

COMPASS



Basics

User Guide

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Center for
Information
Management, Inc.

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About COMPASS

COMPASS, the successor to MI Choice Information System (MICIS), supports the HCBS waiver and other local aging programs. COMPASS currently tracks the status of program participants, vendor bills, and Medicaid claims processing. The system provides both pre-programmed and ad-hoc reports, including a variety of outputs based on the MDS-HC and iHC algorithms (Quality Indicators, CAPS and Triggers, and RUG III HC reports).



Key Benefits

- ④ COMPASS provides **comprehensive** waiver management software, including assessments, service plans, and billing (future)
- ④ COMPASS provides **advanced clinical management tools**, including interRAI Quality Indicator, RUG III-HC, and CAPs and Trigger reports
- ④ COMPASS supports centralized information used by **multiple agencies**
- ④ COMPASS provides **statewide** views and functions for state managers
- ④ COMPASS includes over **50 standard reports**, most with multiple user selection criteria
- ④ COMPASS enforces **HIPAA-compliant** data transactions and storage
- ④ COMPASS processes HIPAA claims transactions, including **claims inquiry and claims submission** and remittance files
- ④ COMPASS GO can **support portable information collection** and limited access on laptops offline.

Technical Details

COMPASS is a robust web-based application hosted by CIM on its Oracle database server. COMPASS can be accessed by authenticated users from any internet connection; no software must be installed locally.

COMPASS includes automated tools to process the following data components:

- ④ Status information – historical program status of each enrolled person is tracked, including their care setting. Assigned supports coordinator/case manager will be added as a status in a subsequent release.
- ④ Waiting List – Collects data for people who are waiting to enroll in a program and insures consumers are being chosen in the correct order based on priority and length of time on the list.
- ④ NFT Portal - communicates between Waiver Agents/ Centers for Independent Living (CILs) and MDHHS regarding people who are planning to transition from nursing facilities, or people who can be diverted from entry to a nursing facility.
- ④ Participant data - the system tracks initial assessments, ongoing reassessments, and documents progress notes.
- ④ HIPAA Claims/Encounters – automated claims inquiry and response file processing (270 and 271 files) and claims/encounters submission and remittance file processing (HIPAA 835 and 837P files)
- ④ Person-Centered Service Plan – results from person-centered planning process that describe consumer’s interests and needs, providing shared documentation of interventions and goals.
- ④ Service Plans (future) - structured plans for delivery of services, including multiple services, flexible service schedules, easy-to-read calendar reporting.



Contacting CIM Help Desk

Email and telephone support is available for COMPASS users from 8:00 a.m. to 5:00 p.m. Eastern Standard Time (EST) Monday through Friday excluding holidays.

Email: CIMhelpdesk@ciminc.com

Telephone: 734-930-0855

Fax: 734-995-7277

Getting Started



- ⌚ *Minimum System Requirements*
- ⌚ *Accessing COMPASS*
- ⌚ *Login to COMPASS*
- ⌚ *Logout of COMPASS*

Getting Started

In just a few minutes, you will learn about connecting to the COMPASS database server to get started using COMPASS.

Minimum System Requirements

An internet connection is required. A high-speed connection is preferred, such as cable or DSL, but not necessary.

Only Microsoft Edge, Internet Explorer 11 (or later), Mozilla Firefox (current), and Google Chrome browsers are supported; note that Mozilla Firefox is recommended. Other browsers may work with COMPASS but are not tested for verification. Browser settings need to accept cookies and JavaScript enabled. Compass is best viewed at full HD (1920x1080).

COMPASS GO

Compass GO is the offline version of the COMPASS case management system that is run online. Unlike COMPASS itself, Compass GO can be run without connection to the internet.

Office-based workers simply connect to the COMPASS application and have no need for COMPASS GO. Mobile workers need to install the COMPASS GO application on their Windows laptop computers, download cases from the server, and perform their work at an out-of-office location, synchronizing with the server on daily basis if possible.

Compass GO will be installed on laptop computers and will be used primarily for assessing participants in their residences. The participants are entered into COMPASS, and downloaded to Supports Coordinator laptops using a synchronization process. Then SCs can then conduct assessments, enter progress notes, and run reports from the offline software. Once back in the office or at any location with an internet connection, they will sync Compass GO, and changes from their laptop will be uploaded to COMPASS as well as changes from COMPASS will be downloaded to the laptops for the participants they have selected.

COMPASS GO Equipment Recommendations

Given the demands of the COMPASS-Go technology, we provide the following guidelines to ensure the laptops and tablets can effectively run the COMPASS-Go software. MSB customers are encouraged to closely review the following supported technologies and associated recommendations. These should be compared with the profile of prospective hardware. If there are any discrepancies or possible concerns, please consult with CIM to discuss possible issues with running COMPASS-Go.

Component	Supported	Recommended
Operating system	Windows 7 Windows 8 Windows 10 Note: COMPASS-Go will NOT install on non-Windows systems, such as Apple iOS (iPad) or Google's Android (smartphone, etc.)	
Browsers	Internet Explorer 11 Microsoft Edge (current) Firefox (current) Chrome (current) Note: browser settings (all versions) 1. Cookies accepted 2. JavaScript enabled	Firefox (current)
Processor	Any modern, laptop-class processor. Note: Compass-Go will NOT run adequately on "Netbook" class processors (e.g., Intel® "Atom" processors)	Intel® "Core i5" (or better)

Additional Equipment Issues

1. **Secure access control** is required, enforced by robust password-based user authentication – provided and administered by customer
2. **Hard disk encryption** is required to secure protected health information (PHI) in accordance with HIPAA security standards – provided and administered by customer. NOTE: CIM recommends that customers encrypt the ENTIRE laptop hard drive.

Accessing COMPASS

All users must have individual usernames and passwords to access COMPASS. These usernames are universal in all MICIS Service Bureau products. For instance, users with ID's for MICIS or Clear Access will have the same username in COMPASS. Non-MSB users and CILs will have specific NFT Portal rights assigned by CIM. Regular MICIS Service Bureau users will need to assign appropriate roles/privileges in order for their users to access the NFT Portal. To add or manage users, see [Managing Users](#) section.

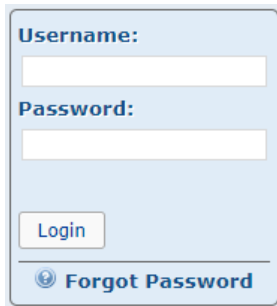
COMPASS has three types of users, agent, state, and CIM. Please note that the word "agent" is used to describe either a Waiver Agent or a CIL, as an agent that has contracted with MDHHS for services. State users have limited view access except within the NFT Portal where they can enter or change state specific data fields. Agent users can only access one agency's data whereas state and CIM users can access all agencies. Therefore, state and CIM users will be prompted to select an agent prior to accessing COMPASS.

Login to COMPASS

Each user will need to login to access COMPASS data.

1. Open an Internet browser window and navigate to the COMPASS web address

The COMPASS login page will appear:



2. Enter your **Username** and **Password** to log in
3. Press **Enter** or click the **Login** button

For **agent** users, depending on a user's permissions, this will take you to the COMPASS Case File Selector where you can begin accessing participant information or to the Compass NeXt Dashboard which displays to-do items and several informational widgets.

For **state** users, this will take you to the initial state COMPASS search screen, from which you can select an agent or the statewide NFT List by selecting the Search link and then the NFT List.

System Message

Users may see an important system message in COMPASS from time to time. This message usually provides information about new software releases or planned system maintenance periods. System messages will be shown at the top of the module throughout the system and will persist until CIM removes the message.

Logout of COMPASS

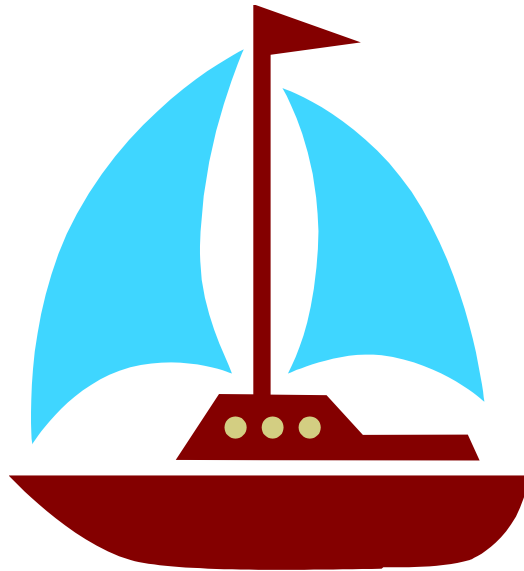
Logout of COMPASS when you are finished using the application or when it will be idle for an extended period of time. This will ensure HIPAA guidelines are followed to protect participant data and prevent unauthorized access.

1. Click the **Logout** link in the top right of your COMPASS page
2. You will be returned to the Login page which will indicate you logged out successfully

Closing all browser windows will also log you out of COMPASS.

If your browser window is open and inactive for over 90 minutes, COMPASS will automatically end your session.

Learning the Basics



- ⌚ *Browser Window*
- ⌚ *Browser Back Button*
- ⌚ *Navigation Bar*
- ⌚ *Field Color*
- ⌚ *Page Navigation*
- ⌚ *Connection Status Icon*
- ⌚ *Clearing your Browser's Cache*

Learning the Basics

COMPASS is easy to use but it is even easier when you understand the basics and learn a few shortcuts. Take a few minutes to read this overview before you start using COMPASS.

Browser Versions and Browser Window

COMPASS operations are supported in either Mozilla Firefox or Google Chrome (preferred) or Internet Explorer 11 or later or Microsoft Edge. If your computer has an earlier browser, you can download either browser by going to www.firefox.com, www.google.com/chrome or www.microsoft.com. COMPASS works best when the browser window is maximized to use the entire computer screen. The maximize/minimize buttons are located in the middle of three icons in the top right of your browser.

