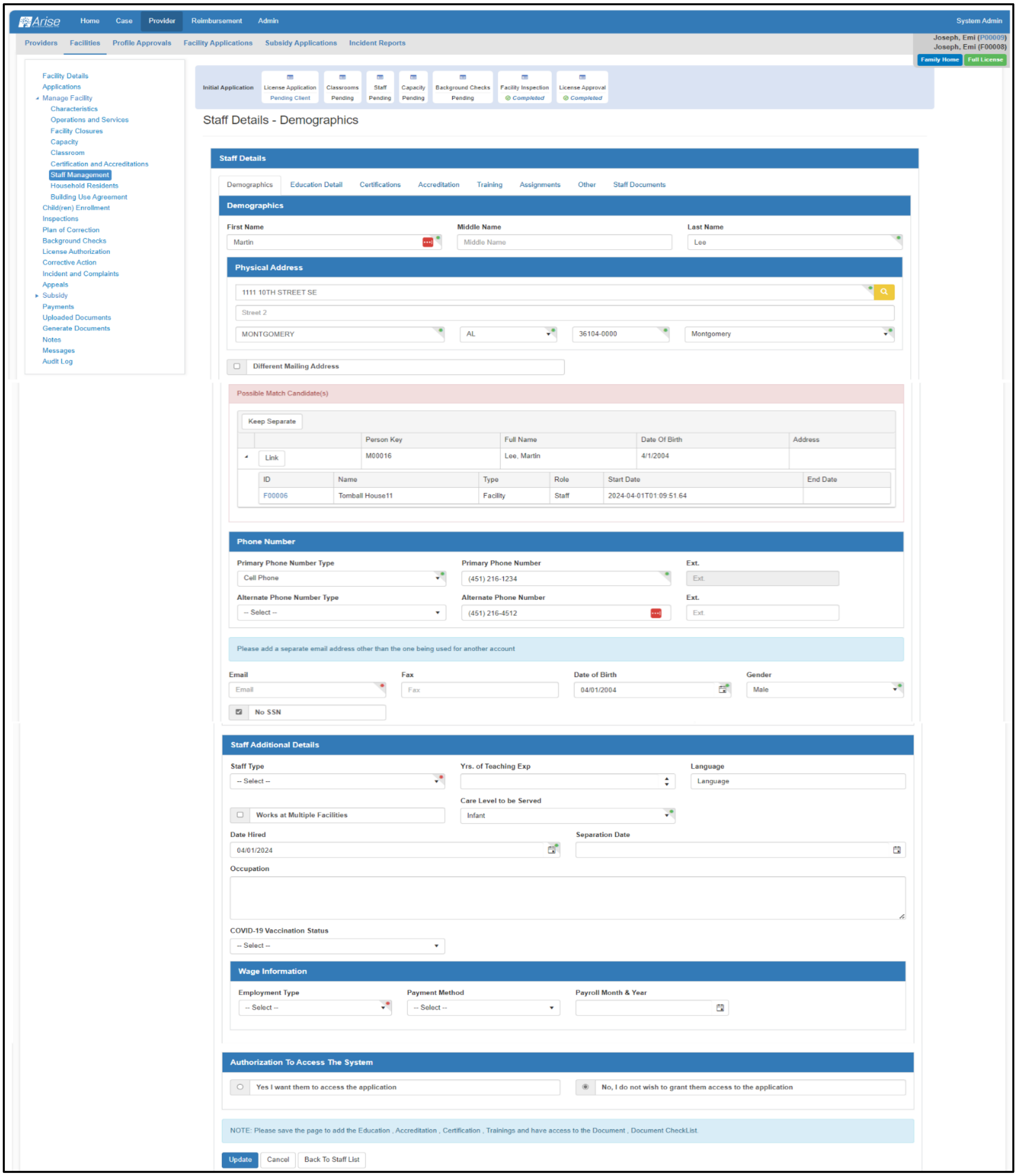

Figure 45: Facility Management – Staff Management - Demographics

Education Detail

This screen allows authorized users to view and make appropriate updates to the Staff Educational Details.

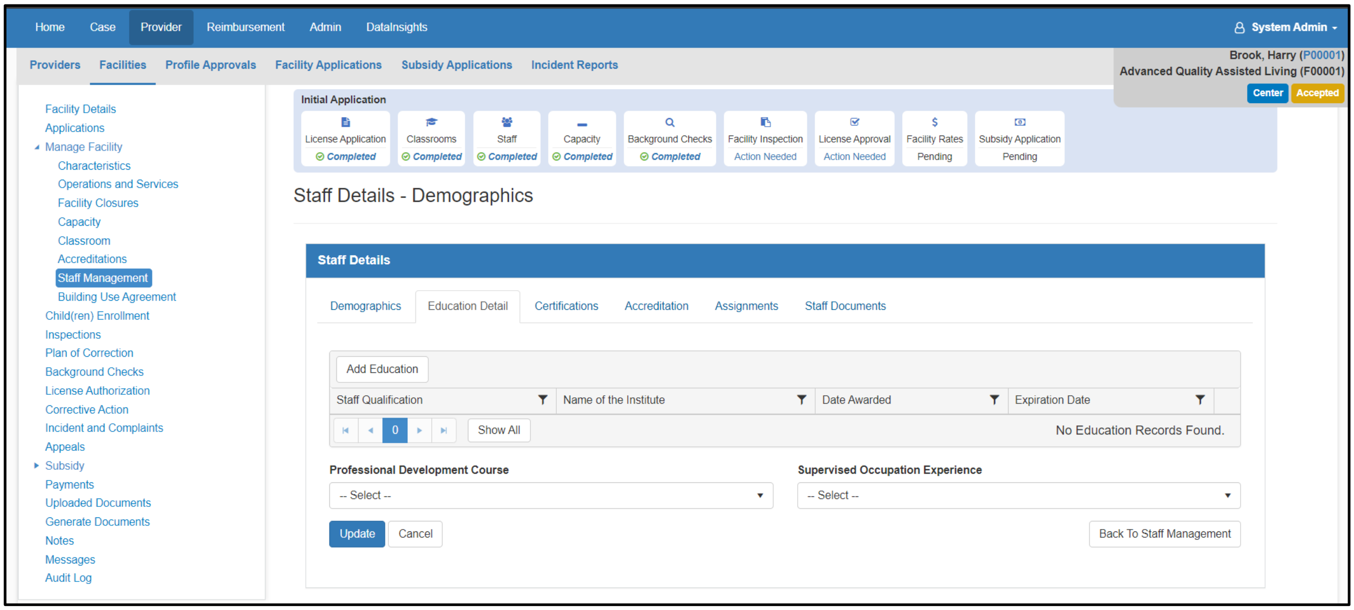

Figure 46: Facility Management – Staff Management – Education Details

Certifications

This screen allows authorized users to view and make appropriate updates to the Certifications of the respective staff member.

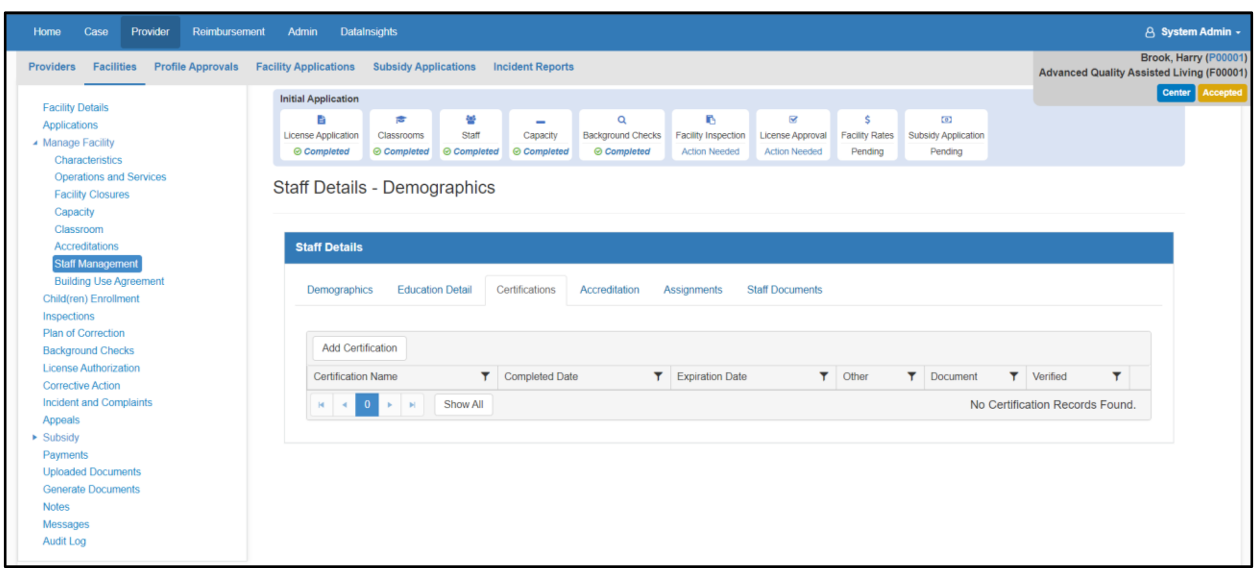

Figure 47: Facility Management – Staff Management – Certifications

How to add a new certificate for the respective staff member?

1. Click on 'Add certification' button
2. Select a 'Certificate Name' from the dropdown list
3. Add the 'Completed Date' and 'Expiration Date' fields.
4. Upload a document by clicking on 'Select files' under Document column.
5. Click 'Update' to save your changes or 'Cancel' to cancel changes.

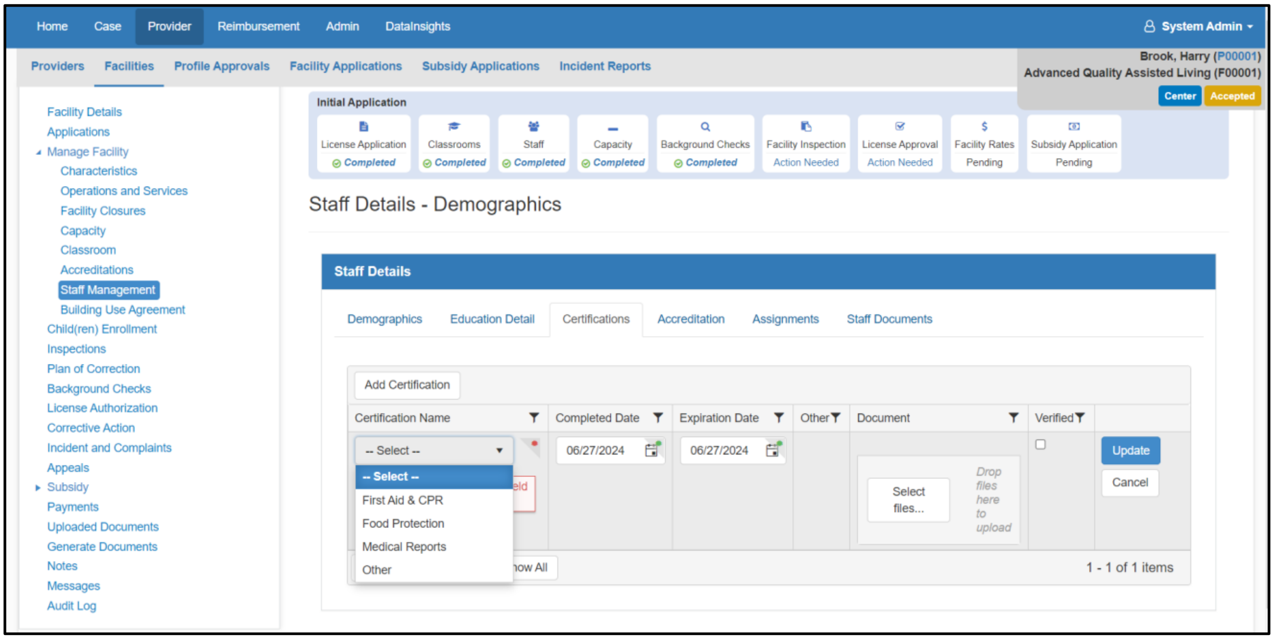

Figure 48: Facility Management – Staff Management – Adding Certifications

Accreditations

This screen allows authorized users to view and make appropriate updates to the Accreditations of the respective staff member.

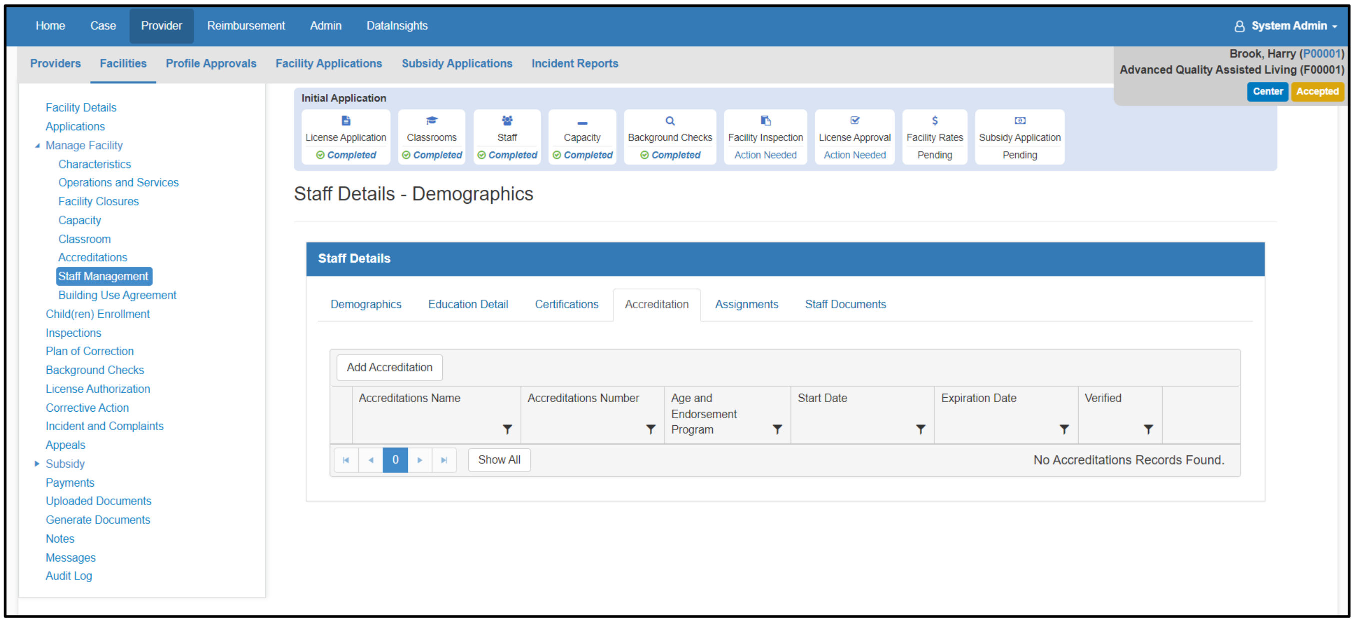

Figure 49: Facility Management – Staff Management – Accreditation

How to add a new accreditation for the respective staff member?

1. Click on 'Add Accreditation' button.
2. Select a 'Accreditations Name' from the dropdown list.
3. Enter a number under the 'Accreditations Number'.
4. Add the 'Age and Endorsement Program' details.
5. Add the 'Start Date' and 'Expiration Date' fields.
6. Click 'Update' to save your changes or 'Cancel' to cancel changes.

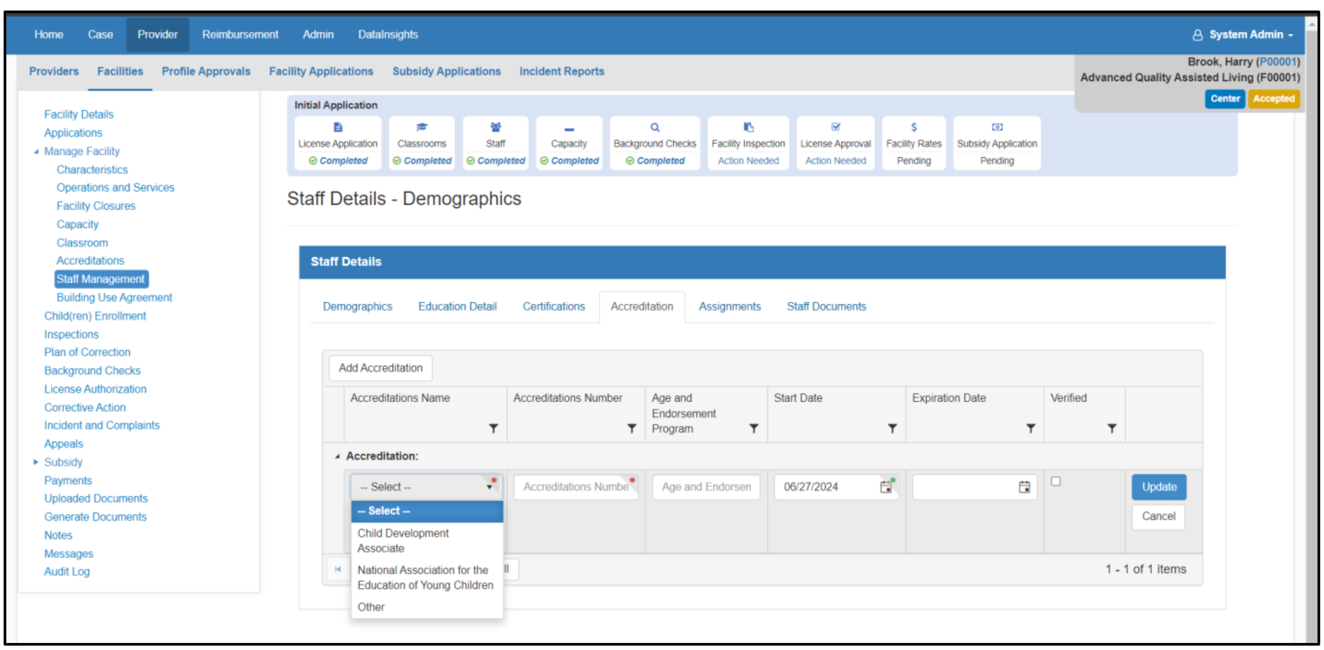

Figure 50: Facility Management – Staff Management – Adding Accreditation

Assignments

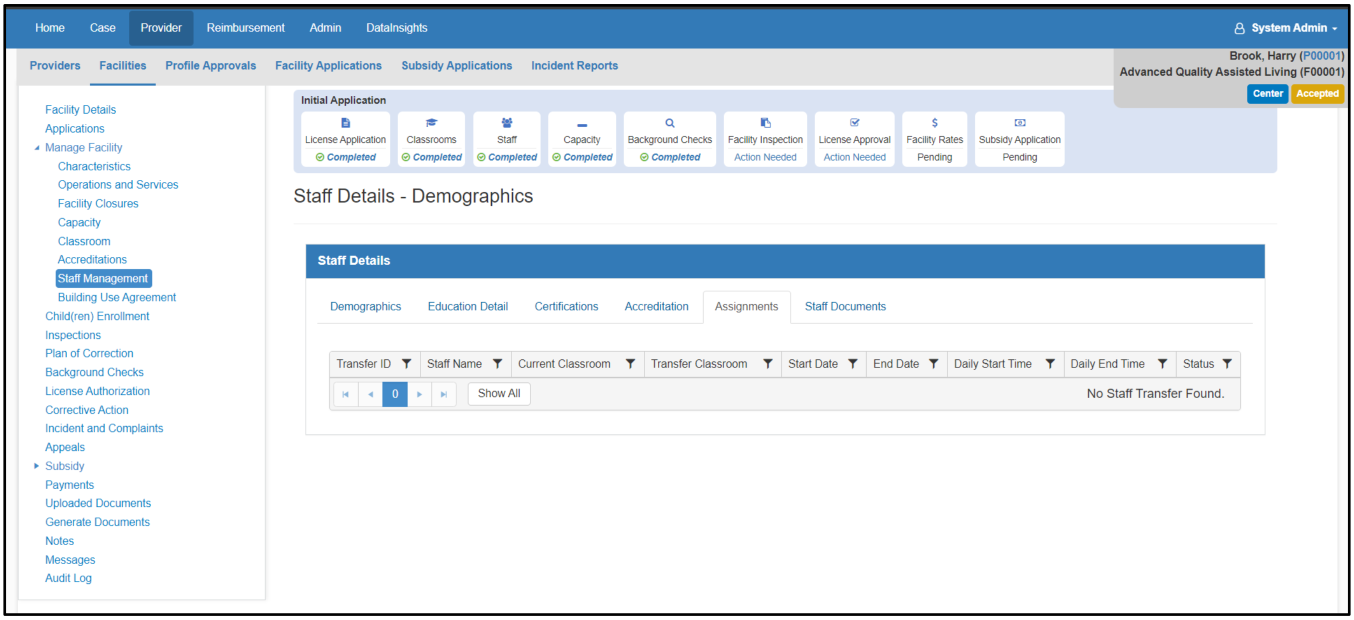

Figure 51: Facility Management – Staff Management – Assignments

Staff Documents

Documents pertaining to the respective staff member cab be viewed and updated on this screen.

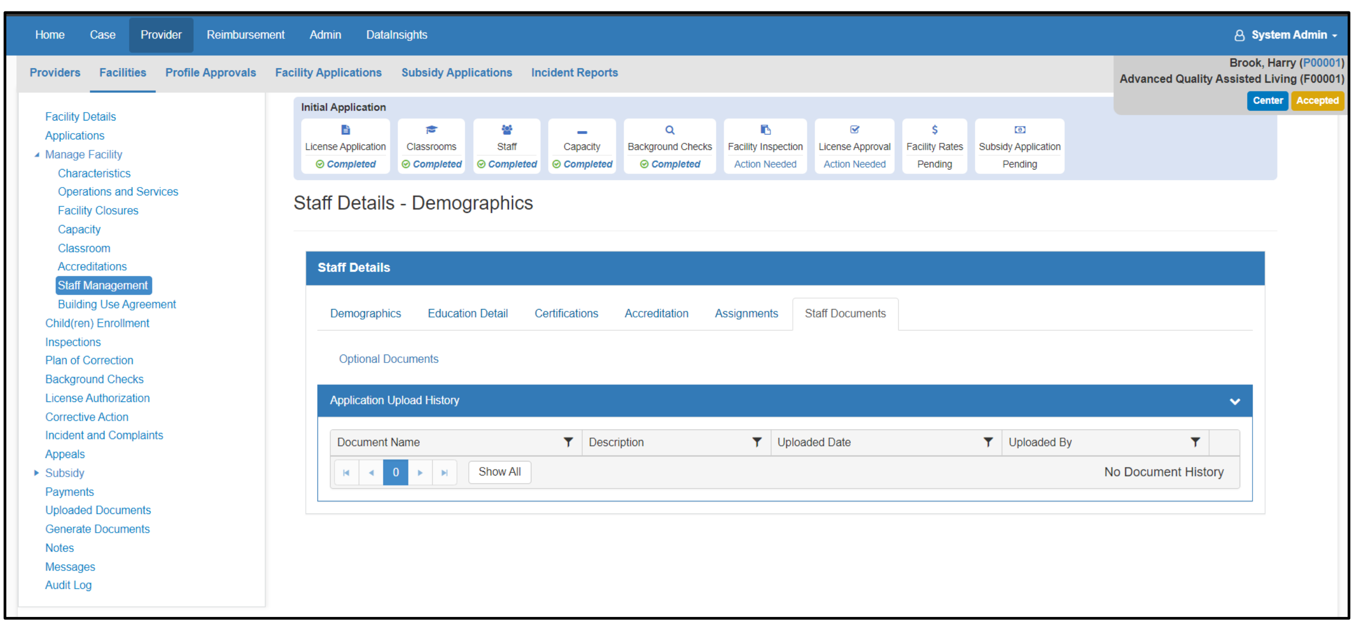

Figure 52: Facility Management – Staff Management – Staff Documents

How to upload a new document?

1. Click on 'Optional Documents' hyperlink.
2. Select document type from the list of documents dropdown.
3. Click on 'Select files' to select a document from the system.
4. Click on 'Upload' to complete uploading to the system.
5. The uploaded document shall appear on the documents uploaded grid.

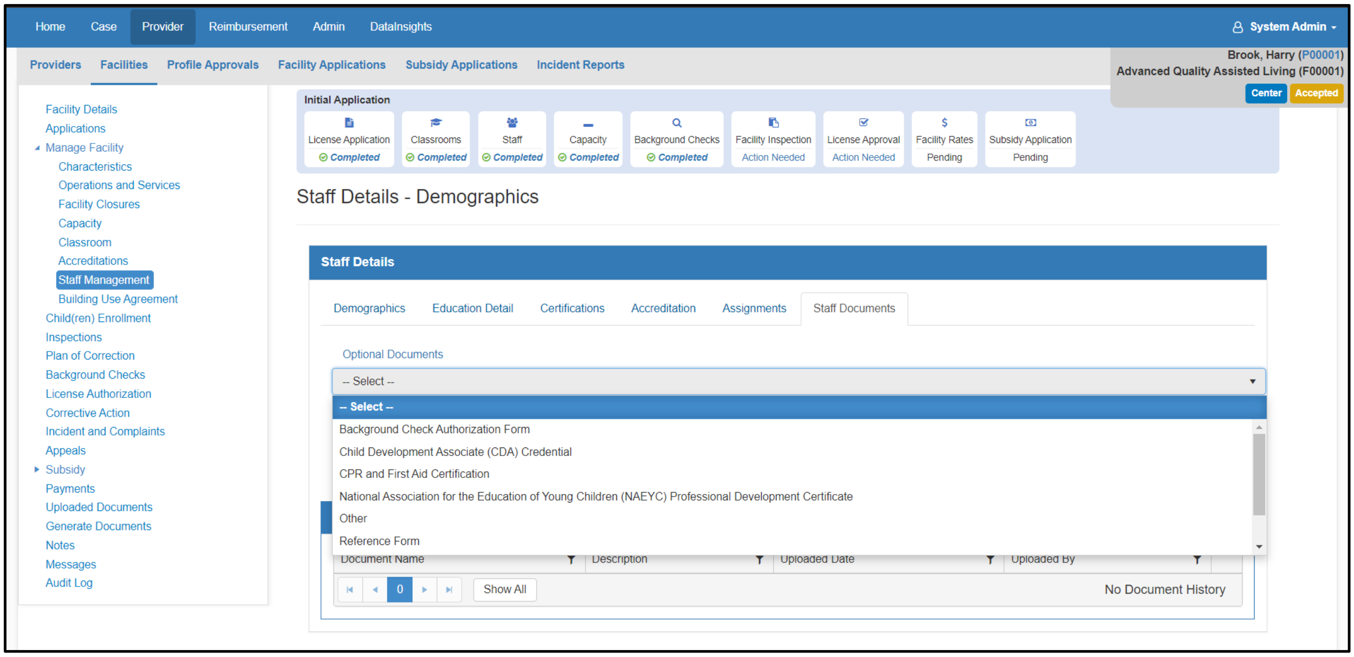

Figure 53: Facility Management – Staff Management – Adding Staff Documents

4.8 Household Residents (if applicable)

The Household Residents page is only applicable for family/group home, and relative provider types. In case of these provider types, this screen details all household residents for a provider.

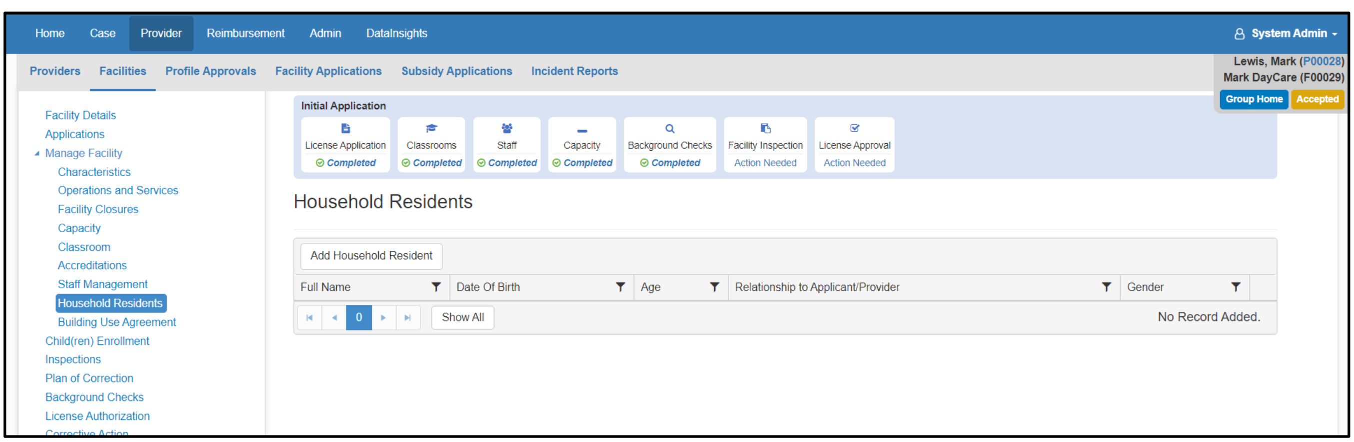

Figure 54: Facility Management – Household Residents

How to add a new Household Resident?

1. Click on 'Add Household Resident' button.
2. Add the required fields – First Name, Last Name, Date of Birth, Relationship to Applicant/Provider.
3. Click on 'Save' to save details and 'Cancel' to cancel the details.

3.9 Building Use Agreement

This screen details out the Building Use Agreement information.

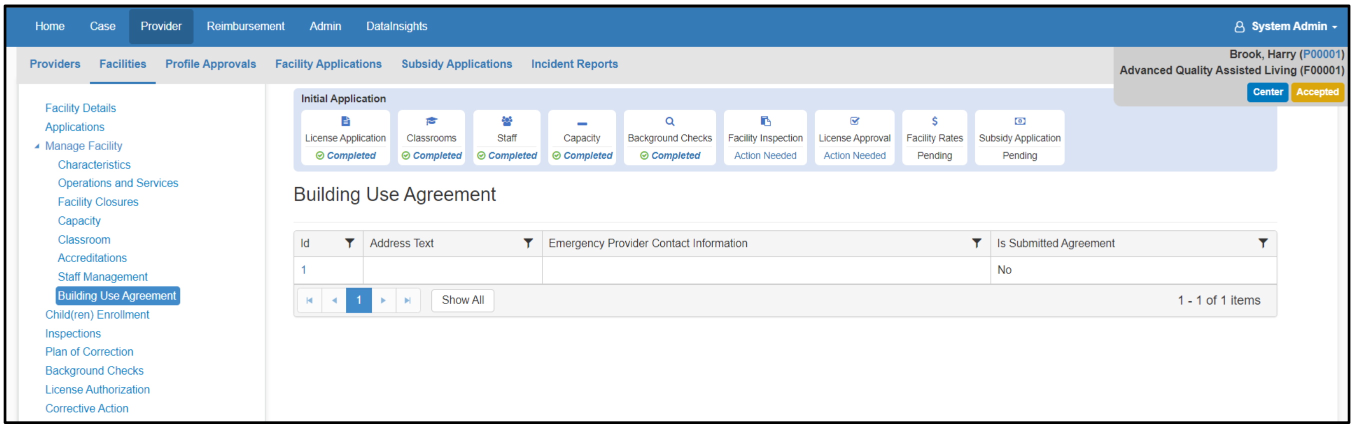

Figure 55: Facility Management – Building Use Agreement

How to view Building Use Agreement details?

1. Click on 'ID' hyperlink.
2. View details regarding the agreement.
3. Update details about the agreement.
4. Click on 'Save' to save the details or 'Cancel' to cancel the details.

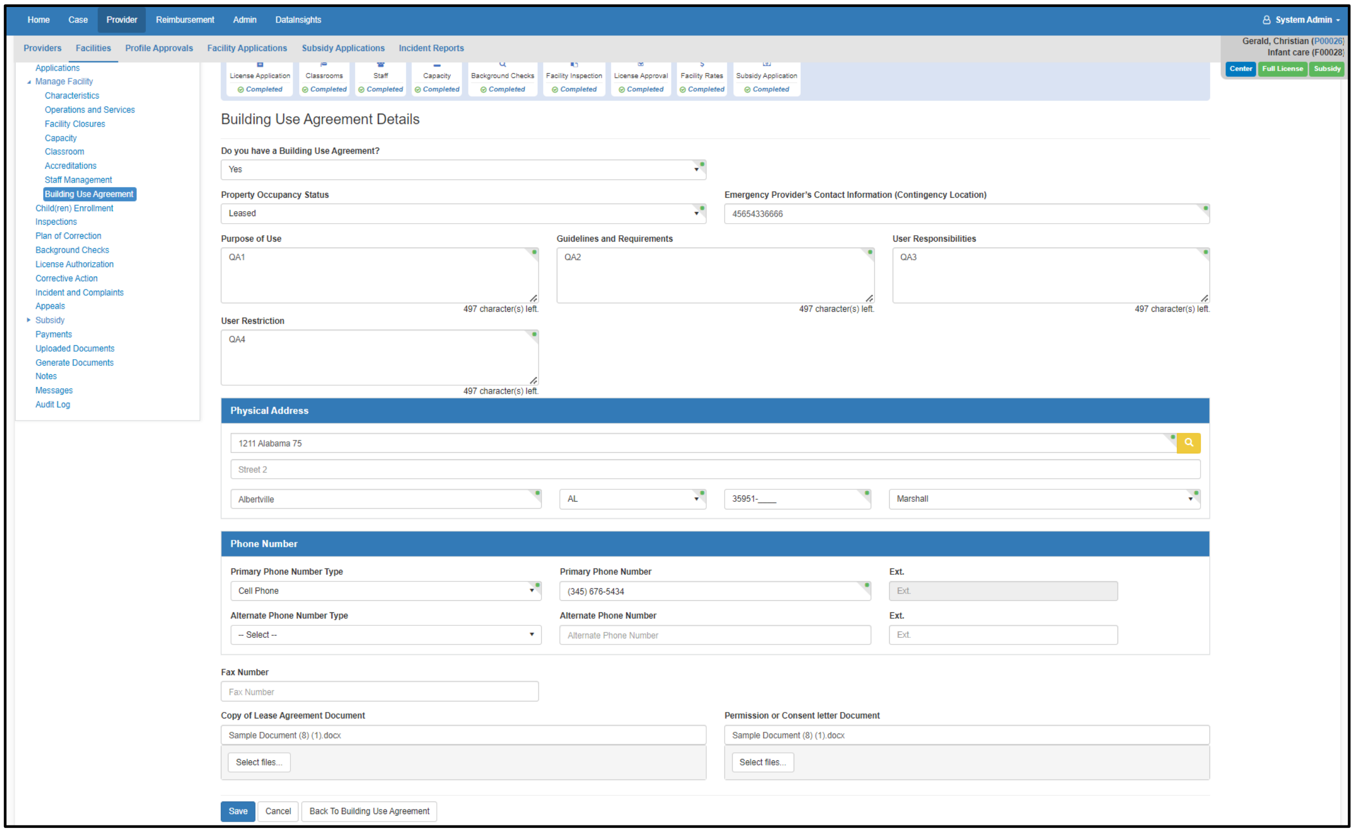

Figure 56: Facility Management – Building Use Agreement Details

4. CHILD(REN) ENROLLMENT

This screen displays details of the children enrolled in the specific facility.

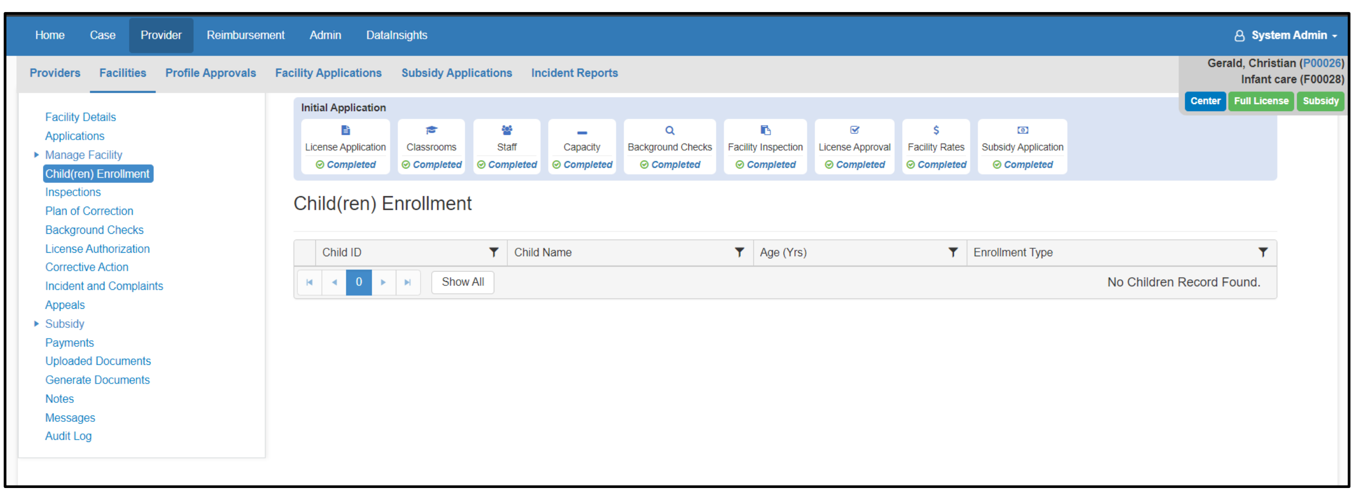

Figure 57: Children Enrollment

5. INSPECTIONS

This screen details the information regarding Facility and Fire Safety Inspections.

Under Facility Inspections: User can view any Pending appointments and Inspections already scheduled

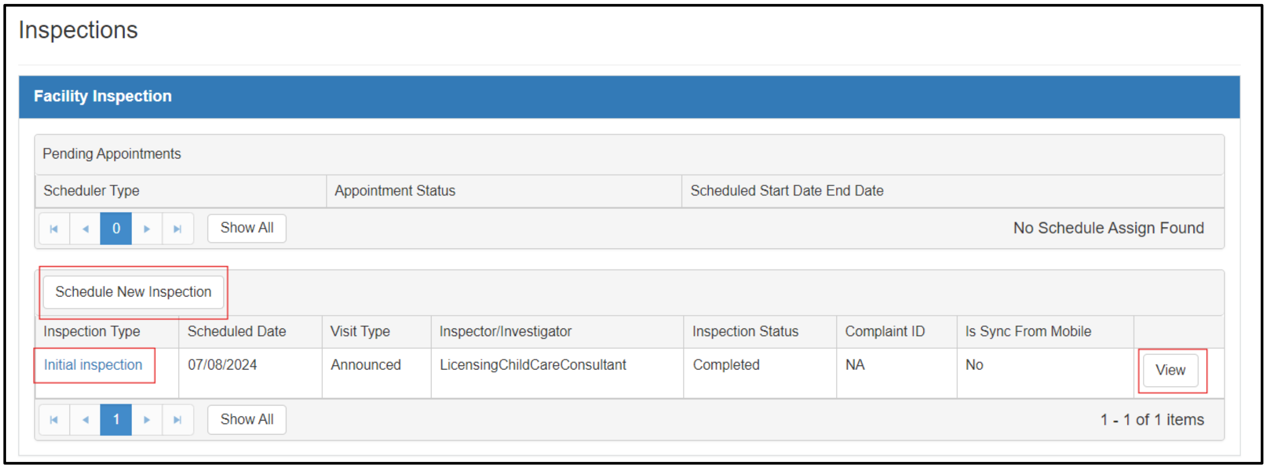

Figure 58: Facility Inspections

How to view inspection details:

1. Click on the 'Inspection Type' hyperlink. For instance: Initial Inspection in above case.
2. 'View Inspection' screen opens with detailed information about the Inspection.

How to schedule an Inspection?

1. Click on 'Schedule New Inspection' button on above screen (refer to Figure 58)
2. User is navigated to the below screen to 'Schedule an Appointment' for the Inspection.

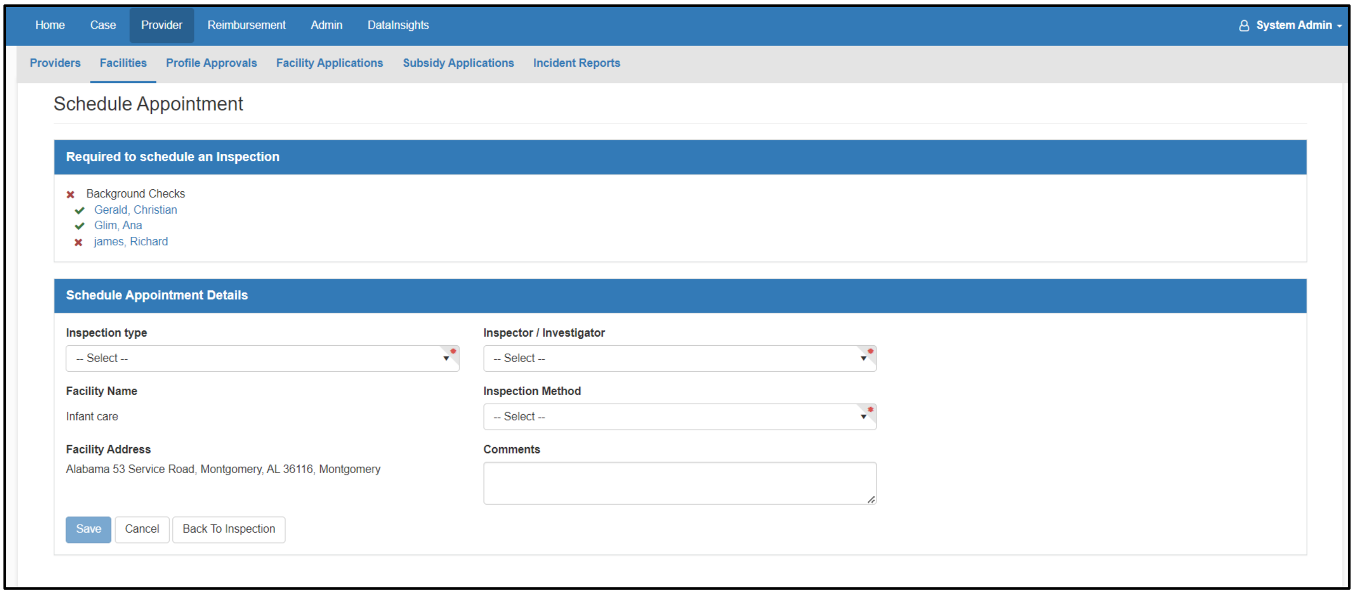

Figure 59: Scheduling an Inspection

3. User will be able to select an Inspection Type
4. User will be able to select an Inspector/Investigator
5. User will be able to select an Inspection Method.
6. Click on 'Save' to update the changes.
7. Calendar feature is presented. User will be able to select three timings as options for the Inspection. Provider will be notified of the three timings and will be able to confirm one of the timings to undergo Investigation. (Calendar can be viewed Day-wise, Week-wise or Month-wise).

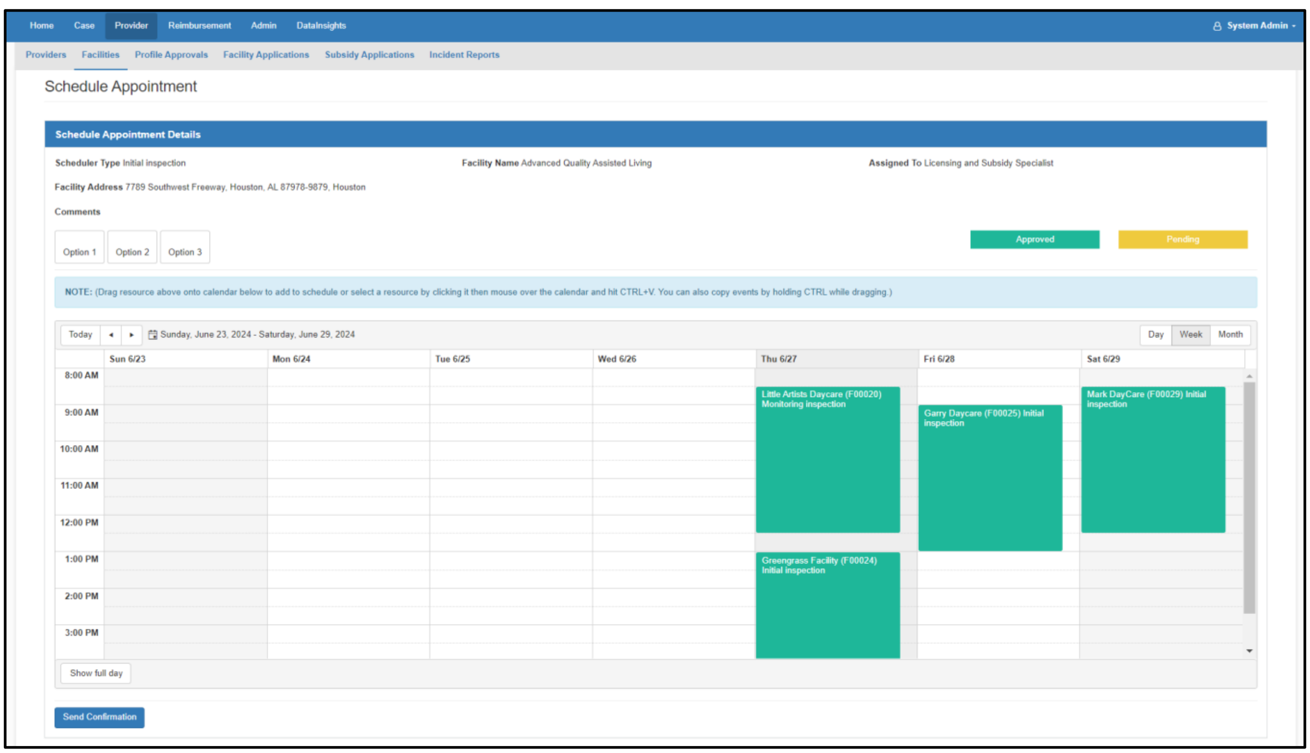

Figure 60: Inspection Calendar

Under Fire Inspection: User can view Fire Inspection details.

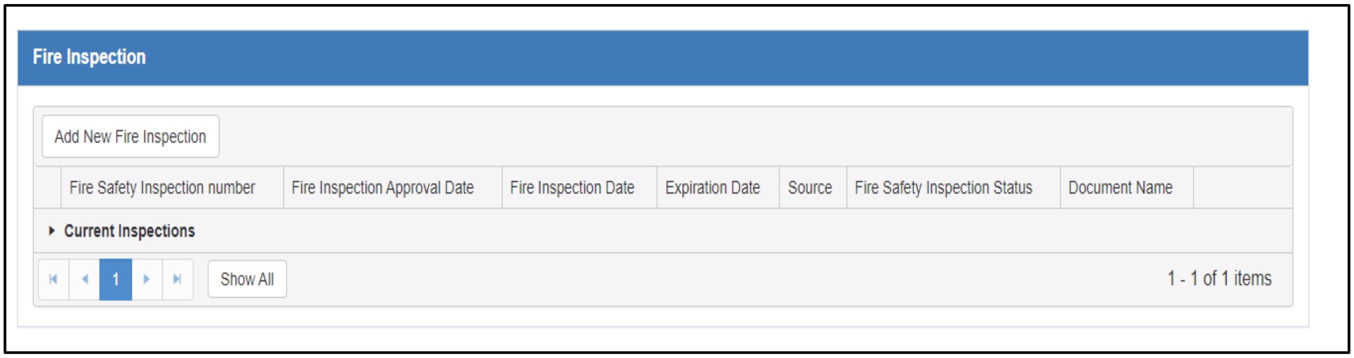

Figure 61: Fire Inspection Grid

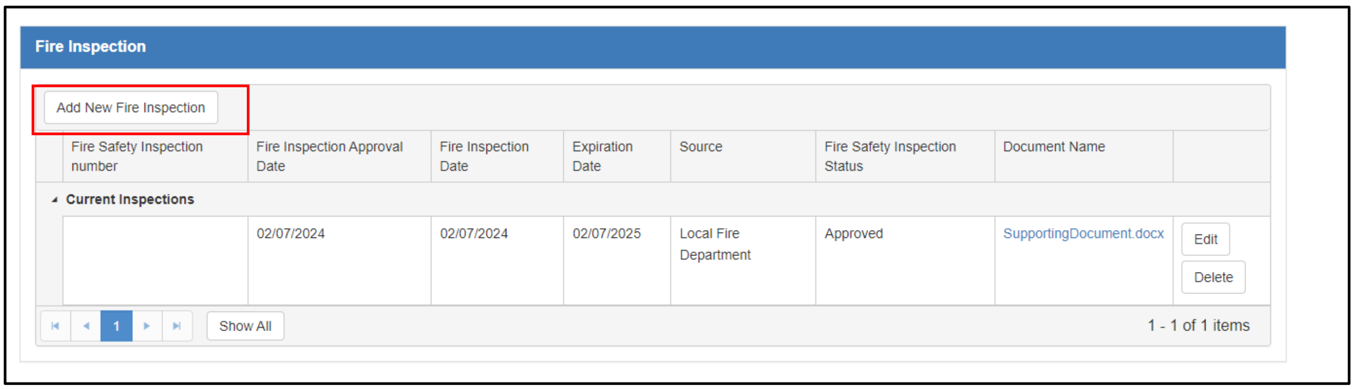

Figure 62: Adding Fire Inspection

How to 'add a new Fire Inspection'?

1. Click on 'Add New Fire Inspection' button.
2. Fill in the mandatory details.
3. Click on 'Save' to save the updates.

Figure 63: Adding Fire Inspection

6. PLAN OF CORRECTION

This screen captures details about the deficiencies noted during the Inspection. It details the Deficiency Summary.

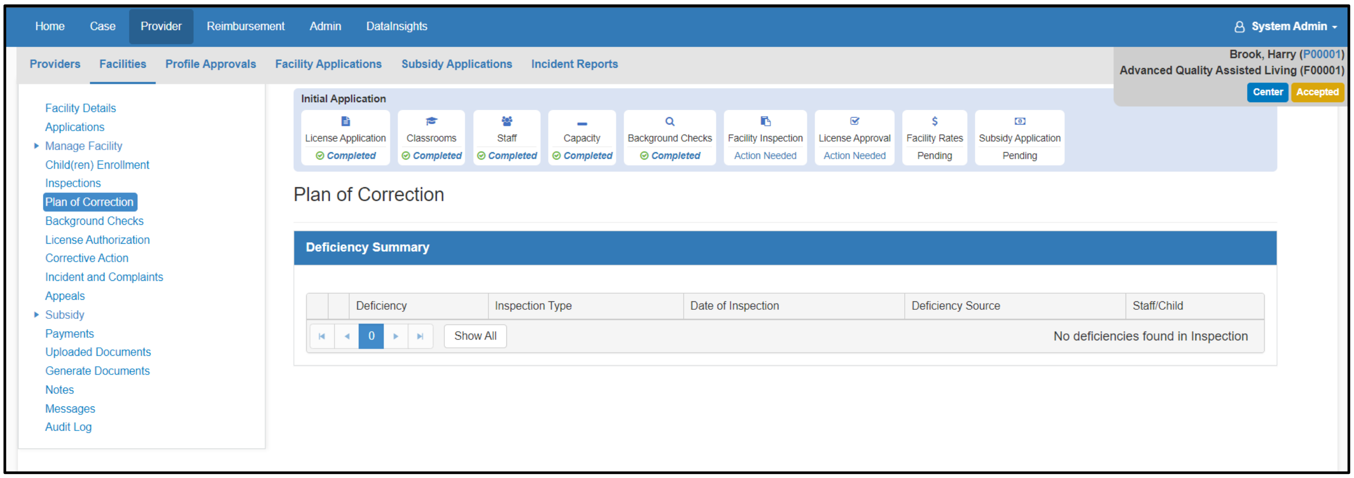

Figure 64: Plan of Correction

7. BACKGROUND CHECK

The following screen displays all the Background Check information for: Current Staff, Provider and Contact Person, Household Members & Terminated Staff. Additionally, the screen also details the information regarding Tuberculosis Test.

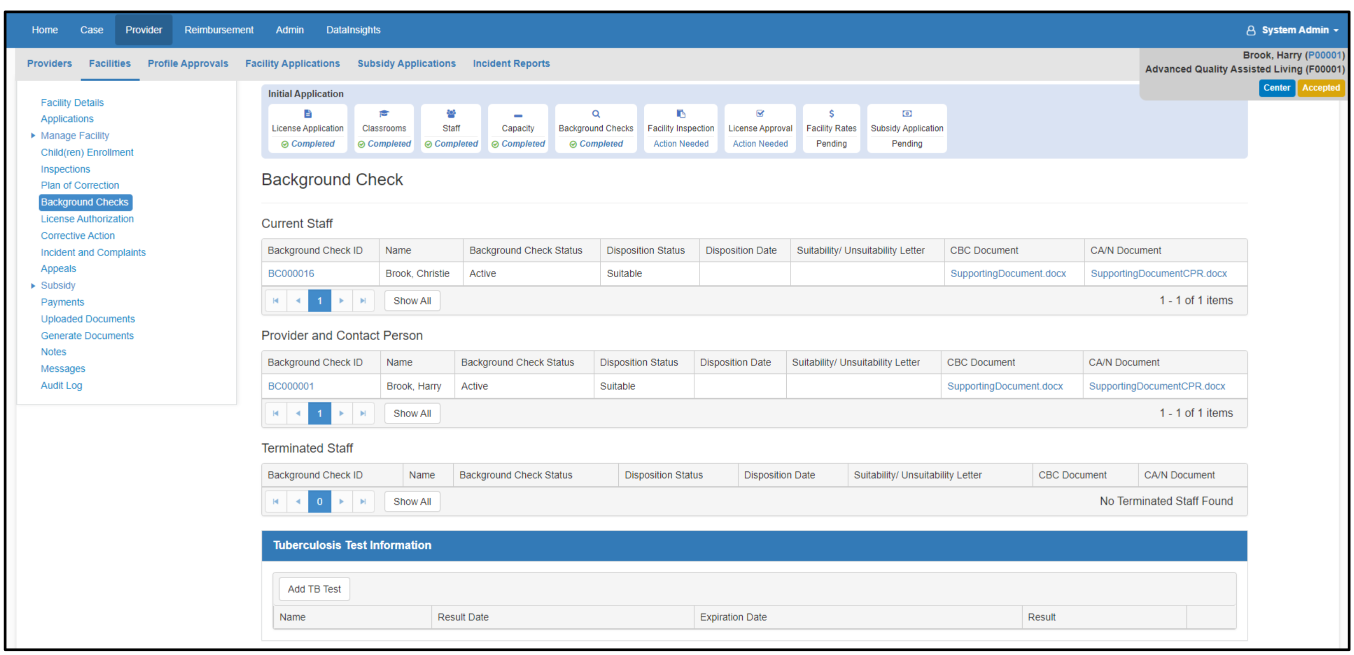

Figure 65: Background Checks

How to view Background Check details?

1. Click on the 'Background Check ID' hyperlink.
2. 'Background Check Details' screen opens with detailed information about the respective person.

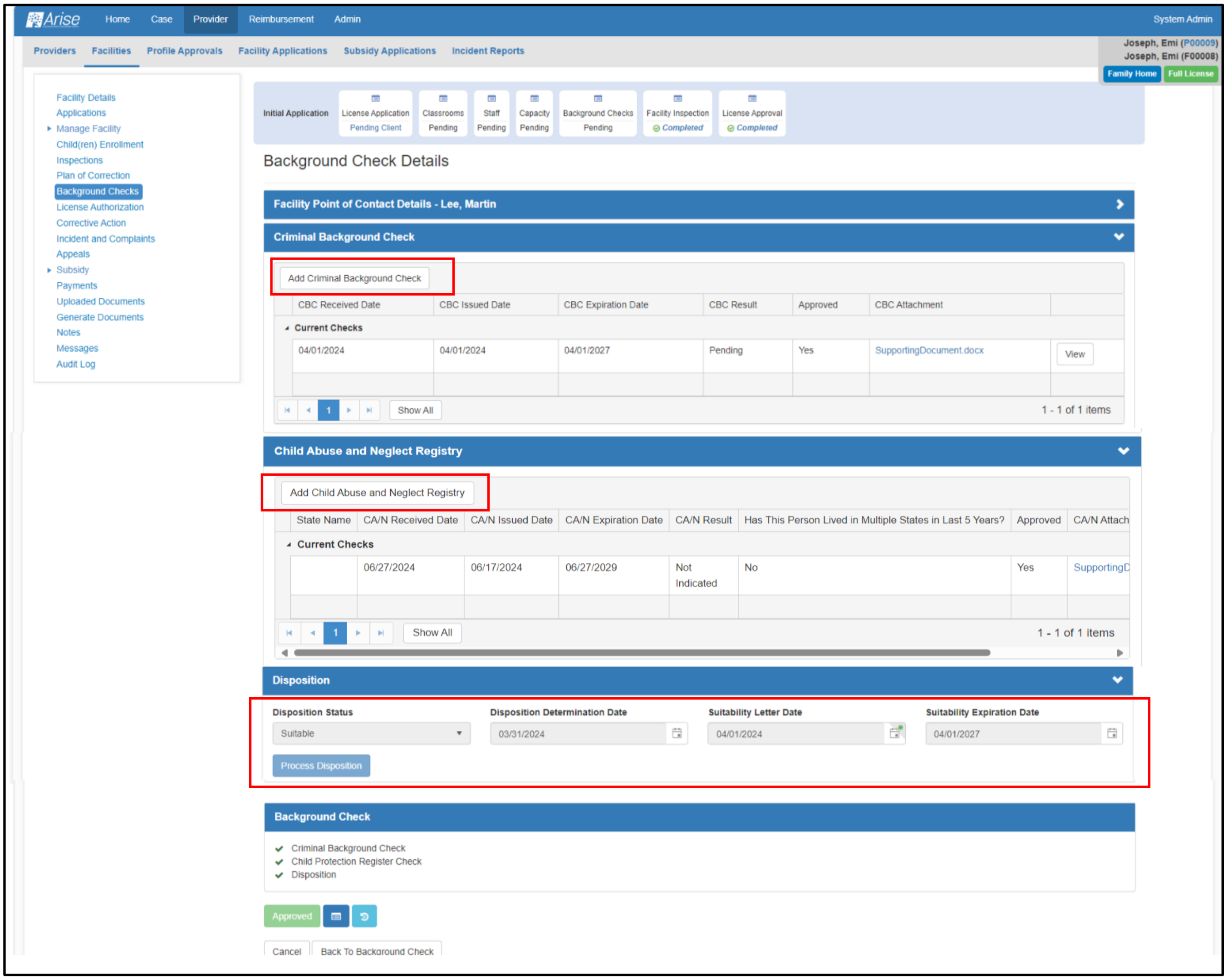

Figure 66: Background Check Details

Under **'Background Check Details'** screen, to add a new 'Criminal Background Check' record follow the below steps:

How to add a new 'Criminal Background Check' record?

1. Click on 'Add Criminal Background Check' button.
2. Fill in the mandatory details.
3. Click on 'Save' to save the updates or 'Cancel' to cancel out the updates.

How to add a new ‘Child Abuse and Neglect Registry’ record?

1. Click on ‘Upload CA/N Document Authorization’ button.
2. Upload the required document.
3. Click on ‘Save’ to save the updates or ‘Cancel’ to cancel out the updates.

How to process a Disposition?

1. Select appropriate value from the ‘Disposition Status’ dropdown.
2. Add a date for ‘Suitability Letter Date’.
3. Click on ‘Process Disposition’ button.

After successfully following the above steps, the ‘Approve’ button on the bottom of the screen gets enabled for the authorized user to ‘Approve’ the Background Check.

8. LICENSE AUTHORIZATION

This screen displays the License authorization details. It captures the licenses/exemptions provided in the past and the status of Current License/Exemption.

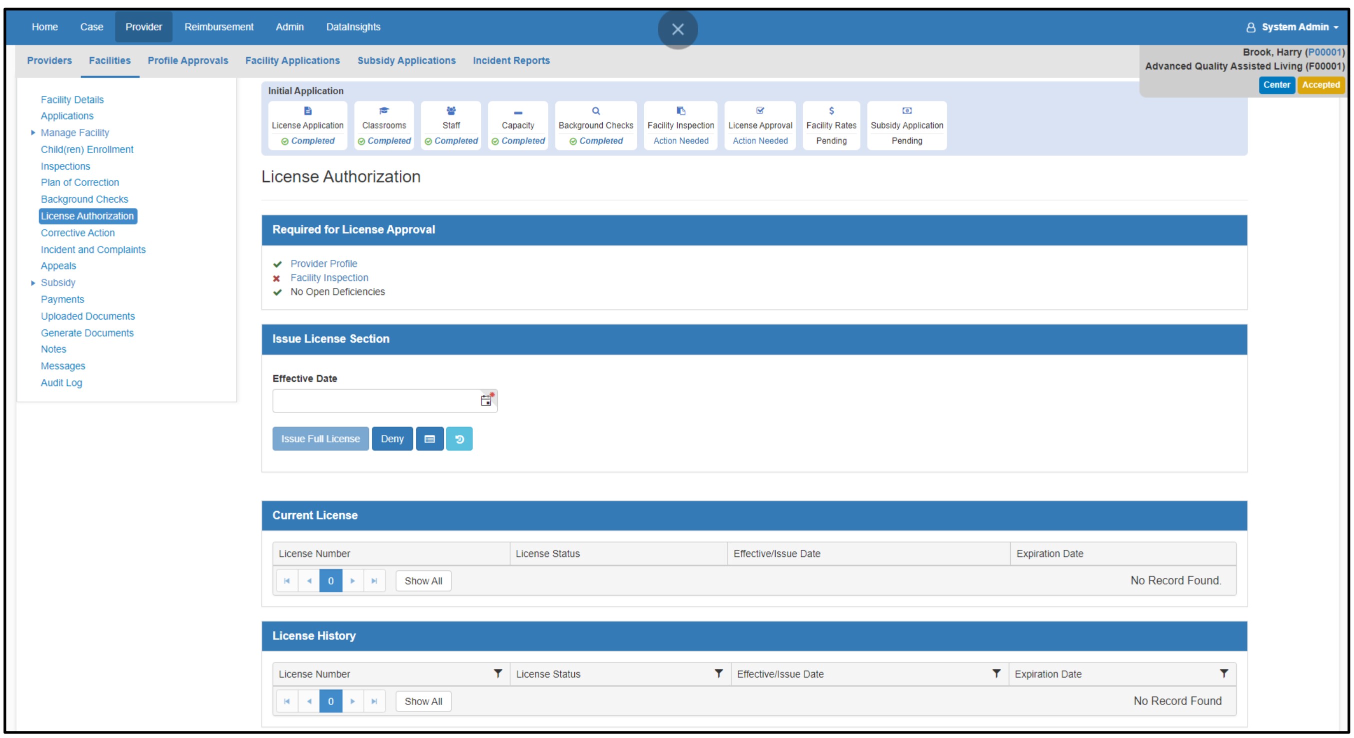

Figure 67: License Authorization

Authorized users are also allowed to Renew/Issue a License/Exemption when all pre-conditions are met OR Suspend, Revoke, Deny or Put on Probation the License/Exemption if there are any deficiencies found during an Inspection or Incident Report.

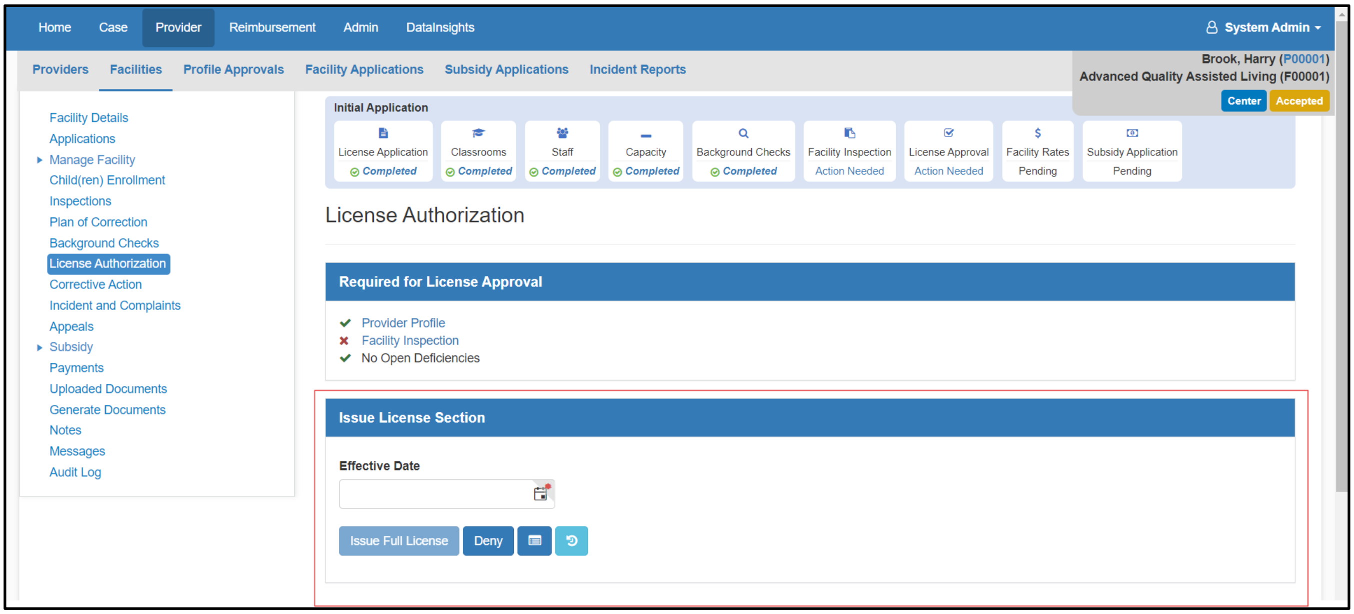

Figure 68: Issuing a License/Exemption

9. CORRECTIVE ACTION

This screen displays all the corrective actions required by the provider to be taken, for their application to be approved.

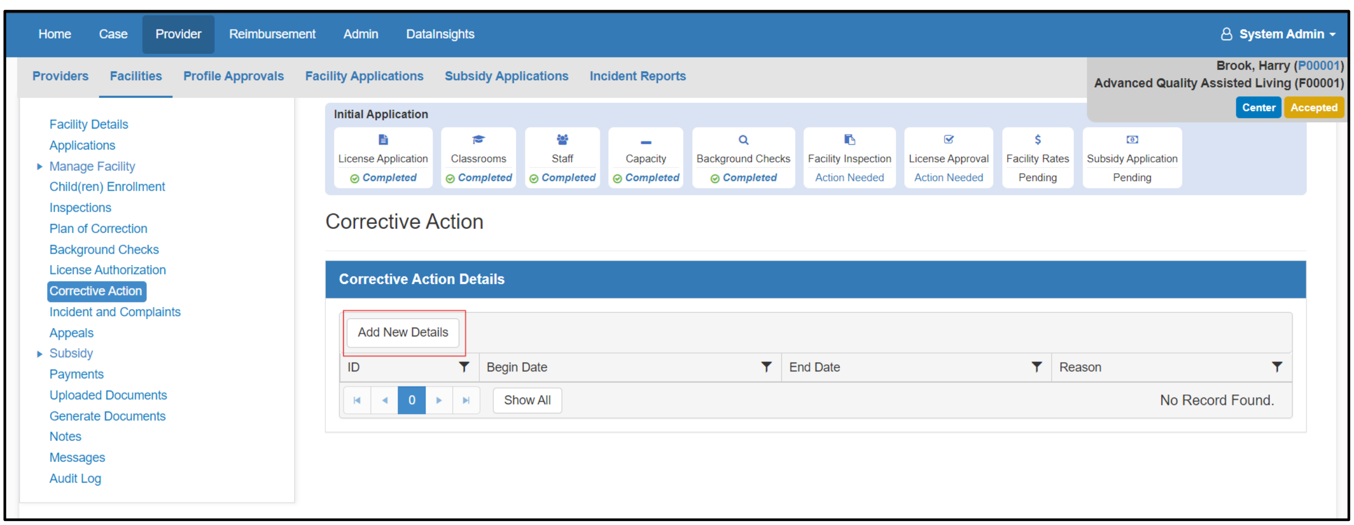

Figure 69: Corrective Action

How to create a new corrective action record?

1. Click on 'Add New Details'.
2. Fill in the mandatory details.
3. Click on 'Save' to save the details or 'Cancel' to cancel out the details.

10. INCIDENT AND COMPLAINTS

This screen captures all the incidents and complaints filed against the provider.

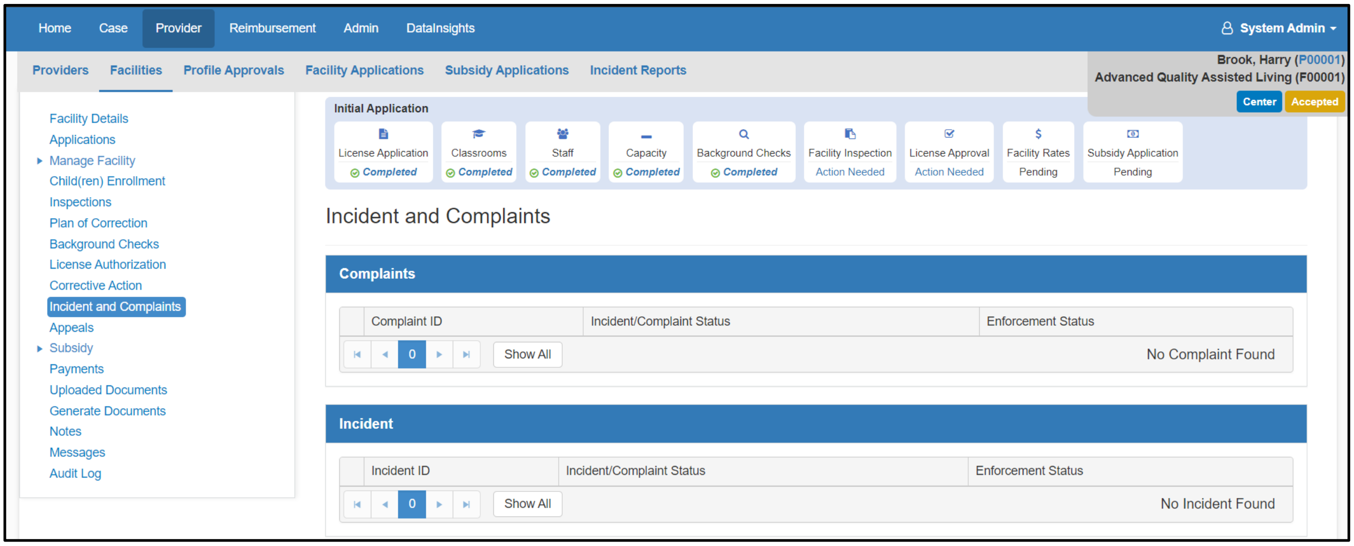

Figure 70: Incident and Complaints

11. APPEALS

This screen captures all the Appeals made by the provider.

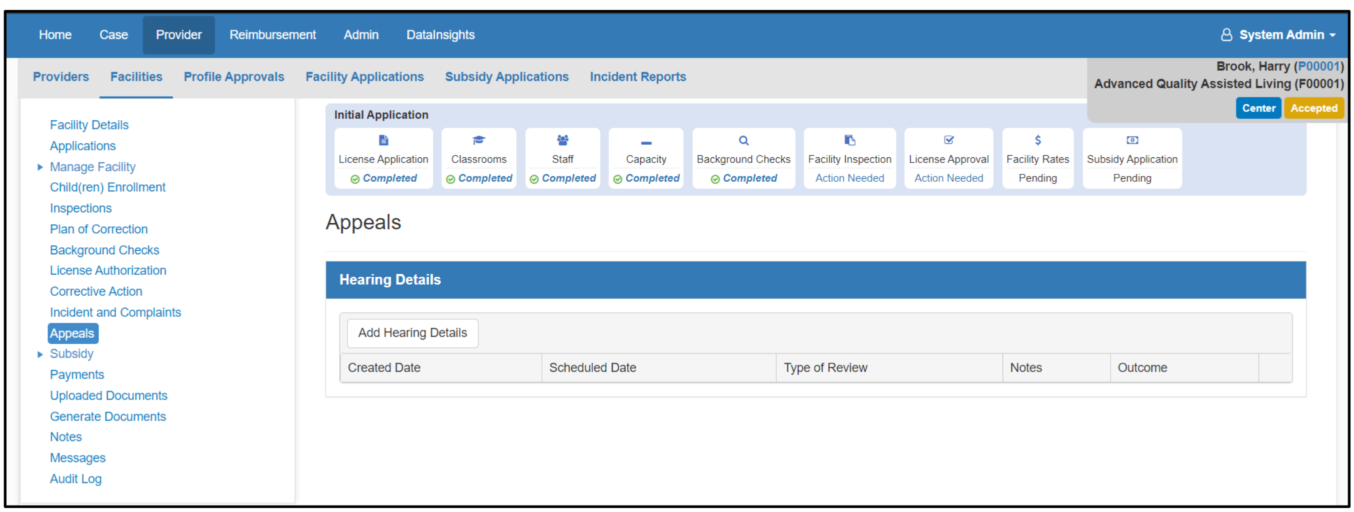

Figure 71: Appeals

How to add new hearing details?

1. Click on 'Add Hearing Details' button.
2. Fill in the mandatory details.
3. Click on 'Update' to save the changes or 'Cancel' to cancel the changes.

12. SUBSIDY

12.1. Subsidy Application

This screen displays all subsidy applications for the respective facility.

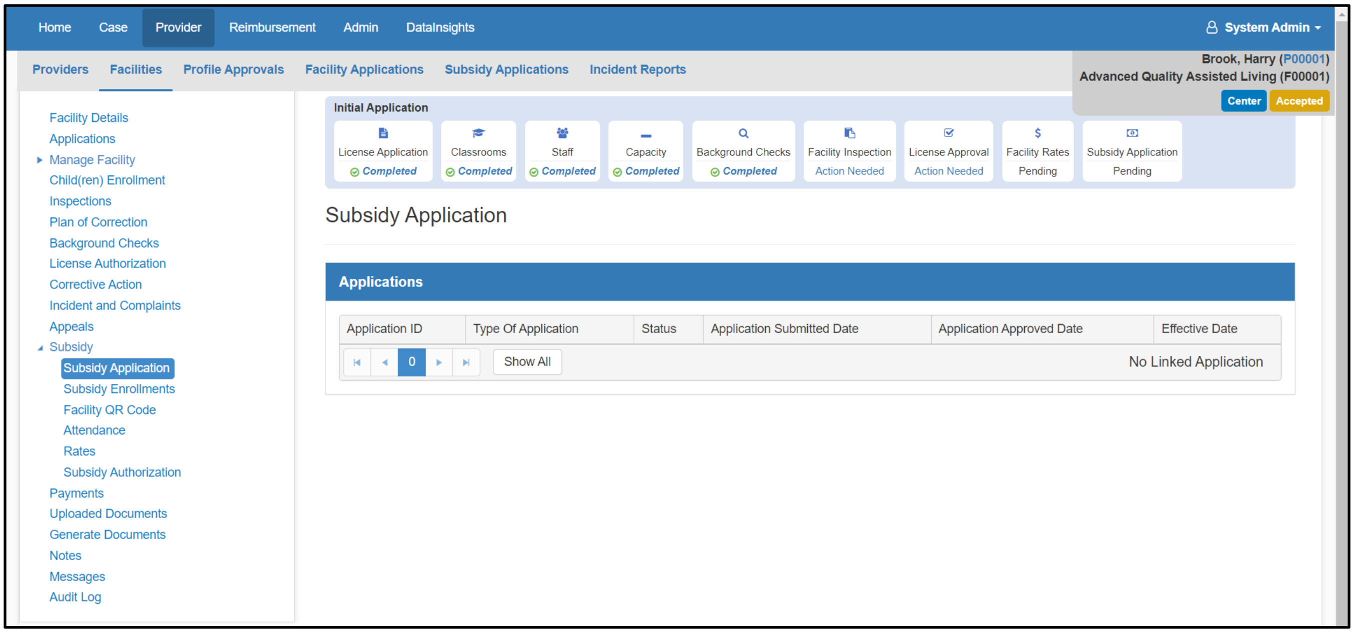

Figure 72: Subsidy Application

12.2. Subsidy Enrollments

This screen displays the subsidized child enrollments.

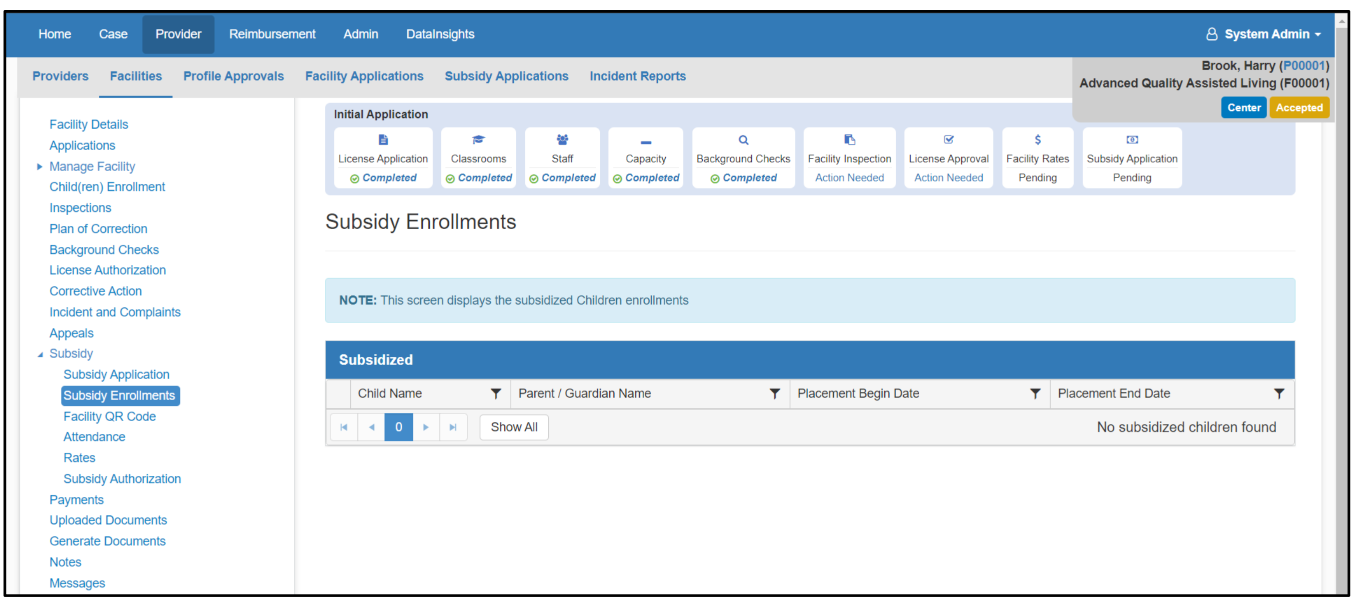

Figure 73: Subsidy Enrollments

12.3. Facility QR Code

This screen provides a QR Code to scan in order for authorized users to mark attendance.

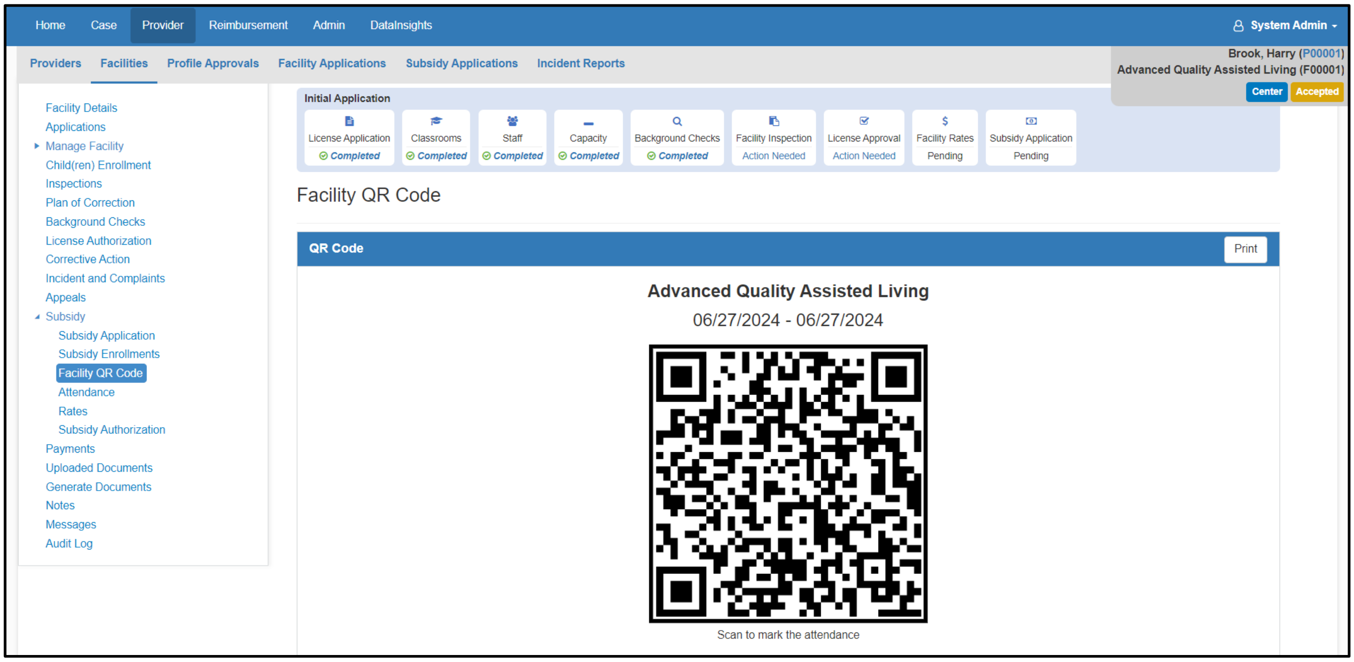

Figure 74: Facility QR Code

12.4. Attendance

This screen allows an authorized user to view/edit attendance for the selected service period. Users will also be able to view/edit the attendance by clicking on the month.

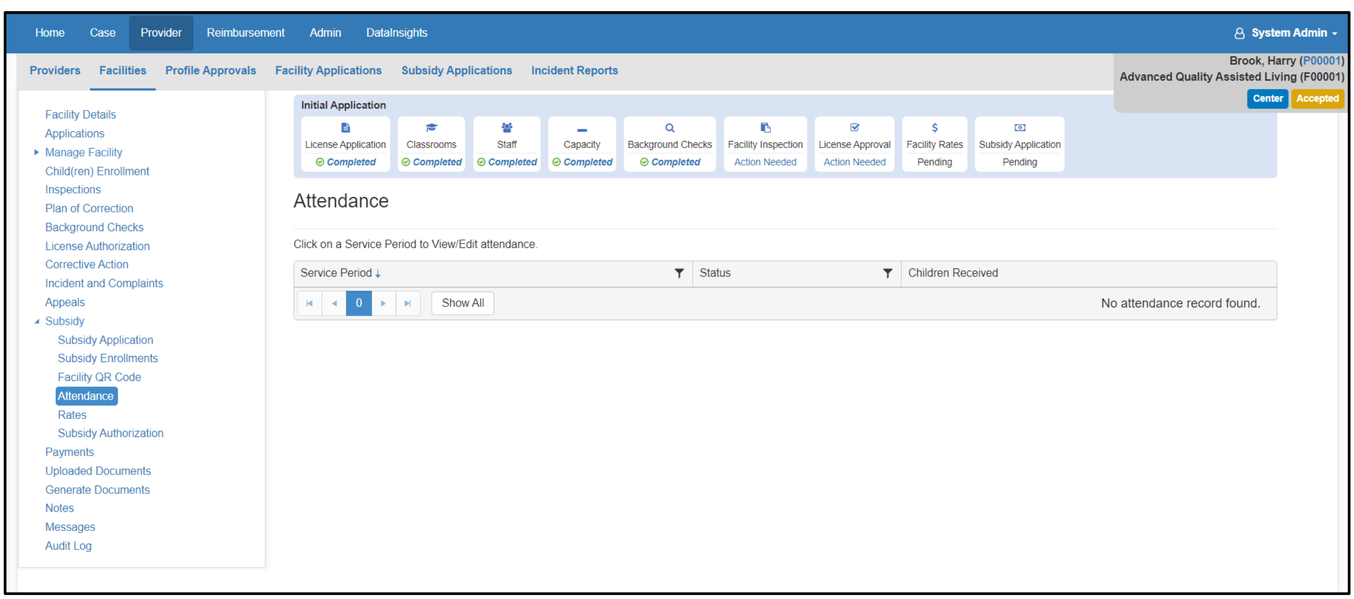

Figure 75: Attendance

12.5. Rates

This screen allows the user to create a new rate set for a facility.

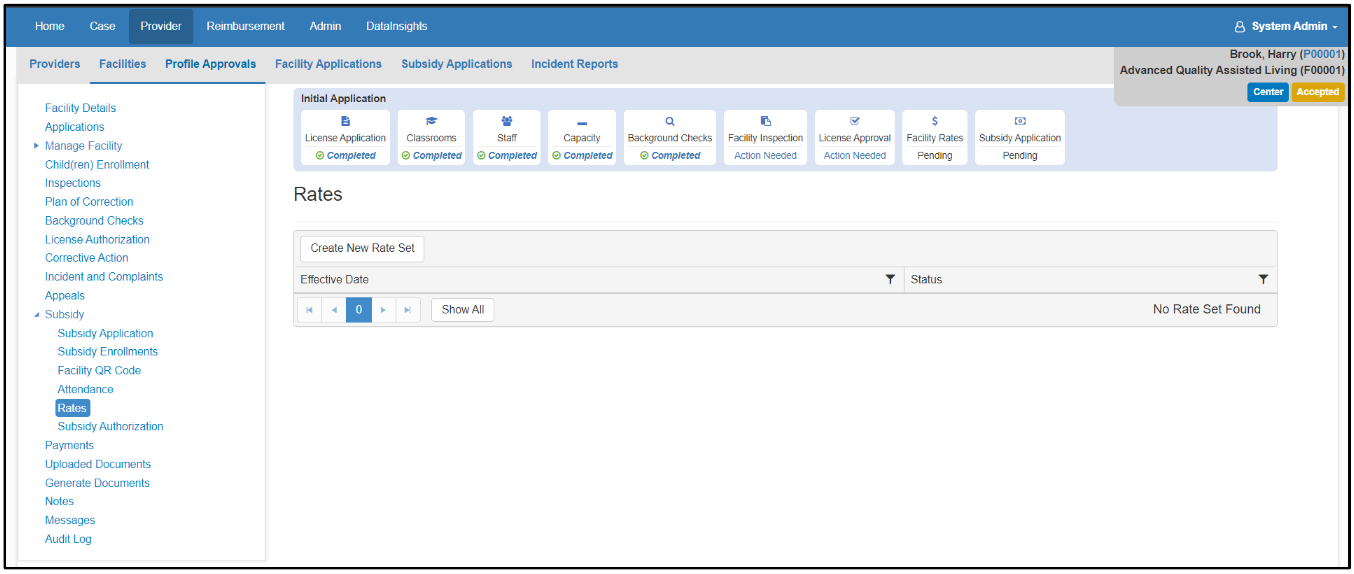

Figure 76: Rates

How to create a New Rate Set?