The green circled icon is what you should see in your browser window:



Excellent! Your screen is maximized.



This indicates you need to click the **square box** icon to maximize the screen.

Browser Back Button

While using COMPASS, users should not use the browser's back button. This may cause errors and incorrect processing. Note that the back button will not undo any changes to a record you have made.

Navigation Bar

COMPASS provides navigation to other MICIS Service Bureau (MSB) web applications, contact information, and help. The navigation bar is located at the top right of the COMPASS web pages. Note that some navigation items will not be displayed based on the user's permissions and roles to access the component.

Search menu displays options to Agent, Case Files, Statewide, MIG List, Waiting List, NFT, MI Capable, or Case Review Selector. Note that State users can only access many of the search menus after an agent has been selected.

Quick Links menu has three aspects: Recent, Bookmarks and Status. Recent list shows case files recently accessed by user, Bookmarks allow users to mark a section/location in the system for easy return and Status is displayed when located in a Case File and is used to navigate to the participant's Status records.

Claims menu displays options for Claims Processing or Encounters Processing.

Reports menu displays Compass Reports Portal, Wait List and Capitation Reports as well as a selector report which are found on the following selectors: Case Files, NFT, Waiting List, MIG, Statewide Search, MI Capable, and Case Review Selector. This report will display the search results. Reports also are available within certain components as context-sensitive reports. Users in the Assessment will show a variety of assessment related reports from this menu.

Tools menu links to Agent Specific Data (Agent Information, Agent Providers and Referral Agencies), Manage Users, Secure File Exchange, Clearinghouse, Synchronizer Conflicts, COMPASS Assistant, Eligibility Requests and Mass SC Assignment.

Links menu displays a link to the Vendor View website used for online entry.

Help menu displays links to this documentation (COMPASS User Guide) which is continuously updated, Training Videos, interRAI iHC assessment and CAPS manuals, iHC FAQ's, Release Notes, as well as to CIM's Contact information.

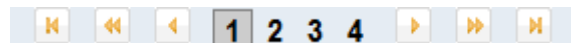
Logout ends your session to prevent unauthorized access to COMPASS.







Field Color

Data fields appear in two colors: gray or white. Fields with a gray background are display-only, and cannot be edited. When you click the **Edit** button, the fields with a white background can be changed. Note that some fields may remain "grayed out" (not editable) even when you click the **Edit** button.

Page Navigation

When there are multiple pages that do not fit on the screen, COMPASS provides page navigation on the bottom of the page. Page numbers are in the middle, while the buttons are described below:







-  First Page: Moves to Page 1
-  Fast Rewind: Moves back 3 pages at time
-  Previous: Moves back 1 page
-  Next: Moves forward 1 page
-  Fast Forward: Moves forward 3 pages at a time
-  Last Page: Moves to last page

Edited Fields

In COMPASS, a field that has been changed appears with a blue vertical bar to the left of the response(s). In order to be changed, the user must change a letter or selection. To mark that the question was asked even though it has not changed, click on a different response and click back on the original response.

Connection Status Icon


COMPASS shows the current connection status using an animated icon at the top of the page. When data is being received or submitted, the connection status icon changes to be one of these four states:


-  Idle – This indicates that COMPASS is currently idle and is not exchanging data with the server.
-  Active – This indicates that data is being received or submitted to the server.
-  Caution – This indicates that the connection is experiencing extended latency. This could be caused by slower internet connections or intermittent internet connection problems.
-  Disconnected – This indicates the connection has been disconnected. This could be caused if the user's session expires, no internet connection, or the application is down for updates or maintenance.


Clearing your Browser's Cache


With new software releases, there could be errors or display issues due to the pages being cached in your browser. If odd behavior that is unexpected is occurring, try clearing your cache first before contacting the Helpdesk.

Here are the current instructions for various browsers; over time, the browser options change and this may no longer be current. Search the internet for “clear cache <browser name; if Internet Explorer 11, include version>” which you can find instructions and videos.

Firefox - click the  in the top right corner, choose Options, then Privacy & Security on the left panel and under Cookie and Site Data click Clear Data. Both boxes will be checked by default. Click Clear and then Clear Now in the pop-up.

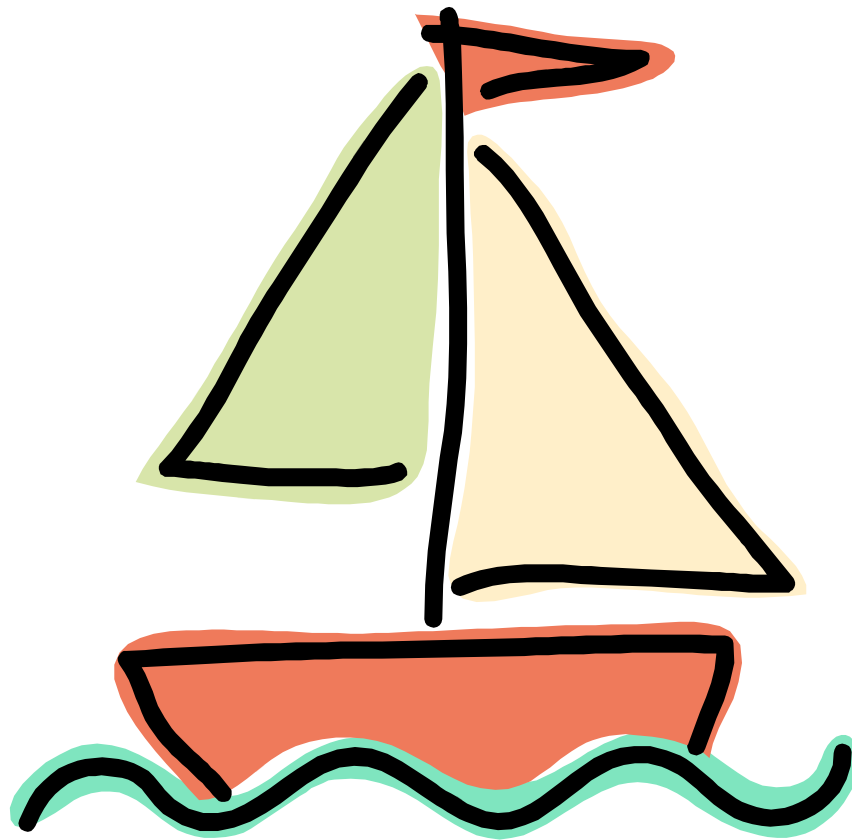
Chrome - click the  in the top right corner, choose Settings, then click Advanced at the bottom. Go to the Privacy and Security section and click Clear browsing data. Make sure All Time is selected in top drop down and only check Cached Data and Files. Click the Clear Data button.

Edge - click the  in the top right corner, choose Settings and then select Privacy & Security (the lock icon). Under Browsing Data click Choose What to Clear. Make sure Cached Data and Files is checked and click the Clear button.

Internet Explorer - Click the  button in the top right corner, choose Safety>Delete browsing history. Check the Temporary Internet Files and Website Files box only and click Delete button.

Once the cache is cleared, the user should close and reopen the browser.

Statewide Search, New Person or Episode



[⌵ Statewide Search](#)

[⌵ Statewide Search Selector Report](#)

[⌵ Detail](#)

[⌵ New Person](#)

[⌵ New Episode for Existing Person](#)

Statewide Search, New Person or New Episode

An important component to COMPASS is the ability to identify a person uniquely, using a system-assigned identifier, regardless of where s/he is served. This ability supports the need to be able to accurately identify the number of people being served, the number transitioned from nursing homes, the number on waiting lists, etc. In addition, using the statewide search when adding a new person should minimize the problem of duplication of services by more than one agency or CIL.

When adding a person to COMPASS, that person can either have a record at the agency, have a record at another agency but not this one, or never have had a record. In addition, the person might be waiting at one or more agencies for an opening, or might be in the process of getting ready to move from a nursing facility. It is important that every person added to the system go through a review to determine current or past service or waiting episodes: this is the function of Statewide Search.

Statewide Search can be accessed either by clicking the “Statewide Search” button from the Case File Selector or by using the top right navigation bar “Search” menu then “Statewide”.

The screenshot shows a search interface with the following elements:

- Search Criteria:**
 - Last Name*: duck
 - First Name starts with*: d
 - Medicaid ID: (empty)
 - Date of Birth (mm/dd/yyyy): (empty)
 - Buttons: Reset, Search
- Sorting:**
 - Sort First: Match Count (dropdown), Desc (dropdown)
 - Sort Second: Name (dropdown), Asc (dropdown)
 - Sort (button)
- Results Table:**

Name	Date of Birth	Medicaid ID	City	Match Count
DUCK, DAFFY				0
DUCK, DAISY				0
DUCK, DONALD	2/2/1930		GRAND RAPIDS	0
- Actions:** Detail, New Person (buttons)

The top of the screen is used to enter search criteria. The FULL last name and first initial are required to conduct the search. Note that a name suffix like Jr. or using apostrophes for names like O’Malley will not limit search results to those matching exactly; the system will perform the search without those criteria to find all likely matches. Medicaid ID and Date of Birth are optional search fields, but if known, entering either of these values will assist in the search process. Always use Medicaid ID in search criteria if known.

Search Process

The system uses the name/date of birth information or the Medicaid ID to find a match. For instance, if the user inputs the last name of O'Malley and Medicaid ID 1234567890 and there isn't a match based on the last name of O'Malley, but there is a match on the Medicaid ID, the search results will display the match for Medicaid ID 1234567890. This helps reduce chances of no results when name spellings differ in the person's records. Also, the system ignores suffixes (such as JR, III, DR, etc.), apostrophes, and hyphens in the search process. So searching for O'Malley will find results of O'MALLEY or O'MALLEY.

Click the Search button on the right of the selector box or press the Enter key to display potential matches.