1. Click on 'Create New Rate Set' button, to be taken to the following screen:
2. Click on the calendar icon to select an 'Effective Date'.
3. Click on the 'Rate' field to type in a dollar amount or use the increment or decrement buttons to increase or decrease an amount value for each 'Care Level'.
4. Check the box if the 'facility offers discount rates' and enter the discount percentage.
5. Click on 'Submit'.

The grid on main screen should display the Effective Date of the Rate Set along with the Status (refer to Figure 76).

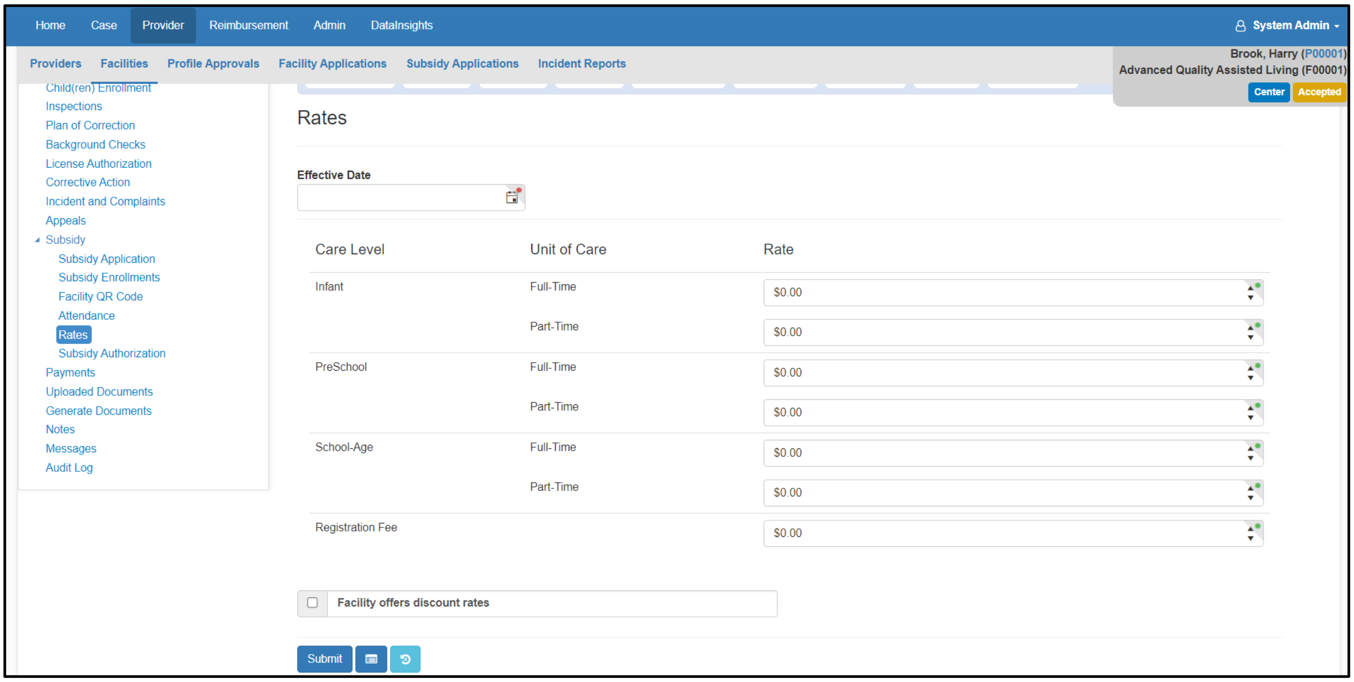

Figure 77: Creating a New Rate Set

12.6. Subsidy Authorization

This screen represents all information regarding subsidy authorization. i.e., Subsidy status, Program violation information.

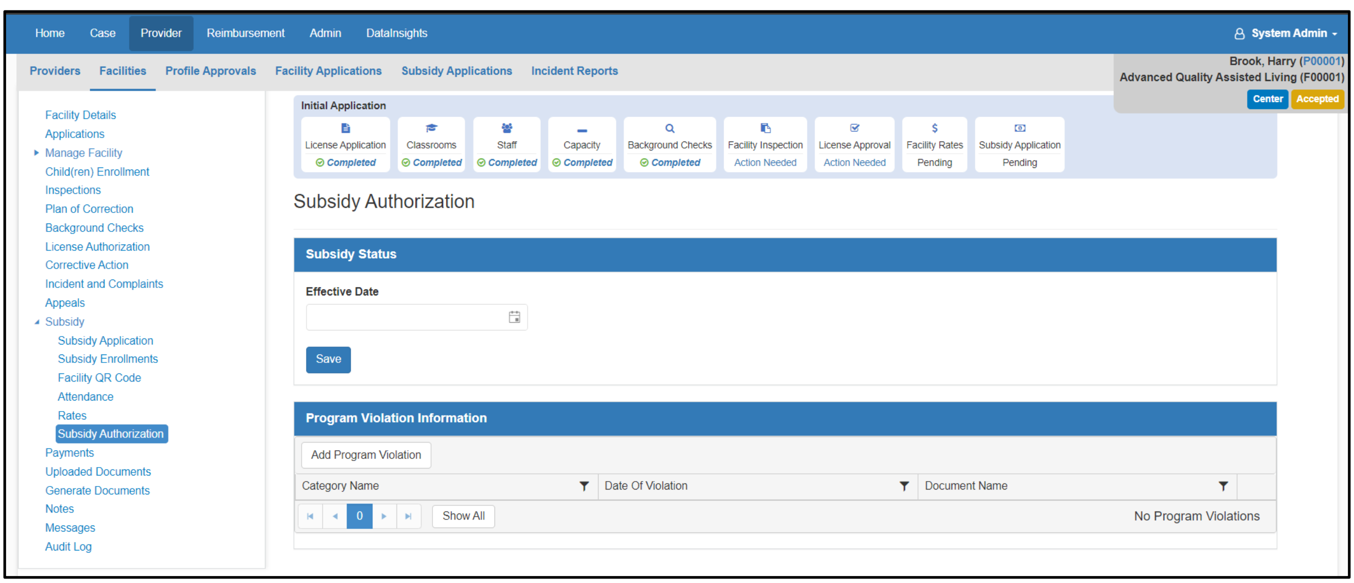

Figure 78: Subsidy Authorization

Alternatively, on this page, authorized users will also be able to ‘Terminate’ a subsidy by clicking on the ‘Terminated’ button, as follows:

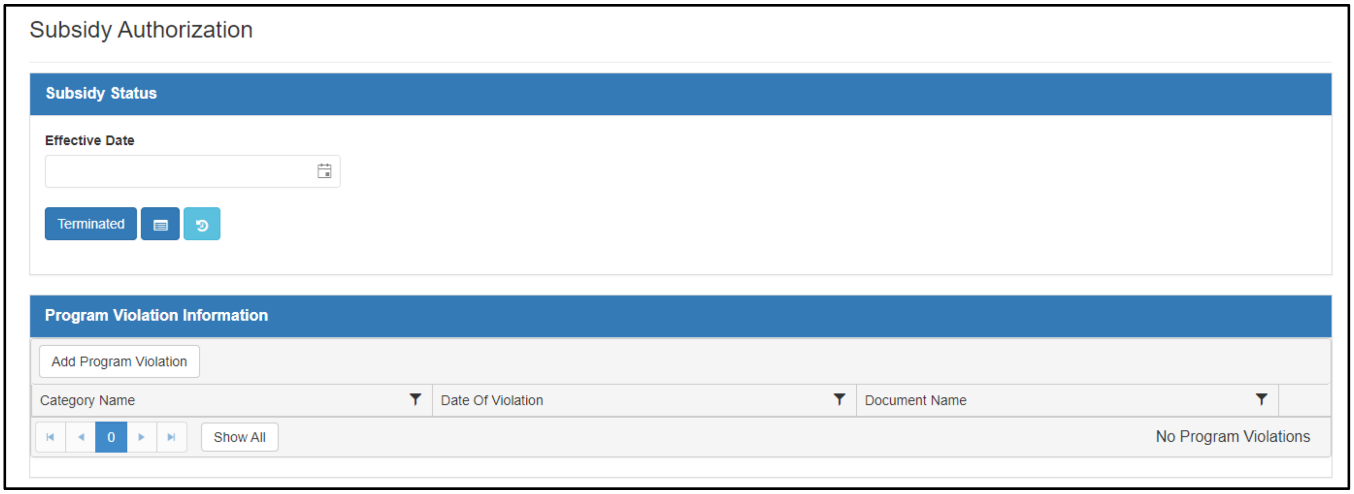

Figure 79: Terminating a Subsidy

13. PAYMENTS

The payments section allows users to view adjustments, paid payments, and pending payments to be made to the specific facility in question.

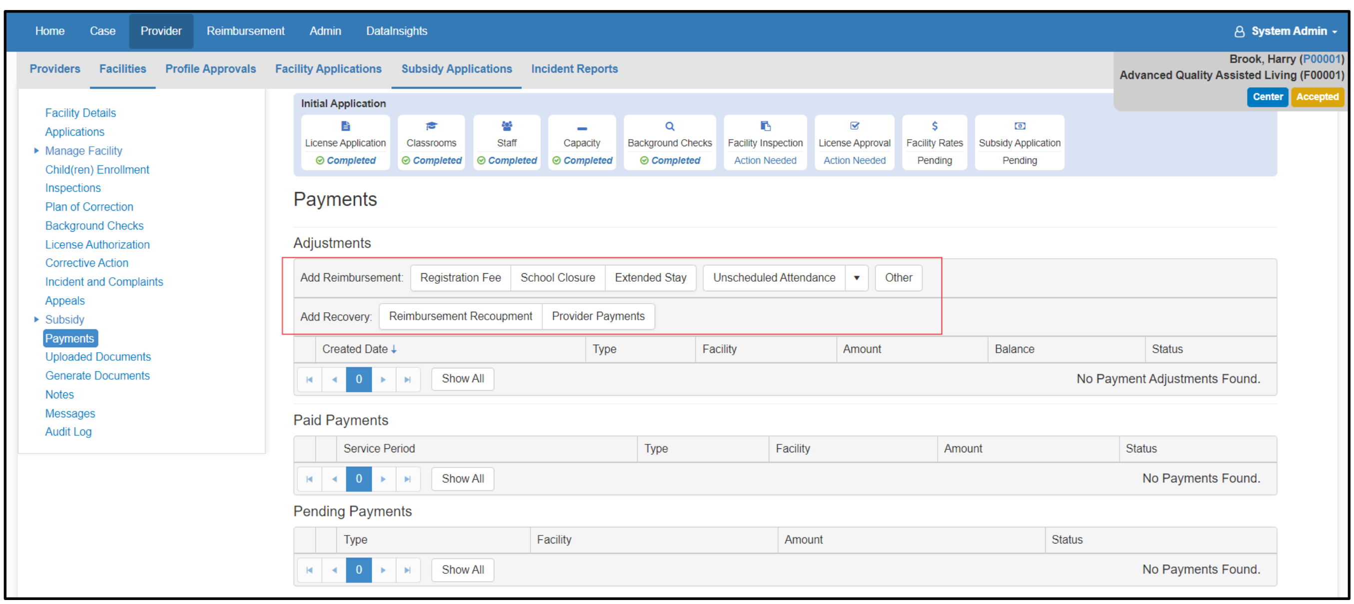

Figure 80: Payments

On this screen, authorized users will also be able to manually add and submit recoupments and payments, based on the requirement, by clicking on the respective buttons (refer to Figure 80).

14. UPLOADED DOCUMENTS

The Uploaded Documents section lets the user view documents uploaded for the respective facility.

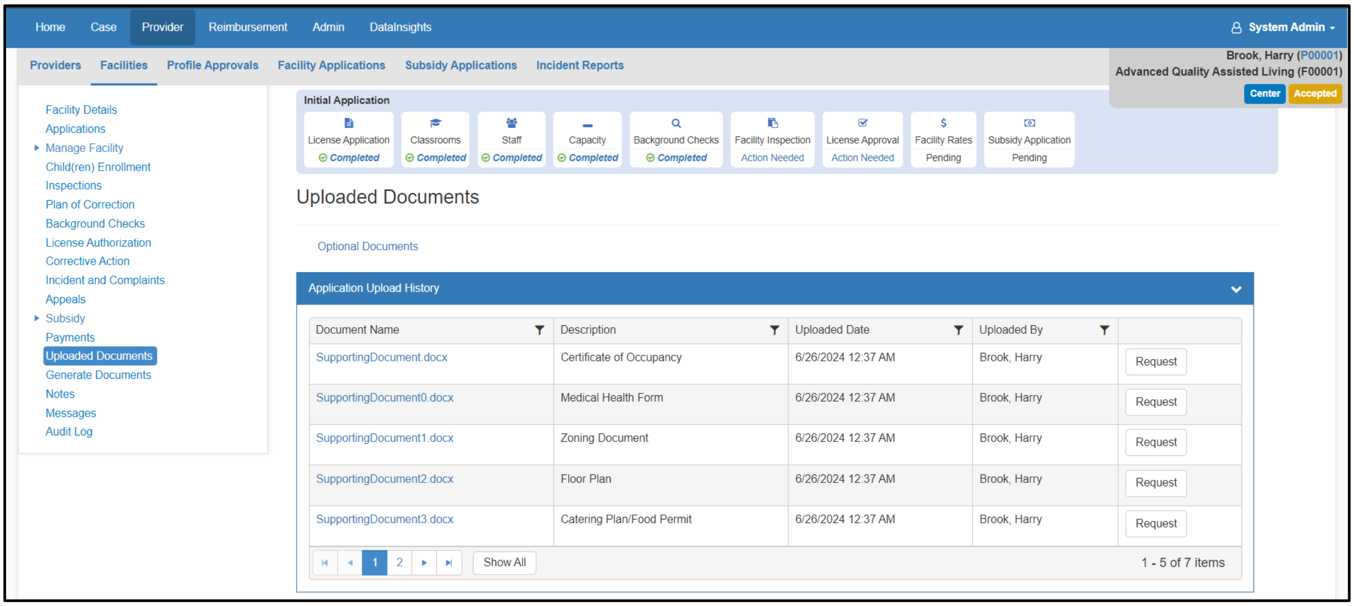

Figure 81: Uploaded Documents Grid

How to view an Uploaded Document?

1. Click on the respective document name hyperlink.
2. The document will be downloaded for user's viewing.

15. GENERATE DOCUMENTS

The 'Generate Documents' screen allows user to generate Facility related documents and download them.

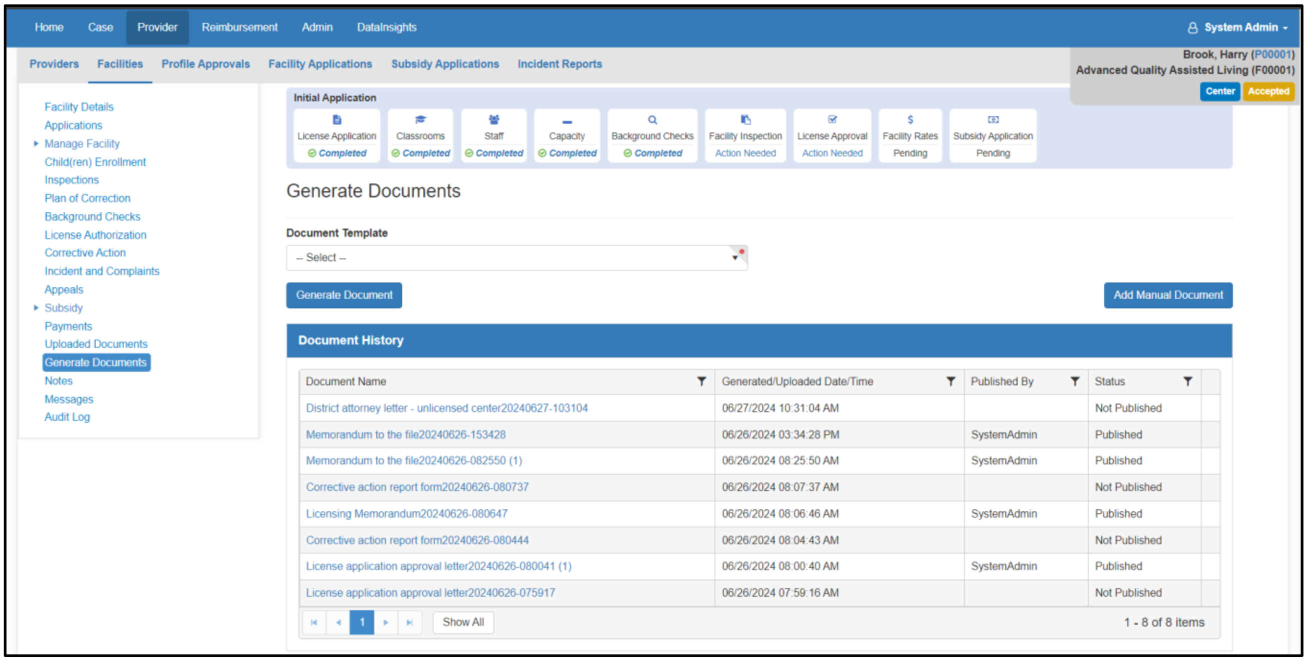

Figure 82: Generate Documents

How to Generate Documents?

1. Click on 'Generate Documents' tab from left navigation.
2. Select a document to be generated from the list of documents in the dropdown.
3. Click on 'Generate Document'. Generated document will be displayed in the 'Document History' grid.
4. The document shall appear in the 'Document History' grid.
5. Click on Document Name hyperlink under the 'Generate Document' column to download the document.

16. NOTES

How can a user create notes?

1. Click on 'Notes' tab from left navigation. You will be navigated to the screen displaying notes summary
2. Click on 'Add new Note'
3. Select 'Name' LOV from the drop down
4. Enter the description/ elaboration in the text box.
5. Click on Update

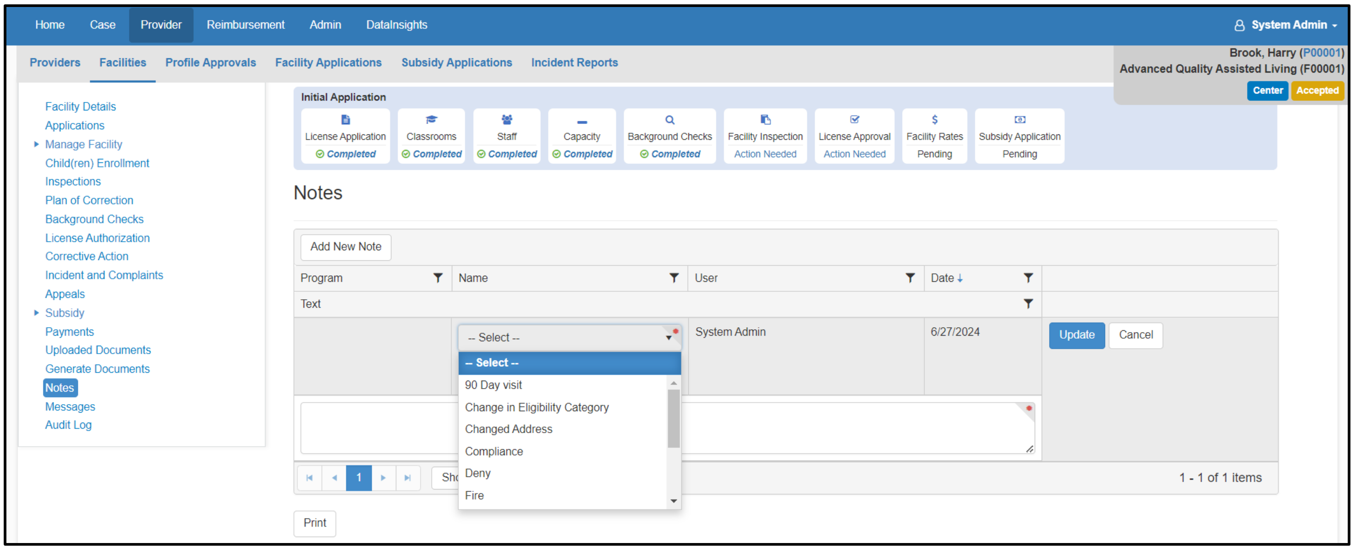

Figure 83: Notes

17. MESSAGES

The messages screen consists of two sub tabs:

- ➢ Internal Messages: In which user can create manual tasks with the due date and assign it to users.
- ➢ Provider Messages: This tab displays the requests received from the provider portal and tasks for the provider.

<u>Internal Messages:</u>

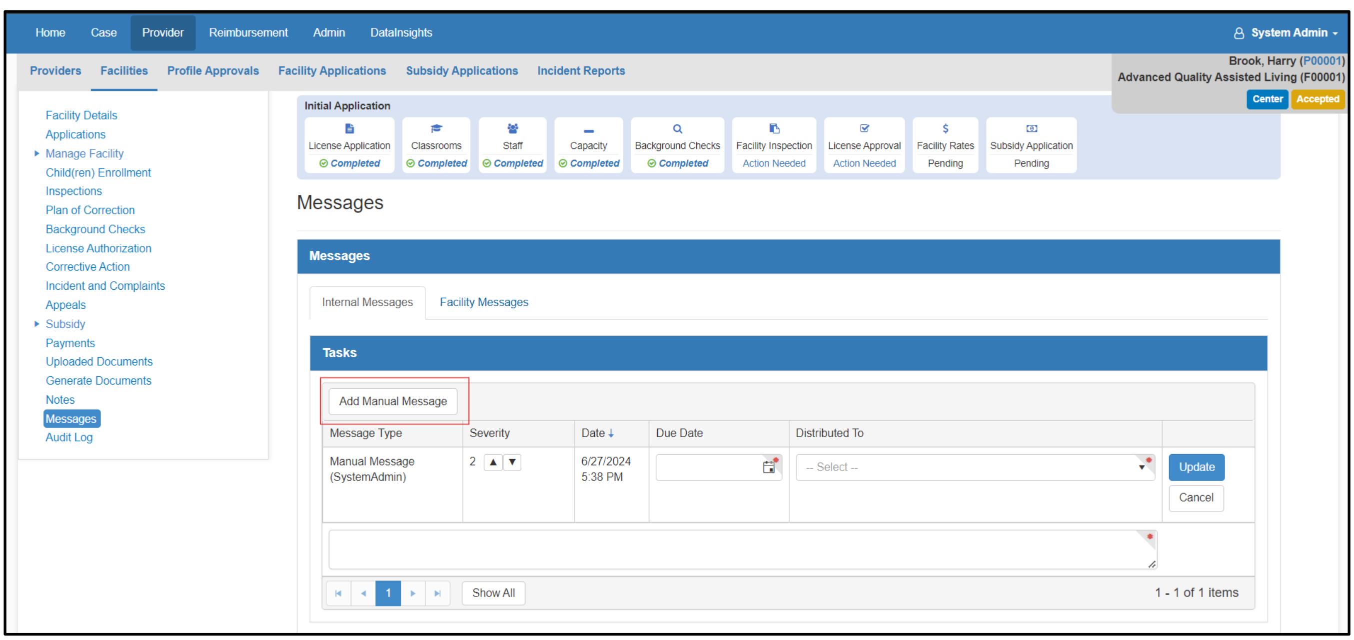

Figure 84: Internal Messages

How to 'Add Manual Message'?

1. Click on 'Messages' from the left navigation
2. Click on 'Add Manual Message' button from the tasks container (refer to Figure 84)
3. Set the 'Severity'
4. Enter 'Due Date'
5. Select the user to assign the message/tasks from 'Distributed To' drop down
6. Click on 'Update'

Facility Messages:

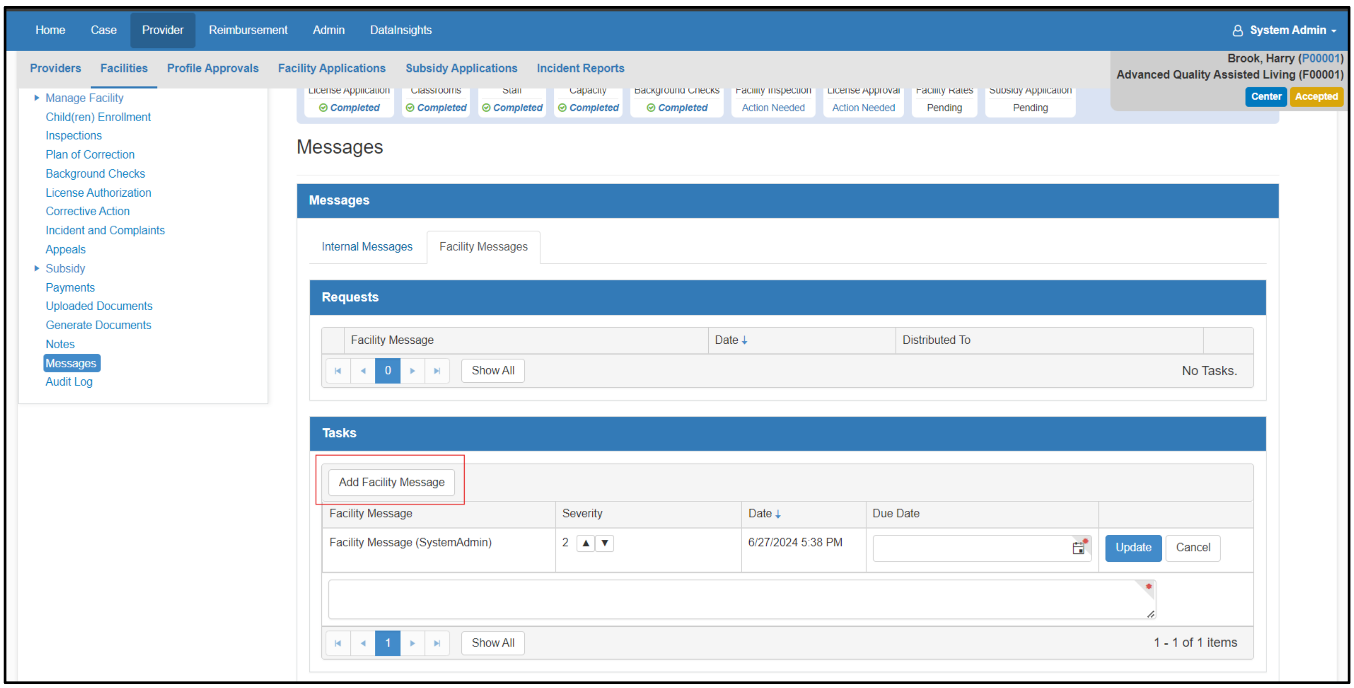

Figure 85: Facility Messages

How to create provider tasks?

1. Click on 'Facility Messages' tab under 'Messages'
2. Click on 'Add Facility Message' button from the tasks container
3. Set the 'Severity'
4. Enter 'Due Date' and comments for the Facility.
5. Click on 'Update'

18. AUDIT LOG

The level of information you can view in the audit trail includes 'Username', 'Log Date', 'Module', 'Page' and 'Message'. The audit log screen displays the users who logged into the system, the associated modules accessed by the user, and the actions performed on the different pages of the module.

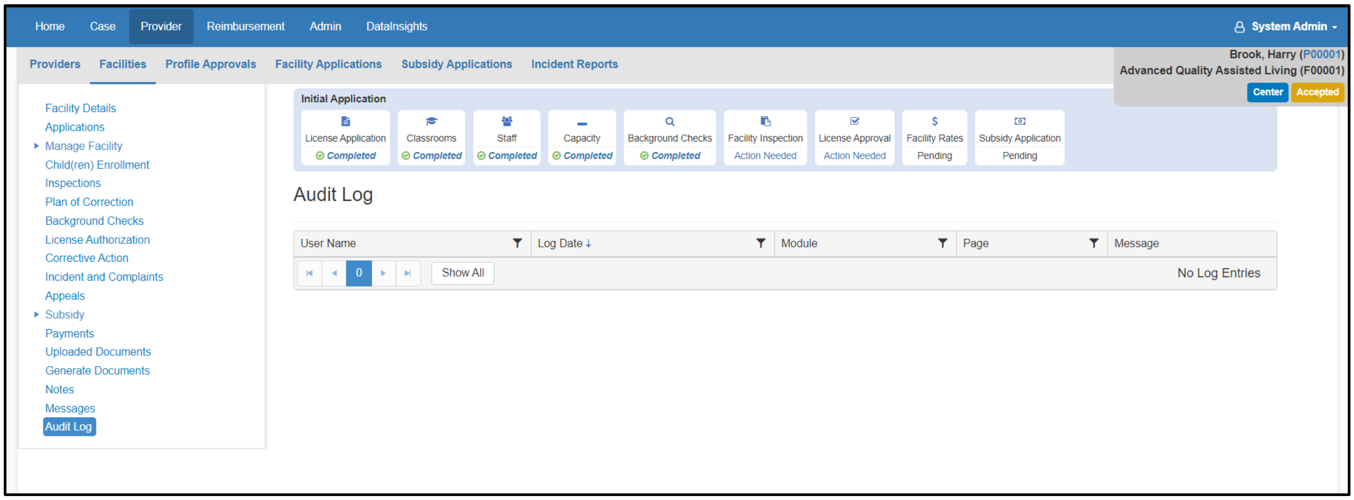

Figure 86: Audit Log

PROFILE APPROVALS SUB-MODULE

SUBMITTED PROFILE APPROVALS

This screen displays all profiles submitted by different providers.

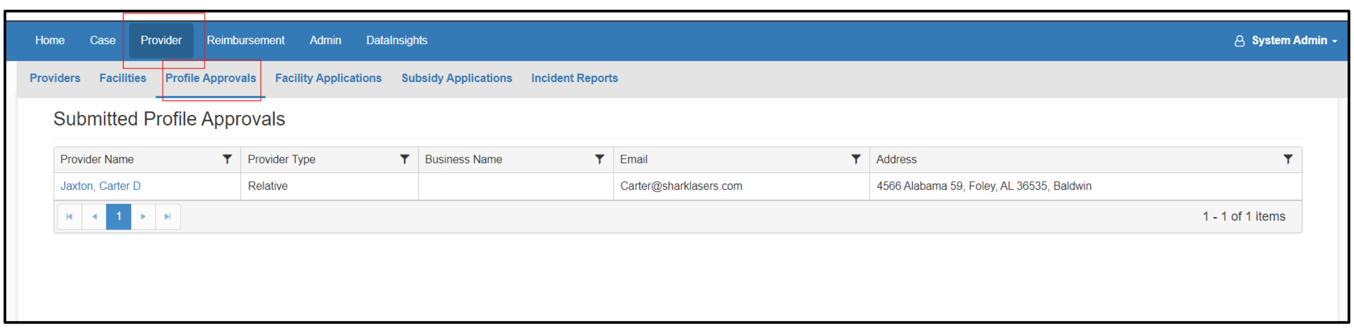

Figure 87: Submitted Profile Approvals

How to review provider profiles?

1. Log in as an Authorized User, which has role-based access for the Initial approval process for provider license applications.
2. Click on Provider Module.
3. Click on Profile Approvals sub-module. You will be navigated to screen displaying Submitted Provider Profiles for approval.

4. Click on Provider ID hyperlink, to review the respective provider profile. You will be navigated to screen displaying Provider Details, as follows:

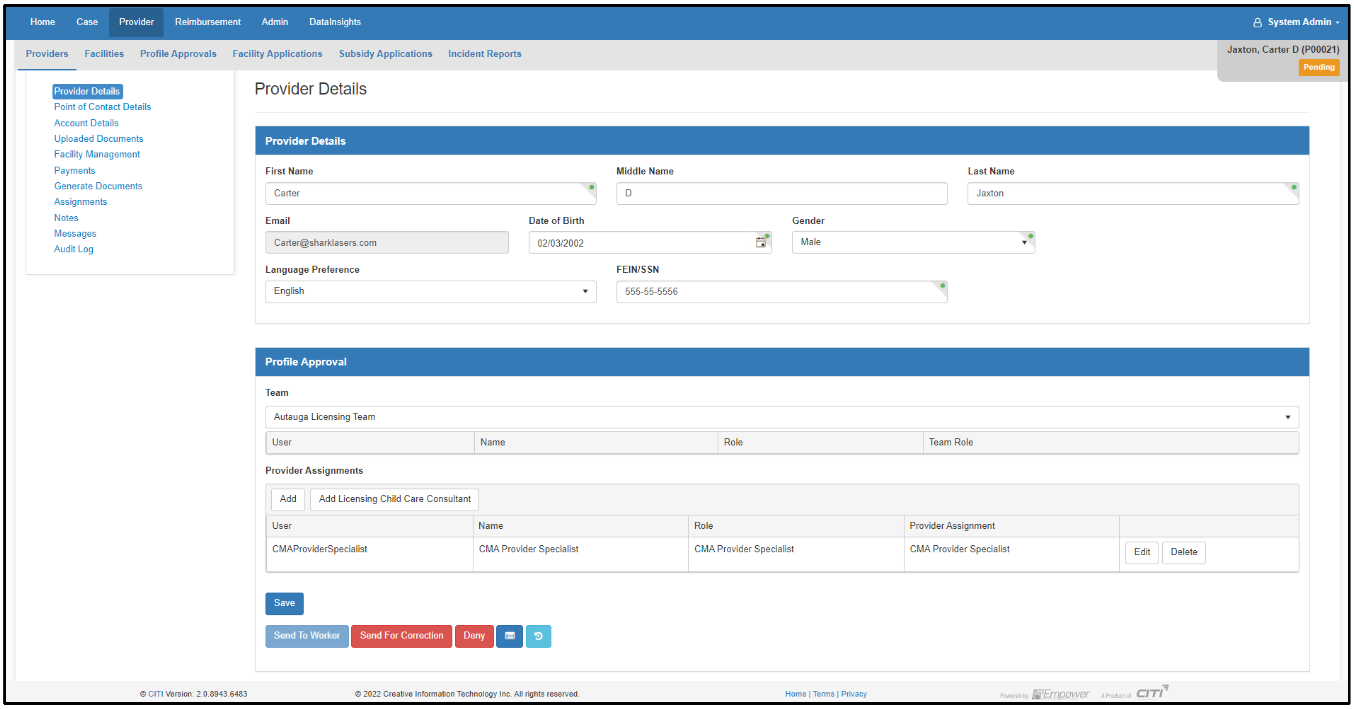

Figure 88: Provider Details

5. Review the information submitted by visiting all left navigation tabs.
6. Click on 'Approve' if the submitted information is relevant.
   OR
7. Click on 'Send for Correction' in case the information needs any updates from the provider.

FACILITY APPLICATIONS SUB-MODULE

SUBMITTED APPLICATIONS SCREEN

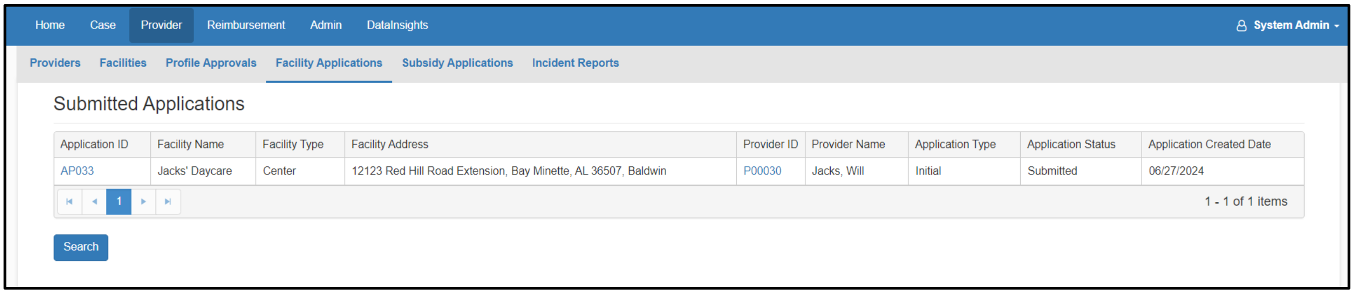

Figure 89: Submitted Facility Applications

How to view submitted facility applications?

1. Log in as an Authorized User, which has role-based access for the Initial approval process for provider license applications.
2. Click on Provider Module
3. Click on the Facility Applications sub-module. You will be navigated to the screen displaying submitted facility applications.
4. Click on Application ID hyperlink, to review the respective facility application
5. Review the information submitted by visiting all left navigation tabs, as follows:

FACILITY APPLICATION:

1. ORIENTATION

This screen displays the orientation score obtained by the provider.

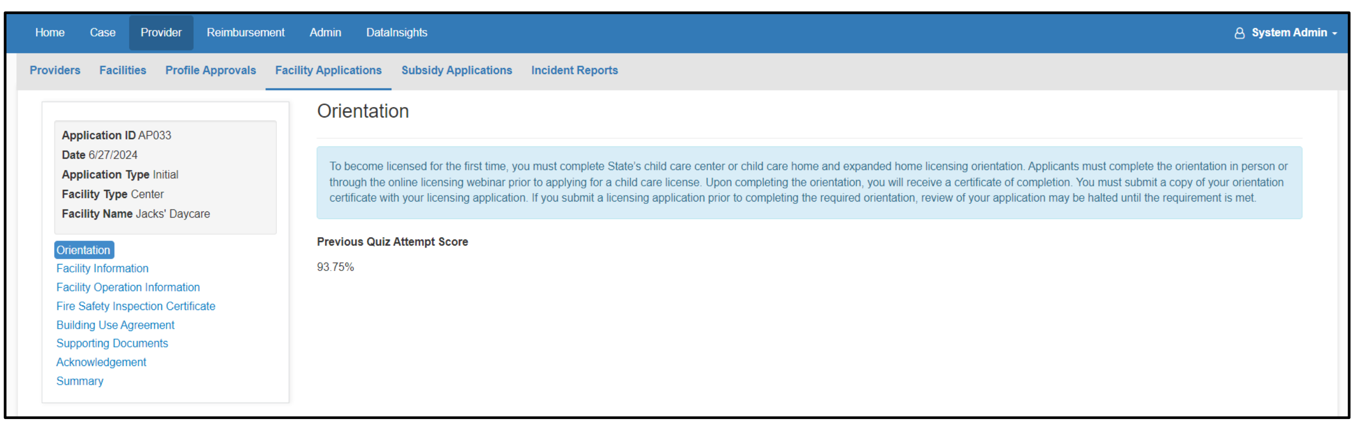

Figure 90: Orientation

2. FACILITY INFORMATION

This screen displays the information entered by the Provider on the Provider portal regarding the facility.

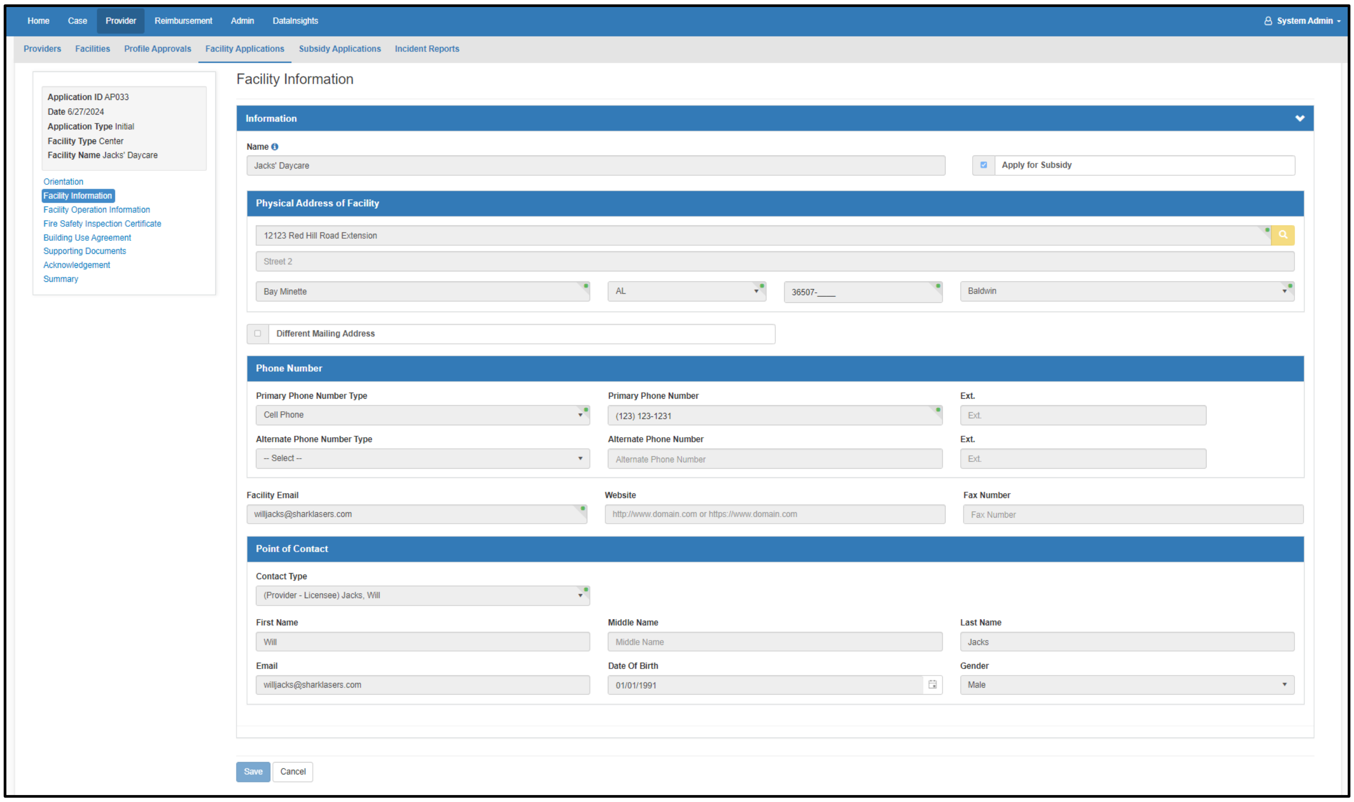

Figure 91: Facility Information

3. FACILITY OPERATION INFORMATION

This screen captures the Facility Operation Information. It includes details regarding: Hours of Operation, Children to Be Served, Type of Care Category, and Holidays.

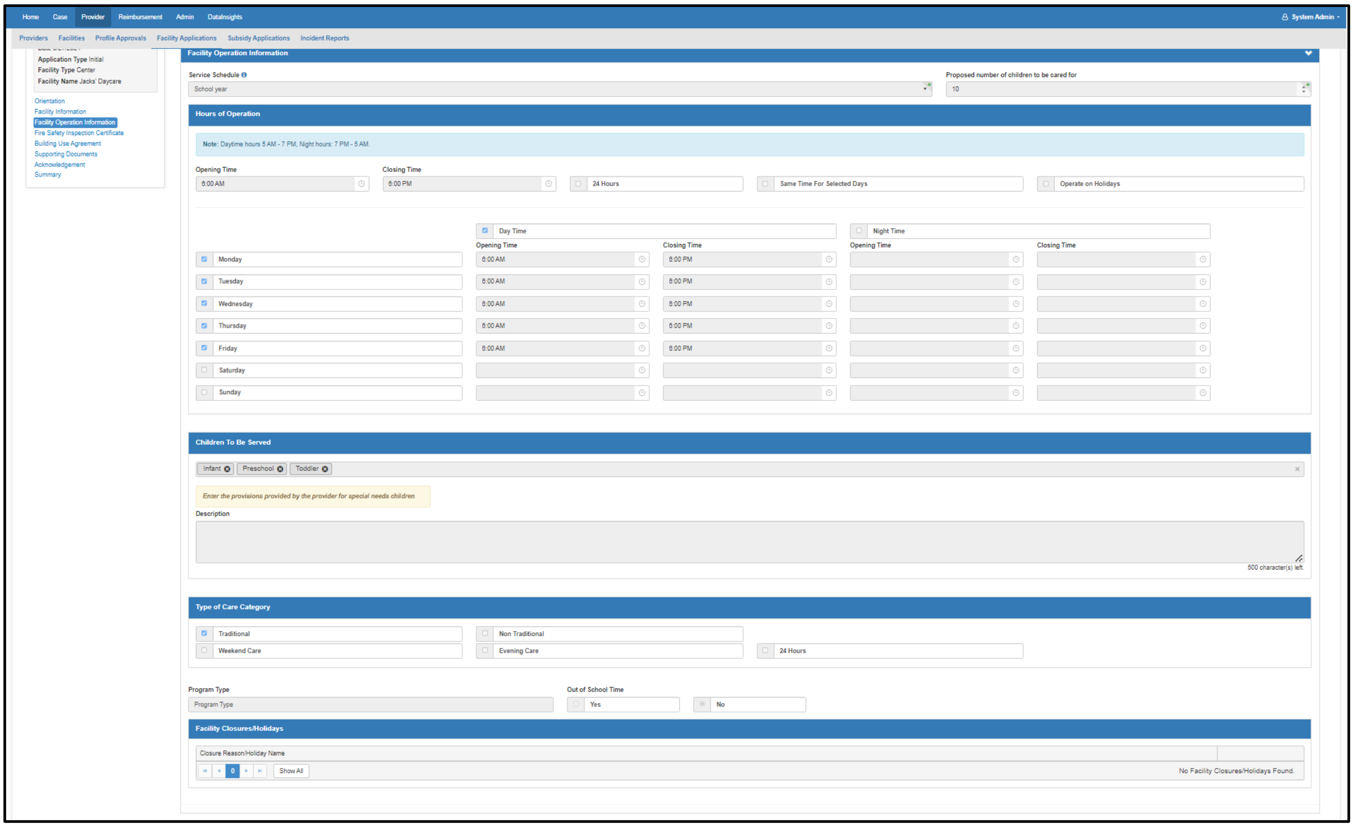

Figure 92: Facility Operation Information

4. FIRE SAFETY INSPECTION CERTIFICATE

This screen details the Fire Safety Inspection Certificate information.

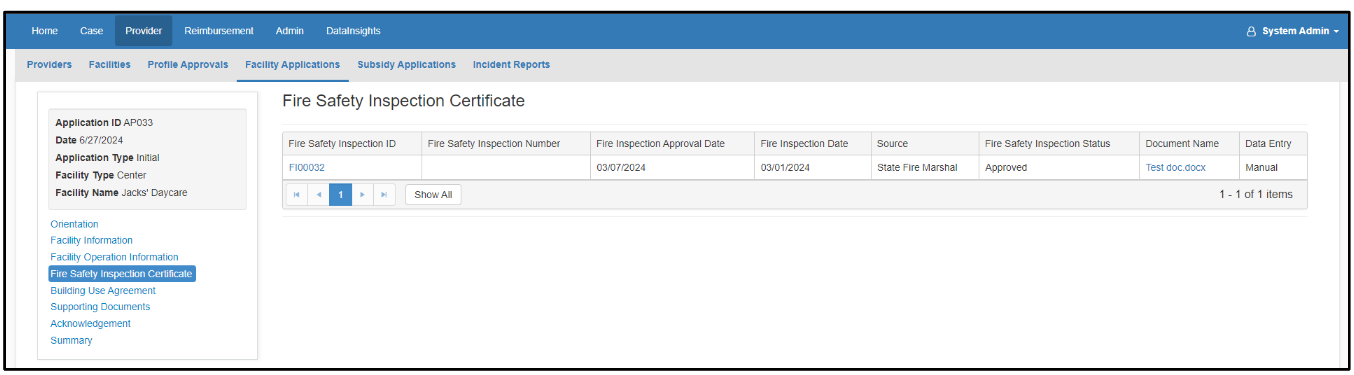

Figure 93: Fire Safety Inspection Certificate

Clicking on the Fire Safety Inspection ID navigates the user to the detailed information screen regarding the selected Fire Safety Inspection ID.

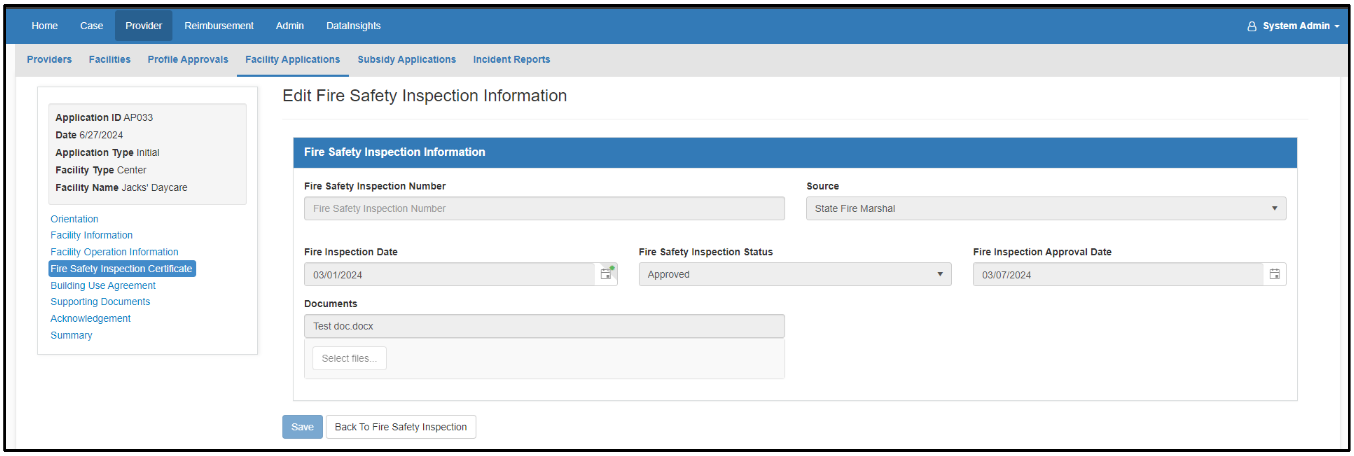

Figure 94: Fire Safety Inspection Details

5. BUILDING USE AGREEMENT

This screen details the Building Use Agreement information.

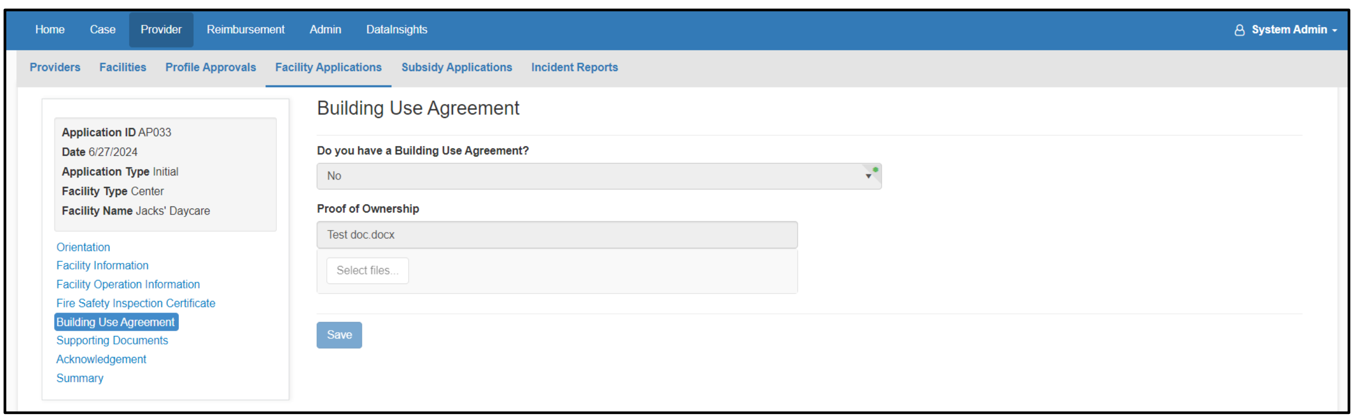

Figure 95: Building Use Agreement

6. SUPPORTING DOCUMENTS

This screen displays all the documents submitted by the provider for their facility.

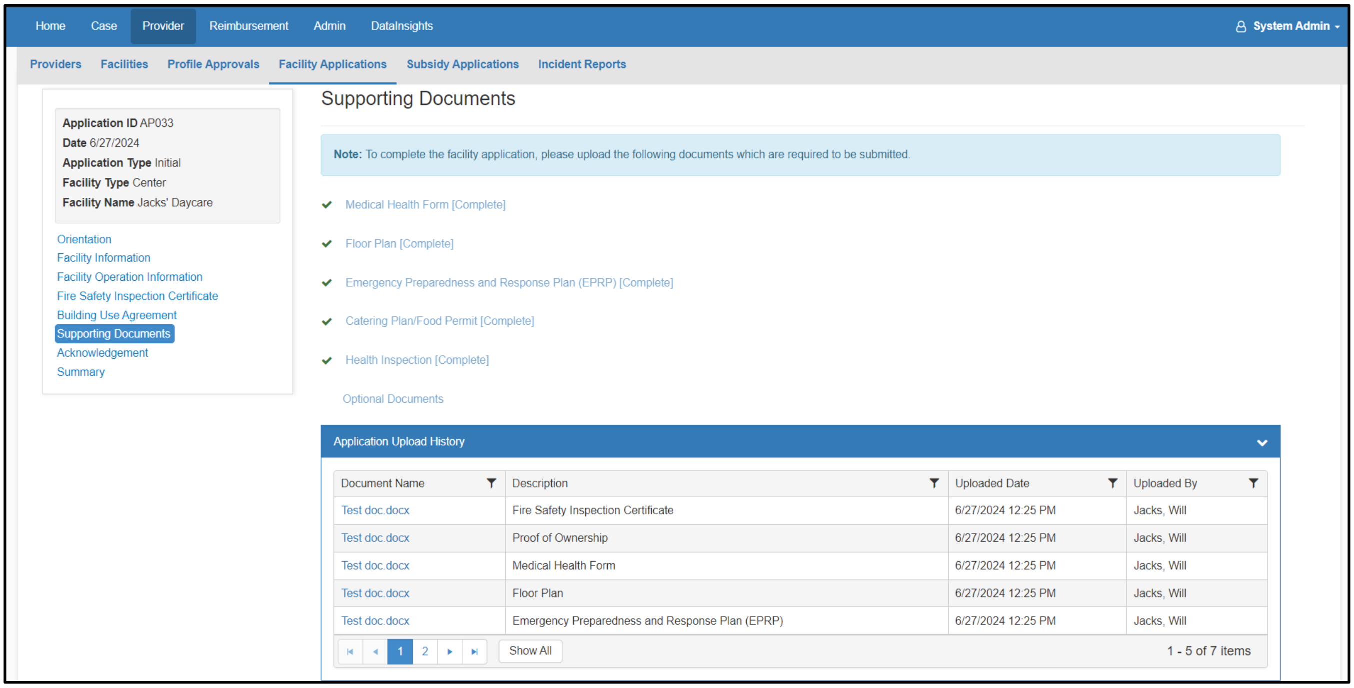

Figure 96: Supporting Documents

7. ACKNOWLEDGEMENT

The Acknowledgement screen captures the responses provided by the Provider for the questions asked under the Acknowledgement section of the Provider portal.

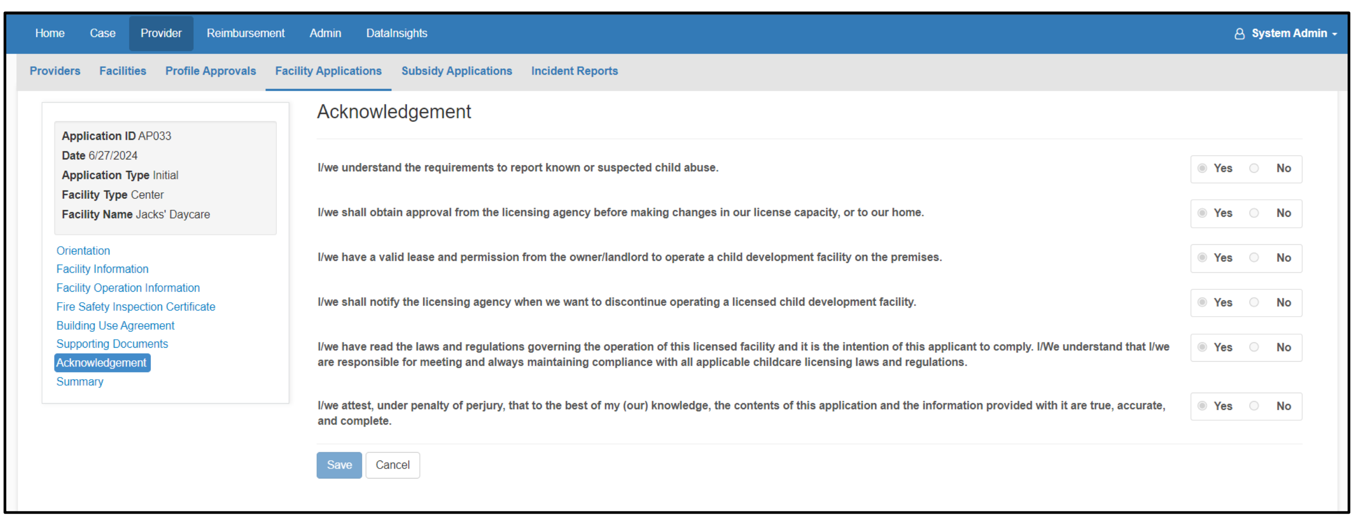

Figure 97: Supporting Documents

8. SUMMARY

Summary comprises of entire summary of the respective Facility application with the links to navigate to different screens under the Facility application.

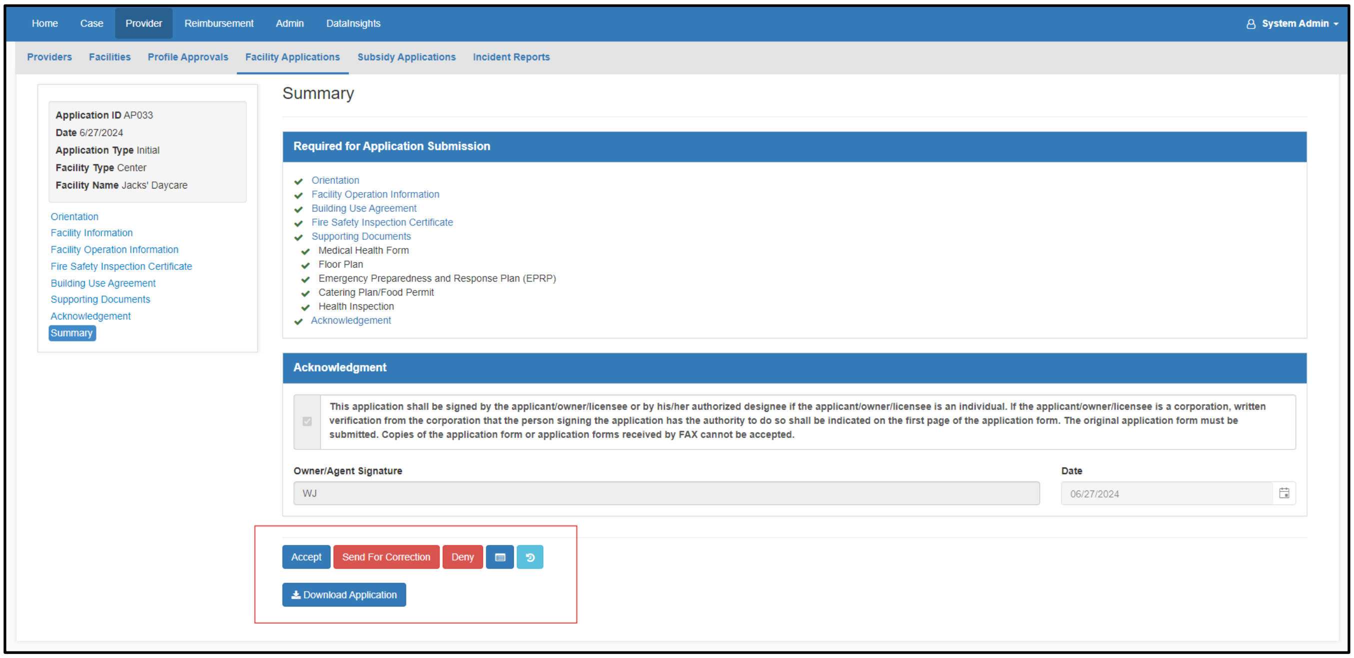

Figure 98: Summary

From this screen, authorized users will be able to Deny, Send for Correction, Accept or Download the reviewed facility application.

SUBSIDY APPLICATIONS SUB-MODULE

SUBMITTED LICENSE SUBSIDY APPLICATIONS

This screen lists all the submitted license subsidy applications by different providers. This screen allows the authorized users to keep a track on all subsidy applications.

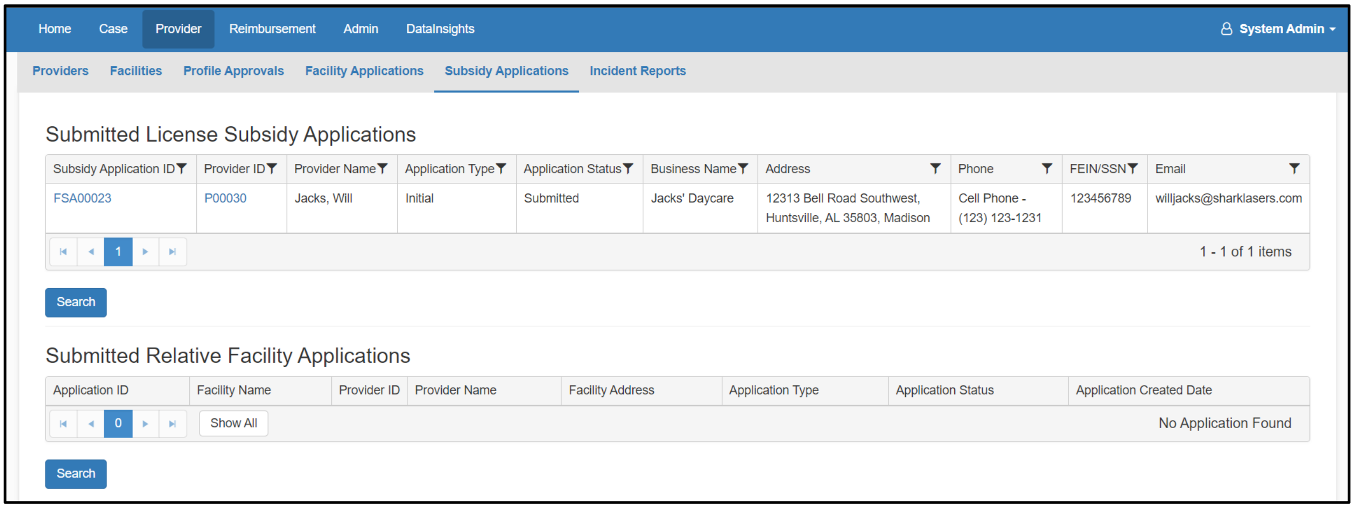

Figure 99: Submitted License Subsidy Applications

How to view a submitted Subsidy Application?

1. Login with correct credentials.
2. Click on Provider Module.
3. Click on Subsidy Applications sub-module.
4. Click on the respective Subsidy Application ID.
5. Review the information provided by the applicant, as follows:

1. STAFF RELATED CHECKS

This screen lists the pending and completed staff checks for the respective facility.

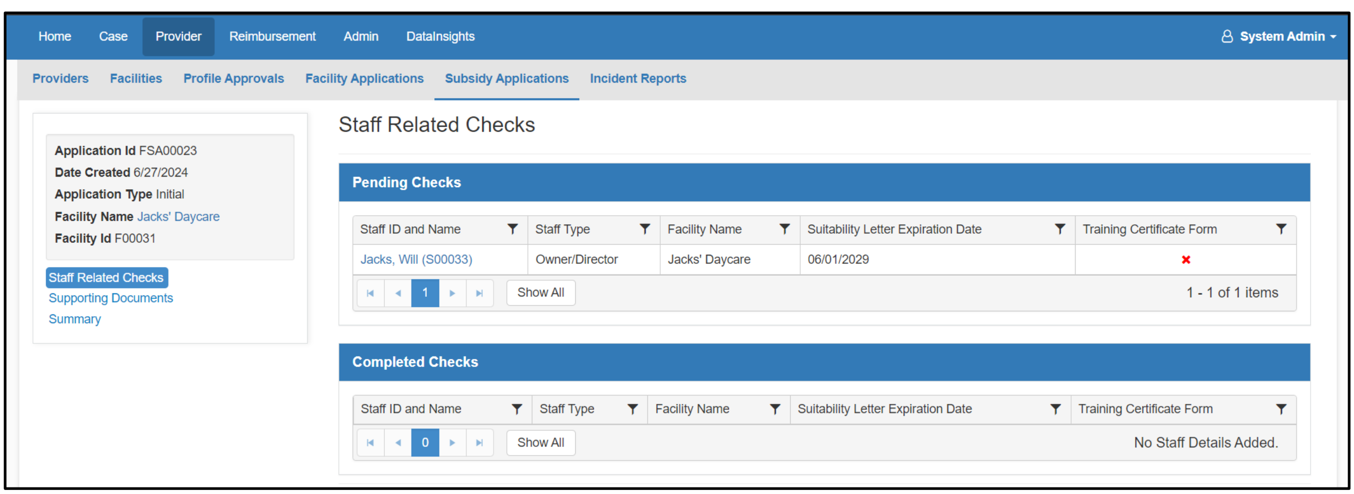

Figure 100: Staff Related Checks

2. SUPPORTING DOCUMENTS

This screen lists all the documents submitted for the respective facility.

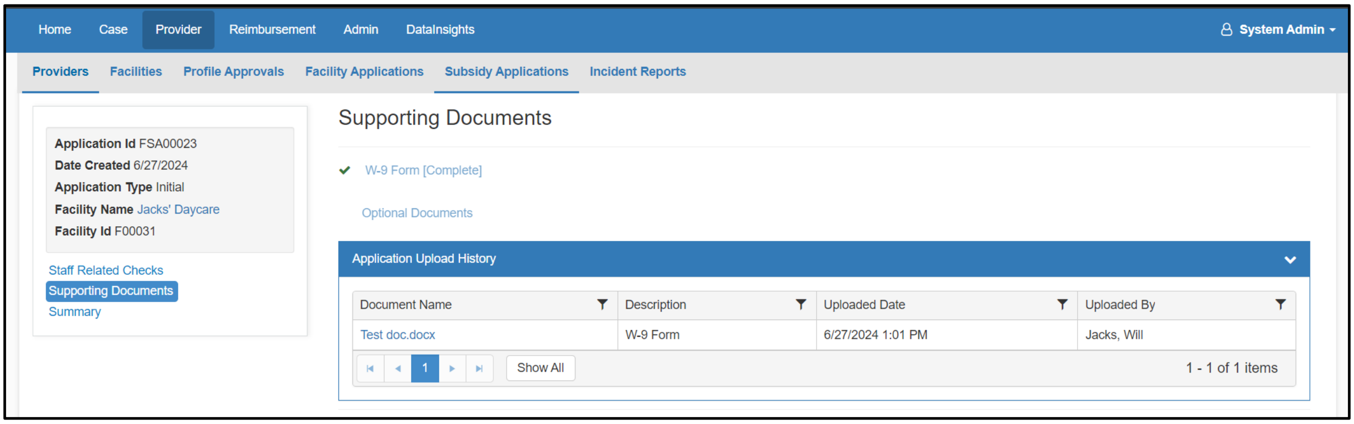

Figure 101: Supporting Documents

3. SUMMARY

This page summarizes all required items that need to be completed before an application can be marked 'Approved'. The required items include approving facility subsidy rates and setting an effective date.

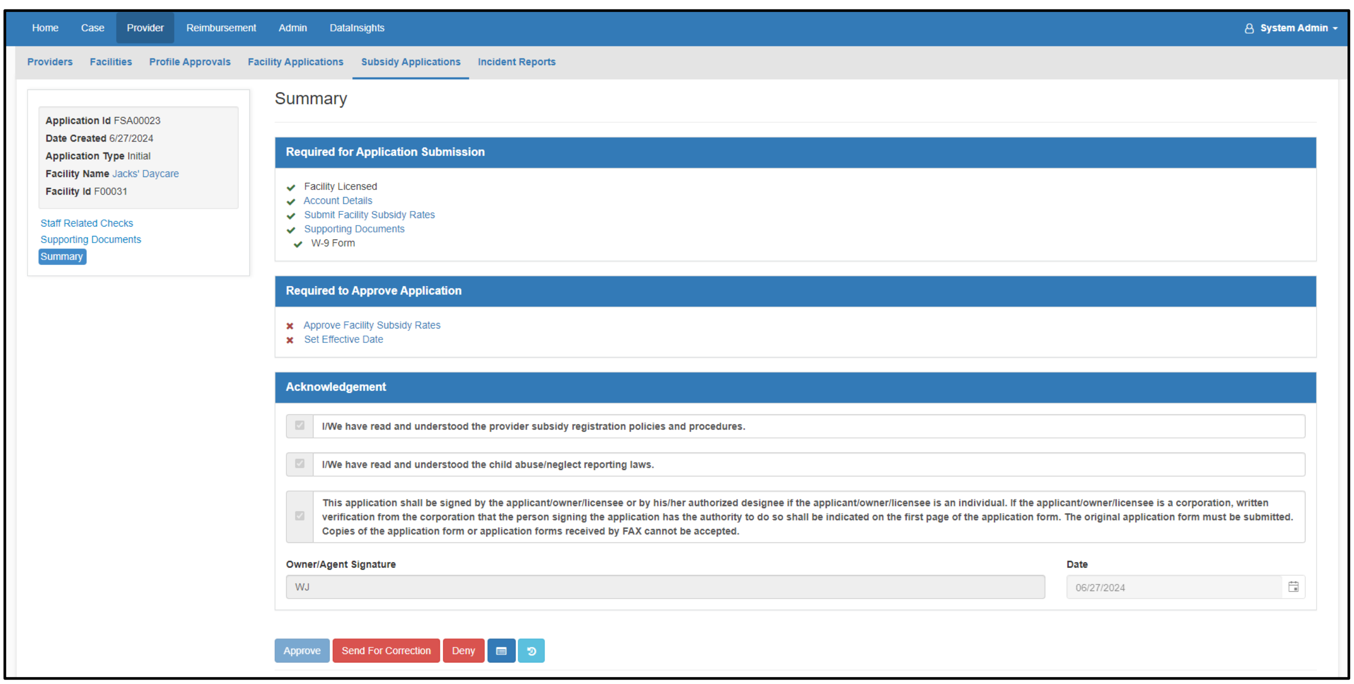

Figure 102: Summary

How to approve Facility Subsidy Rates?

1. Click on the 'Approve Facility Subsidy Rates' link on the subsidy application summary page (refer to Figure 102)
2. Review rate set
3. Approve, send for correction, or deny rate set

How to Set Effective Date?

1. Click on the 'Set Effective Date' link on the subsidy application summary page (refer to Figure 102)
2. Add date
3. Save the date

INCIDENT REPORTS SUB-MODULE

INCIDENT REPORT SEARCH SCREEN

The following screen displays the 'Incident Report Search' functionality where an authorized user may search for the existing records with various 'Search Criteria' and/or can 'Create' a new incident record.

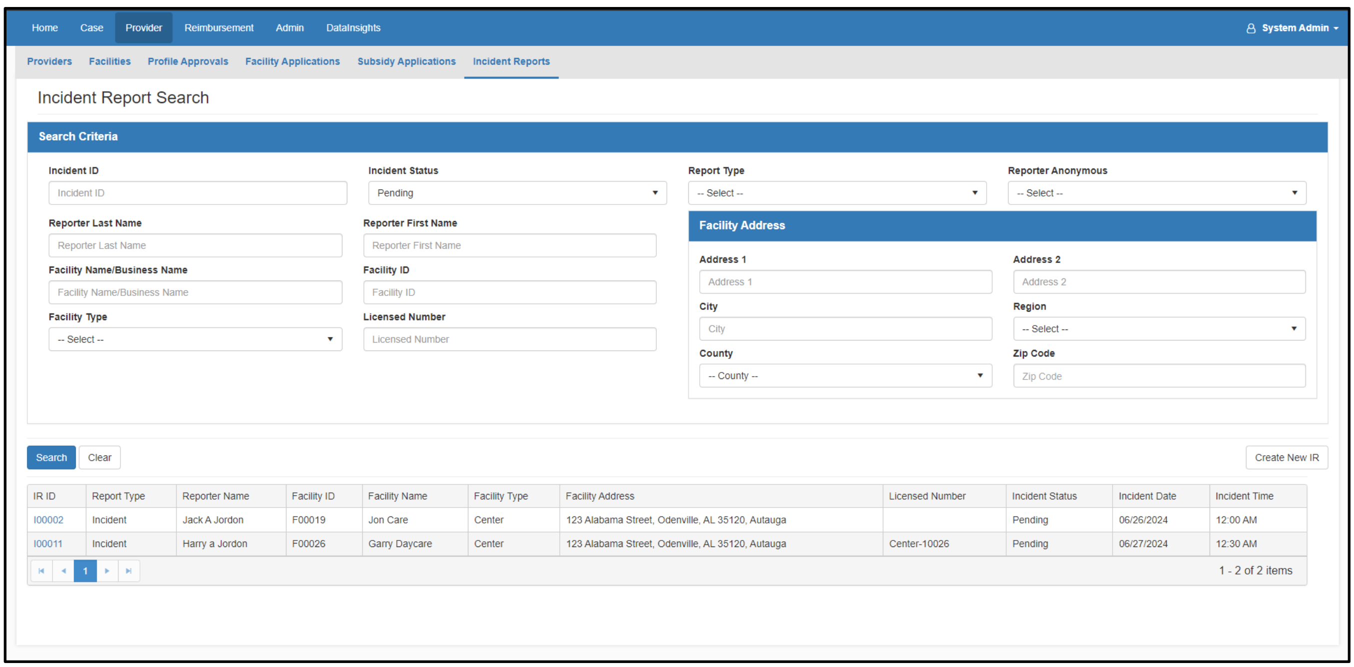

Figure 103: Incident Report Search Screen

How to view an Incident Report?

1. Login with correct credentials in CMS.
2. Click on Provider Module.
3. Click on Incident Reports sub-module.

4. Click on the respective IR ID.
5. Review the information provided by the applicant.

The screen also allows searching and viewing of Complaints and Illness/Injury.

How to view a Complaint/Illness/Injury?

1. Login with correct credentials in CMS.
2. Click on Provider Module.
3. Click on Incident Reports sub-module.
4. Select an appropriate value from the 'Report Type' dropdown.
5. Click on the IR ID.
6. Review the information provided by the applicant as follows:

1. INTAKE

1.1 Reporter Information

This screen captures all the details about reporter who has reported the incident.

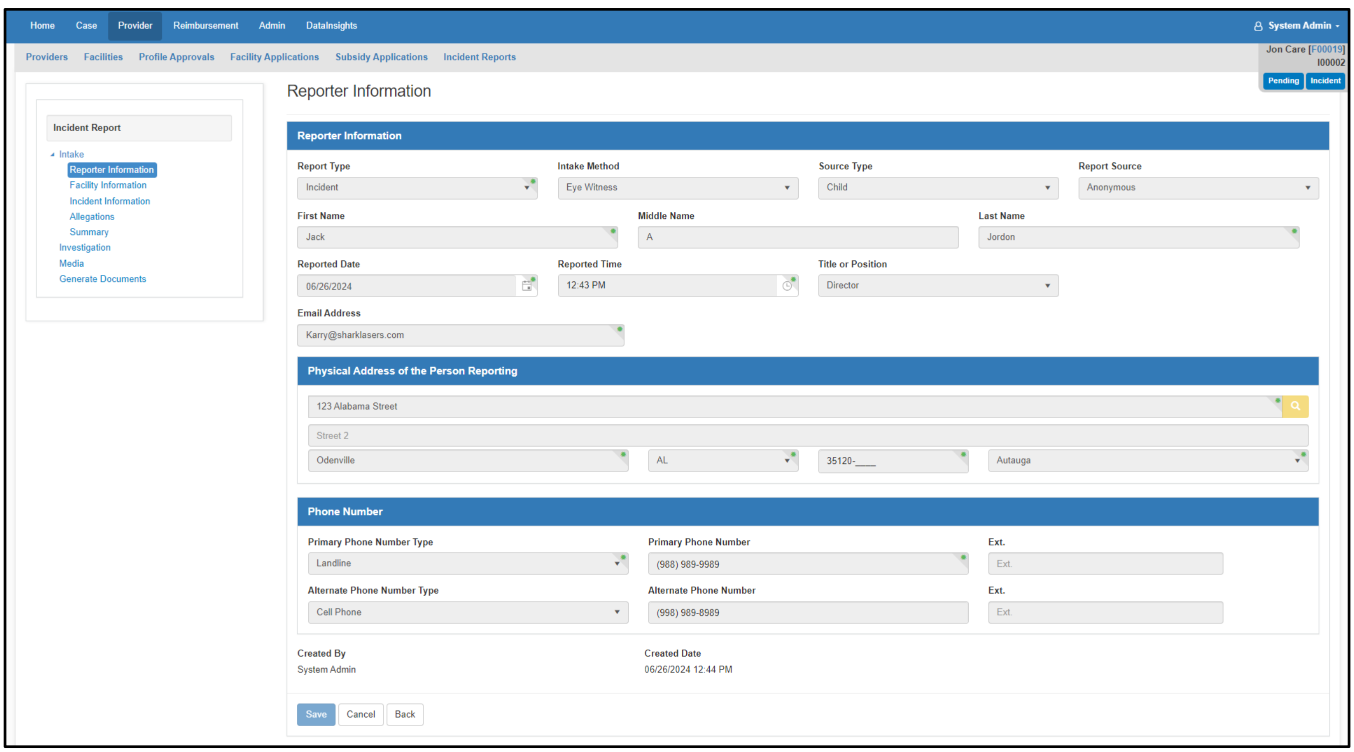

Figure 104: Reporter Information

1.2 Facility Information

Facility information screen details out all the facility related information; the incident is related to.

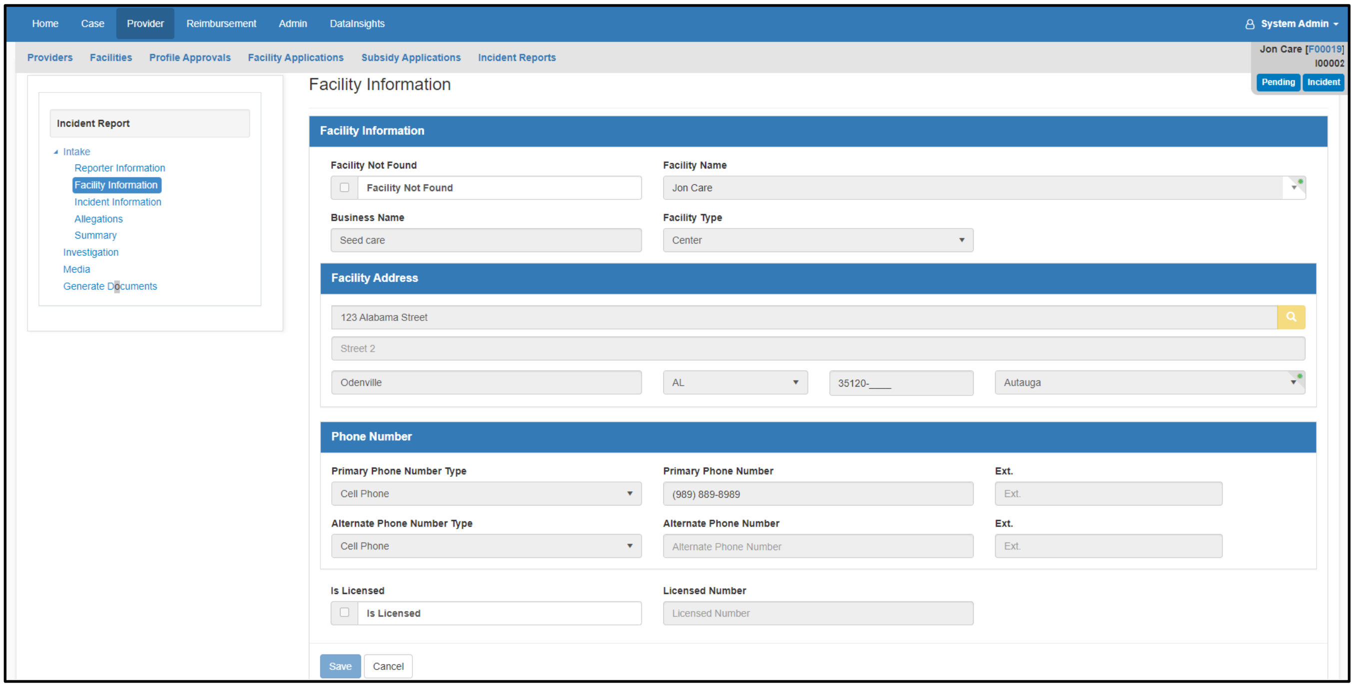

Figure 105: Facility Information

1.3 Incident Information

This screen captures information regarding the incident. Authorized users will also be able to mark findings and schedule investigations on this page.

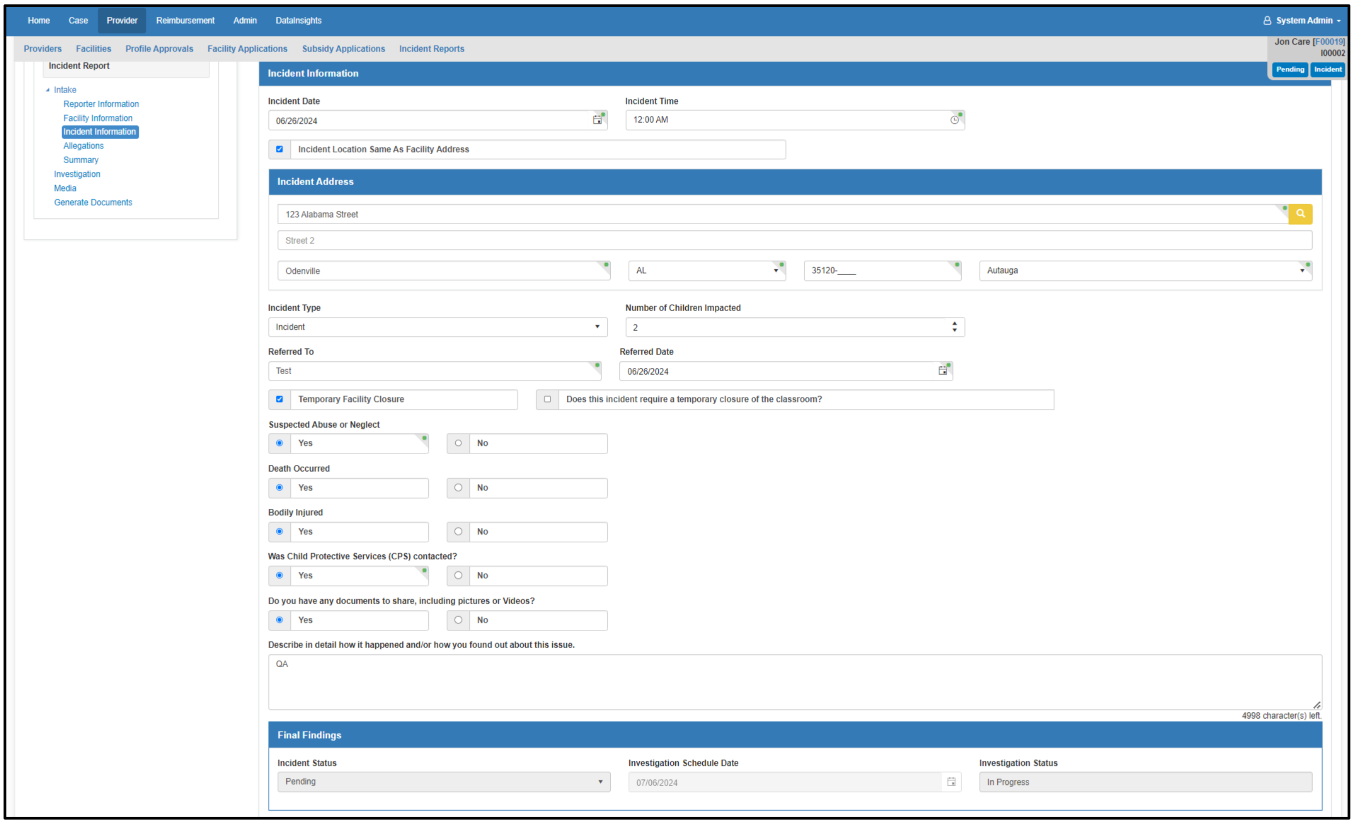

Figure 106: Incident Information

1.4 Allegations

This screen captures information regarding the allegations of the incident.

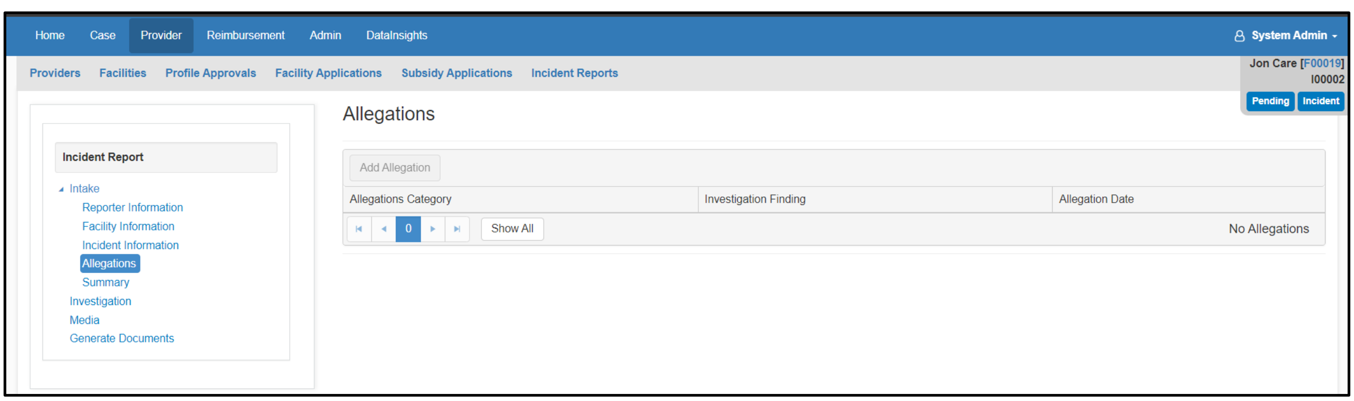

Figure 107: Allegation

Authorized users may add allegations by clicking on the 'Add Allegation' button

1.5 Summary

This screen summarizes all details about the incident: Reported information, Facility information, Incident information, Final Findings, and Allegations.