Search Results

The above screen appears with potential matches to the search criteria. Each person in the system is displayed with identifying information of the name, date of birth, Medicaid ID, and city.

Match Count

The last column of the display is Match Count, which indicates the number of matches that the record has with the search criteria for Medicaid ID, and Date of Birth if specified. The system displays the episodes with the highest match count on top, and then in descending order of match counts. The hope is that the highest number of matches is the person.

Statewide Search Selector Report


The Statewide Search Selector Report is a default report found on all other selectors as well (e.g. Case File, NFT, Waiting List). This report is available from the Reports menu to show the results of your search in the format requested. Report formats available are PDF, Excel (XLS), CSV, and HTML. Clicking on the report name will open the report in the default PDF format.

Statewide Search Detail

The Detail screen will present more information about the person including demographic details in Participant box, Waiting List information in Waitlist Details box, and Episode information in Episode Details box. This screen is used to determine if the person you have selected is the person you want to work with to add waiting, NFT or episode information.

Participant Detail: MOUSE, MICKEY

MOUSE, MICKEY



SSN: 750-00-8987
 Gender: Female
 Marital Status: Separated
 Date of Birth: 05/29/1935
 Medicaid ID:
 County: SAGINAW

Waitlist Details

Waiting For Programs
Not waiting for any programs

Processing Programs

Program	Priority	Entering Agent	Start Date	Processing Began	Processing Agent
Waiver	2	27	6/28/2014	6/28/2014	27

Removed Programs
No Removed programs

NFT Details

Details

Agent	Agent Phone	Interview Date	Transition Stage
27	989-249-0004	06/28/2014	Notice not yet sent

MIG Details

Details

Agent	MIG Date	Eligibility Level	Intake Disposition
27	6/28/2014	B - Indicator of Homemaking services	Yes, will be put on waiting list


Episode Details

Details

Agent	Agent Phone	Intake Date	Status	Program
27	989-249-0004	11/11/2012	Closed - 06/22/2015	LCM 3

Left Panel

MOUSE, MICKEY




SSN: 750-00-8987
 Gender: Male
 Marital Status: Separated
 Date of Birth: 05/29/1921
 Medicaid ID: 0065349876
 County: SAGINAW
 SSP Info: Non-NFT SSP 06/01/2014

This person is not a participant in your agency. Click here to add them.

Participant Panel: The left panel shows the information regarding the person. This panel indicates if the person has been involved with your agency in the past as well. If the panel looks like the one above, your agency has either had a waiting list or episode for the person in the past. If the panel has the additional panel as shown below, then the person is in the system, but has not been involved with your agency in the past. If this is the correct person, then click in that red box to enable them for your agency. See below for more details on determining if the person is the correct one.


SSP: SSP shows on the participant panel when the person was previously SSP (significant support participant). This applies to all MI-Choice Waiver agencies since once an SSP, always an SSP. The type of SSP is listed (NFT, Old_SMOU, Old_Diversion, or Non-NFT SSP). The start date is listed next to the type. If SSP is indicated, make sure when enrolling the person in CHAMPS, the SSP indicator is marked and that the program status reflects as SSP either by "Transition" for NFT SSP or "SMOU" for all other type for any Waiver periods on or after the SSP start date.

Right Panel

Waitlist Details 					
Waiting For Programs					
Not waiting for any programs					
Processing Programs					
Program	Priority	Entering Agent	Start Date	Processing Began	Processing Agent
Waiver	2	27	6/28/2014	6/28/2014	27
Removed Programs					
No Removed programs					

NFT Details			
Details			
Agent	Agent Phone	Interview Date	Transition Stage
27	989-249-0004	06/28/2014	Notice not yet sent

MIG Details			
Details			
Agent	MIG Date	Eligibility Level	Intake Disposition
27	6/28/2014	B - Indicator of Homemaking services	Yes, will be put on waiting list

Episode Details 				
Details				
Agent	Agent Phone	Intake Date	Status	Program
27	989-249-0004	11/11/2012	Closed - 06/22/2015	LCM 3

Waiting for Programs: All open waiting list entries will be displayed here, including each program person is waiting for.

Processing Programs: If an agent has begun work with person to move them out of nursing home, the program information will be here; NOTE that these people are still waiting, but have begun steps to be admitted to a program.

Removed Programs: If a person has been on a waiting list but has been removed, the details will be displayed here

NFT Details: All NFT Portal records for the person will display in this section. This will help easily identify if the person has been working with another agency.

MIG Details: Any MI-Choice Intake Guideline (MIG) screens that were added are included here to show anyone that may be in progress by another agency. Note that many MIGs have been added and never completed, only if the record has an Eligibility Level or Intake Disposition would be an indicator that the participant may be in progress.


Episode Details: Displays *most recent episode information from each agency* that has served the person

Details Navigation Buttons

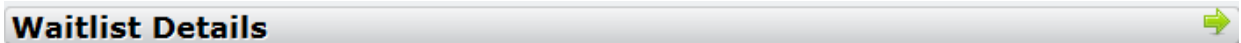
The Details screen has the following Statewide Search navigation buttons in various locations:


Participant Level Records



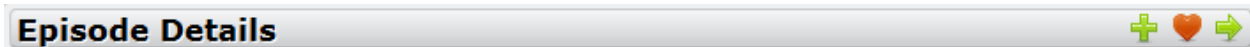
 takes user to Participant record

Wait List Records





 goes to person's Wait List records for your agency


Episode and Participant Level Records



If user highlights the episode for their agency, these shortcut buttons appear:

 adds a new Episode for a person (if user has add/change rights only)

 to access status records (if user has rights to status)

 to move to selected episode (only if you have selected your agency episode)



IMPORTANT NOTE!


Linking to the participant record from the Participant name arrow takes to you the top part of the participant navigation tree. This should be used for viewing Participant, Address, Referral, MIG, Waiting List, Contact, and NFT records. There are no navigation arrows for NFT or MIG detail sections. Use Participant navigation arrow in top left panel. The Participant name arrow does open all episodes for your agency as well.

State User note: State and CIM users also have the ability to change which agency they want to access from the Statewide Search Detail screen. At the top is a Select Agent drop down. If the agent is changed to one that had this person before, then the state/CIM user can access the records from here. State/CIM

users can also access all episodes for all agencies no matter which agency was selected. Certain functionality, however, is based on the agency selected at the top left of the screen.

Statewide Search Actions

Below are actions users will take depending on whether the person is found, and the reason for the Statewide Search:

- 1.) Review information for the person, but determine this is not the correct person. Note that the SSN may be a dummy SSN (750-) or could be incorrect if the other agency had an incorrect SSN. Evaluate the name, date of birth, Medicaid ID, and/or county to identify if this is the right person. If not correct person, return to Statewide Search screen and conduct a less restrictive search. If the person is the same, but a data item is incorrect, such as the spelling, SSN, etc., still continue to work with that person and do not choose New Person since that will create a duplicate person in the system.
- 2.) If this is the correct person, but the person was already added to your agency (either waiting list or episode). Move to episode or waiting list using Details navigation and continue your work.
- 3.) If this is the correct person, but the SSN doesn't match, then:
 - a. If the existing SSN is a dummy SSN (750-), then continue as instructed below. You will be prompted when adding the new episode to be able to change the SSN to the real one or can change the SSN in the Participant record if adding a waiting list.
 - b. If the existing SSN is not a dummy SSN and does not match your records:
 - i. Check both SSN's to make sure which is correct. One method to validate an SSN is to check their Medicare ID. If the person's Medicare ID ends in A, HA, J1, M, or T, then the SSN in the Medicare ID is that person's SSN. Otherwise it may be the spouse or child's SSN.
 - ii. If the SSN in the system is correct, continue adding your records.
 - iii. If the SSN in the system is not correct, then contact either the other agency involved or CIM to have it corrected first. Then once corrected, continue adding your records. If you do not make the correction now, another participant record is added by using New Person that will cause duplicate participants in the system which is difficult to merge later.
 - c. If would like to add a waiting list and the existing SSN is not a dummy SSN and you would like to use a dummy SSN , note that you cannot. Since the waiting list is at the person level of the system, only one SSN is allowed. You will need to use the real one that exists in the system already.
- 4.) If this is the correct person, and they only need to be added to your agency's waiting list, not an episode, use the green arrow  located next to either the person's name in the box on the

left panel or located on the right of the Waitlist Details to access the person's record to add a new Waiting List record. See the Waiting List chapter for more information.

- 5.) If this is the correct person and they will be receiving services from your agency (as a NFT participant or other services), add a new episode (**which can include placing the person on the waiting list**). **Note that all Waiver enrollees must be placed on the waiting list for at least one day.** If the person found will be assessed or interviewed as a NFT participant (either with or without a Waiting List entry), The information on this page will let the user know if this is the person they are searching for. There are three possible outcomes from a Statewide Search:
 - a. The correct person is found and they have had an episode in your agency.
 - b. The correct person is found and they have not had an episode in your agency .
 - c. The correct person is not found.

If the person is not on the list, agents can try a different, less restrictive search. Limit the first name to just the first letter of their name to make sure not misspelled (either then or now), try switching the first and last names (many times in the past, the name was reversed), or try entering the Medicaid ID if you didn't the first time. These steps will ensure you have done due diligence in identifying the person is in the list or not. Once it is determined that the person is not in the statewide system, the user clicks the New Person button on the bottom of the search results list. See [New Person](#) section later in this chapter for more information.

Episode versus Waiting List

An episode is created for a person that will receive services with an agency. Creating an episode allows the agency to track status information, enter assessments, and conduct all necessary business on behalf of the person. This must be done when the agent will begin services to the person.

Waiting list does not require that an episode be created, because the person usually is not receiving services from the agency. Waiting list is just that – a list of people waiting for services. If the person never ends up receiving services from the agency, it is not necessary to create an episode. The user will simply add a waiting person.