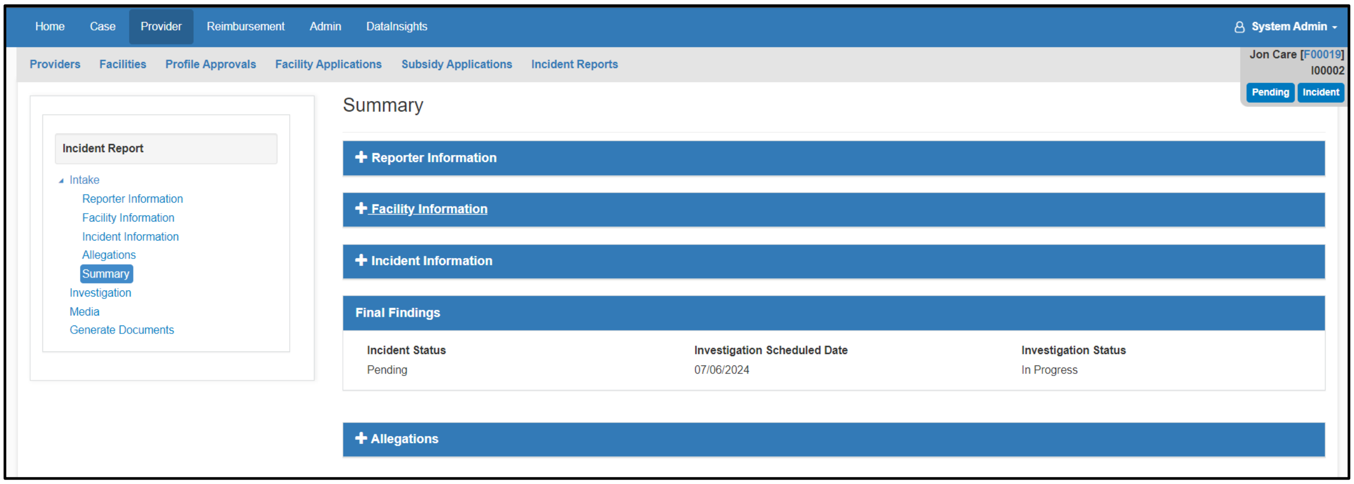

Figure 108: Summary

2. INVESTIGATION

Authorized users can access and view the Investigation performed from this screen. They will also be able to schedule or add new investigations, if required.

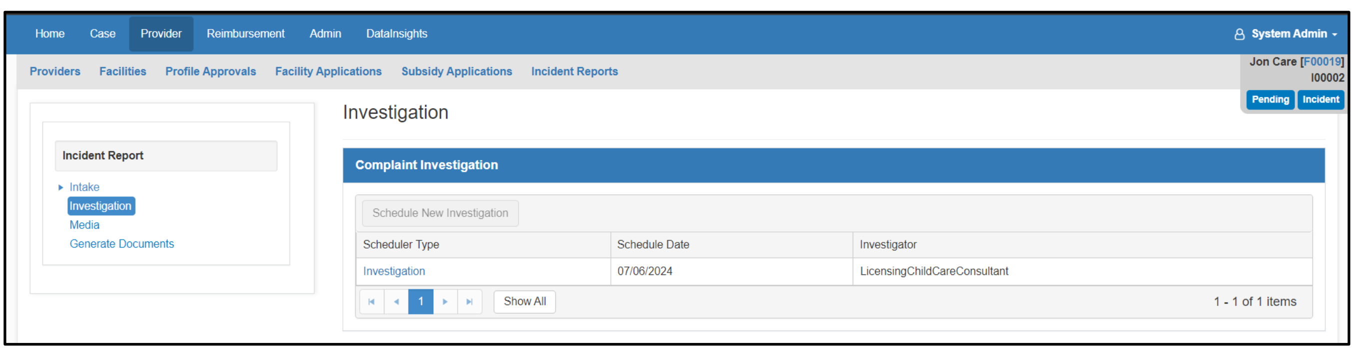

Figure 109: Investigation

Clicking on an existing Investigation link from this screen will navigate the user to the Facilities sub-module Inspection section, as seen below:

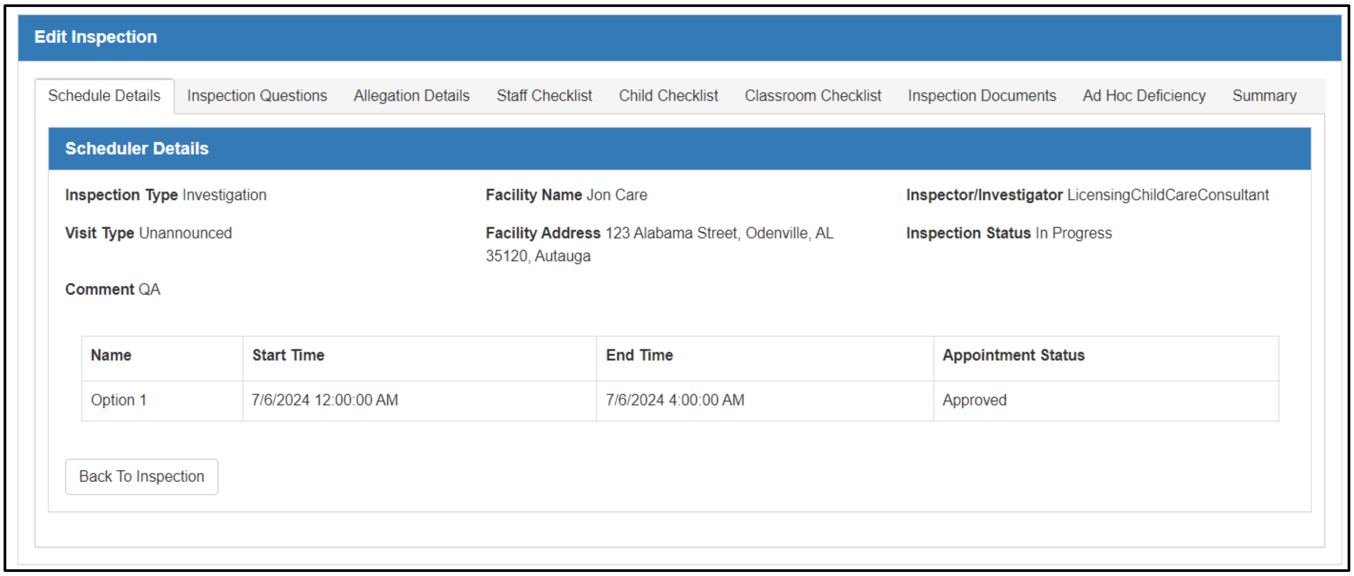

Figure 110: Facilities Sub-Module - Investigation

Here, under the 'Ad-hoc deficiency' tab in Inspection section, users maintain the deficiencies observed from the Inspection. An un-resolved deficiency can lead to the Provider license being suspended, revoked, or put on Probation.

3. MEDIA

Media section allows users to upload multimedia file related to the incident.

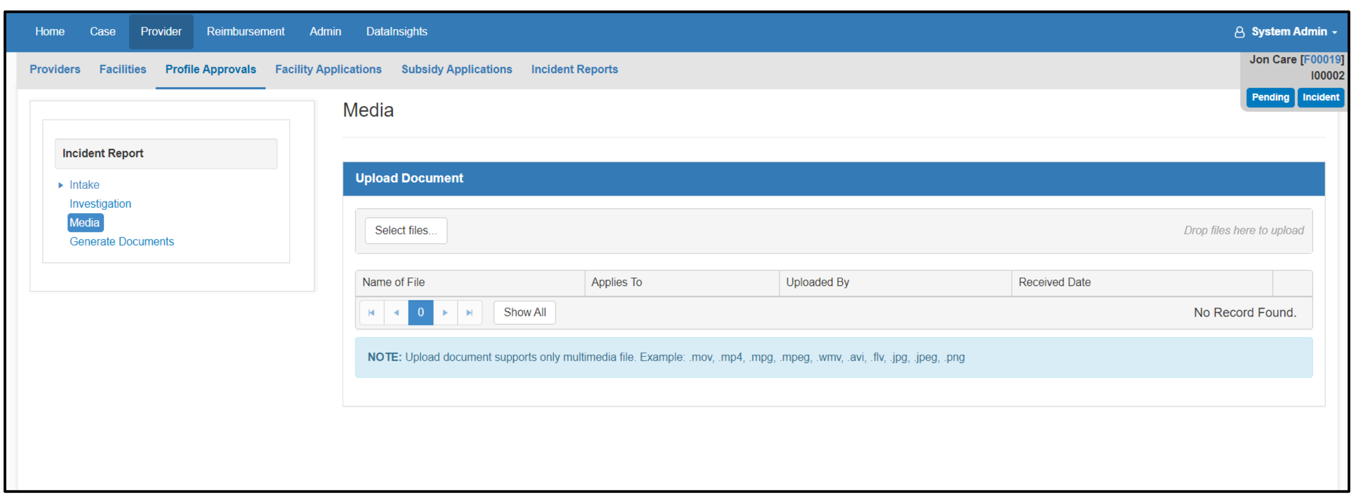

Figure 111: Media

4.GENERATE DOCUMENTS

This feature allows users to generate documents based on the templates available in the system.

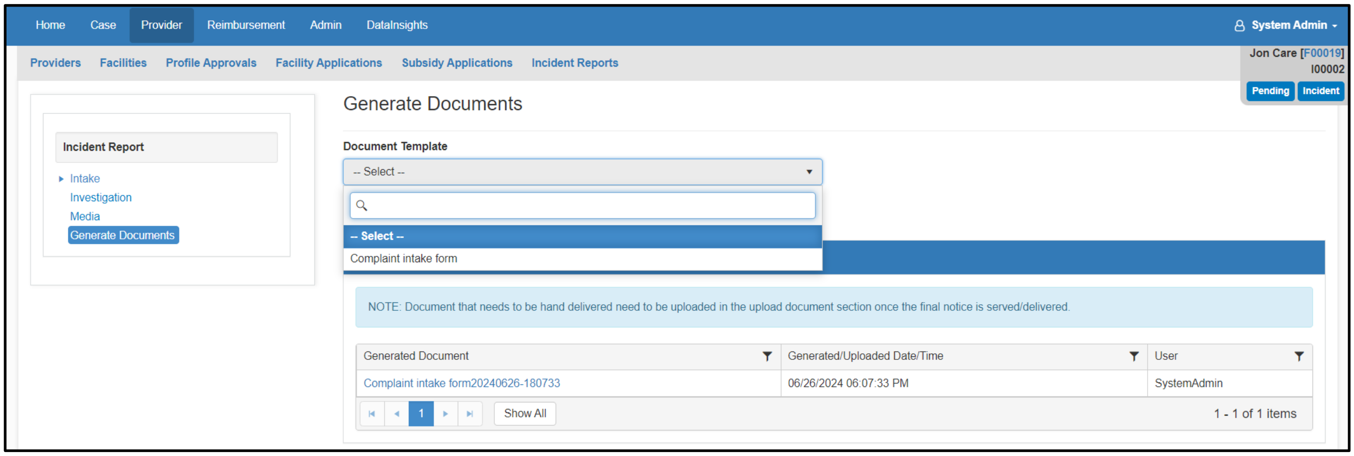

Figure 112: Generate Documents

Arise CMS

Case Management Module

06/28/2024

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TABLE OF CONTENTS

INTRODUCTION

Case management in Arise aims to help eligible individuals access childcare and coordinate necessary care and services tailored to a child's needs. These services strive to minimize care fragmentation, overcome barriers, and connect children with suitable support. Within the Case Module, CMS users gain the capability to perform Case Management operations in the following functional areas:

1. Case Search
2. Subsidy Application
3. Client Demographics
4. Case Characteristics
5. Household Members
6. Dependents
7. Education and Employment
8. Other Income and Deductions
9. Documents
10. Eligibility
11. Placement
12. Appeals
13. Authorization
14. Document Generation
15. Assignments
16. Notes
17. Messages
18. Audit Logs

LOGIN PAGE

Logging onto the CMS portal, user lands on the following login page. Authorized users with their respective credentials can login to the CMS portal and perform the tasks assigned to them.

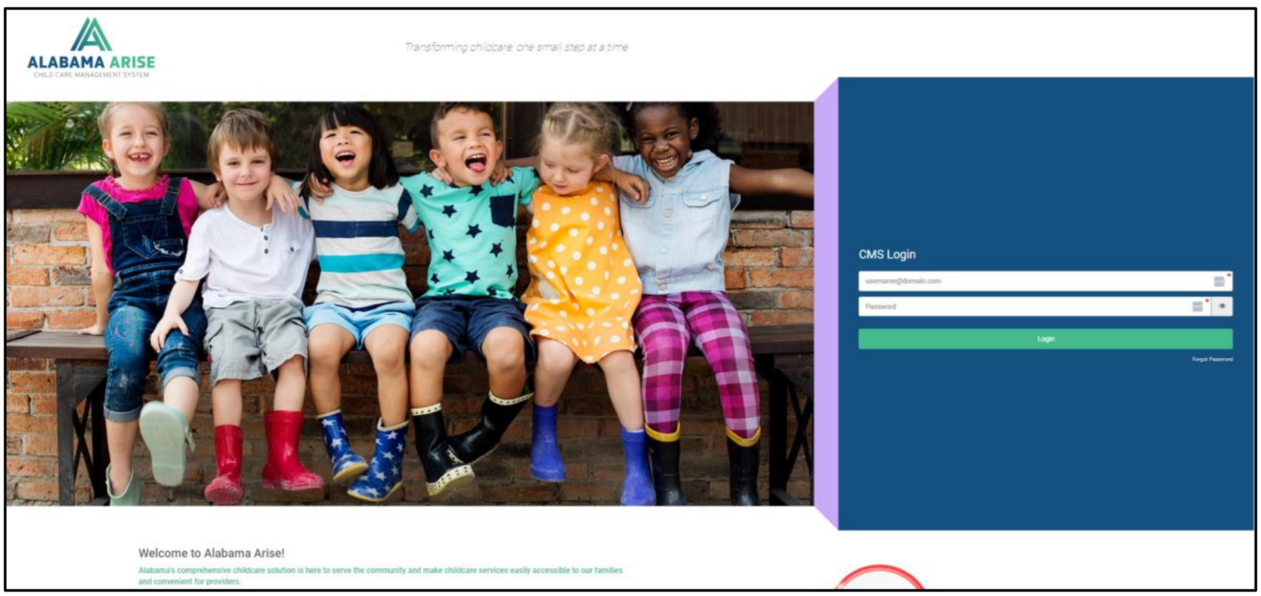

Figure 1: CMS Application Login Page

HOME PAGE

The landing page/ Home Page of the ARISE CMS is the screen displaying dashboard which provides users an overview of the work assignments, notifications, and pending approvals.

The dashboard consists of three blocks:

1. Tasks: Consists of all the tasks assigned to logged in user
2. Notices: Consists of all the notifications from different workflows
3. Recently Cleared: Consists of all items which user cleared.

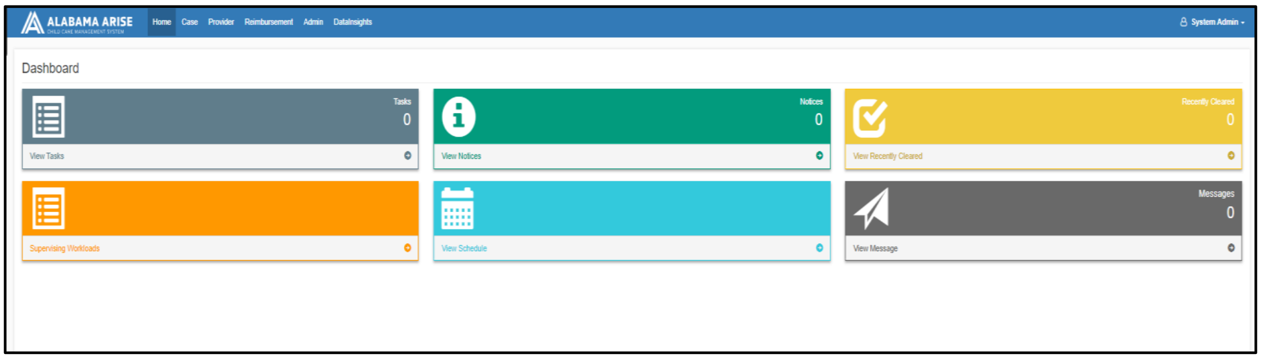

Figure 2: CMS Application Home/Landing Page

CASE MODULE

Users can navigate to the Case module by selecting the 'Case' in the top menu bar.

The Case Module is the Cases, Subsidy Applications, and Contacts repository. Authorized users can access submodules such as Cases, Subsidy Applications, and Contacts by clicking the Case Module

CASES SUB-MODULE

Case Search

By clicking on the ‘Cases’ link in the menu bar, the user will see a search for a case screen by default. The search page will enable the user to search for a case using one or more search criteria. Search can be initiated based on various factors such as Last Name or First Name.

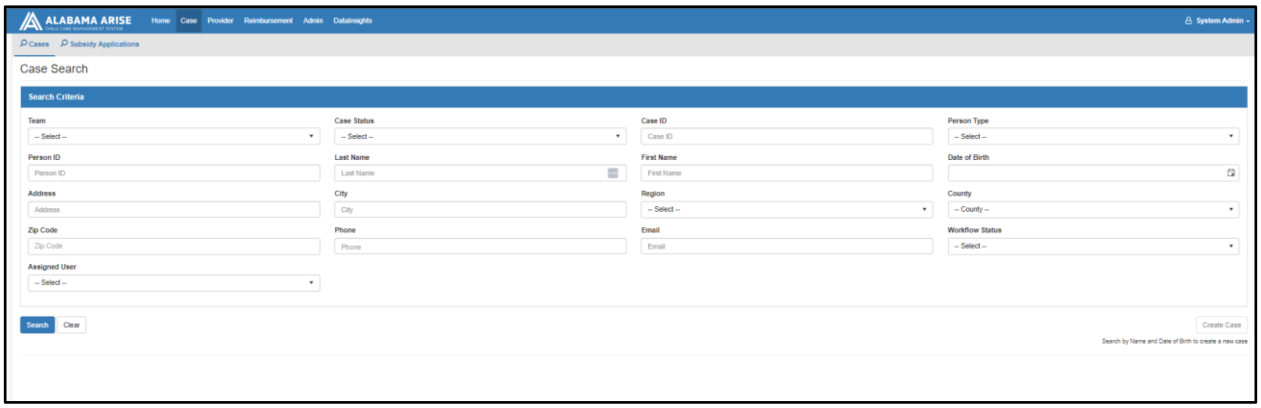

Figure 3: Case Search Page

Search page with a Case Record Found

When a system finds matching records, records will show up in the grid below. The grid will display the following:

- Case ID
- Client Name
- Address
- Phone Number
- Dependent/Provider
- Case Status

To open a record from the Case Search Results grid, the user must click on the desired record's CaseID.

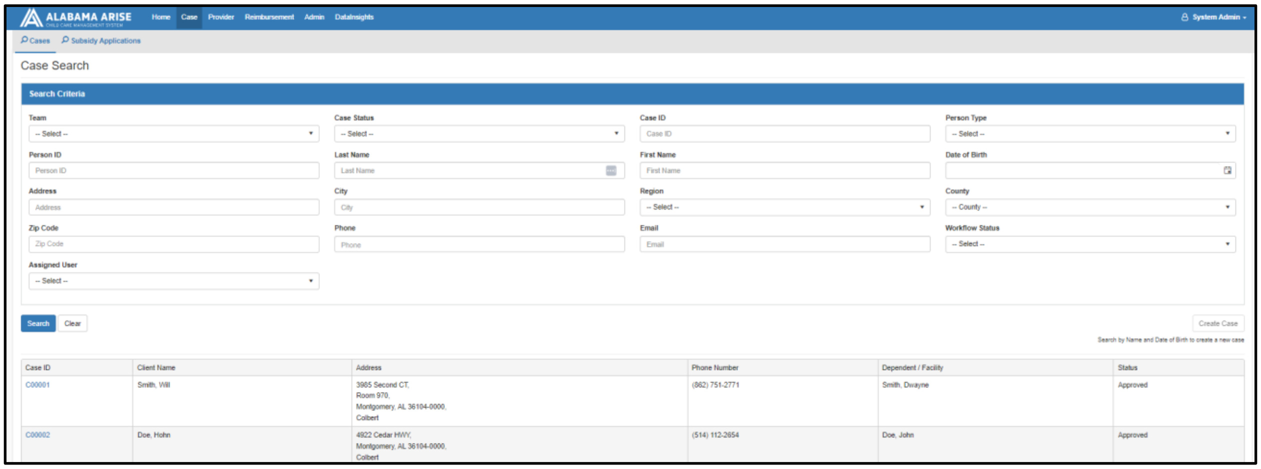

Figure 4: Case Search Results

Search page with 'No record found'

If a search fails to find matching records, the system will communicate this with a message in the grid, stating, "No records found matching your criteria."

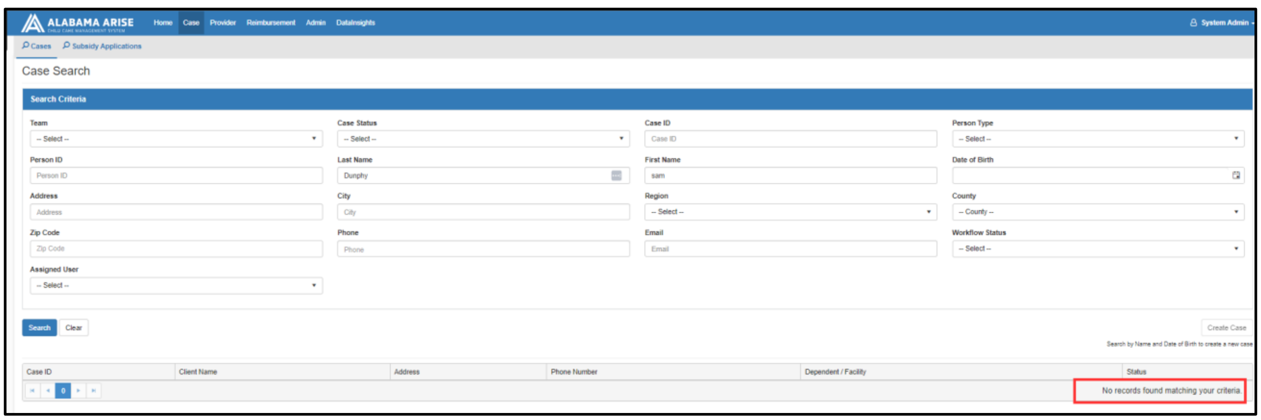

Figure 5: No Records Found

SUBSIDY APPLICATIONS SUB-MODULE

Applications submitted from the Family Portal will be queued in the Subsidy Applications sub-module of the Case Module. An authorized user can review the applications in the queue, assign the team and submit the application to the respective case worker for further procedures.

To access a case from a submitted application, the user can follow these steps:

1. Navigate to the 'Subsidy Applications' sub-module
2. Click on the application ID to review the application.

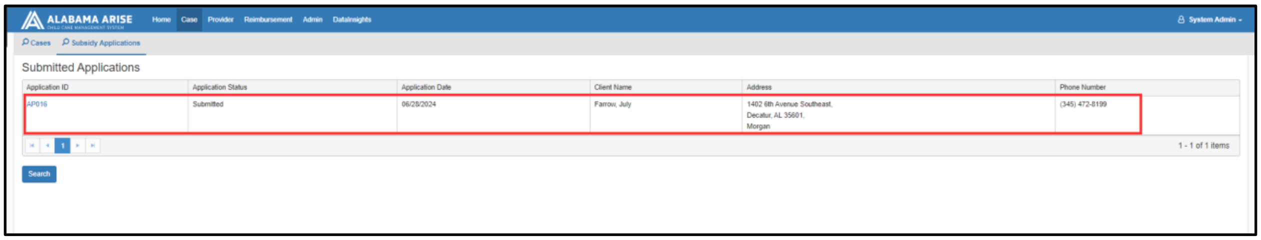

Figure 6: Subsidy Applications

Clicking on the Application ID will allow the authorized user to view an application summary and choose to send it to the caseworker or send it for correction.

The overview will display application information as follows:

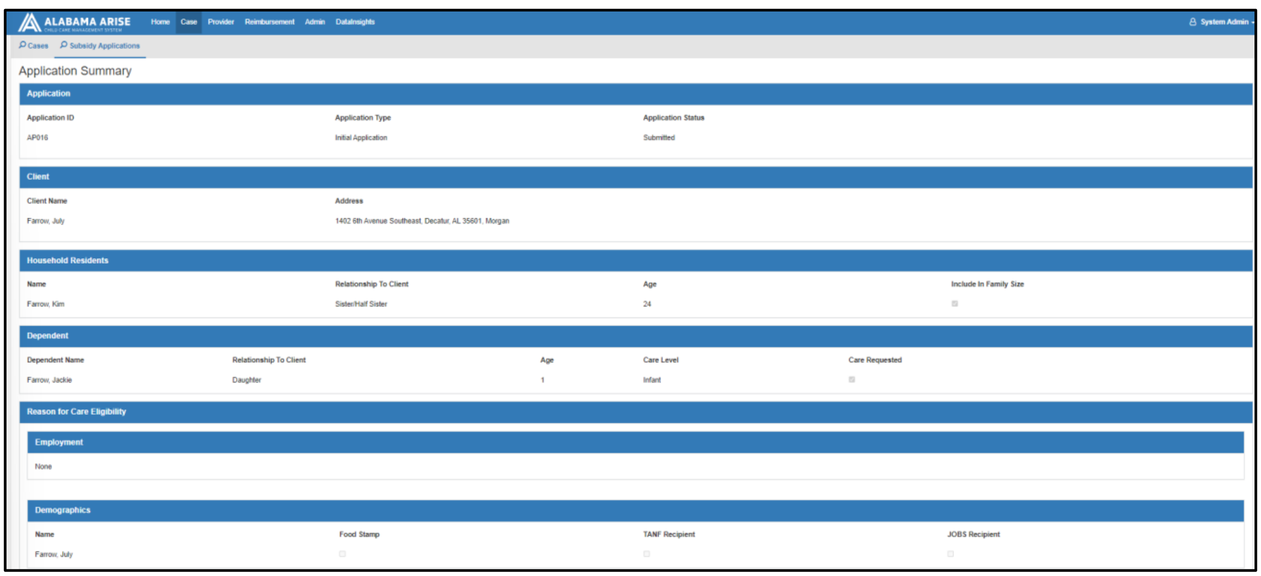

Figure 7: Application Summary Part1

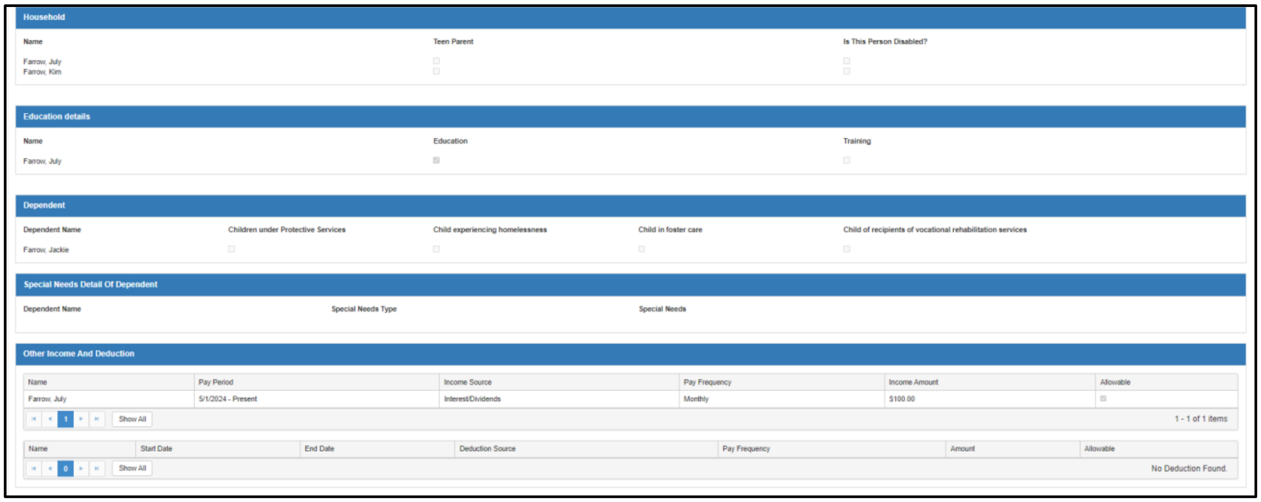

Figure 8: Application Summary Part 2

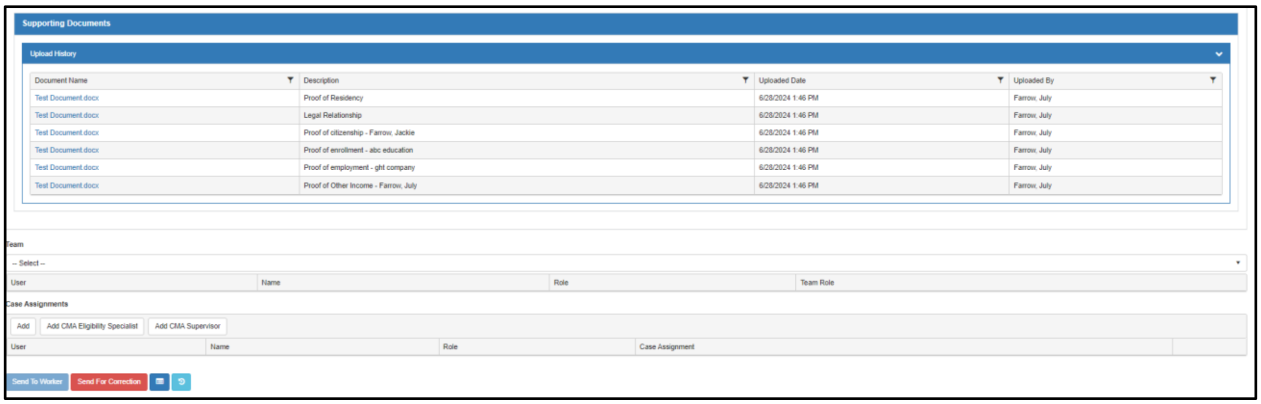

Figure 9: Application Summary Part 3

3. The system will assign the team automatically based on the Family's region.
4. Based on the information submitted from the Family portal, the user can send it to the case worker for further processing or send it for the correction. They can select the case worker from case assignments dropdown and click on 'Send to worker.'

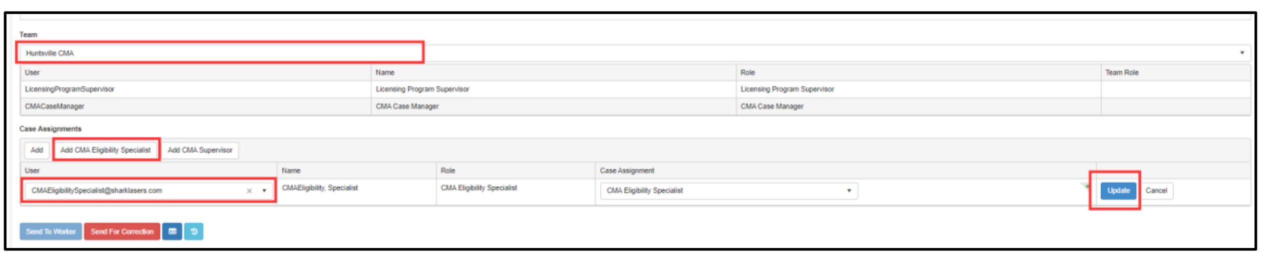

Figure 10: Team And Case assignment

5. If a CMS user thinks that the information provided by the applicant(family) is not complete or needs correction, they can send it back to the family for the correction.
   For that, they need to

a. Click Reject 'send for correction'
b. Add a comment for the correction or additional information.
c. Click the 'send for correction' button again.

Figure 11: Send for Correction

This message will be received by the family on the portal. After correcting the information, the family can submit the application again and CMS user can find that application in the 'Subsidy Applications.'

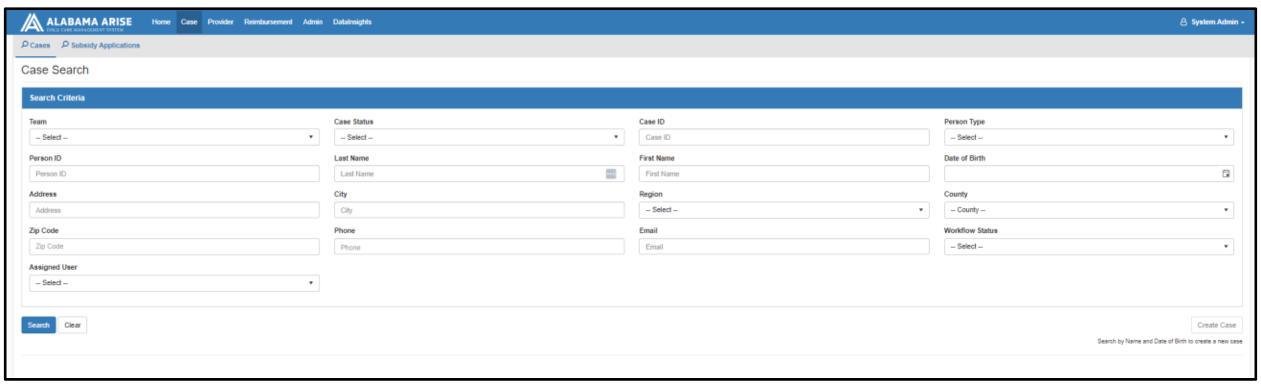

Figure 12: Application Search on Submitted Applications

Once the assigned case worker accepts the application, user/case worker will be able to search the case from the case search.

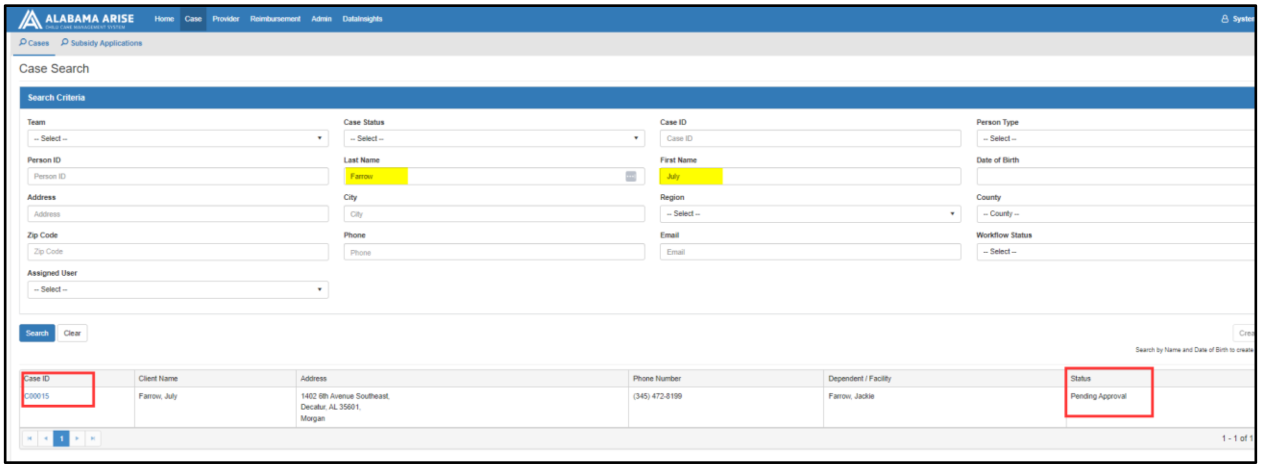

Figure 13: Case Search on case search

CASE APPLICATION

To review a case, users must perform a case search via the Cases sub-module, identify the appropriate case and click on the Case ID to access case information as follows:

1.1 Summary

The 'Summary' tab presents integrated information, including details about the primary client, household residents, dependents, reason for care requested, education and employment details, and other income deduction details in read-only mode.

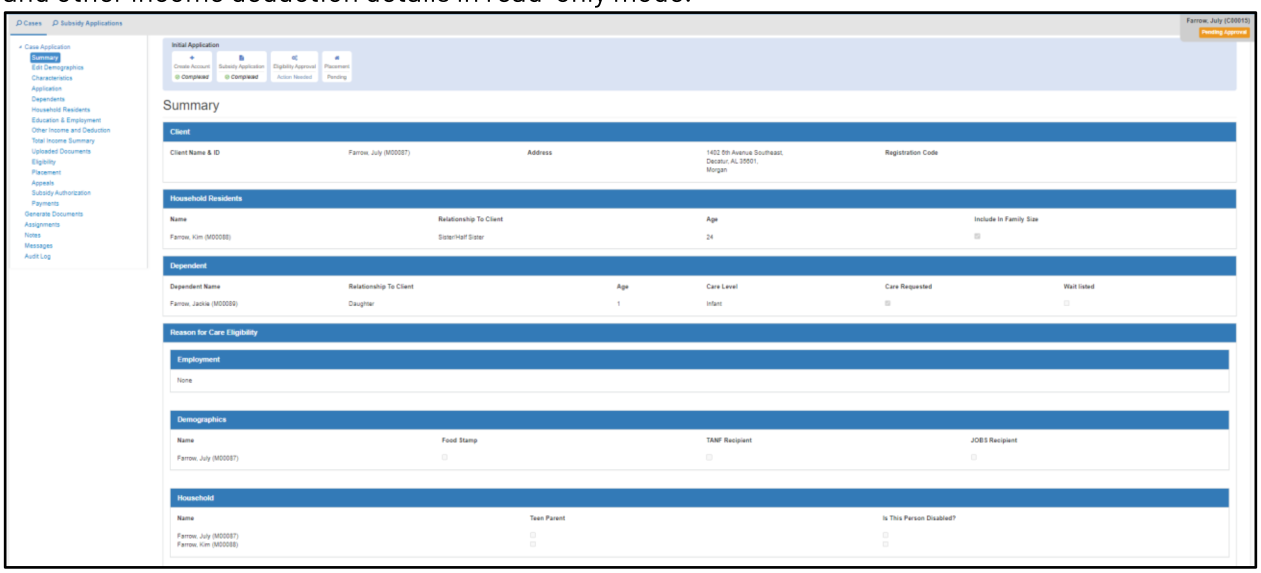

Figure 14: Summary

1.2 Edit Demographics

Once the user clicks on the Case number, the user will be directed to the edit demographics page.

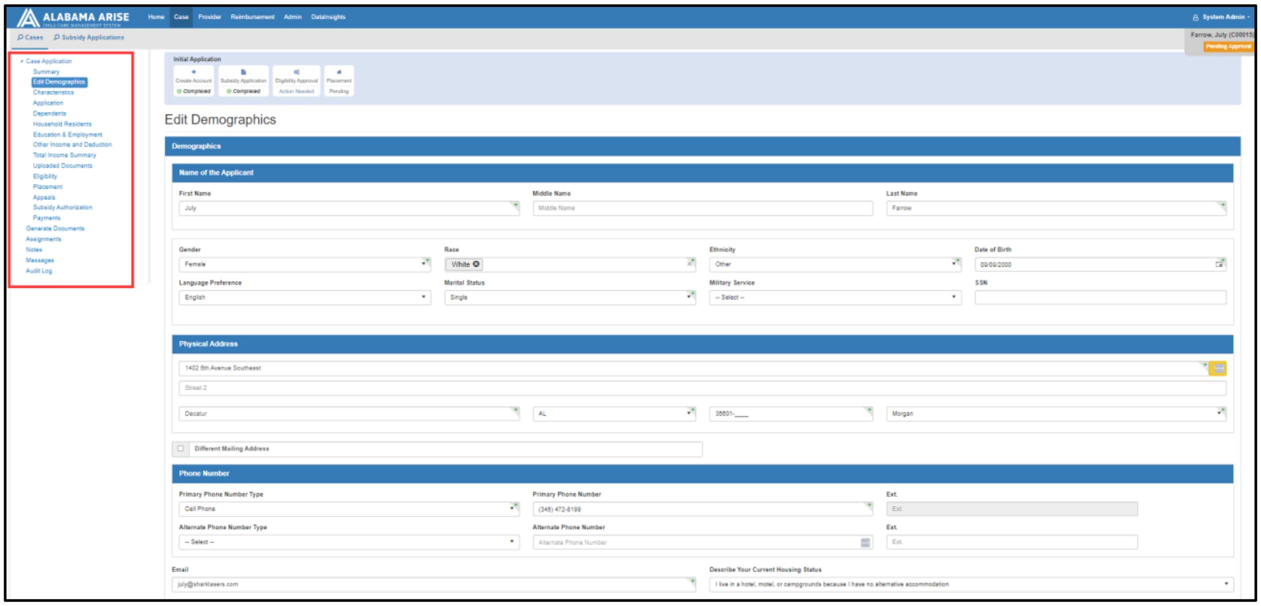

Figure 15: Edit Demographics Page

The left navigation pane will have different sections to view/update/delete the information regarding the application and the case.

Additionally, the application wizard at the top will show progress on the current case application:

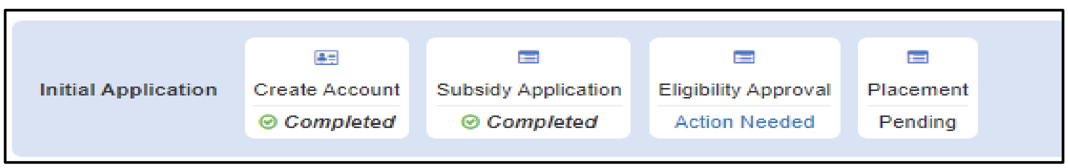

Figure 16: Application Wizard

On the Edit Demographics Page, users can add or update the primary applicant's information obtained during the registration / application process on the' Demographics' screen. This includes demographics, physical address, contact number, email address, and additional details such as childcare referrals and benefits the family has received and receiving.

To edit the demographics in the case application.

1. Add or update the information if required.
2. Ensure all mandatory fields are entered.
3. Click 'Save' (refer to Figure 13).

1.3 Characteristics

The characteristics screen enables user to add various case characteristics to the case record, based on their observations or interactions with the primary client. These details include case status and appeals information, as well as specific information such as occurrence of domestic violence, active military background, special needs, and more.