The navigation tree for a person with an episode looks like this, with an Episode icon:

+ Add Refresh Delete Missing Relevant History

STRAWBERRY A SHORTCAKE

Address
 MI Choice Intake
 Wait List
 Referral
 Contact
 NF Transition/Diversion
 NFT Notes
 Episode
 Intake
 Screen
 Assessment
 Progress Notes
 PCSP Reviews

Person's Name
 Last Name: SHORTCAKE
 First Name: STRAWBERRY
 Middle Initial: A
 Title: Ms.
 How do you prefer to be addressed?: Berry

Date of Birth
 05/01/1950

Gender
 No Selection
 Male
 Female

Note that if the person is simply waiting and did not have an episode added to the system, the last icon for Episode in the navigation tree will not appear.

New Person

If person is not found on the list, try a different, less restrictive search. From the Details screen, click Search menu and select Statewide to return to the previous search results. Once you determine that the person is not in the statewide system, click New Person button on the bottom of the search results list.

When the New Person button is clicked, the system displays this box:

New Person Type Selection [X]

What type of person would you like to create?

When the New Person button is clicked and the Statewide Search was not used, the system displays this message to remind you that the statewide search must be conducted before adding a new person:

Please make sure this person is not already in the system by filling the form data above and searching.

MIG Person, Waiting Person, NFT Person and Person Episode

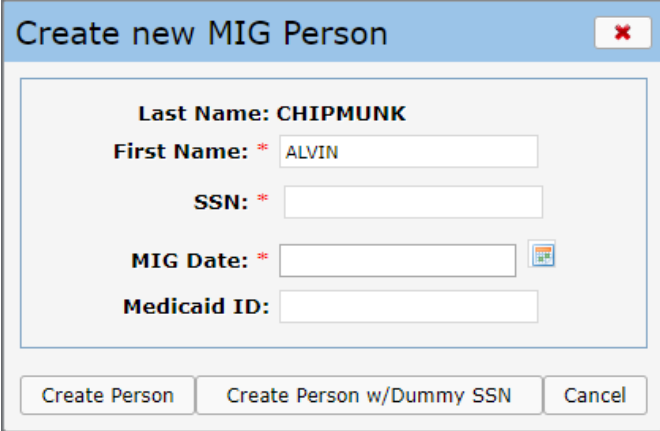
An episode is created for a person that will receive services with an agency. Creating an episode allows the agency to track status information, create screens, enter assessments, and conduct all necessary business on behalf of the person. This must be done when the agent will begin services to the person.

MIG, Waiting List, and NFT entry do not require that an episode be created, because the person is being initially screened for service eligibility from the agency. MIG is used to determine if a person might be eligible for a more in-depth assessment of eligibility for services. If the person never ends up receiving services from the agency, it is not necessary to create an episode.

Agencies can create either a MIG entry only, Waiting list entry only, NFT entry only, or create an episode (that might include a MIG and waiting list entries). Note that creating an episode requires users to have Add/Change permission on Case File – Assessment in order to create the Next Assessment records as part of an episode.

Each type of new person entry displays a slightly different ‘Create’ box asking for different information. A red asterisk (*) indicates a required field:

New MIG Person




The screenshot shows a dialog box titled "Create new MIG Person" with a close button (X) in the top right corner. The dialog contains the following fields:

- Last Name:** CHIPMUNK
- First Name:** * ALVIN
- SSN:** *
- MIG Date:** * (with a calendar icon)
- Medicaid ID:**

At the bottom of the dialog are three buttons: "Create Person", "Create Person w/Dummy SSN", and "Cancel".

New Waiting Person



The screenshot shows a dialog box titled "Create New Waiting Person" with a close button (X) in the top right corner. The dialog contains the following fields:

- Last Name:** CHIPMUNK
- First Name:** * ALVIN
- SSN:** *
- Program:** * -- No Selection --
- Priority:** * No Selection
- Start Date:** * (with a calendar icon)
- Medicaid ID:**

At the bottom of the dialog are three buttons: "Create Person", "Create Person w/Dummy SSN", and "Cancel".

NFT Person

Create new NFT Person

Last Name: **CHIPMUNK**

First Name: * ALVIN

SSN: *

Date of Birth: * [Calendar Icon]

Interview Date: * [Calendar Icon]

Medicaid ID: *

Buttons: Create Person, Cancel

Person Episode

Create New Person

Last Name: **CHIPMUNK**

First Name: * ALVIN

Intake Date: * [Calendar Icon]

SSN: *

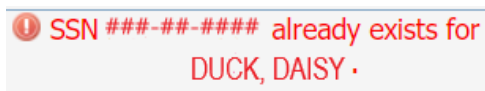
Medicaid ID: *

Buttons: Create Person, Create Person w/Dummy SSN, Cancel

With either type of new person, user can click Create Person or Create Person w/Dummy SSN

Create Person

Clicking this button creates a new {waiting} person, unless the entered SSN already exists in the system. If it does, the system displays this message:



If you receive this error, search again and use New Episode if appropriate for the same person.

Create Person w/Dummy SSN (FOR NON-WAIVER PROGRAMS ONLY)

Clicking this button creates a new {waiting} person using a system-assigned Dummy (or fake) SSN, starting with '750', then moves the user to the Intake screen. Remember that Dummy SSN should only be used for non-Waiver participants.

The system assigns the Dummy SSN in COMPASS to insure that the same number is not used in multiple agencies. This feature can be used for a non-Waiver participant for whom the agency does not want to store the SSN. A person can have only one valid SSN and one Dummy SSN in the system.


When either of these buttons is clicked, Participant screen is displayed with information provided in statewide search. (Note that if a Person episode was not created, the last icon in the navigation tree will not appear).

The screenshot shows a web interface for a participant named MINNIE A MOUSE. At the top, there are buttons for '+ Add', 'Refresh', 'Delete', 'Missing', and 'Relevant History'. Below these is a navigation tree for MINNIE A MOUSE with icons and labels for: Address, MI Choice Intake, Wait List, Referral, Contact, NF Transition/Diversion, NFT Notes, and Episode. The main content area is divided into sections: 'Person's Name' with input fields for Last Name (MOUSE), First Name (MINNIE), Middle Initial (A), and Title (Ms.); and 'Date of Birth' with a date input field (05/06/1917) and a calendar icon.

From here, users will:

1. Enter participant information (remember that participant information is shared with any other agency that has the same person on a waiting list or is serving the person)
2. Enter address
3. Enter MIG record (note: MIG record is REQUIRED to enter a Waiver Waiting List record)
4. Enter waiting list, referral, or contact information (see Waiting List User Guide)
5. Enter NF Transition/Diversion record (see NFT User Guide)
6. If adding an episode, click on Episode to modify any Intake fields or add Status records

New Episode for Existing Person

Click the  in Episode Details row to add a new episode, as long as all prior episodes **in your agency** are closed (if applicable). This applies to people that either 1.) will be enrolled in a program with no waiting or 2.) are a high priority on the waiting list and must begin the NFT process or 3.) will immediately come off the waiting list.

New Episode Information

The system displays a "Create New Episode" box that displays the selected person's SSN (or Dummy SSN), and a space for Intake Date. Users must enter the Intake date and/or SSN, and then can select

or

Create Episode

Clicking this button creates a new episode using the existing GUID for the person, and takes the user to the Episode screen if all system checks are passed (described below). The Episode address is display only, copied from the Address node when the address is updated in the Participant node and the episode is opened.


Create Episode w/Dummy SSN (FOR NON-WAIVER PROGRAMS ONLY)

Clicking this button creates a new episode for the selected person using a system-assigned Dummy (or fake) SSN, starting with '750', then moves the user to the person's information screen. Dummy SSN is described in New Person section above.


New Episode System Checks

Several checks are performed by the system in trying to create a new episode.

1. For a person with an open episode in the same agency that is on or after the Intake date, the system produces this message, prevents addition of a new episode, and returns to the selector list:


 A later episode exists. New episodes must be after any existing episodes

2. System produces this warning for person with open episode in a different agency on the Intake date or later:

 Participant has an open episode with another agency, a potential overlap with another agency may prevent program status entry

User is able to [Cancel] or [Continue] when adding the new episode.

3. For a person with an older episode with WA-Y, WA-P, or WA-PB program status in the same month as the new proposed intake date, the system will show a warning message:

 Person had WA episode in the same month as the intake date in a prior episode. If this new episode will potentially be for WA, click Cancel and re-open the existing closed episode.

User is able to [Cancel] or [Continue] when adding the new episode.


Confirm Participant and Address Information

When a new episode is added for a person, it is important to also review the Participant and Address information to see if anything has changed. Follow these steps:

1. If address is incorrect, click on Address node to add a new address with the start date of either the move or when you began contact with the person at that address.

2. Click on Participant node to review information on the participant and make any necessary changes. Remember this is supposed to be the most recent information for the person, so it is important to keep it up to date.

Also remember that information above the Episode is shared with your shared waiting list agency, so post only information that you want to share.

3. Add a new Referral if appropriate by clicking on Referral and then on the  button.
4. Click Intake node to review the few fields in Intake and add or change any fields for this Episode.

Overlapping Episodes

In order to support statewide Waiting List and NFT Portal functions that will interact with COMPASS data, a person can be open in more than one agency at a time. However, a person CANNOT have an overlapping program status record, which means that the person cannot be served in two different agency's programs at the same time.

An overlapping message will appear only when an agency tries to enter a program status for a person if there is another program status at a different agency. With the exception of Caregiver Respite and Transition Navigator, which can overlap with another program at a different agency, a person can have only one program status at a time, based on date ranges.

Note that CILs do not use the Status module, so they will not be able to create a program status, which is appropriate for NF Transition activities.

Overlapping Transitions

Agents and CILs are unable to open a transition when there is an open transition with another agency or CIL. An open transition is defined from the initial interview date to one of the following:

- i. Closed date – Agents and CILs
- ii. Transitioned date – Agents only
- iii. Follow-Along close date – CILs only (see below)
- iv. Today (if neither Agent or CIL has closed or transitioned the person)

If your agency is opening a new transition and another agent or CIL has a transition open, please contact them to close their transition so you can proceed.

Manage Users





- ① *Manage Users Details*
- ① *Send Welcome Email*
- ① *Forgot Password*
- ① *Permissions and Roles*
- ① *Add a New User*
- ① *Reports*


Managing Users


All users must have an individual Username and Password to access any MI Choice Service Bureau (MSB) application to comply with HIPAA security regulations. All MSB Users are added through COMPASS. COMPASS Manage Users is found under the Tools menu. Users will need View or Add/Change rights to be able to access this module.

Username: Show Disabled Users:

User Search				
Username	Name	SC	Enabled	Edit
DEMO99	User, Demo	DMO	✓	
WISP99	Training, Agent	AGD	✓	

The list defaults to show all active users in your agency. There is a username search available on the top left as well as the ability to show disabled users (by default they are not included). Disabled users are users that no longer have access to COMPASS in your agency. See more about the Account Enabled checkbox below.

View only permission for Manage Users will not show the Edit column indicating the user can only view the reports available from the Reports menu. Users with Add/Change permission will see  in the Action column which indicates they can change the permissions and roles within their agency. To manage user's permissions and roles in the agency, the person making these changes does not have to have all permissions and roles themselves. For instance, if user DEMO99 has only the permissions to View and Add/Change Manage Users and Case File Selector or MI Capable (required to login to COMPASS for Agent users) or NFT Selector (required to login to COMPASS for CIL users), they will be able to assign to themselves and someone else permission to Assessment or Status.

When the  is clicked, the User Profile page will be opened. The User Profile is broken down into four sections: Details, Password, User Permissions, and Roles.

Manage Users Details

Tools > User Data > Edit
Name: WISP CIM Username: WISP10

User Profile	Send Welcome Email
<ul style="list-style-type: none"> <li style="background-color: #e0e0e0; padding: 2px;">Details Password User Permissions Roles <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/> </div>	<p>Username: <input type="text" value="WISP10"/></p> <p>First Name:* <input type="text" value="WISP"/> Last Name:* <input type="text" value="CIM"/></p> <p>Start Date:* <input type="text" value="01/30/2004"/> Stop Date: <input type="text"/></p> <p>Phone #: <input type="text"/> SC Initials: <input type="text"/></p> <p>Credentials: <input type="text"/></p> <p>Email Address:* <input type="text"/></p>

The Details section shows the username, account enabled, first and last name, start and stop date, phone number, SC initials, credentials, and email address. The Start Date defaults to the date the User Maintenance record was added. Stop Date does not end user access to COMPASS, but will not allow users to input if cases are assigned to the Supports Coordinator after that date.

SC Initials should contain the Supports Coordinator Initials that will be used to show in COMPASS, Vendor View, and Reports Portal selectors, pages, and reports. To remove Supports Coordinators from list in Vendor View, enter a stop date.

Credentials should contain the RNs/SWs credentials. These will be inserted along with their full name on the signature lines of reports that require one.

Phone Number will be required if SC Initials are entered as it will be used in Vendor View and Participant Reports to show the Vendors and Participants the Supports Coordinators phone number(s).

Email Address is required. This is used for the system to send an email to the user for situations where there was a sync error or they forgot their password or to send them a welcome email when the account is added.

Account Enabled/Disabled Users

The Account Enabled checkbox is by default marked, but if the user no longer should have access to any MSB applications, uncheck this box and click Save on the left panel. This will remove the ability to login to COMPASS and will remove rights to Vendor View, MICIS and ClearAccess. It also scrambles the password. There is no need to go into MICIS separately to delete. Note that you cannot de-activate your own user account you logged in as.

To re-activate a disabled user, you need to do the following:

1. Check the Account Enabled box, remove Stop Date, and click **Save**
2. Reset the password
3. Add permissions and roles as needed and click **Save**

NOTE: If a user has left your agency, but has not synced Compass GO, log in to Windows on their computer with their user credentials (not your own), then you can open Compass GO

- If you have NOT disabled their Compass account yet, you can log in as them and sync
- If you HAVE disabled their Compass account already, then you can log in with a different user's credentials that has access to Compass GO and sync
 - The audit logs on the database will not show the disabled user as the person who made changes to those records; the audit logs will have the person who performed the sync.
 - For instance, if Sheresa left the agency and Melissa needs to sync her data, then when Melissa syncs the data, Melissa's username will be logged as the person who made the changes to the records even when Sheresa was actually the person who made the changes in Compass GO.

Change User's Name

This discusses the process to change a user's name if a user gets married or divorced (or any other reason).

If the person wants to keep the same username, but just wants the last name and/or SC initials changed, simply change those in the user record. The SC initials are not stored in all the records, it's based on the GUID of the user account, so the change in SC initials will just show the correct initials after the change is saved.

If the person wants to change the username they log in with, then perform the following steps:

1. Add a new user account, set the password and the permissions/roles
2. If the user has cases assigned to them, use the Mass SC Assignment to reassign those cases to the new user's name
3. Disable the user's original account

Send Welcome Email

The Send Welcome Email feature can be used by agencies to send the user an email that includes the link to COMPASS as well as their username. Password is not included, but should be communicated to the user separately. The email will come from CompassAdmin@ciminc.com with the subject, Welcome to COMPASS, and will look like this:

Welcome to the COMPASS software!

Your COMPASS Username is: **MOUSEM**

Opening Compass and Creating Your Password:

1. Open <https://webapp.ciminc.com/CompassMI>
2. Click "Forgot Password" link to create a password the first time you visit
3. Enter in your Username
4. Click NEXT
 - A new page stating "A confirmation email has been sent to you containing an Identification Code you will need to continue" will open
 - **Do not exit out of that page**
5. Look for a new email from Compass Admin; this will give you an Identification Code
6. Enter the Identification Code from the Compass Admin Email into the Compass Page
7. Click NEXT
8. Create your new password
 - The password must be at least 7 characters long, but no more than 16 characters
 - CANNOT start with a number
 - CANNOT have the user's first or last name or the word 'password' included
9. Re-Enter your new password
10. Click Next

You are now logged in!

Be sure to save <https://webapp.ciminc.com/CompassMI> as a bookmark for future reference.

Please feel free to contact us with any questions at CIMhelpdesk@ciminc.com.

Thank you for being a valued customer.

Sincerely,

Center for Information Management, Inc.



Forgot Password

The Forgot Password feature as referenced in the above email allows the user to change their own passwords without permission to Manage Users. It can be used for initial password set up, for changing the password at any time as well as when the password is forgotten by the user. The user will have no need to contact internal staff to change their passwords.

An email address is required in the User Profile Details for this to operate. The User will go to the initial login page of COMPASS and click Forgot Password, then type in the user name on the next page.

 A screenshot of the COMPASS login interface. It features a light blue background with a white border. At the top, the label "Username:" is in bold blue text, followed by a white text input field. Below that, the label "Password:" is in bold blue text, followed by another white text input field. A "Login" button is positioned below the password field. At the bottom of the form, there is a link labeled "Forgot Password" with a blue circular icon containing a white arrow pointing to the left.

Please enter your Username and press or type enter.

Forgot Password

Username:*

When the user enters their user name and clicks 'next', the system will check if the user name exists. If not, an error will appear at the top of the screen, 'Unknown User'. The user can try the correct user name or will need to contact internal agency staff for their user name. If the user name is found, the system will prompt for an identification code. *Do not leave this page.* This identification code will be found in a Password Reset Request email sent from CompassAdmin@ciminc.com to the email address found in the User's record.

Dear Mickey Mouse,

Here is the Identification Code you will need to reset/create your password.

Your Identification Code is: **2004884183**

This code will expire soon. Please enter it in the appropriate field online as soon as possible.

Please feel free to contact us with any questions at CIMhelpdesk@ciminc.com.

Thank you for being a valued customer.

Sincerely,

Center for Information Management, Inc.



Note that the email indicates that this identification code will expire soon. If you leave the identification code entry page seen below before you enter the identification code, the identification code will be expired since you cannot return to the same page to input it. Once you click Forgot Password again, a new identification code will be required. This means that once you start this process, it has to be completed before you can leave this page.

A confirmation email has been sent to you containing an Identification Code that you will need to continue. Do not close this page.

An Identification Code has been sent to **MOUSEM** Please enter it below.

Enter Identification Code

Identification Code:*

The user will need to check their email inbox for an email from CompassAdmin@ciminc.com. They can copy and paste that identification code found in that email into the application and click 'Next'. The user will then be prompted to enter a new password twice. Click 'Reset' and the password will be reset.

Reset Password

New Password:*

Re-Enter: *

Password

Passwords are restricted to be numbers and letters only. No special characters are allowed. The password must be at least 7 characters long, but no more than 16 characters, cannot start with a number, have the user's first or last name or the word 'password' included. When a password is changed in COMPASS, the password will be changed throughout all MSB applications including COMPASS, MICIS, ClearAccess, Vendor View, and Vendor Billing.

User Profile

Details

Password

User Permissions

Roles

New Password:

Enter Again:

Password reset required

Note that Compass GO users will need to continue using their old password until they are connected to the internet again. If the Compass GO user forgot their password, they will need to have it reset online and be connected to the internet while using Compass GO to login again.

Users also have the ability to require a user change their password the next time they log in to COMPASS. Simply check the box and Save the changes on the left side. You can also enter the new password at the same time, but this is not necessary since they will just reset it again when they login. However, if it is a new account, you may want to set the new password to a generic password you use throughout your company and require the reset so the first time they login, they'll enter the generic password and then be prompted to reset the password. Note that you will not see the 'Password reset required' checkbox when looking at your own account since the application assumes you are going to change the password immediately.