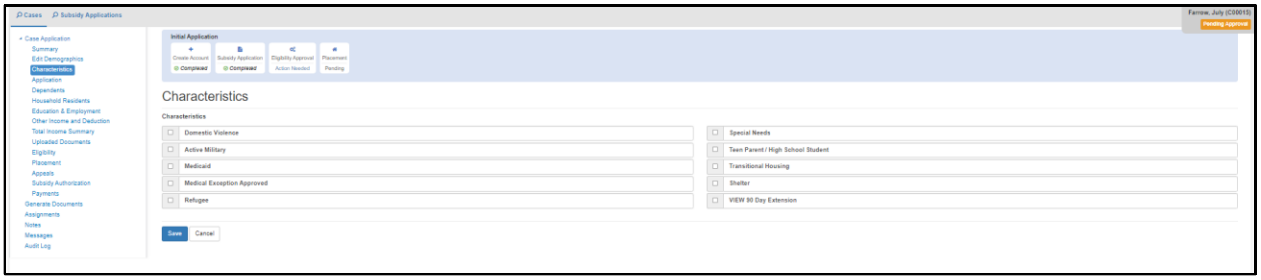

Figure 17: Characteristics

1.4 Application

On the application screen, User can find a grid containing details like Application Type, Application's Accepted Date, and Application Status. The Application Type column includes both 'Initial and Renewal Applications' records. The application type's record is hyperlinked, leading the user to its respective summary upon clicking. The 'Accepted Date' column reflects the application acceptance date, automatically setting the 'Application Status' to 'Accepted' upon approval.

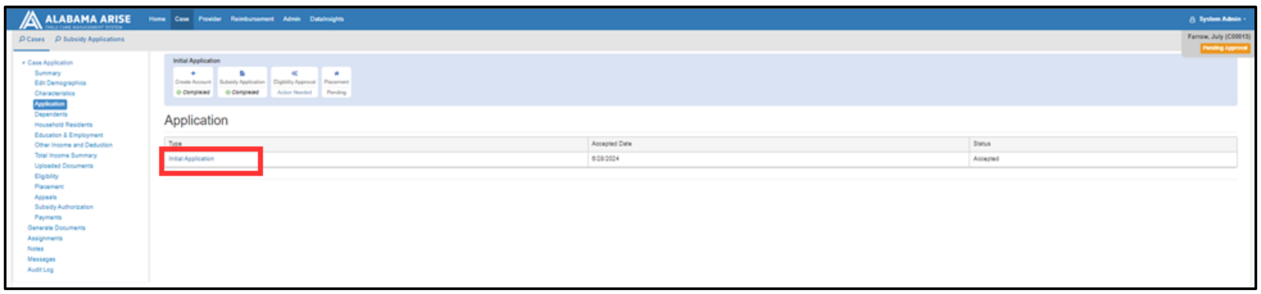

Figure 18: Application

Clicking on the Application hyperlink here will navigate users to the application summary information.

1.5 Dependents

The dependents screen captures the information for all the residents in the family under 13 years old. The information includes the dependent's demographics, relationship with the primary applicant, physical address, email address, and a few relevant checkboxes.

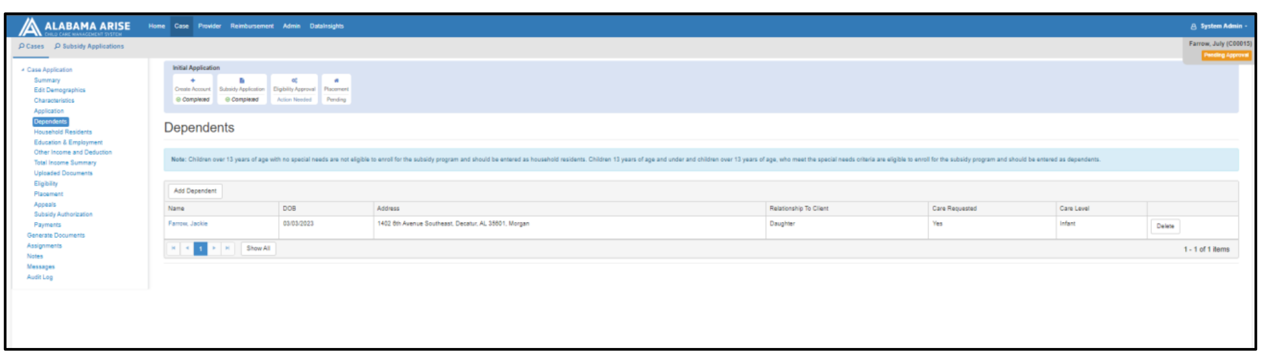

Figure 19: Dependent Summary Grid

Updating Existing Dependent

Clicking on the Dependent's name leads to the following screen with dependent details that may be edited or updated, if required:

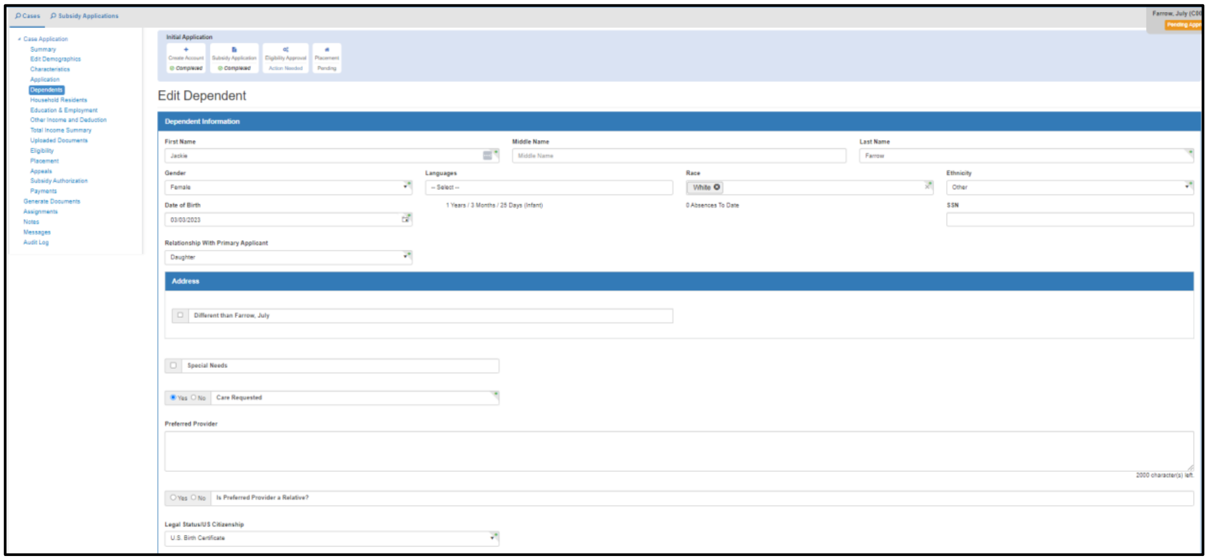

Figure 20: Edit Dependent Page Part 1

Figure 21: Edit Dependent Page Part 2

How to Add a New Dependent?

1. Click on the 'Dependents on the left navigation band.
2. Click on the 'Add Dependent' button (refer to Figure 14)
3. Fill in the Dependent's Demographic information
5. Check the applicable checkboxes
7. Enter Absent Parent Information (if applicable)
8. Click 'Save'.

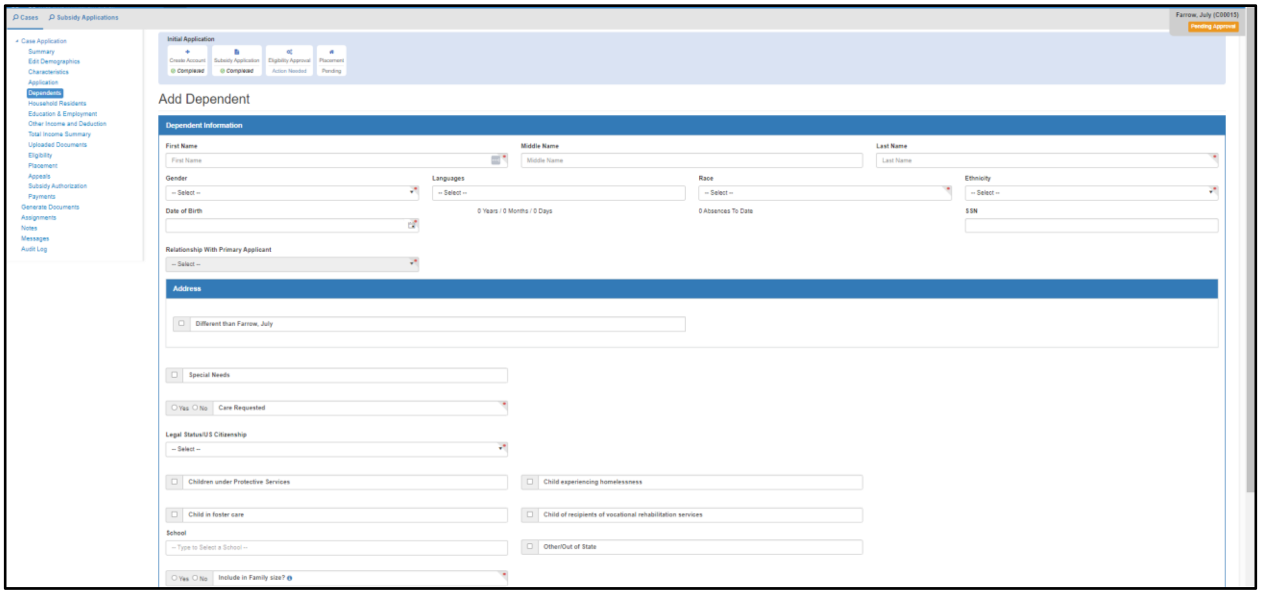

Figure 22: Add Dependent Page Part 1

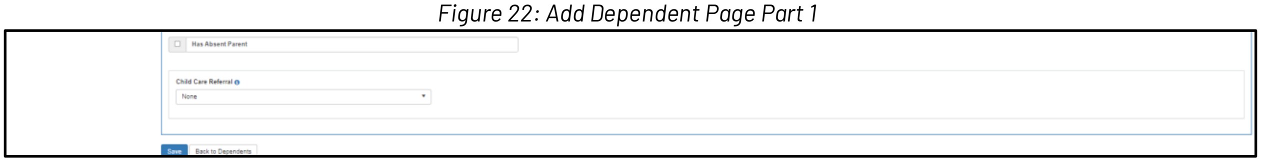

Figure 23: Add Dependent Page Part 2

1.6 Household Resident

In the household section, users can add/update the information about all residents in the household. This includes details like the resident's demographics, relationship with the primary applicant, physical address, email address, and several checkboxes to capture additional resident information.

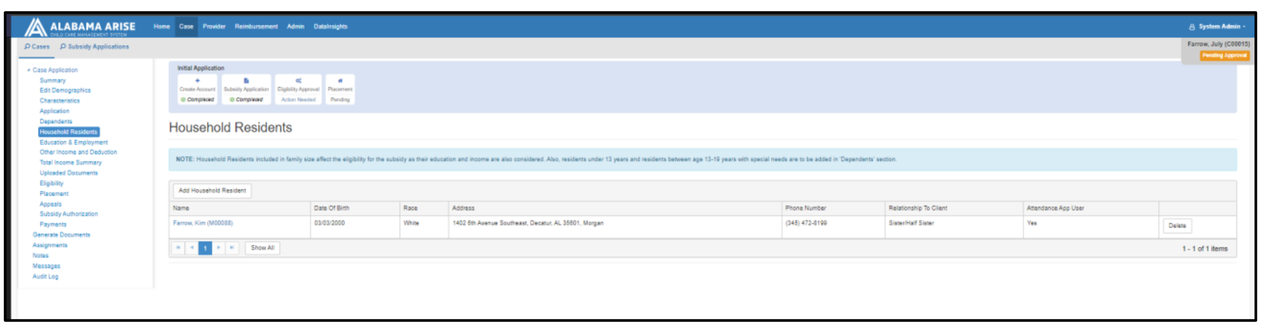

Figure 24: Household Resident

Updating Existing Household Resident's Details

Clicking on the Household resident's name leads to the following screen with dependent details that may be edited or updated, if required:

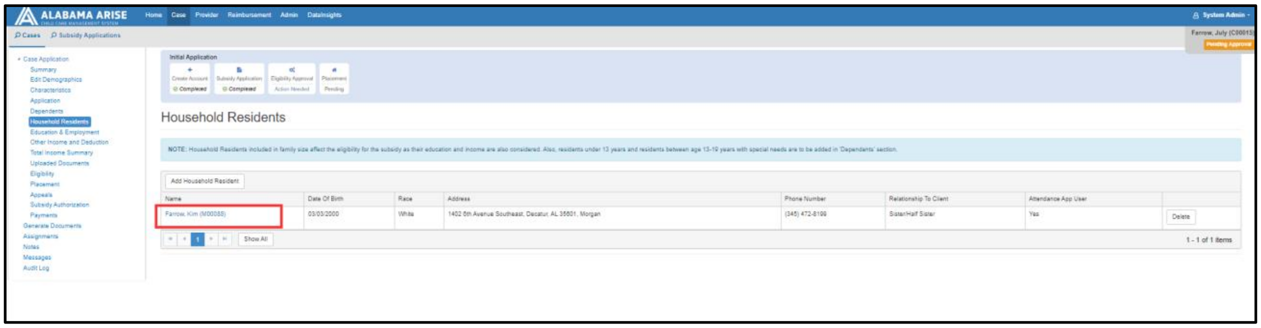

Figure 25: Edit Household Resident Part 1

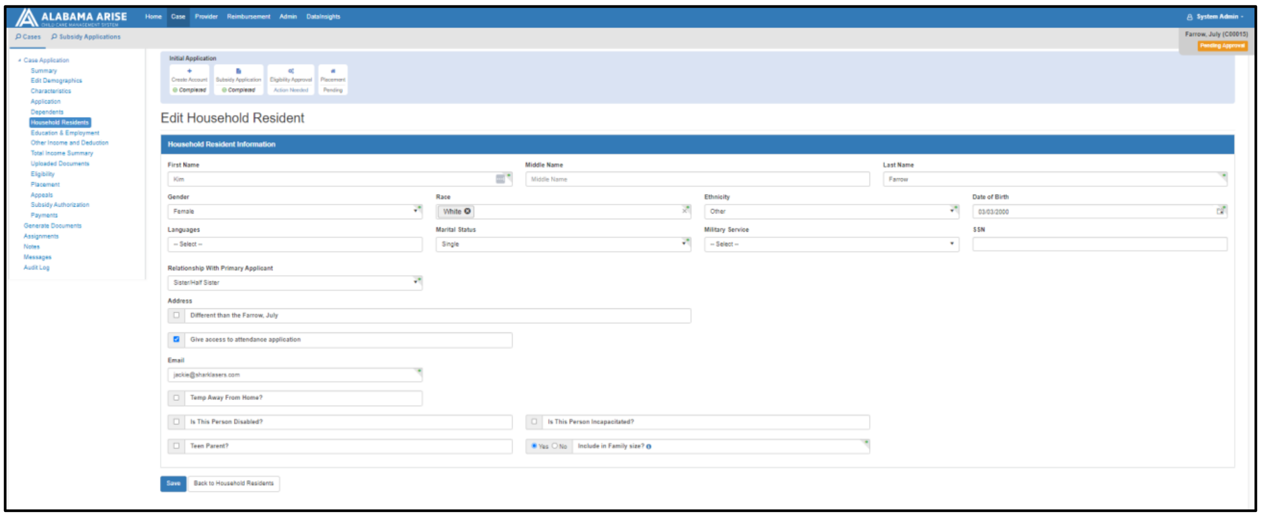

Figure 26: Edit Household Resident Part 2

How to Add a New Household Resident?

1. Navigate to 'Household Residents' on the left navigation pane.
2. Click on the 'Add Household Resident' button.
3. Fill in the Demographic information.
4. Click 'Save'.

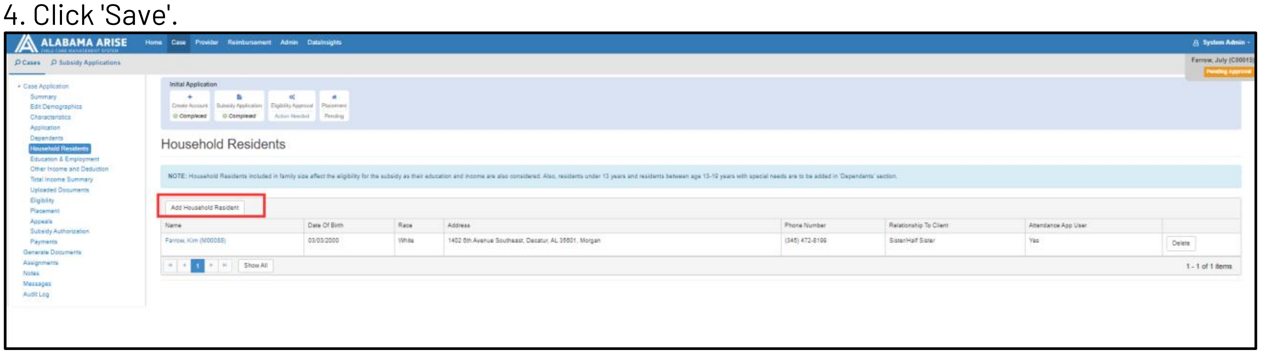

Figure 27: Add Household Resident

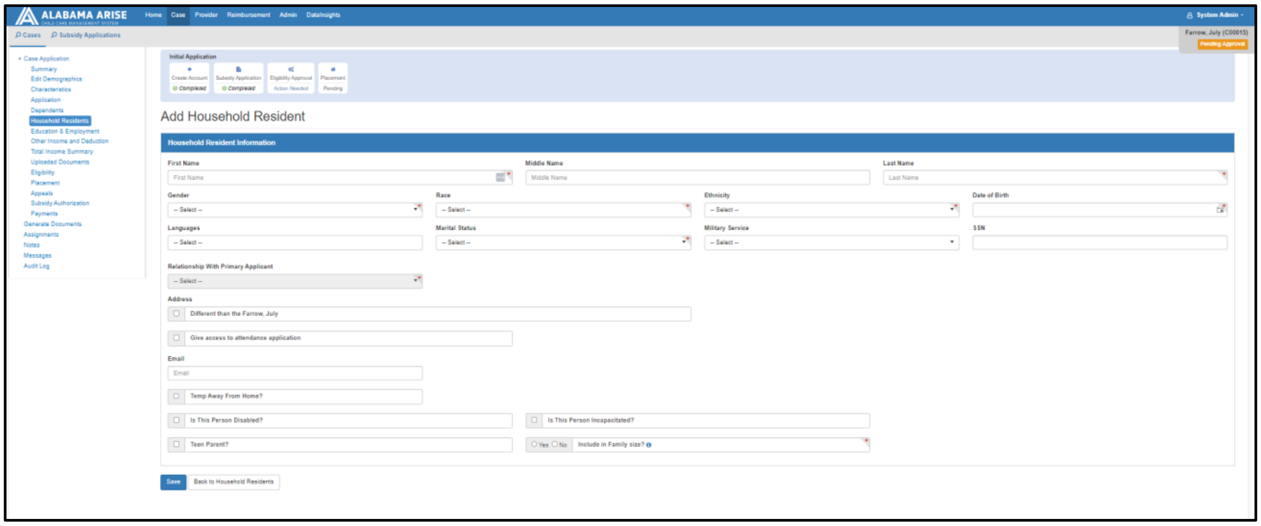

Figure 28: Add Household Resident Part 2

1.7 Education and Employment

Education

The 'Education and Employment' screen comprises two grids, 'Education' and 'Employment & Income.' The screen captures an overview of the current employment and education details of all household residents.

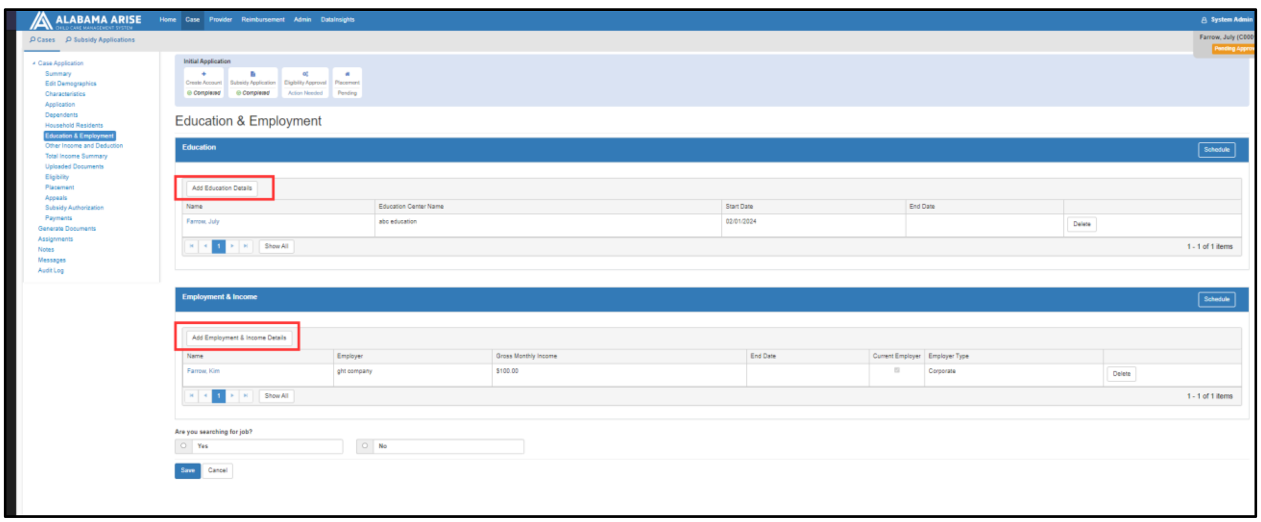

Figure 29: Education and Employment

Updating Existing education details

Clicking on the existing household resident’s name leads to the following screen with education details that may be edited or updated, if required:

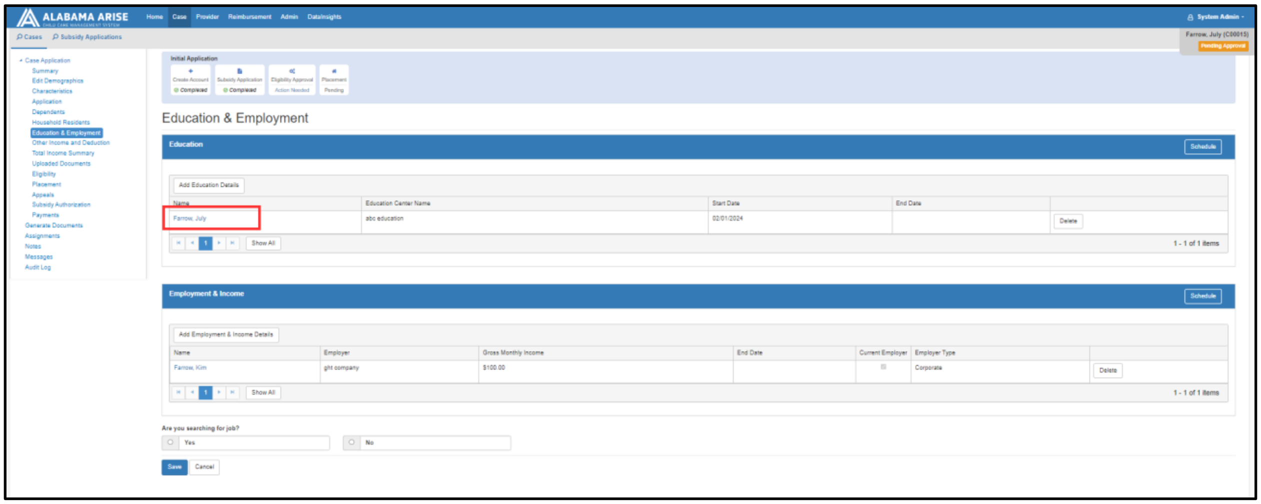

Figure 30: Edit Education Part1

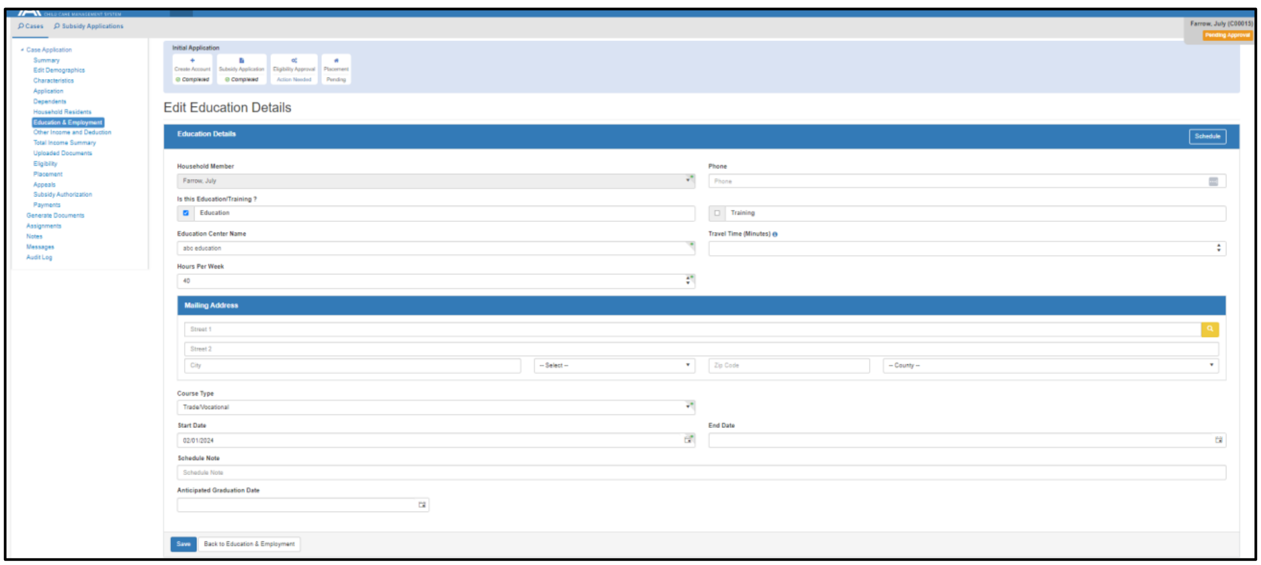

Figure 31: Edit Education Part2

How to Add Education Details?

Clicking on the 'Add Education' button allows the user to capture Education details. Users can add information such as the Education center name, address of the education center, Start date, end date etc.

To add educational details:
1. Click on 'Education & Employment' on the left navigation pane.
2.Click on the 'Add Education Details' button.
3. Select the household member from the dropdown.
4. Enter the details about the education
5. Click 'Save'. The saved information is displayed under the 'Education' grid.

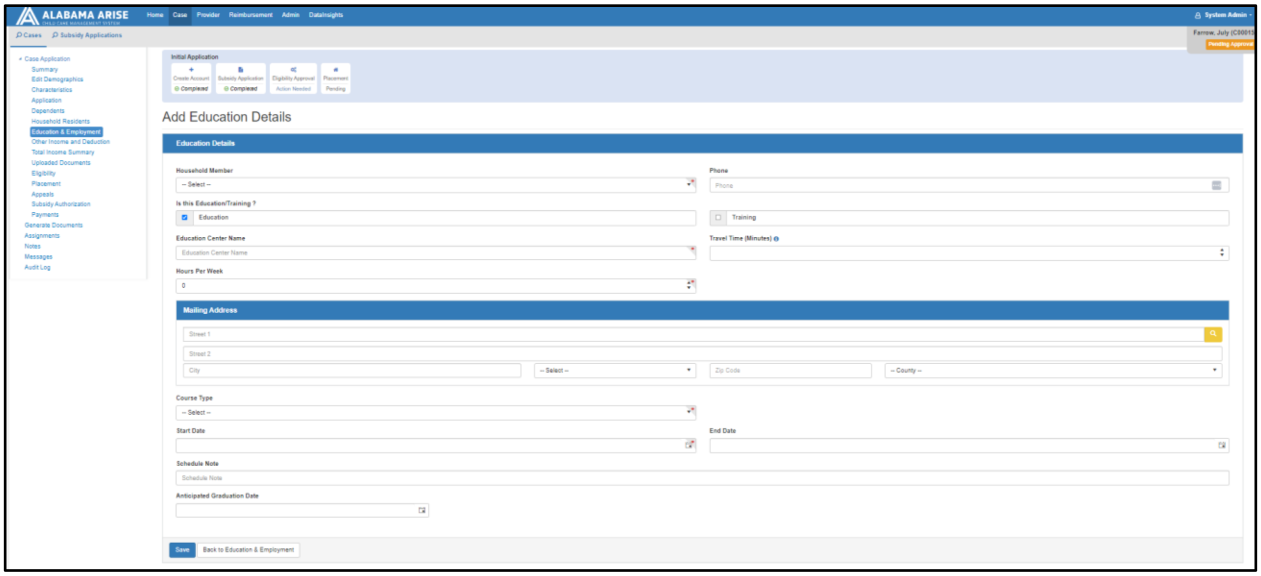

Figure 32: Add Education

Employment

Clicking on the 'Add Employment & Income' button takes the user to capture employment and income details. Users can add information such as 'Employment Information,' 'Mailing Address,' and 'Employment Income'. Once the user saves the employment information, the 'Add Employer Income' button gets enabled.

Updating Existing Employment details

Clicking on the existing household resident's name leads to the following screen with employment details that may be edited or updated, if required:

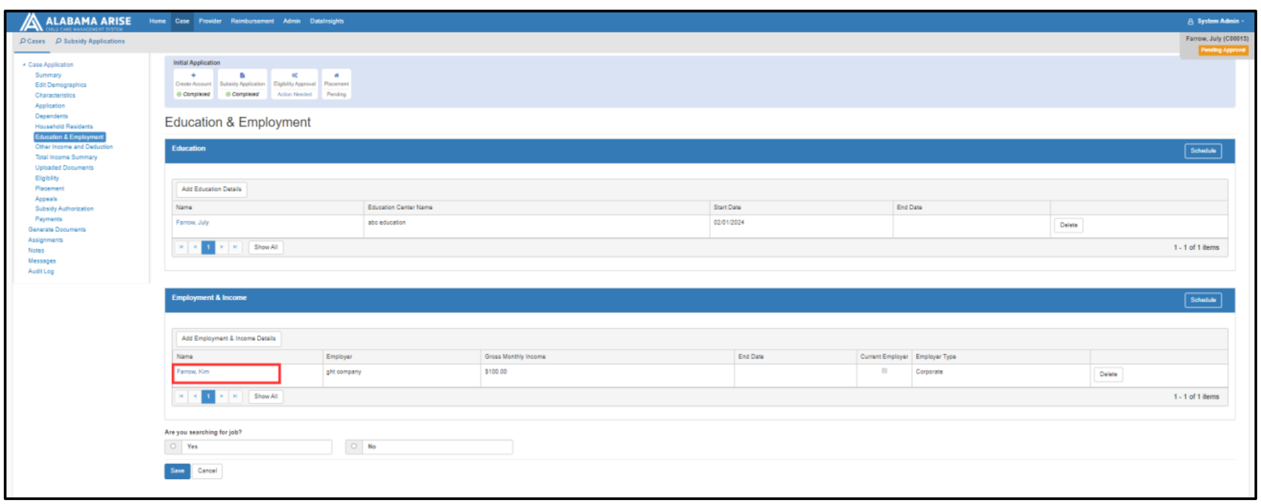

Figure 33: Edit Employment Income

How to Add Employment Details?

1. Click the 'Education and Employment' tab on the left navigation band.

2. Click on the 'Add Employment & Income' button.
3. Select the household member
4. Complete the form by entering all the mandatory details

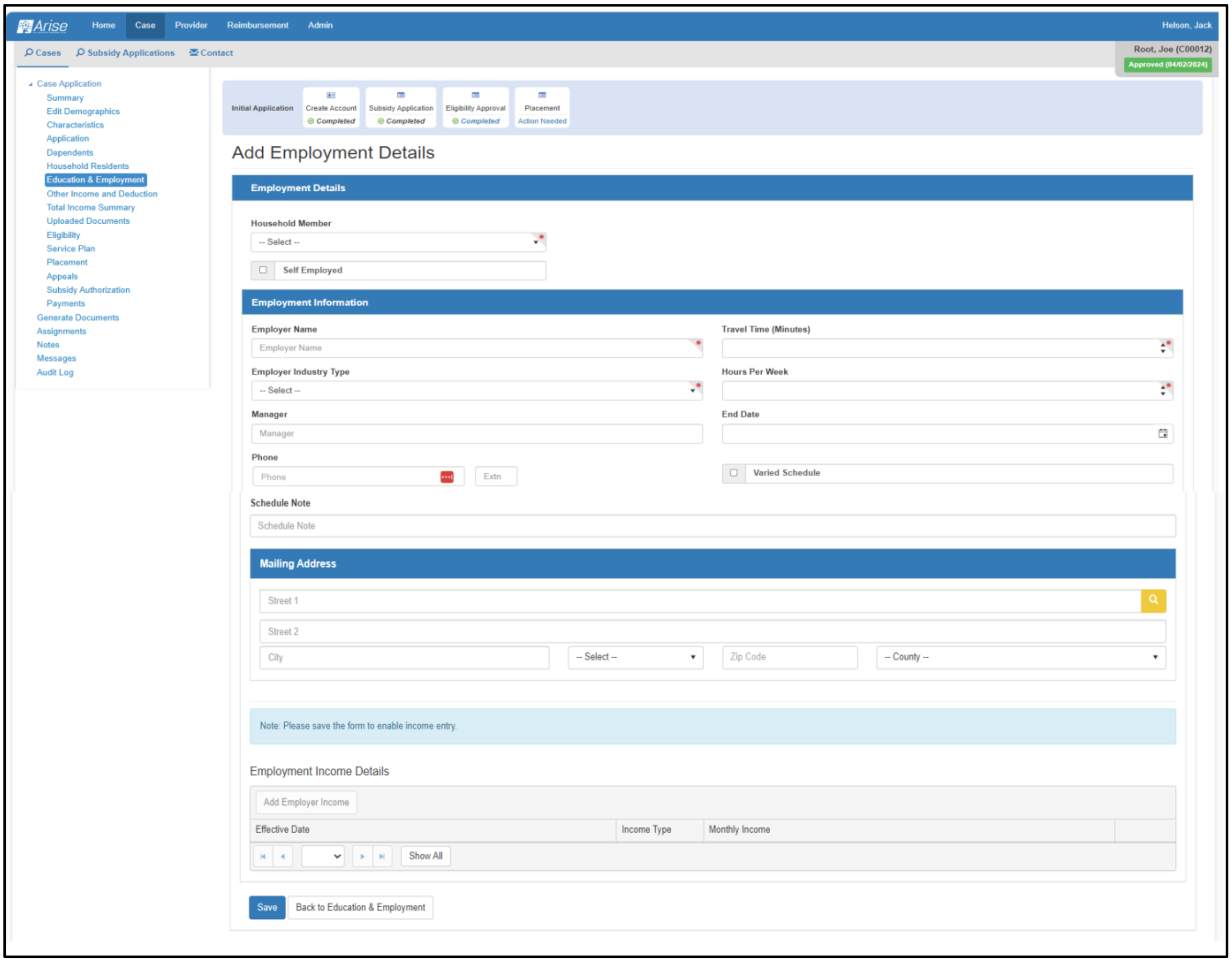

Figure 34: Add Employment Details

6. Once the user saves the information on Add Employment detail, the 'Add Employment Income Details' section will be activated, as seen below:

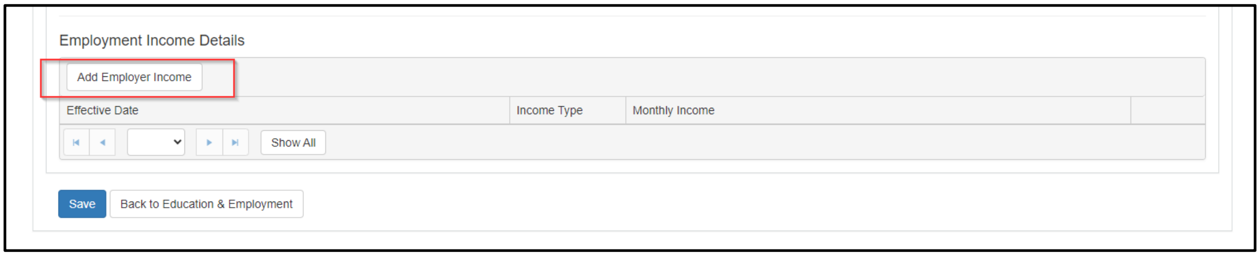

Figure 35: Add Employer Income

7. Click on 'Add Employer Income' to access the following form:

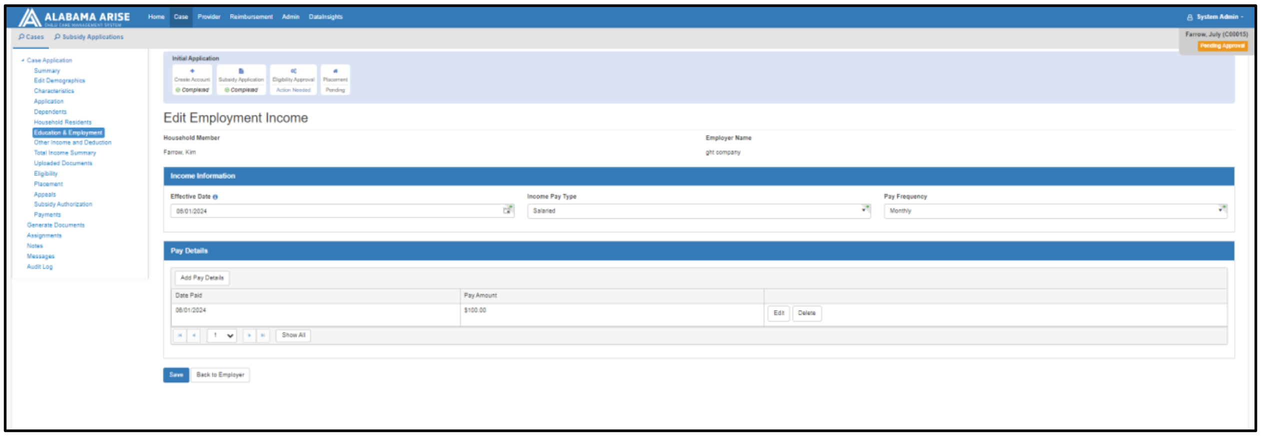

Figure 36: Add Employment Income Details

8. Enter all the information.
9. Click on the save button.

This entered information will be displayed under the Employment income details.

1.8 Other Income and Deductions

The 'Other Income and Deduction' screen consists of two grids, 'Other Income' and 'Deduction'. This screen displays an overview of other sources of income or allowable deductions that impact overall family income.

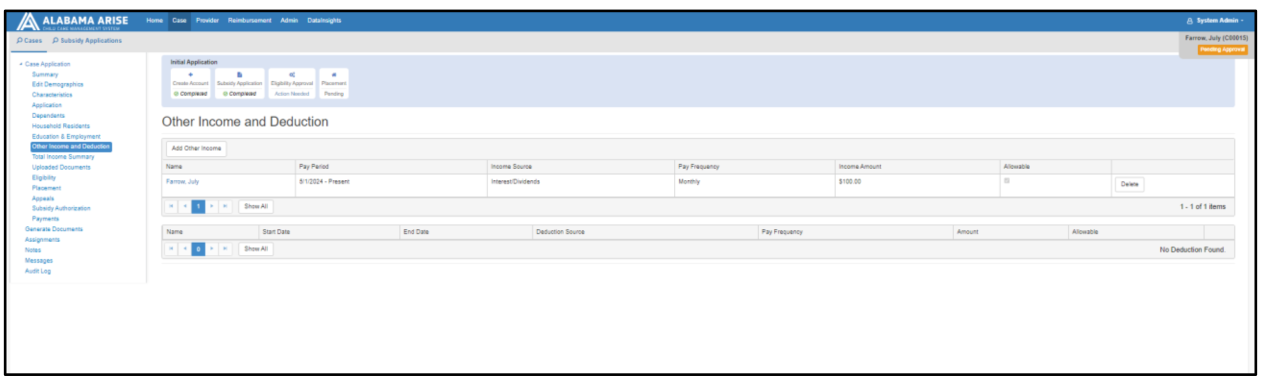

Figure 37: Add Other Income and Deduction

Updating Existing Other Income and Deduction Details

To update/edit the information, click on the name of the existing record.

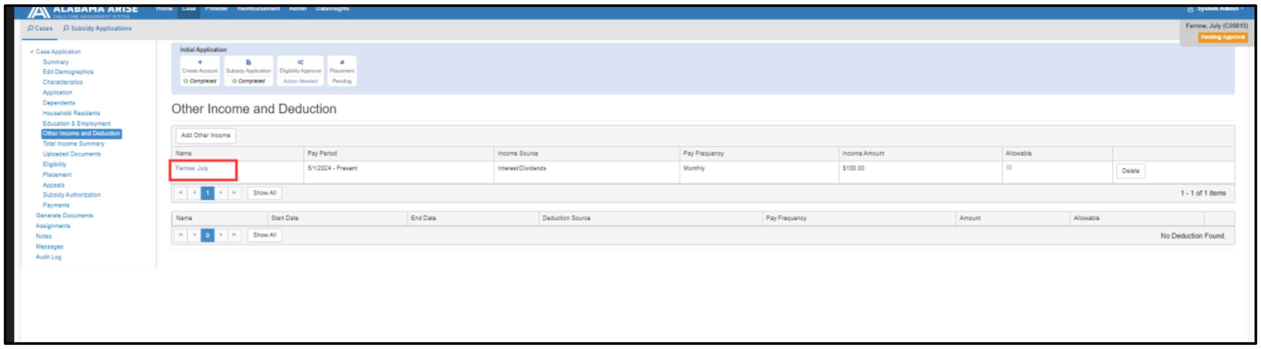

Figure 38: Edit Other Income

How to Add Other Income Details?