User Permissions and Roles

Permissions and Roles are assigned through COMPASS Manage Users. Users can have View only, Add/Change, and/or Delete permissions in Manage Users. Users with only the View permission can view individual's user information, but cannot change it. Some permissions are set up only for View only which is meant as they can access the information (such as Capitation Reports). Add/Change allows users to add and change information in the records. The Delete permission is not used often, since Add/Change most of the time suffices.

For users to access a COMPASS module, they must have at least the View permission checked. If a user does not have the View permission for an area of COMPASS, the navigation button or menu item (such as Status or Manage Users) will not appear when they login. Note that if users have Add/Change permission for one area, they must also have the View permission for that area (this is enforced by the application).

Many COMPASS permissions require another permission above that level to access. Users require Participant/Address to access any case-related records. Users also require Case File Selector and Case - Intake/Episode to access any case records found below the Episode hierarchy such as assessment, progress notes, and attached files.

To grant the View, Add/Change, or Delete permissions for a user, simply click on the checkbox and Save the record. The user will have access on their next login to COMPASS.

Permissions

Any agent user who is added to COMPASS requires the Case File Selector or MI Capable at minimum to login. State users will at minimum require the Agent Selector. CIL users require the NF Transition Selector to login. However, users can only access other areas within COMPASS (such as opening an episode's case file) if they have the appropriate permission assigned.

Statewide Search – Access the Statewide Search from the Search menu.

Case File Selector – Any agent user who is added to COMPASS requires the Case File Selector or MI Capable at minimum to login.

Case – Participant/Address – Access the participant and address records. This is required for viewing any case record.

Case – MIG – Access the MI Choice Intake Guidelines record. This requires Case - Participant/Address View permission.

Case – Referral – Access the referral records. This requires Case - Participant/Address View permission.

Case – Contact – Access the Waiting List Contact records. This requires Case - Participant/Address View permission.

Case – Intake/Episode – Access the case file. **This is required for any user to open a case file from the case file selector pages in COMPASS and Compass GO.** Add/Change allows the user to add new episodes, but they also require Add/Change Assessments to add new episodes. This requires Case - Participant/Address View permission.

Case – PCS Assessment – Allows a user to View, Add/Change, or Delete PCS Assessment records. PCS Assessment is used by ICO pilot agencies, so your agency may not see this as an option. Note that state users will not have access to this data. Requires Case – Participant/Address View permission.

Case – Screen – Access the MDS-HC screen. This requires Case - Participant/Address View permission.

Case – Assessment – Access Assessment node within COMPASS navigation tree. This requires Case – Intake/Episode and Case - Participant/Address View permissions. Users need delete permission to delete medications, caregivers, or any other records part of the assessment. Users also require this Add/Change permission in order to add episodes. Note: in order for user to actually delete an assessment, they must also have the “Never see records locks” checked.

Case – C-Cap OT Assessment– Displays this assessment for Waiver Agency users.

Case – Progress Notes – Access progress notes. This requires Case – Intake/Episode and Case - Participant/Address View permissions.

Case – PSCP Review – Access the PCSP Review records. This requires Case – Intake/Episode and Case - Participant/Address View permissions.

Case – ADT/CCD – Allows users to view the ADT and CCD summaries.

Case – Attached Files – Access the attached files. Add/Change is required to upload new files. This requires Case – Intake/Episode and Case - Participant/Address View permissions.

Case – MOW Assessment – Allows a user to View, Add/Change, or Delete Meals on Wheels Assessment records. MOW Assessment was created for Detroit Area Agency on Aging, so other agencies will not see this as an option. Note that state users will not have access to this data.

Status – Access the status from the case file selector or in Quick Links in the case file. Add/Change allows users to add, change, or delete status records including Open, Program, Care Setting, Financial, and Supports Coordinator Statuses.

CompassGo – Access COMPASS GO (offline). Without this permission a user will not be able to log in. User MUST have both View and Add/Change to log in. This requires Case - Participant/Address and Case - Intake/Episode View permissions.

CompassGo Synchronizer Selector – Access the Synchronizer Selector from Tools menu. Allows user to select and sync case files down to GO or up to online.

CompassGo My Sync Conflicts – Access to the menu item located under Tools/Synchronizer Conflicts. This allows users to resolve their own conflicts they caused, but not other conflicts in the agency.

CompassGo Agent Synchronizer Conflicts – Access the Tools/Synchronizer Conflicts for all conflicts in their agency and resolve Conflicts with data.

CompassGo Sync Issue Emails – Users with this permission will receive daily Sync Issue emails.

NF Transition Selector – Access to the NFT List in the Search menu.

NF Transition – Agent – Access the NF Transition/Diversion section of data within the case file. Add/Change will allows users to add new NFT records or change any information. Delete will allow users to delete NFT records not yet sent to the state. Users with this permission should also be given

Statewide Search, Case - Participant/Address, Case - Referral, NFT Files, NFT Notes, NF Transition – State, and for MI Choice Agents only, Case File Selector permissions as well.

NF Transition – State – View the state only fields in the NFT records. Add/Change allows users to edit the state only fields. Note that Add/Change is only permitted for State Users, but View should be given to every NFT user.

NFT Notes – Access NFT Notes. This requires Case - Participant/Address View permissions.

Waiting List – Access Waiting List from the Search menu and view the Waiting List in a case file. This requires Case - Participant/Address View permissions.

MI Capable – Access the MI Capable selector from the Search menu and be able to View, Add/Change, or Delete MI Capable records. Requires Case – Intake/Episode View permission. MI Capable is currently a grant project being completed by a few MI-Choice agencies, so your agency may not see this as an option. Note that state users will not have access to this data.

Reports Portal – Access the COMPASS Reports Portal (previously known as WISP) to generate reports.

Reports – Back-Up Plan – Access the Back-Up Plan report from an assessment record. This requires the Case - Assessment View permission.

Reports – Capitation – Access capitation reports from Reports menu and generate reports.

Reports – Non-NFT SSP – Access the Non-NFT SSP report. Requires Case - Intake/Episode View permission.

Reports – Service Summary – Access the Service Summary report from an episode. This always shows the current services as of today's date. Requires Case - Intake/Episode View permission.

Claims – Claims Processing – Access Claims Processing; View only allows access to Claims Processing and the ability to generate the reports, but only those with Add/Change can process and create batches.

Claims – Encounters Processing – Access Encounters Processing; View only allows access to Encounters Processing and the ability to generate the reports, but only those with Add/Change can process and create batches.

Vendor Billing – Access Vendor Billing. Add/Change allows users to approve bills posted by vendors.

Tools – Manage Users – Access or edit Manage Users from the Tools menu. Requires Case File Selector permission.

Tools – COMPASS Assistant – Access the COMPASS Assistant page to Change SSN, Intake Dates, or Merge Agent Specific DME, Medical Providers, and Pharmacies. The View permission acts as the Add/Change permission.

Tools – Eligibility Requests – Access the Eligibility Requests page to send 270 HIPAA Health Care Eligibility Benefit Inquiry files to CHAMPS and review reports based on CHAMPS data received in the 271

HIPAA Health Care Eligibility Benefit Response files to compare to COMPASS Program Status records. The View permission allows users to view the reports and the Add/Change permission allows users to also send requests and optionally receive emails when the 271 files are processed.

Tools – Mass SC Assignment – Access the Mass SC Assignment page to change Supports Coordinators on active cases all at once. The View permission acts as the Add/Change permission. Permission for Status is not required.

Agent – Information – Access the Agent information such as name, address, phone, etc. Add/Change allows user to update this information.

Agent – Providers – Access the agent-specific list that includes Arranged, Medical, Pharmacy, and DME Providers. Add/Change or Delete allows user to update this information.

Agent – Attached File Tags – Access the agent-specific Agent File Tags list. Add/Change or Delete allows user to update this information.

Agent – Referral Agencies – Access the agent-specific Referral Agencies list. Add/Change or Delete allows user to update this information.

Never see records locks – This permission is for users that will never see assessments or progress notes locked. This will allow user to edit/change data on older assessments and progress notes.

Compass neXt – Access the dashboard, monitors, participants, schedule.

Compass neXt – ADT/CCD Notifications – Access to view ADT/CCD Notices module. Add/Change allows user to edit and archive notices. This requires Compass neXt permissions.

Roles

Roles are used in COMPASS to indicate special rights the user may need such as “Secure File Exchange”.

To grant a role to a user, simply click on the checkbox and Save the record. The user will have access on their next login to COMPASS.

The screenshot shows a 'User Profile' dialog box with a sidebar menu containing 'Details', 'Password', 'User Permissions', and 'Roles'. The 'Roles' section is active and displays a list of roles with checkboxes. The roles and their states are: Clearaccess (checked), Clearinghouse (unchecked), MICIS (checked), NFT - Send to State/Clear Actions (unchecked), Secure File Exchange (unchecked), State User (unchecked), and Vendor View (checked). At the bottom of the dialog are three buttons: 'Save', 'Cancel', and 'Done'.

Clearaccess – Allows users to run scripts and create queries and reports in Clearaccess.

Clearinghouse – Allows users to access the Clearinghouse from the Tools menu. Only Region 1B Area Agency on Aging and Reliance Community Care Partners users utilize this feature to comply with data submission requirements to MDHHS.

MICIS – Allows users to login to MICIS.

NFT – Send to State/Clear Actions – Allows users to click the Send to State button within the NFT case file records and click the Clear Action buttons to remove To-Do's from the NFT Selector.

Secure File Exchange – Allows users access to the Secure File Exchange from the Tools menu.

State User – Allows users to have statewide access. Agents and CILs will be unable to save with this option checked.

Vendor View – Allows users to login to Vendor View.

Add New User

Users with Add/Change permissions to Manage Users, can also Add New Users. This will add access to all MSB Applications depending on the permissions and roles selected. Go to Tools/Manage Users and click the Add New User button on the bottom right of the screen.

The screenshot shows a web interface for managing users. At the top, there is a search bar with the text 'Username: WISP' and a 'Search' button. To the right of the search bar is a checkbox labeled 'Show Disabled Users:'. Below the search bar is a table titled 'User Search'. The table has six columns: Username, Name, SC, Enabled, and Edit. There is one row in the table with the following data: Username: WISP10, Name: CIM, WISP, SC: (empty), Enabled: (checked), and Edit: (pencil icon). At the bottom right of the interface is a button labeled '+ Add New User'.

Username	Name	SC	Enabled	Edit
WISP10	CIM, WISP		✓	

The New User page will appear. Enter the information on the Details section and click Save. The Username will automatically be assigned and displayed. This defaults to the user's last name and first initial. If that user account already exists, it keeps adding another letter from the first name until a unique ID is found. The system ignores hypens, spaces, and other special characters that may have been typed in the first and last name fields.

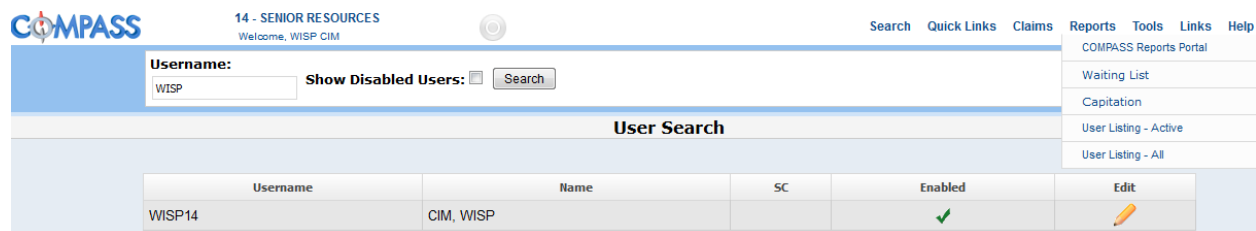
The user ID that is automatically added must be a unique ID. If the name fields are not long enough to create a unique ID, the system will error. For instance, if the person's name is Li Smith and there are already two user accounts for Liza Smith (SMITHL) and Lily Smith (SMITH LI), then a unique account

cannot be created since the first name only had two characters to work with. The agency would need to add an artificial letter such as the middle initial to the first name to create the account. Once the account is created, then the first and last name can be changed to be correct.

The Password, User Permissions, and Roles section will appear after the first and last name are saved. When finished setting up their password, user permissions, and roles, click Save, and then you can choose to Send a Welcome Email from the Details page. If granting MICIS role, permissions must be set within MICIS User Maintenance as well. Note that only users with Agent DBA rights in MICIS can access/update MICIS User Maintenance.

Manage Users Reports

There are two reports within Manage Users. Click on Reports to see the User Listing – Active or All reports.



User Listing – Active

The User Listing – Active report shows only active users in your agency along with the permissions and roles they have assigned.

COMPASS User Listing - Active 10 - TEST AGENCY

Name	Username	SC	Enabled	Email / Phone	User Permissions	Roles
Woman, Wonder	WOMANW	WW	Yes	wonderwoman@email.com 111-222-3333	<p>View: Case File Selector; Compass neXt; CompassGo - Sync Issue Emails; CompassGo - Synchronizer Selector; NF Transition - State; NF Transition Selector; Never see record locks; Reports - Back-Up Plan; Reports - Capitation; Reports - Non-NFT SSP; Reports - Portal; Reports - Service Summary; Statewide Search; Tools - COMPASS Assistant; Tools - Mass SC Assignment</p> <p>Add/Change: Agent - Information; Case - Intake/Episode; Claims - Claims Processing; Claims - Encounters Processing; CompassGo; CompassGo - Agent Synchronizer Conflicts; CompassGo - My Sync Conflicts; Status; Tools - Eligibility Requests; Tools - Manage Users; Vendor Billing</p> <p>Add/Change/Delete: Agent - Attached File Tags; Agent - Providers; Agent - Referral Agencies; Case - Assessment; Case - Attached Files; Case - C-CAP OT Assessment; Case - Contact; Case - MIG; Case - PCSP Review; Case - Participant/Address; Case - Progress Notes; Case - Referral; Case - Screen; NF Transition - Agent; NFT Notes; Waiting List</p>	Clearaccess MICIS Secure File Exchange Vendor View

User Listing – All

The User Listing - All report shows all enabled and disabled users and is the same format as the active report otherwise.

Secure File Exchange



① *File Display*

① *Upload a File*

① *Download a File*

① *File Deletion*

① *Historical Record of Files in SFE*

Secure File Exchange

Secure File Exchange (SFE) is available to selected users on the main COMPASS page under the **Tools** menu. Users must have the Secure File Exchange role assigned in Manage Users to access this feature. The SFE allows MICIS Service Bureau users to exchange files in a secure environment within your own agency, with other agencies, or with MDHHS or CIM. These files may or may not contain protected health information. Some examples of uses for the SFE are:

- 🕒 Provide transferring participant information to the receiving agency
- 🕒 Submit paperwork to MDHHS regarding a NFT request or
- 🕒 Submit quarterly waiting list spreadsheets to MDHHS
- 🕒 Post information about a participant whose record needs to be changed by CIM

Secure File Exchange page is displayed below. All of the fields are required to be completed except the new 'Optionally Send an Email Notification to:'. This email list includes anyone in Tools/Manage Users with the Secure File Exchange role checked, and an email address listed in their User Profile.

Send to Organization: *

Send to Person: *

Optionally Send an Email Notification to:

Description: *



File Name: *
 Capture.PNG

Once these fields are completed, user can browse to find the file, and then click [Upload File] to post it in the SFE. Users receive a confirmation message at the top of the screen and the file appears in the Sent From this agency list.

File Townships_by_County.pdf was successfully uploaded.

File display for either Sent to or Sent from files includes File Name and Description, "From" agency (incoming files) or "To" agency (outgoing files), "By" User ID of person sending the file, and date/time sent.

Show Uploaded Files that were:

Download	Delete	File Name	Description	To Organization	To User	By	Date ▲
		HT.docx	Test	CIM	Helpdesk	WISP10	10/01/2018 03:54 PM

File Display

Files that have been sent from and to this agency are displayed on the SFE for up to 30 days after upload (see File Deletion for more information). The user is able to choose to “Show Uploaded Files that were:” either “Sent to this Agency” or “Sent from this Agency”, using the drop down under the Secure File Exchange box. The system defaults to “Sent to this Agency” since these files need to be downloaded by your agency.

Upload a File

Send to Organization: Select CIM, State, or an agency to receive the file by clicking the drop-down arrow and clicking on the name.


Send to Person: Enter the name of the person to receive the uploaded file; this is a required field that is useful when sending a file to a state user.

Optionally Send an Email Notification to: Drop down list displays any person with Secure File Exchange role in Manage Users, and an email address in Manage Users User Profile page.

Description: Type a short description that includes the name of the person who is receiving the file at the selected agency; for example, “Cost Reconciliation 2009 spreadsheet”. This field is required to assist the receiving agency in identifying the contents.

File Name: Use the [Browse] button to find the file to be uploaded from your network. Double click on the file name to prepare for the upload; the file name will appear in the box. Note that the file size maximum is 30 MB.

Upload File button is clicked to actually upload the file to the SFE, after completing the information above. Once Upload File is clicked, the system displays the following message below the box:

 'Secure File Exchange' has successfully uploaded 'Agency Contact Sheet.xlsx'

If this message does not appear, attempt the Upload again, and contact CIM if it fails a second time.


Email Notification

If the file sender has indicated that an email should be sent to the recipient, the email will include the following subject and message text:


Subject: COMPASS Secure File Exchange

A file has been sent to you through the COMPASS Secure File Exchange.

Download a File

On the file display, each file is listed with icons on the left to “Download” or “Delete” the file. To download a file, click on the “Download” icon  for the file to be downloaded.

File Deletion

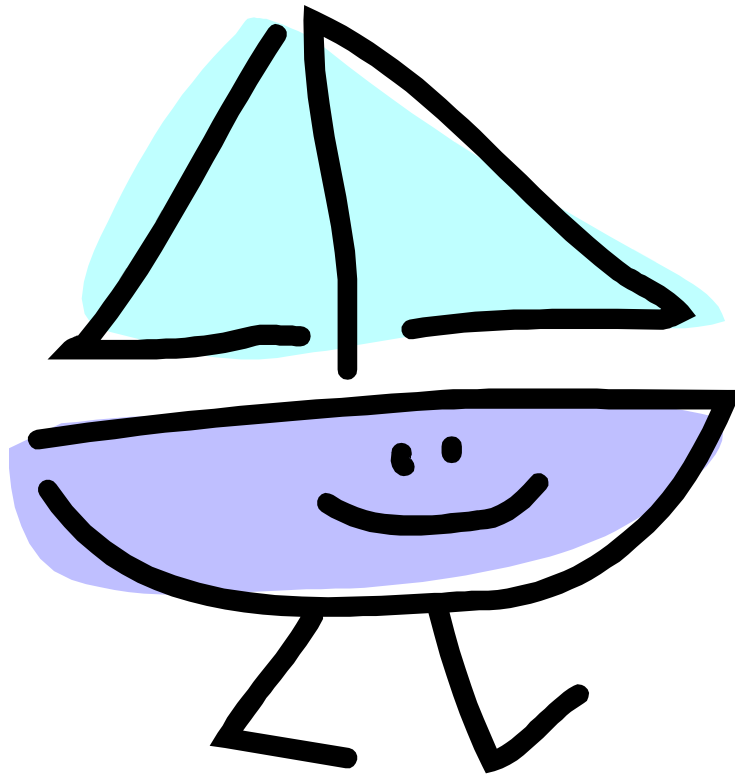
You have the option of deleting the file from Secure File Exchange after you have downloaded it, or if you uploaded the wrong file. Click the “Delete” icon  to delete the file from the Secure File Exchange.