The user can add other income details by clicking on the 'Add Other Income'

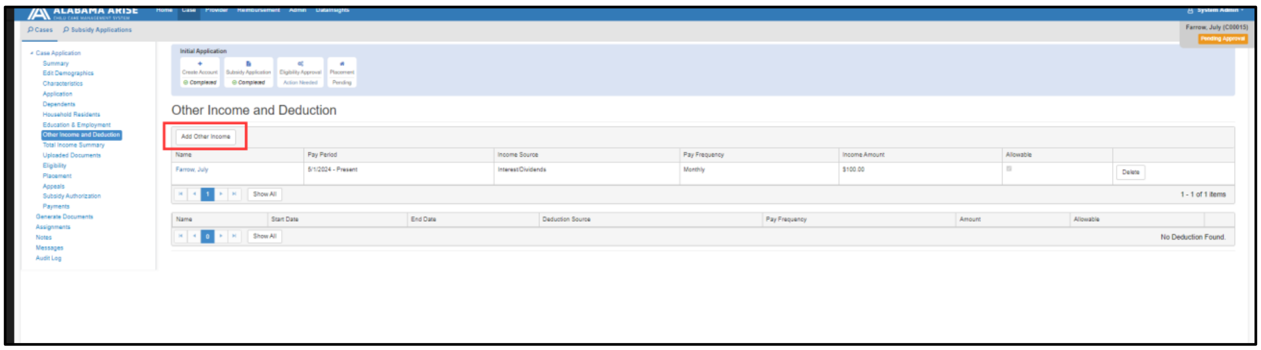

Figure 39: Add Other Income

To add other income details:
1. Click on the 'Other Income and Deduction' on the left navigation band.
2. Click on the 'Add Other Income' button to access the following form:

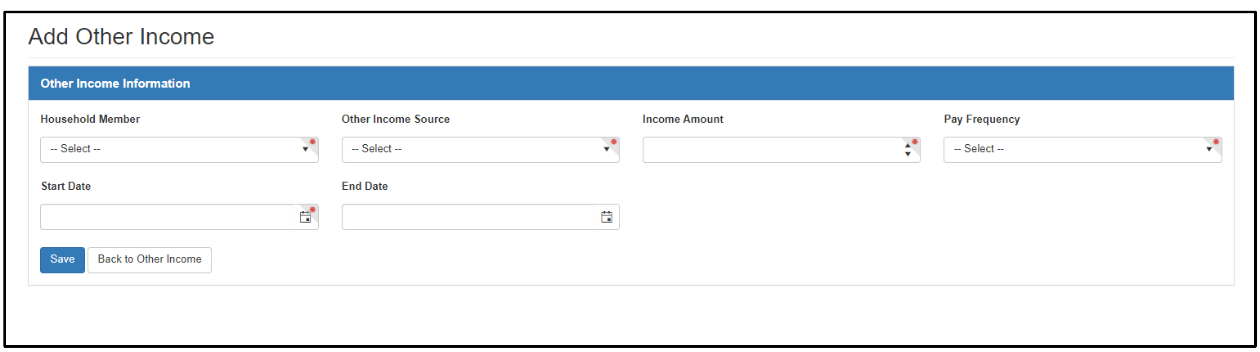

Figure 40: Add Other Income Details

3. Select the household member.
4. Complete the form by entering all the mandatory details
5. Click 'Save'. The saved information is displayed under the 'Other income ' grid.

How to Add Deduction Details?

Deduction details will be automatically added to the page in case the self-employment checkbox is selected in the Education and Employment Details section.

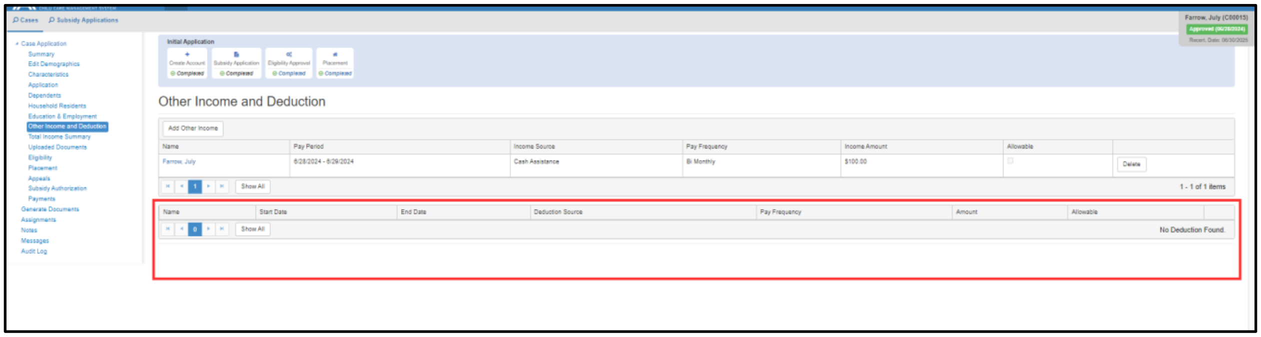

Figure 41: Deduction

1.9 Total Income Summary

The total income summary screen is the summary of the Income sources, Deduction, and Training/Working Hours entered in the 'Education and Employment' section for all the household members. Adjusted Gross Income is calculated by the system based on the difference between 'Total Income' and 'Total Deductions.'

On this screen, the user can click on the hyperlink of the records, and it will navigate the user to the education or Income screen for that specific user. Users can edit the information if necessary.

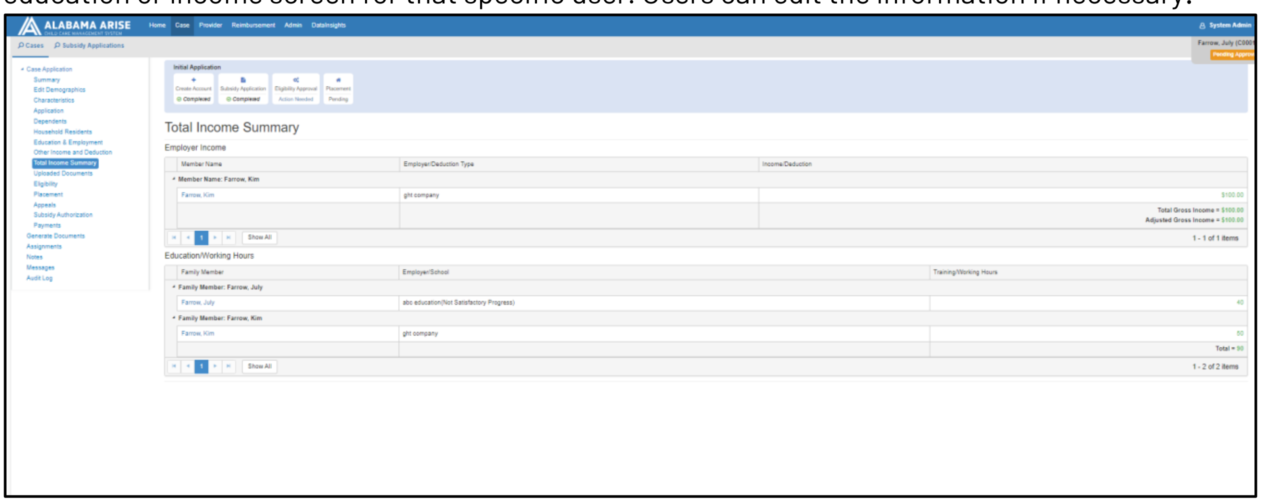

Figure 41: Total Income Summary

1.10 Uploaded Documents

On the Uploaded Documents, users can upload documents through the 'select files' tab under the optional section of the screen. This screen also displays the list of all the documents that users have uploaded with some other information like uploaded date, uploaded by, etc.

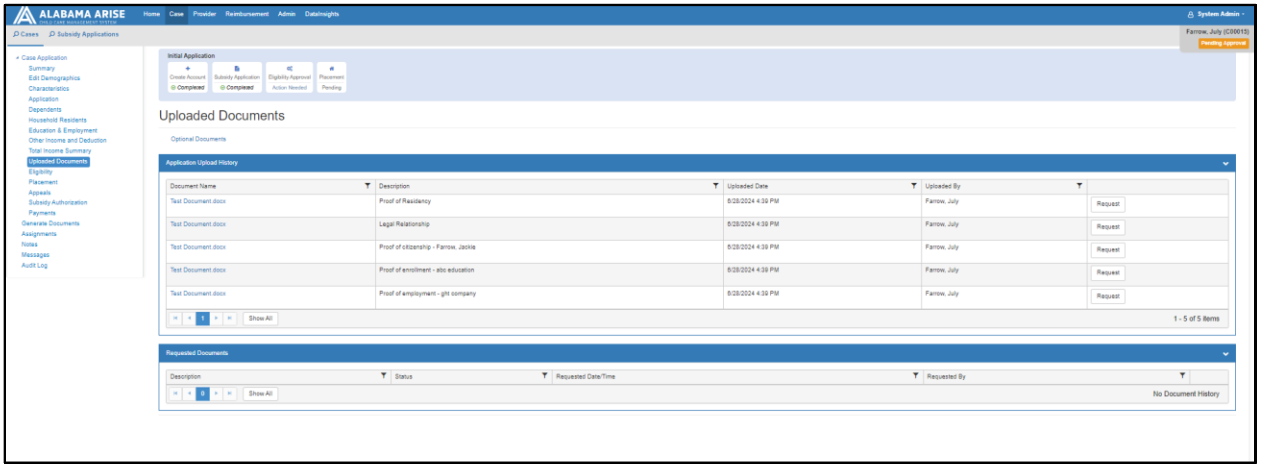

Figure 42: Uploaded Documents

How to Upload a New Document?

To upload a new document

1. Click on 'Upload document' on the left navigation pane.
2. Click on optional documents. It will display a dropdown to select the document type.
3. Select name of the document or 'Other.'
4. Select files from the computer.
5. Click on the upload button.
6. Uploaded files will show up in the Upload History section (as seen in the figure above)

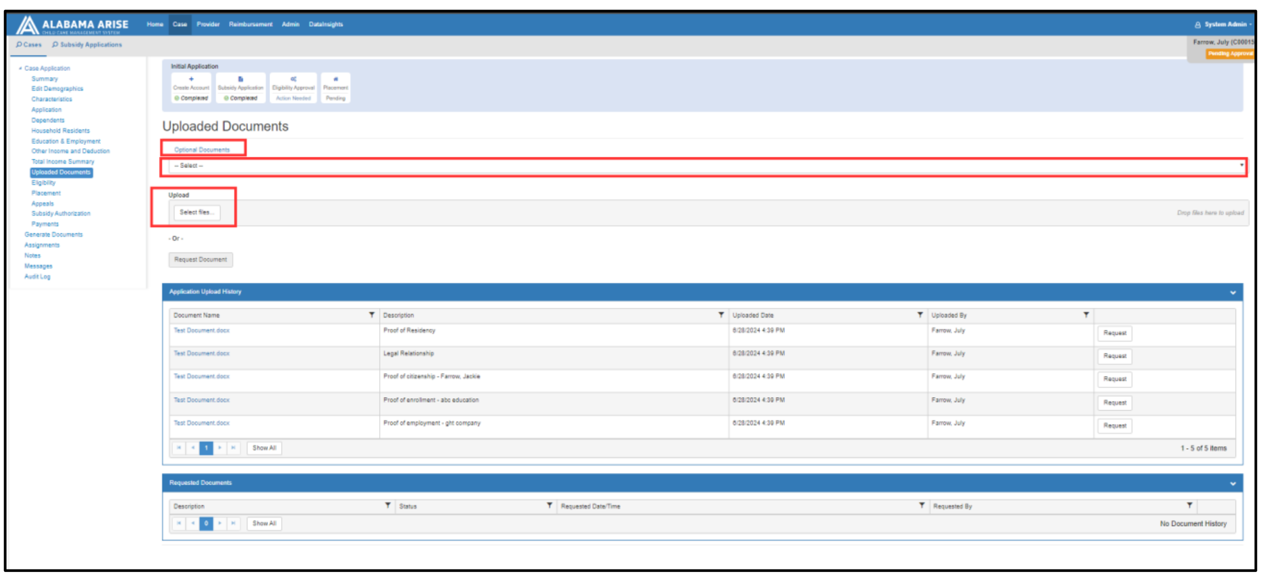

Figure 43: Upload new Documents

To Request a new document from the same screen

1. Click on optional documents. It will display a dropdown to select the document type.
2. Select the name of the document.
3. click on 'Request Document'.

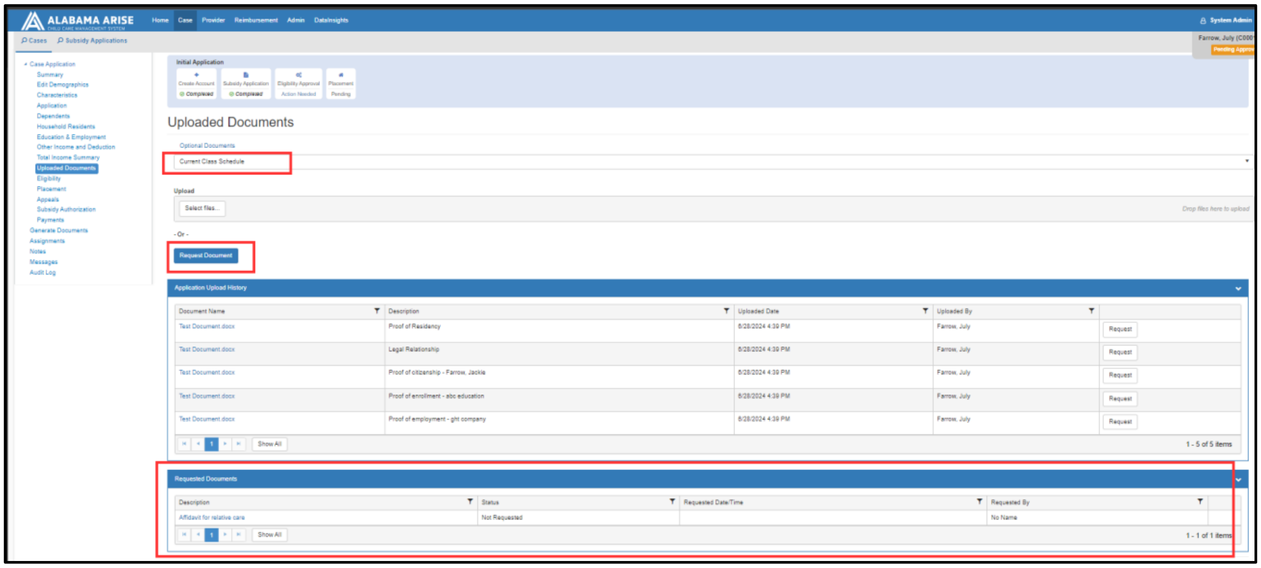

Figure 44: Request Documents

1.11 Eligibility

The eligibility screen displays case-centric information like 'Family Size,' Children Requesting Care,' and 'Adjusted Gross Income.'

1. Family Size: It is determined based on all the household members included in the family size.
2. Children Requesting Care: It is determined based on children for whom the applicant needs subsidy benefits.
3. Adjusted Gross Income: It is determined based on the difference between the family's total income and total deductions.

The pass and fail statuses are automatic and based on the above information provided by the client. If the status is 'Pass, ' then the user can either certify the eligibility or deny it.

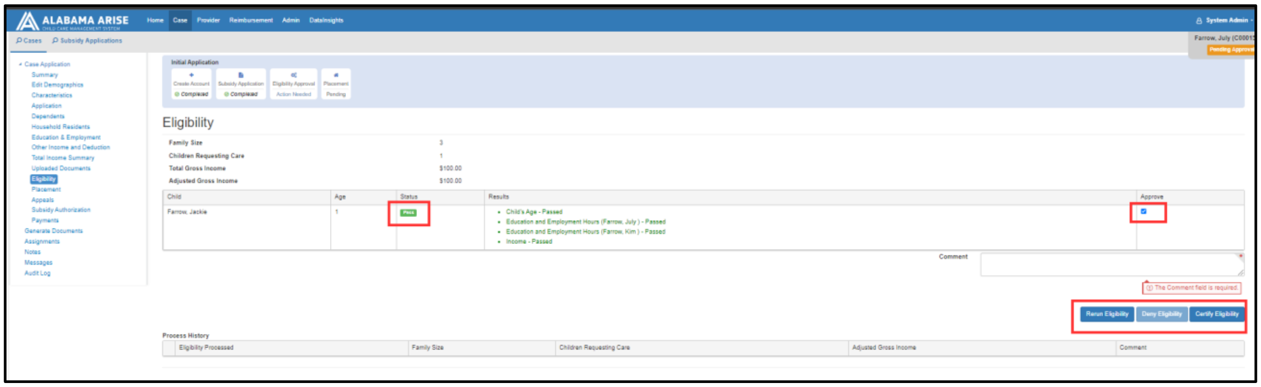

Figure 45: Upload new Documents

How to Approve Eligibility?

To approve the eligibility of the case:

1. Click on the 'approved' checkbox on the grid.
2. Write a comment about the approval.
3. Click on the Certify eligibility.

Approved eligibility will show up in the bottom grid once it has been certified.

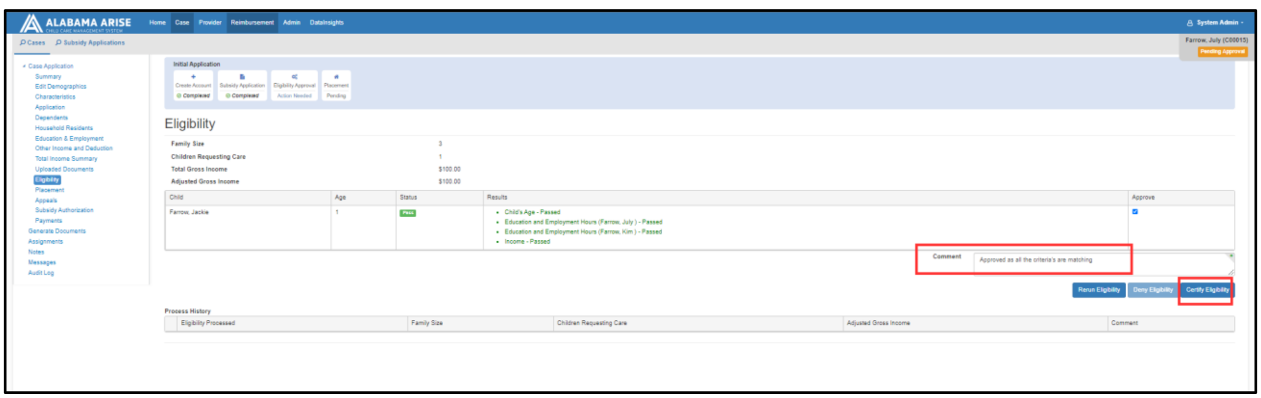

Figure 46: Certify eligibility

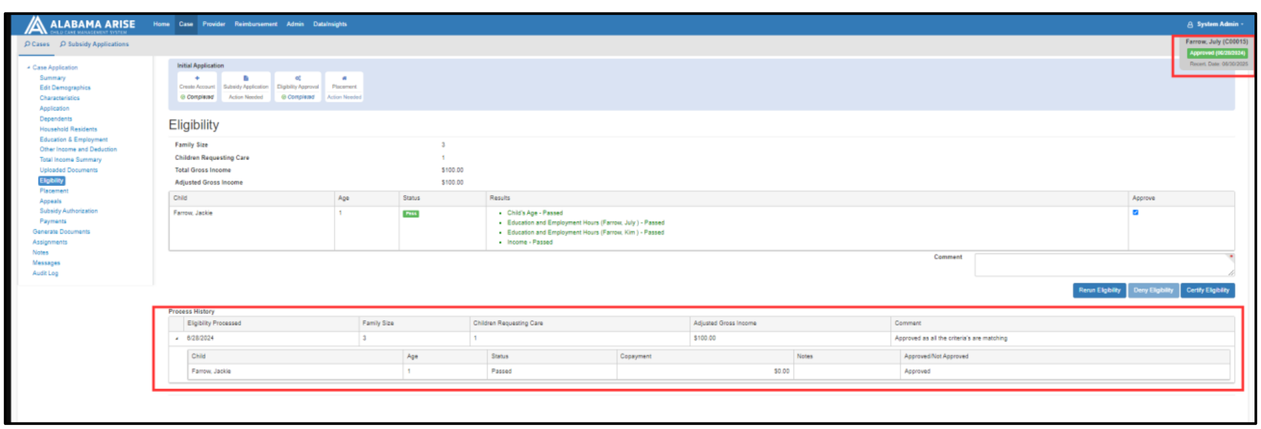

Figure 47: Eligibility record

How to Deny Eligibility?

To deny the eligibility of the case:

1. Write a comment about the approval.
2. Click on the deny eligibility.

1.12 Placement

The placement screen allows users to 'Create' and 'Authorize' placement for the children who are eligible for the subsidy.

The placement page's 'View Schedule' tab shows the work and school schedules and other schedules. The user needs to click on the 'View Schedule' tab to check the schedule.

How to Create a New Placement?

1. Click on the 'Placement' tab on the left navigation pane.

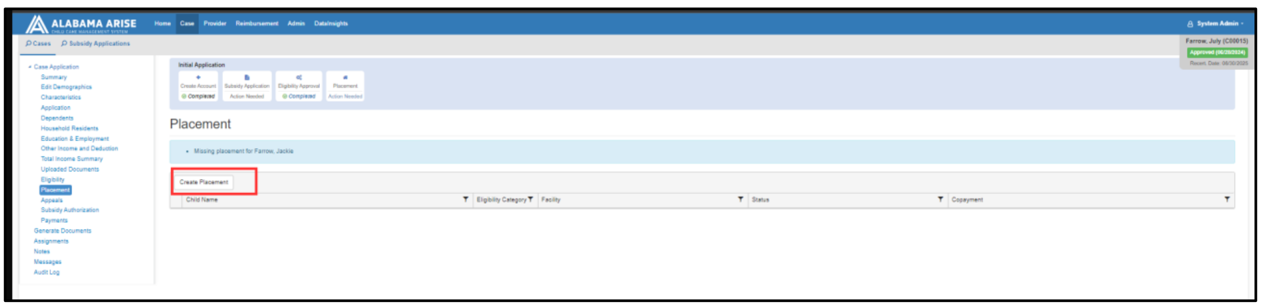

Figure 48: Create Placement Button

Click on the 'Create Placement' button to be directed to the following page:
2. Select the 'Child'. This will populate the Preferred Provider's list (if entered during the application process)
3. Select the Facility from the list of available facilities in the dropdown
4. Enter the Initial Start Date. The date cannot be before the current day's date.
5. Select 'Eligibility Category.'
6. Click on 'Save' to save the placement details

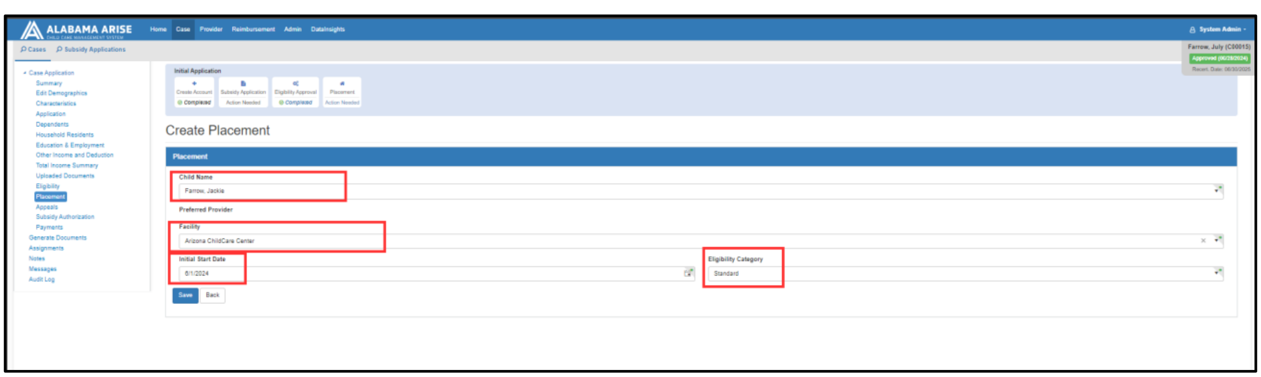

Figure 48: Add Placement Details

Clicking on Save will direct the user to the following screen:

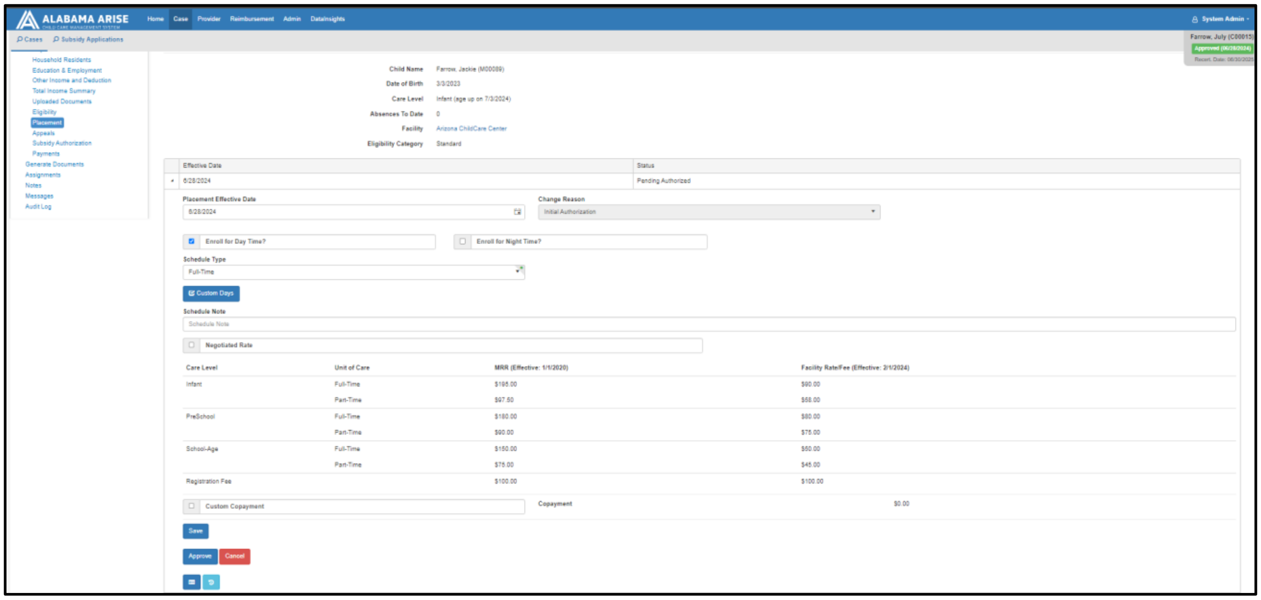

Figure 49: Placement Authorization

On this page:

1. Select placement effective date.
2. Select the checkbox if If child is enroll for day time or night time
3. Select 'Schedule Type' from the dropdown. Add custom days if required.
4. Check the 'Negotiate Rate' checkbox (if required). It will display fields to enter negotiated rates.
5. Add Custom Copayment (if required)
6. Click 'Save'
7. Click 'Approve'

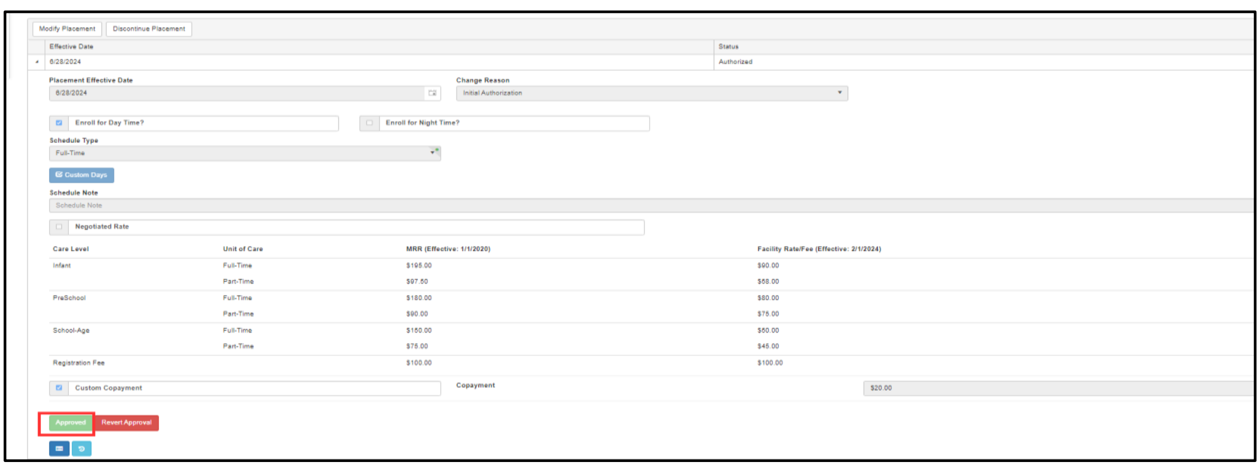

Figure 50: Placement Approval

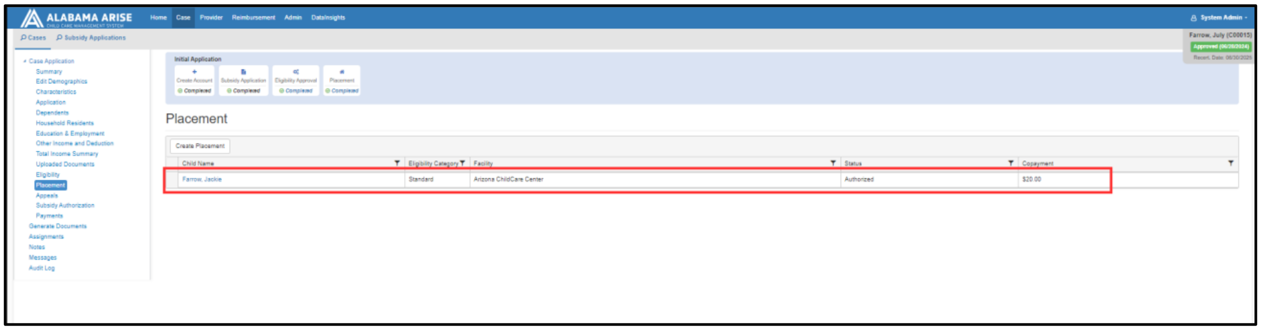

Figure 51: Placement record

The authorized placement will now be displayed on the placement screen

1.13 Appeals

On the appeals page, the user can maintain a list of details mentioned during a court hearing.

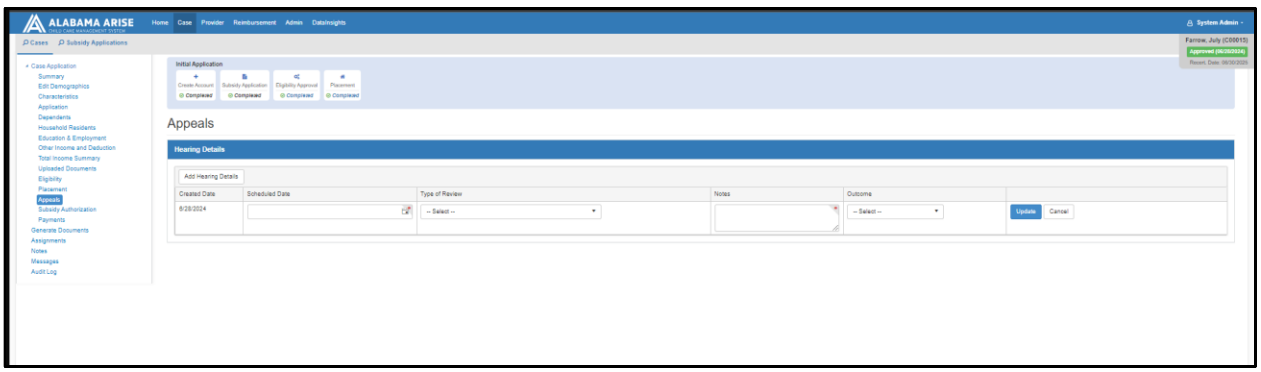

Figure 52: Appeals

1.14 Subsidy Authorization

On the Subsidy Authorization page, users will be able to view subsidy status of the case, terminate subsidy, check the overall workflow, access history, and even add program violations.

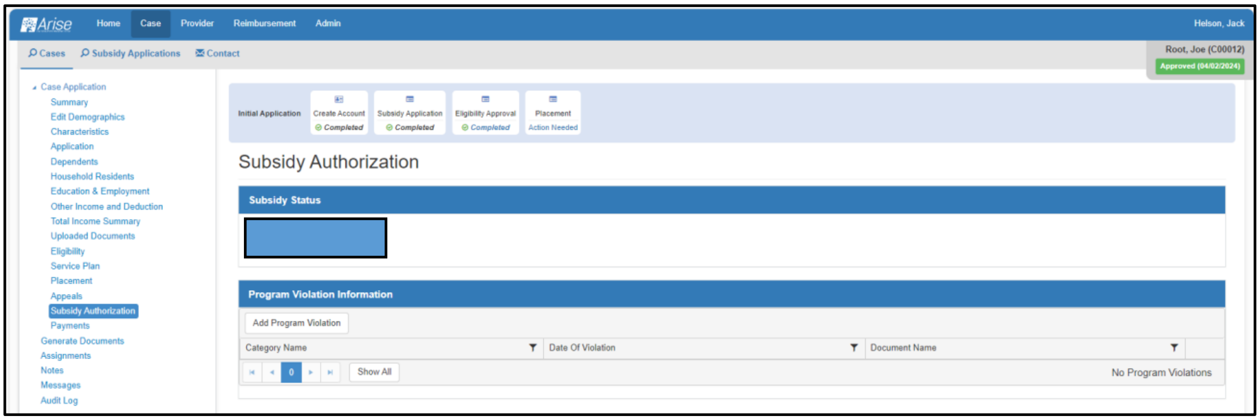

Figure 53: Subsidy Authorization

1. Users can check the subsidy status from this screen.
2. Users can also terminate the case subsidy by clicking on the terminate button (refer to the figure above).

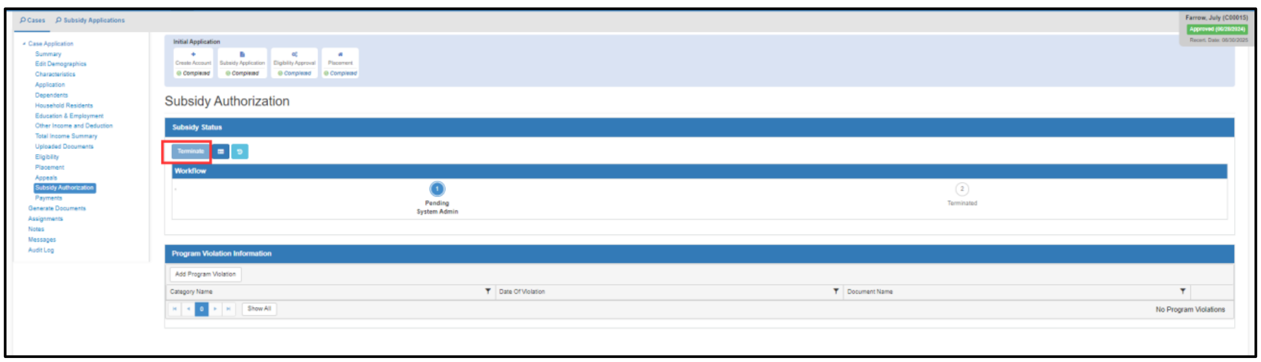

Figure 54: Terminate

Additionally, users can access the case workflow and history by click either of the following buttons respectively.

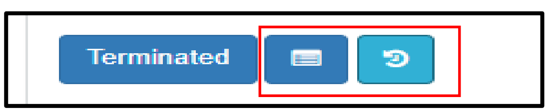

Figure 55: Workflow and History Buttons

Clicking on the workflow button will display the following screen:

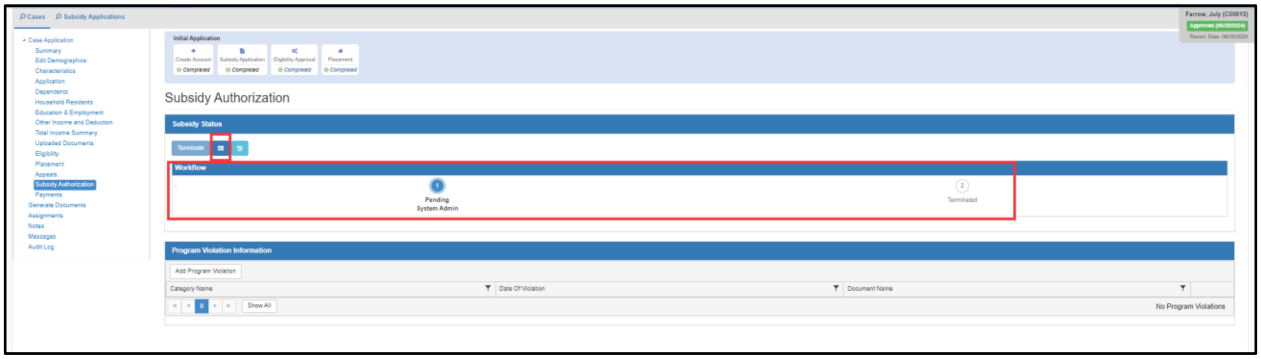

Figure 56: Case Workflow

Clicking on the history button will display the following screen:

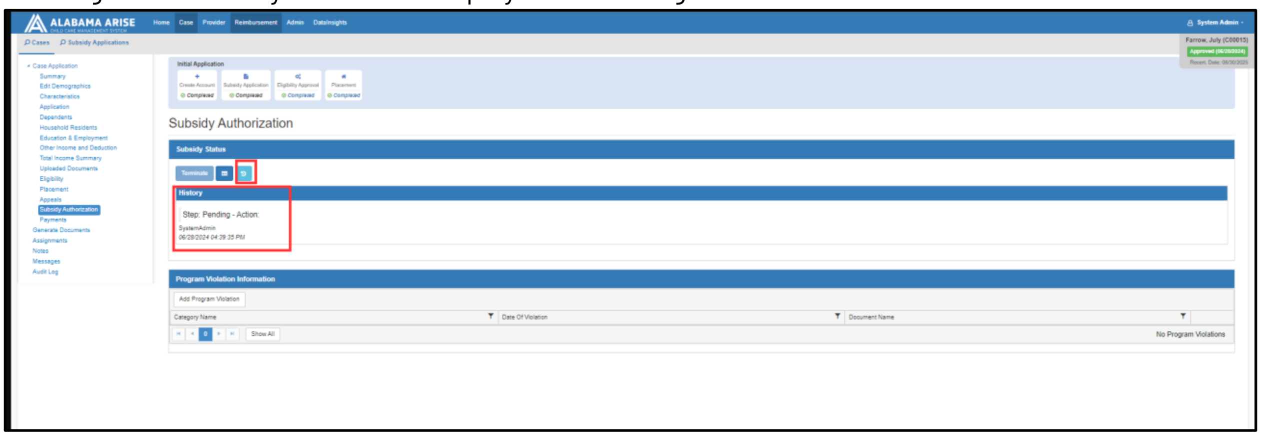

Figure 57: Case History

On the same page, users can also add program violations by clicking on the 'Program Violation' button on the same page (refer to Figure 35). This action will direct users to the following page:

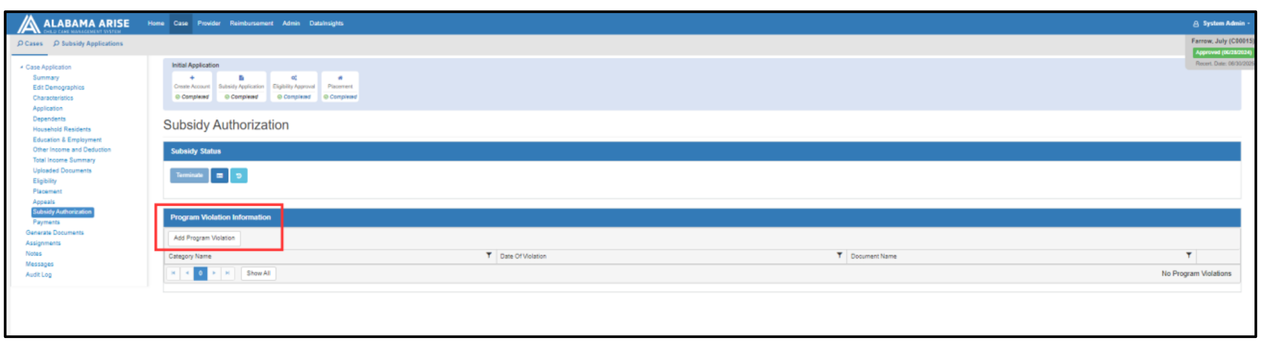

Figure 58:Program Violation

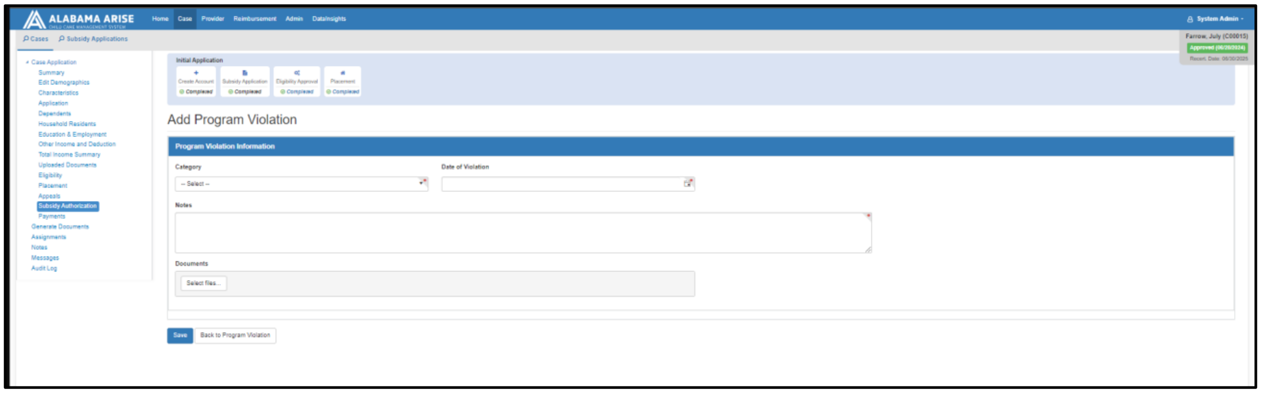

Figure 59: Add Program Violation

1.15 Payments

The Payments page reflects all recovery payments made or added.

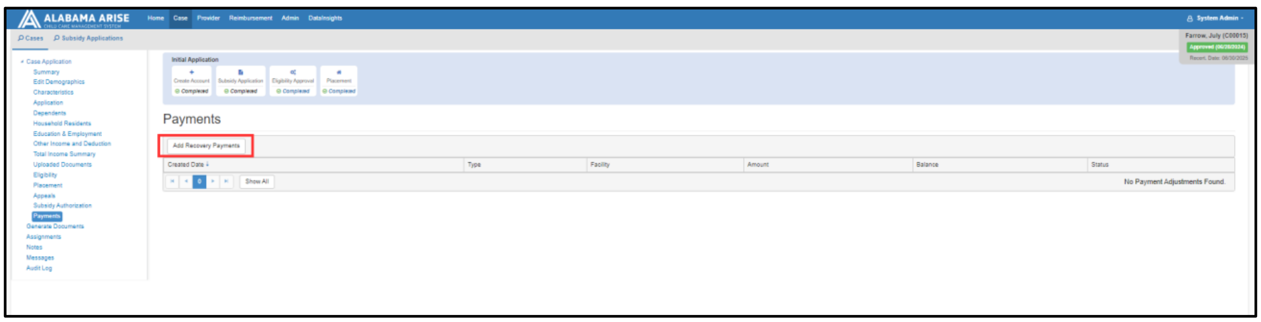

Figure 60: Payments

Users will also be able to add recovery payments by clicking on the 'Add Recovery Payment' button. This action will direct the user to the following page:

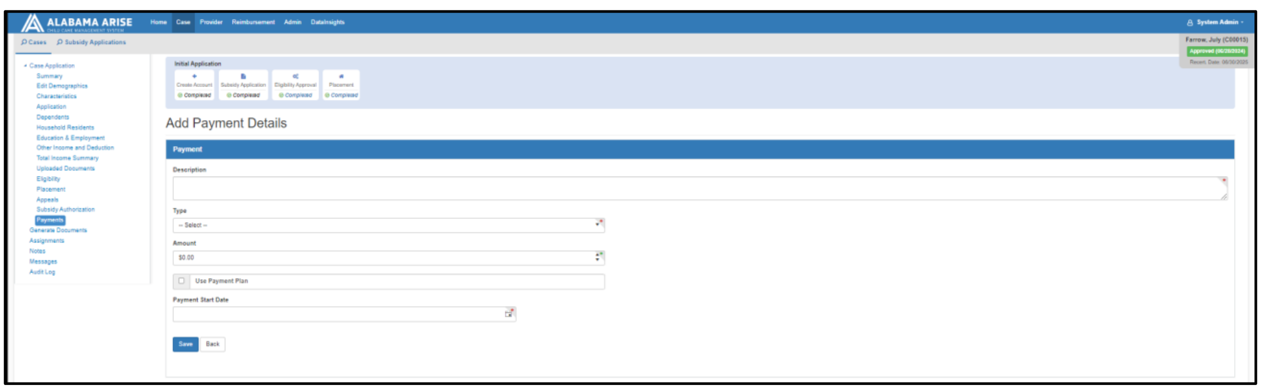

Figure 61: Add Payment Details

GENERATE DOCUMENTS

The 'Generate Documents' screen allows users to generate case-related documents with the client's information and download them. Users will be able to select a document template to be generated, using the dropdown menu, following which, clicking the 'Generate Document' will result in the document being generated.

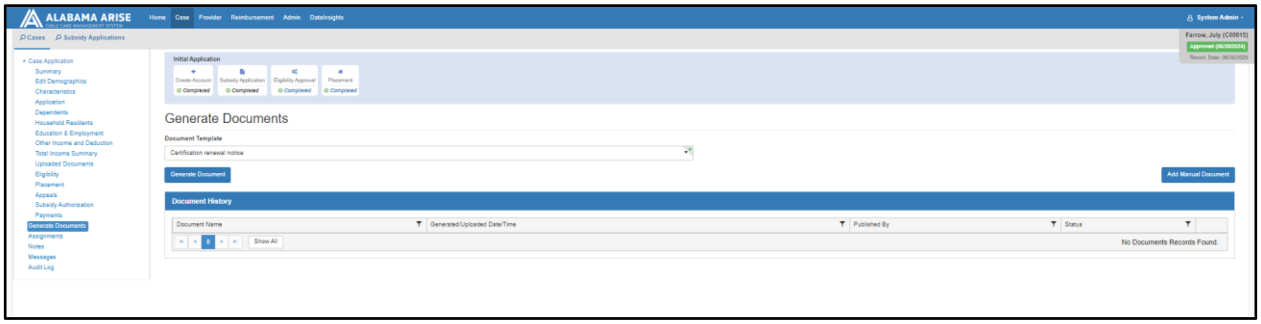

Figure 62: Generate Documents

Once the document has been generated, the file can also be downloaded on the computer system by clicking the name.

Additionally, users will be able to make any changes to the document and publish it to the family, as follows:

1. Click on the document name.
2. Make changes in the document by clicking the document and downloading it to the local system.
3. Add description.
4. Upload the updated document from the local drive.
5. Save
6. Publish

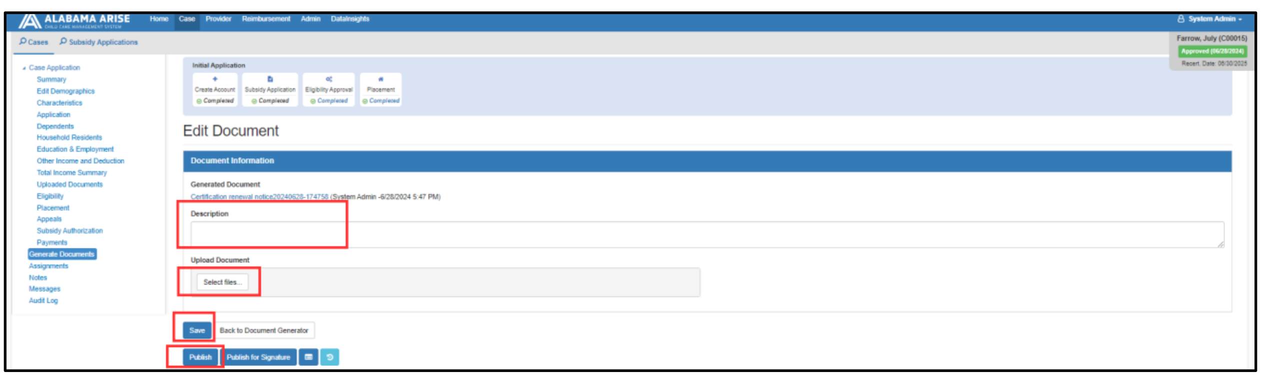

Figure 63: Edit ,upload and publish generated Document.

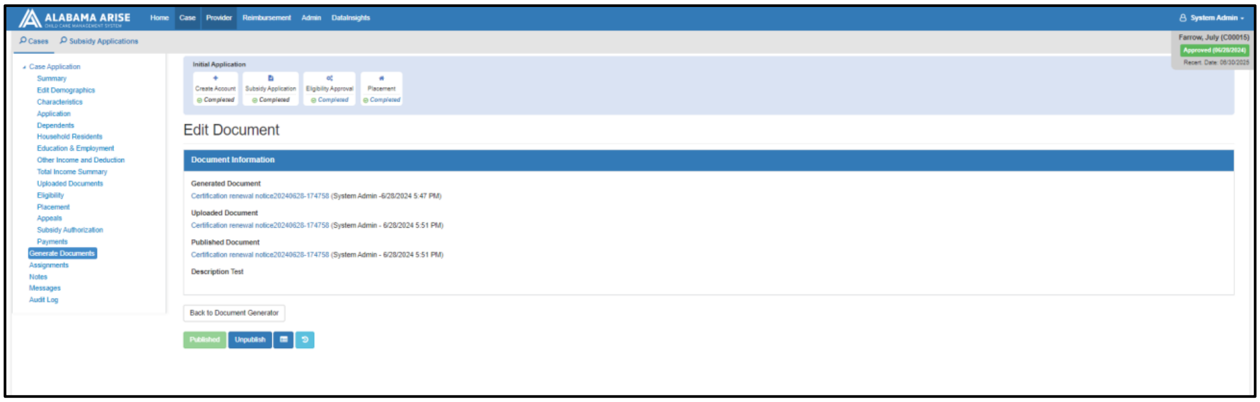

Figure 64: Published Document

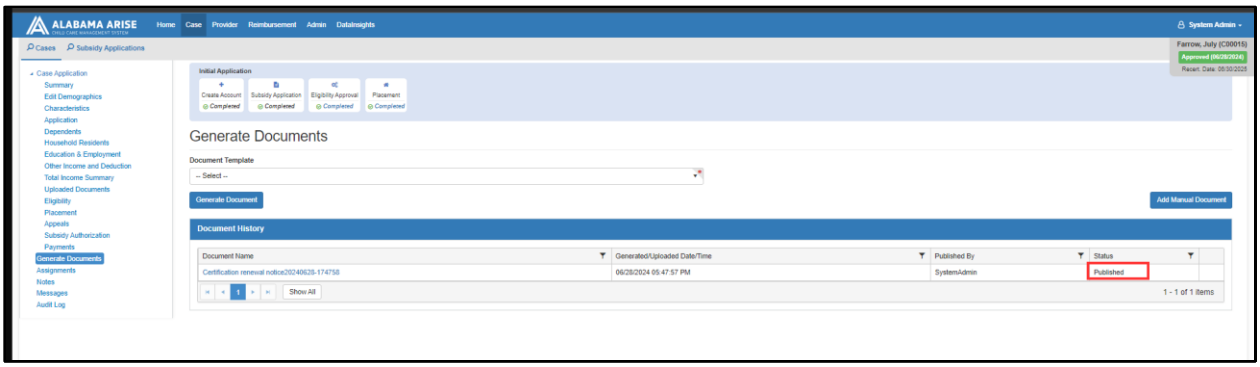

Figure 65: *Generated Document Record with Published Status*

ASSIGNMENTS

The assignments screen displays the following details:

1. Team: The team grid displays the Team Name, Users in the team, Name of the users, and Role assigned to individual team members
2. Case Assignments: The case assignment grid displays the user's roles in reviewing an assigned case.
3. Workflow Process Assignments: This section represents the assignments at different stage of the workflow instances.
4. Workflow Instances: This section displays the steps within each workflow, and their status.

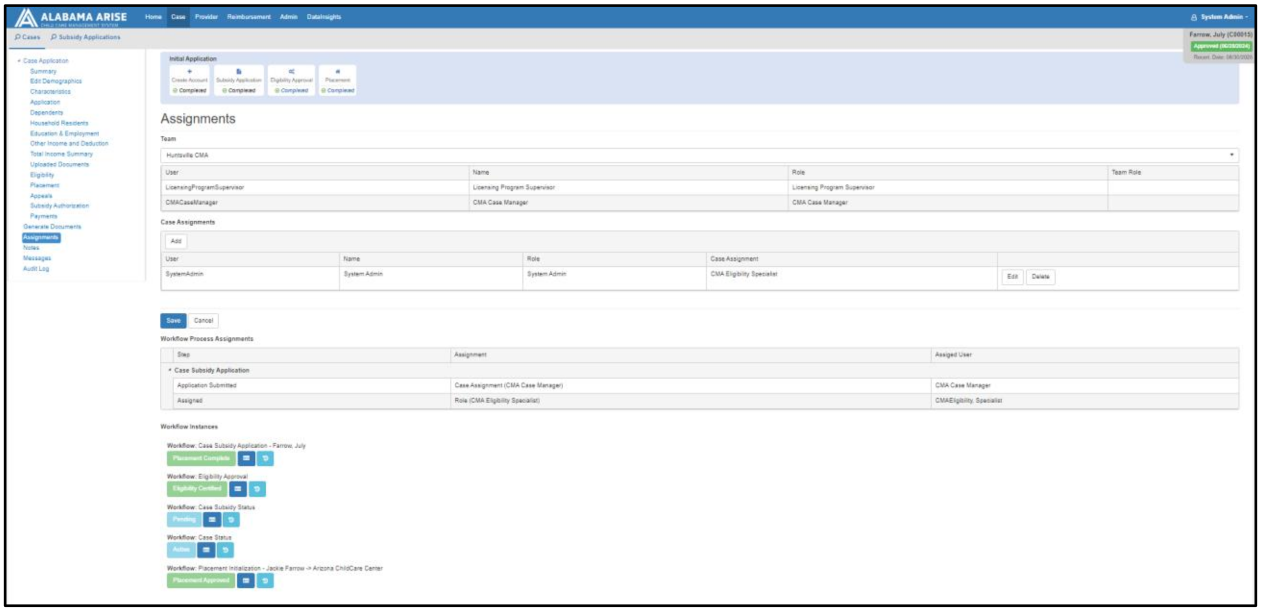

Figure 66: Assignments

NOTES

The user can add notes related to the case on the notes screen.

To enter the notes:

1. Click on 'Notes'
2. Click on 'Add new Note.'
3. Select the name of the note from the dropdown
4. Enter additional details about the note in the text box.
5. Click on update

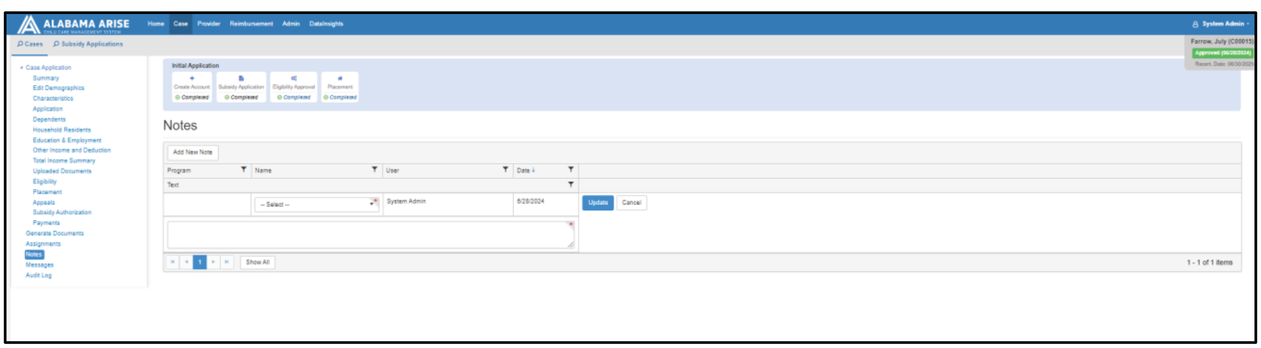

Figure 67: Notes

The updated note will be displayed below.

MESSAGES

The messages screen consists of two sub-tabs:

1. Internal Messages: The User can create manual tasks with the due date and assign them to internal users.
2. Family Messages: This tab displays the messages/requests from the family portal.

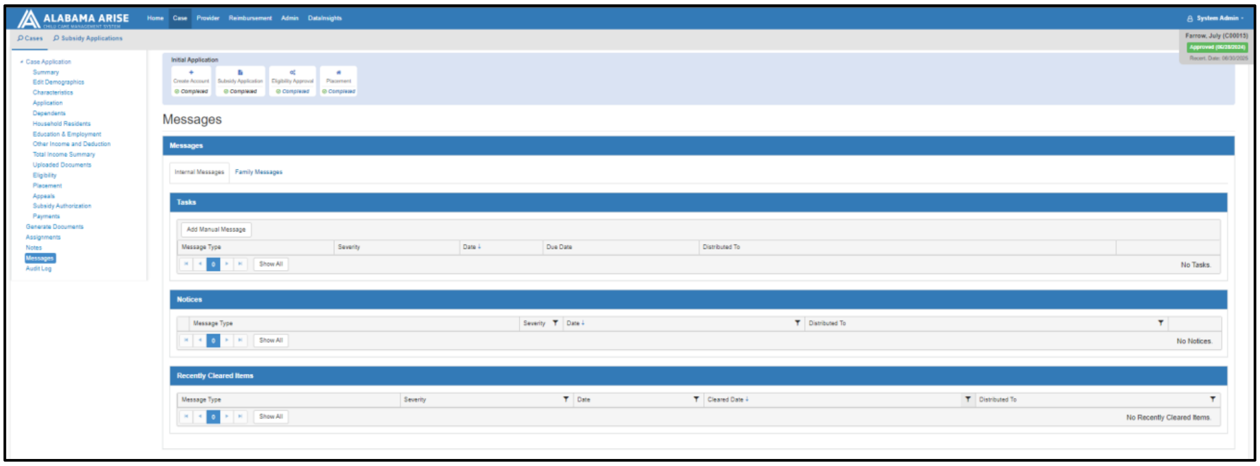

Figure 68: Messages

How to Create a Task?

To create an internal manual task:

1. Click on 'Messages'.
2. Click on the 'Internal Messages' Tab
3. Click on the 'Add Manual Message' button from the Tasks section
4. Set the 'Severity.'
5. Enter 'Due Date.'
6. Type the name of the team/user in the 'distributed to' box. It will show all the records based on the text the user typed.
7. Enter the details of the task details in the textbox below.
8. Click on 'Update.'

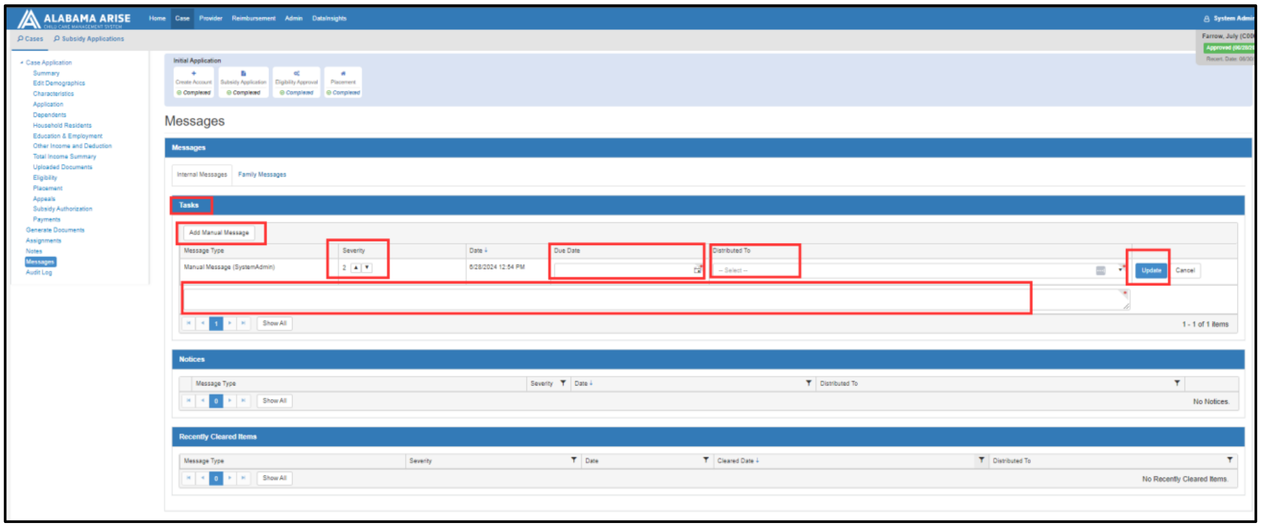

Figure 69: Adding a Manual Message

An updated task will appear below.

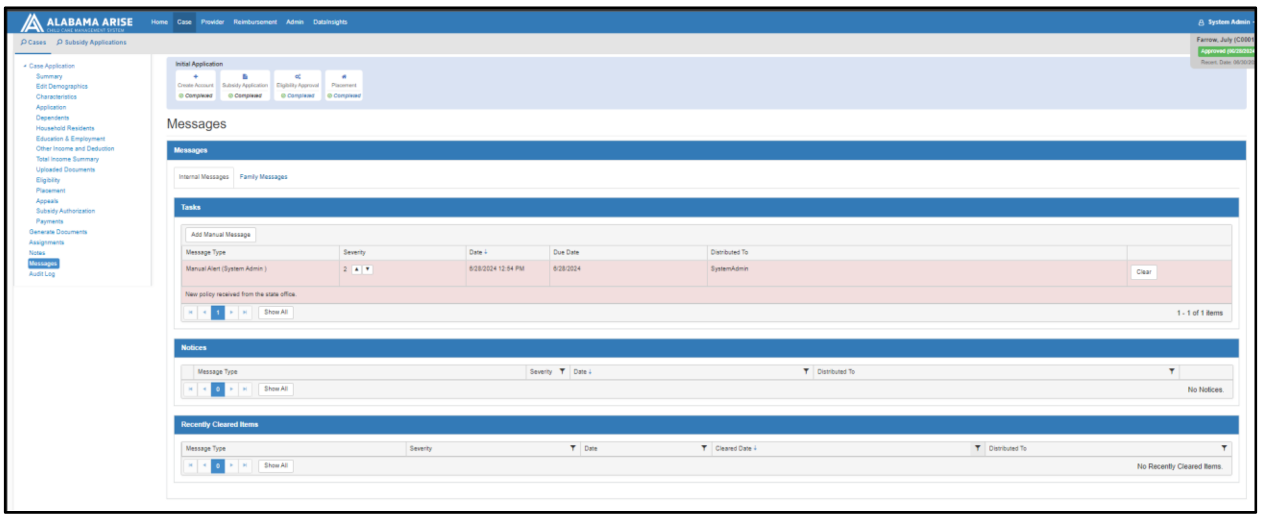

Figure 70: Updated Manual Message

How to Send a Family Message?

To send family broadcast messages:

1. Click on 'Messages'.
2. Click on the 'Family Message Tab to view the following screen.
3. Click on the 'Add Family Message' button from the tasks section to access the following form:
4. Set the 'Severity.'
5. Enter 'Due Date.'
6. Enter the details of the message details in the textbox.
7. Click on the 'Update' Button.

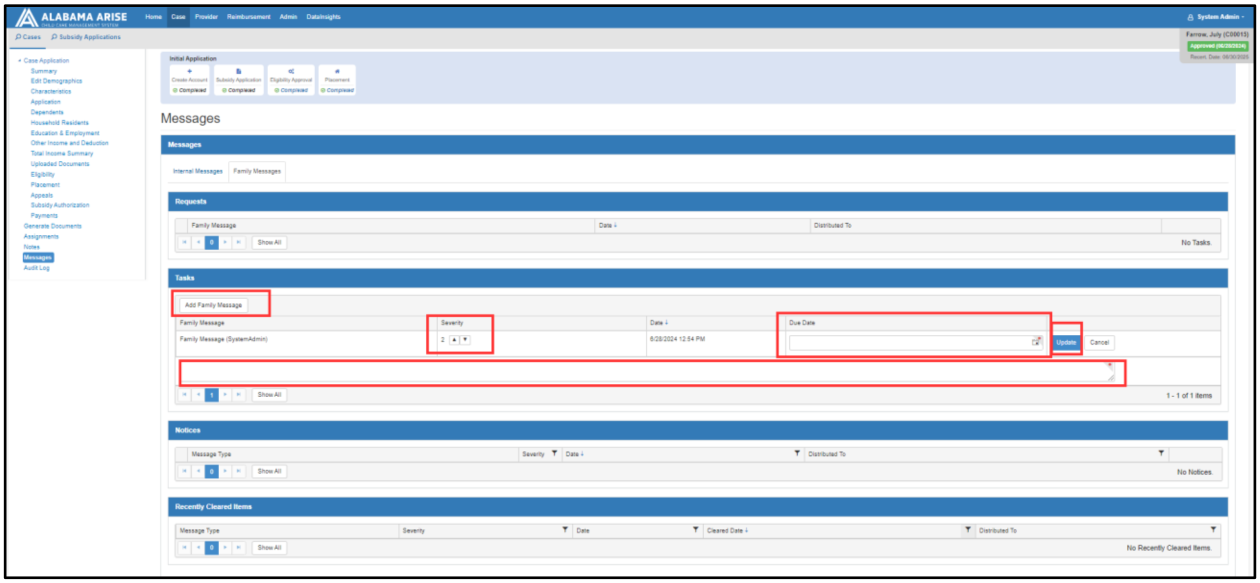

Figure 71: Family Messages

An updated message for the family will appear on the Tasks Grid.

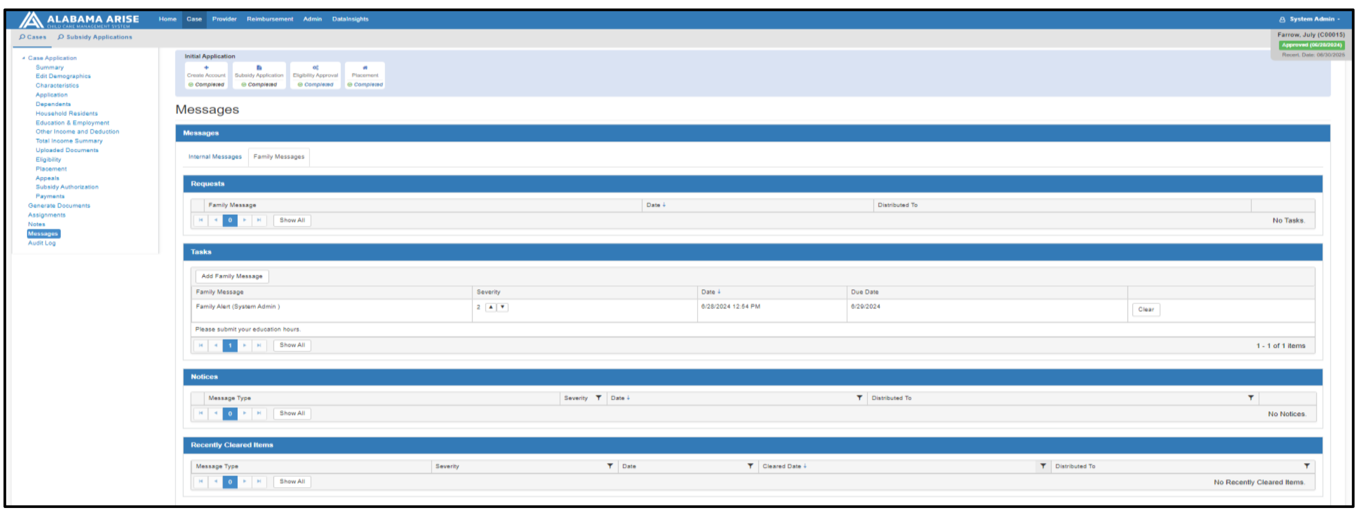

Figure 72: Updated Family Messages

AUDIT LOG

The level of information user can view in the audit trail includes 'Username', 'Log Date', 'Module', 'Page', and 'Message.' The audit log screen represents the user who logged into the system, the associated module the user accessed, and the actions performed on the different pages of the module.

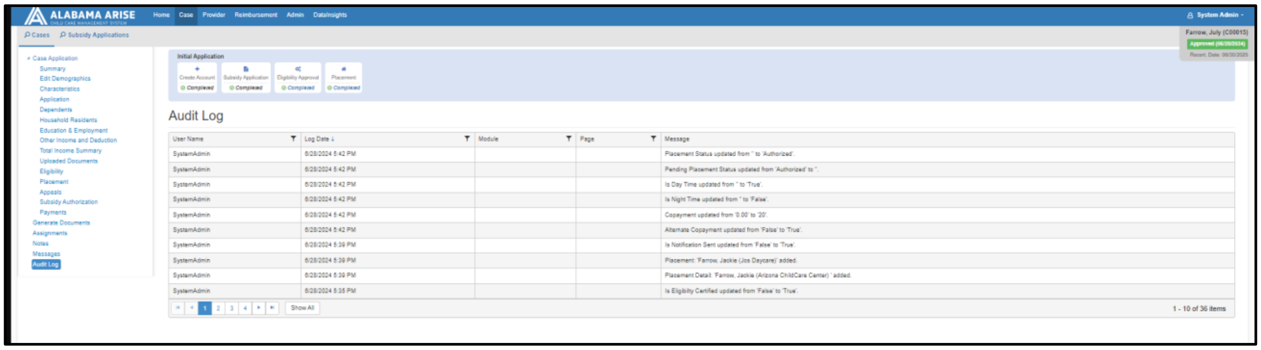

Figure 73: Audit Notes

Arise CMS

Reimbursement Module

03/08/2024

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ARISE REIMBURSEMENT MODULE

The ARISE CMS application provides users with a Reimbursement Module that allows for reimbursement of the services provided by childcare facilities for children enrolled under subsidy. This reimbursement is based on the rates provided by the facilities themselves, as well as the maximum reimbursement rate that is decided by the state.

Based on these two rates, the reimbursement amount is automatically calculated and generated by the system, for services provided for each child. Using the reimbursement module on the CMS Application, users can view, generate, and run the reimbursement process, to ensure that providers receive the payment due to them.

How to access the Reimbursement Module?

To access the Reimbursement Module:

1. Log into the CMS Application using the appropriate credentials.
2. Click on the Reimbursement Module at the top of the screen, as follows:

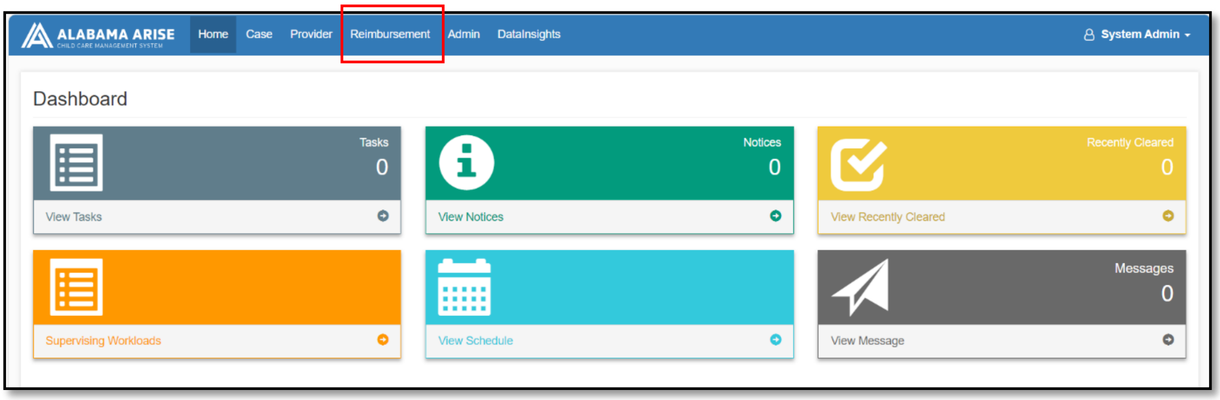

Figure 1: Reimbursement Module

Clicking on the Reimbursement Module will direct users to the following page:

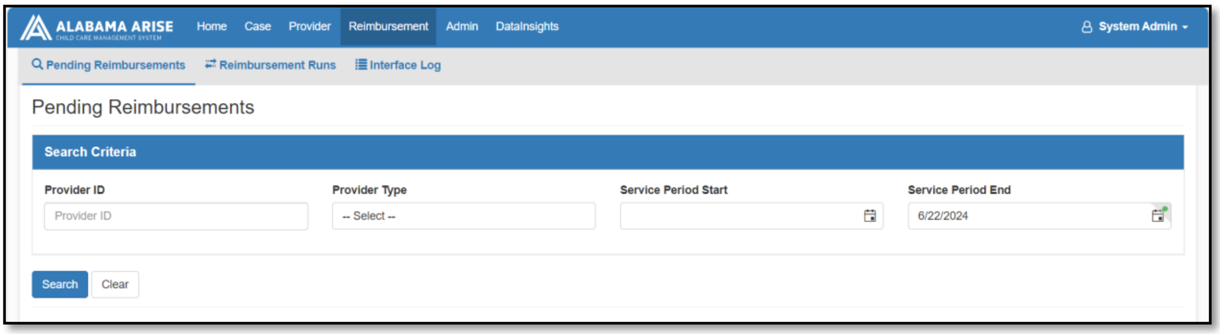

Figure 2: Reimbursement Module Landing Page

On this page, users will see two major sub-modules – 'Pending Reimbursements' and 'Reimbursements Run'. Here, pending reimbursements refers to all reimbursements that have been calculated and generated, on a weekly basis, but have not yet been initiated. That is, the payments have not yet been made. Alternatively, reimbursements run refers to those weekly reimbursements that have already been initiated.

How to initiate the Reimbursement Process?

To initiate the reimbursement process:

1. Click on the 'Pending Reimbursements' sub-module to be directed to the following page:

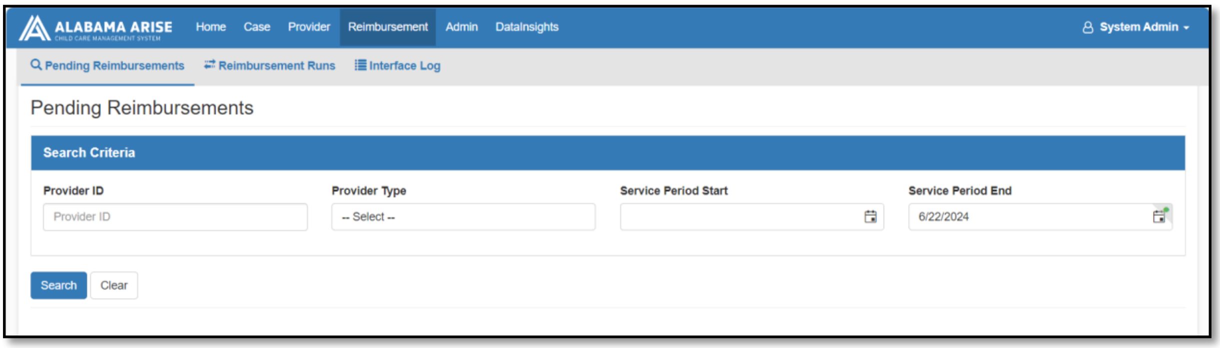

Figure 3: Pending Reimbursements Page

On this page, users can search for any pending reimbursements using the search criteria provided. For instance, pending reimbursements for a single provider may be found by conducting a search using the provider ID. Similarly, pending reimbursements for a specific time duration may be found by entering the start and end dates for the service periods in question.

Ideally, pending reimbursements will be identified and processed every week. Considering this, the standard process would be as follows:

1. Enter appropriate service period start date
2. Enter appropriate service period end date
3. Click on the 'search' button to view all pending reimbursements for the defined service period, as follows:

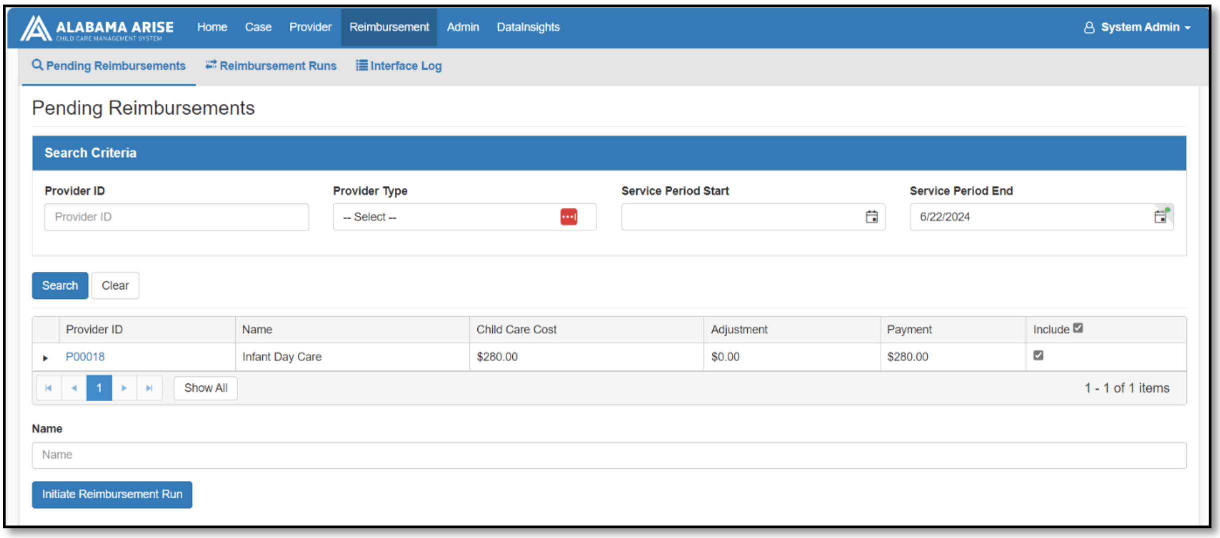

Figure 4: Pending Reimbursements Queue

To proceed:

1. Select the pending reimbursements to be processed by clicking on the 'include' checkbox at the extreme right of the grid (the entire list can be selected by clicking on the 'include' checkbox at the top of the column)
2. Notice that the 'Initiate Reimbursement Run' button has now been activated
3. Click on the 'Initiate Reimbursement Run' button

This action will initiate the reimbursement process and move all pending reimbursements to the 'Reimbursement Runs' sub-module.

Following this, users will be able to process these reimbursements on the 'Reimbursement Runs' sub-module page.

How to process Reimbursement Runs?

Once the Reimbursement Run has been initiated:

1. Click on the 'Reimbursement Runs' sub-module (refer to Figure 2), to be directed to the following page:

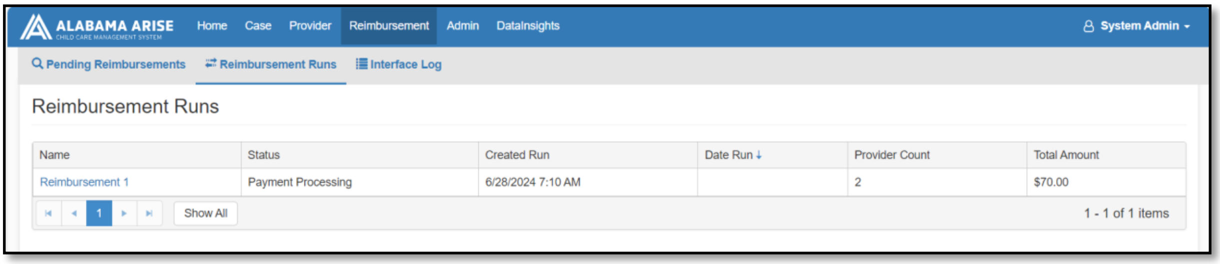

Figure 5: Reimbursement Runs Sub-Module

On this page, users will be able to see all reimbursements that have already been processed, as well as those that have been initiated but not yet completely processed. The status of each such reimbursement will be reflected in the status column on the reimbursement runs grid, as seen above.

To process a reimbursement:

1. Identify the run to be processed
2. Click on the appropriate name to be taken to the following page:

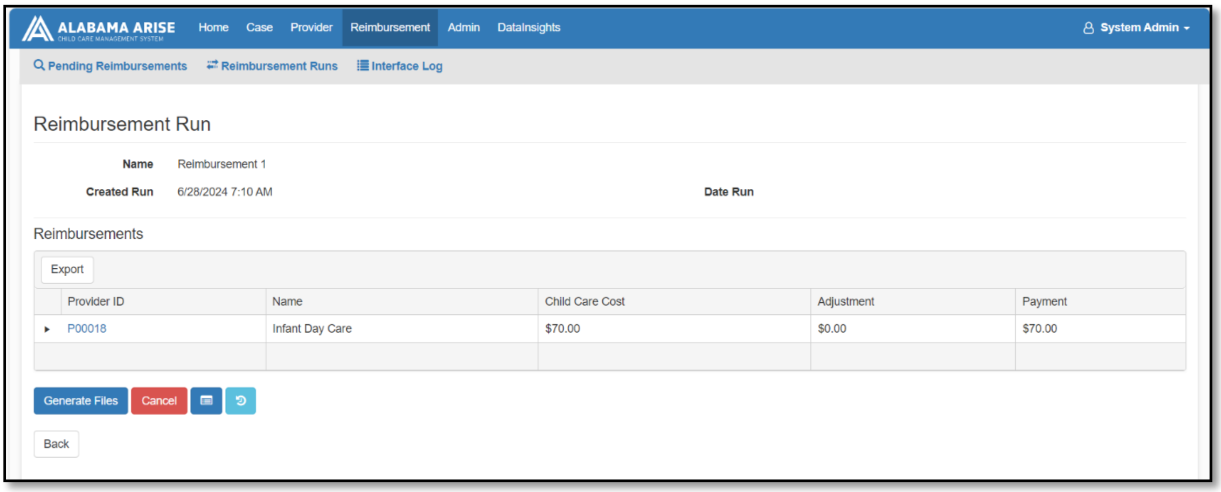

Figure 6: Reimbursements Run Details

On this page, users will see a detailed overview of the reimbursement in question, including details such as the name of the reimbursement run and the date that the run was created. Additionally, they will also be able to see the breakup of each payment to be made in the run, by clicking on the arrow next to individual provider IDs.

For example, clicking on the arrow next to a provider ID displays payment details as follows:

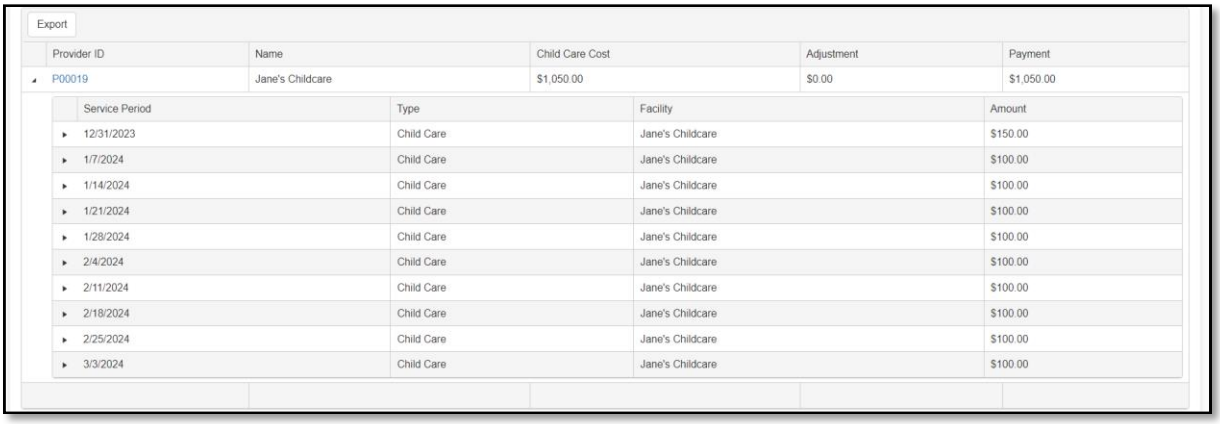

Figure 7: Reimbursements Breakup

To process the reimbursement:

1. Click on the 'Generate Files' button at the bottom of the page, as follows:

Figure 8: Generate Files Button

This action will generate payment files that reflect the payment made to the provider by the third-party payment entity.

The files will then be displayed on the same page as follows:

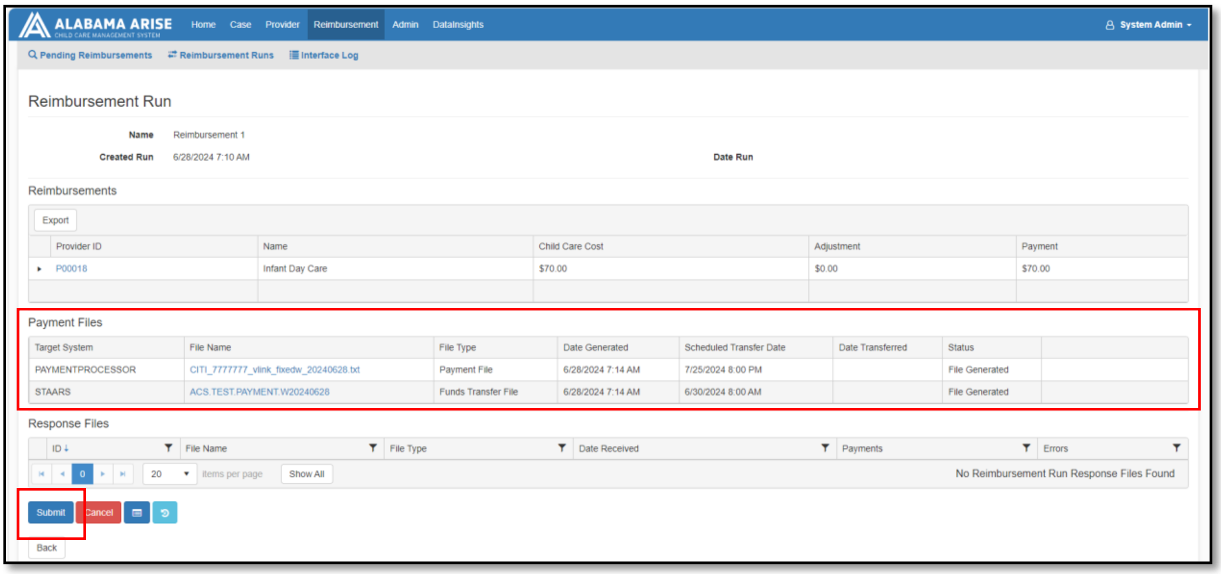

Figure 9: Payment Files

To proceed:

1. Click on the 'Submit' button that is now visible at the bottom of the page (Refer to Figure 9)

Once the files have been submitted, the payment will now reflect as processed.

How to view Processed Reimbursements?

Processed reimbursements may be viewed on the reimbursement runs grid, under the Reimbursement Runs sub-module, with the status "Payment Processed" (Refer to Figure 5).