The system will automatically delete any file that has been in the Secure File Exchange for 30 days.

Historical Record of Files in SFE

When a file is deleted, either by a user or by the automated 30-day delete, the name of the file, User ID and date/time the file was uploaded, and User ID and date/time the file was deleted are saved in an archive file. Note that the file itself is deleted to clean up information on the server. If you have a question about whether a file was in SFE, please contact CIM.

COMPASS Assistant



⌚ *Change SSN*

⌚ *Change Intake Date*

⌚ *History*

⌚ *Agent Provider Merge*

⌚ *Merge Provider History*

COMPASS Assistant Introduction

COMPASS Assistant allows designated users to change SSN's or Intake Dates or merge agent-specific DME Providers, Medical Providers, or Pharmacies. Changing SSN or Intake Date are each categorized Assistant Utilities and Merge Providers are categorized Agent Provider Merge.

Assistant Utilities

Assistant Utilities include changing either a Social Security Number or Intake Date for a participant affiliated with their agency. User must have the COMPASS Assistant permission in Tools/Manage Users in order to access this feature. Users also must have Add/Change permission for Case - Intake/Episode to make the change.

The feature is displayed on the Tools menu:



Clicking the menu brings up the screen below; click on left link to bring up appropriate function.

<p>Assistant Utilities</p> <p>Change SSN Change Intake Date History</p> <p>Agent Provider Merge</p> <p>Provider Merge History</p>	<p>Old SSN: <input type="text"/></p> <p>New SSN: <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Change"/></p>
---	---

Change SSN

The screen above is used to change a person's SSN.

1. Enter Old (current) SSN – must use dashes
2. Enter New SSN – must use dashes
3. Click Change button
4. System produces this confirmation message:

COMPASS Assistant Change SSN Processing...

Old SSN 750-02-1164 for DAFFY DUCK will be changed to 555-44-3333.

5. Click Continue to make the change
6. If the New SSN exists already, the system will prompt you with the new SSN's person information and any records that will be deleted/merged from the old SSN. See Rules and Checks for Change SSN below.

❗ Overlapping episode found for 750-555-5555

7. If no issues found with proposed change, the system displays this message:

❗ Social security number change request submitted for processing. Go to COMPASS Assistant History for details.

See below for History function.

SSN is changed throughout the system, including COMPASS, MICIS and Vendor View/Billing records. Compass GO will retain all data entered if change was made while Supports Coordinator already had downloaded since the background episode guid is not changed as part of this process. There will be no data loss from syncs as a result of this process. Once the SC syncs after the change, they will show the new SSN.

Rules and Checks for Change SSN

1. Person must be affiliated with user's agency. If not, this error message will appear:

❗ SSN not found.

2. If there is a dummy SSN on episodes in two agencies, the system will never change the old dummy SSN for the other agent's intake records, because they may be providing services that do not require an SSN, and as a result have entered the dummy SSN for privacy purposes.
3. If user attempts to change an old real SSN that is also found in another agency's intake, then they will see this message:

COMPASS Assistant Change SSN Processing...

Warning: You will be changing another agent's episode to this SSN too.

Only continue if you are positive that you have the correct SSN.

4. If there are overlapping waiting lists, the system will produce an error at the top of the page:

❗ Merging participants would create Waiting List Status errors. Fix them and try again.

 These must be fixed first to not overlap before the SSN can be changed.
5. If new real SSN exists with a different participant, then move whatever records can be moved without error (for instance if referral dates are the same in each participant, the system will delete the duplicate). Also, the old SSN's participant record and more recent address will be deleted. Any information that needs to be preserved should be copied to the New SSN record first.

Then the system will prompt the user if there are other records/dates that are duplicated or overlapping. This includes referrals, contacts, MIGs, and Addresses. A list of the data that would be deleted is shown to verify. Click Cancel if you want to make sure the duplicated/deleted items are already in the new SSN's records before continuing.

COMPASS Assistant Change SSN Processing...

Some records for Strawberry Short already exist under new SSN 750-555-5555 The following records for Strawberry Short under old SSN 750-44-4444 will be deleted or updated...

Conflicting address to be updated

Start Date	Stop Date	Address 1	City
06/06/2017		123 Sesame St	ECORSE

New address period

Start Date	Stop Date	Address 1	City
06/06/2017	12/31/2018	123 Flintstone Ave	ECORSE

Click on these buttons to reveal the conflicting records which will be deleted or updated.

Addresses to be updated

6. Address records - if the old SSN address records are prior to the first address under the new SSN, then the system will move those old SSN address records to the new SSN and end date the latest to the day before the new SSN's records.

If any of the old SSN records have a start date after the minimum start date of the new SSN, then those will be deleted and listed on the confirmation page.

Change Intake Date

The screen above is used to change an Intake Date for an episode.

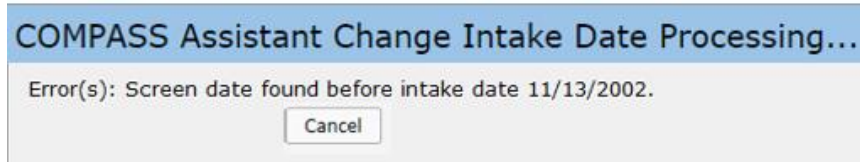
1. Search for person using Last Name or Last 4 SSN
2. System displays anyone affiliated with your agency that fits this criteria
3. Click to highlight appropriate person's intake
4. If same name with different SSNs and want to check that you selected the right person, click Participant button to go to case file navigator and confirm that this is the correct episode. To return to change the intake date, you can use the Back button or go to Tools>Compass Assistant again.
5. Enter new Intake Date either by using the calendar or typing in the date
6. System displays this confirmation request:

7. User can [Continue] or [Cancel]
8. If Continue is selected and the change is successful, this message will appear:

! Intake date change request submitted for processing. Go to COMPASS Assistant History for details.

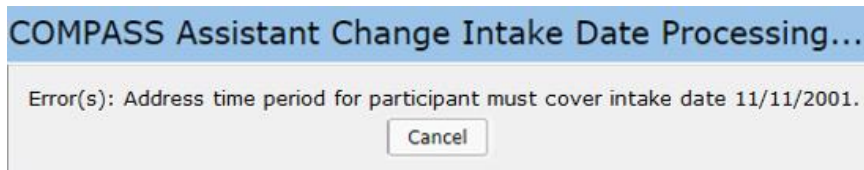
Rules and Checks for Change Intake Date

1. New Intake Date must be on or before Screen Date, or this message appears:



User will Cancel and click Participant button to review Screen date and determine whether to proceed with different Intake Date. Note this is not the MIG but the old MI-Choice screen.

2. New Intake Date must have an Address period covering the date, or this message appears:



User will Cancel and click Participant button to review Address start dates and determine what changes need to be made before changing Intake Date. Normally the Address start date just needs to be changed back to the new proposed intake date.

3. Other rules apply and users will be prompted as necessary (for example, the Intake Date cannot be in the future).

COMPASS Assistant Process History

History displays changes that have been made using COMPASS Assistant. The Processing History shows all changes in reverse order of change date to show a complete history of all COMPASS Assistant changes ever made. This is where users can verify that the change they initiated is complete.

COMPASS Assistant Processing									
Process History									
Process Type	Process Status	Process Messages	Old Value	New Value	User ID	Old Participant History	New Participant History	Process Date	History Detail
Normal SSN Change	Complete	Updated participant MICKEY MOUSE's social security number and social security number for intake dated 08/01/2014 from 750-00-8987 to 555-44-3333.	750-00-8987	555-44-3333	WISP10			09/08/2014 09:09:40 A.M.	

Process History Details

Process Type – This shows the type of change made; could include Normal SSN Change, Intake Date Change or Merge SSN Change. The difference between Normal and Merge SSN is that Merge SSN is where records may be deleted that were duplicates or overlapping because the New SSN already existed in the system prior to the Change.

Process Status – Complete indicates the change was made. If other status shown, contact CIM Helpdesk.

Process Messages – What was changed, for whom, and new and old value.

Old Value – Prior value.

New Value – Value changed to.

User ID – Login ID of user making change.

Old Participant History – History of all changes to the participant record of the Old SSN made at any time by any agent; click on icon to see information. This is important if forgot to makes changes to the new SSN participant record before making the change. The values on the old SSN are available here to know what needs to be re-entered under the new SSN.

New Participant History – History of all changes to participant record of the New SSN made at any time by any agent; click on icon to see information. This is only applicable when Process Type is Merge SSN Change.

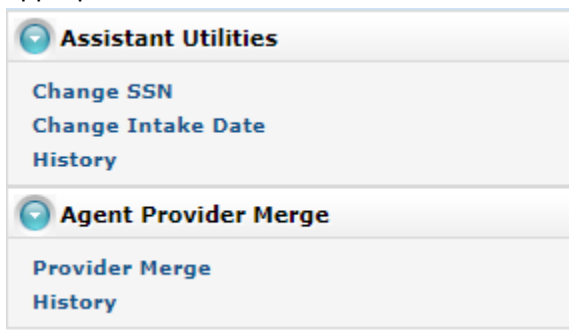
Process Date – Date and time change was initiated.

History Detail – Details of change that is listed; click on icon to see information. This is more technical in detail to know the guids of the changed records and the counts of other tables changed that are not Compass tables such as claims and bills tables.

Agent Provider Merge

Agent Provider Merge includes merging agent-specific DME Providers, Medical Providers, Pharmacies, and Arranged Providers. Also included is a history of the changes made. Only agencies who use MSB Assessment software will see this section of the Compass Assistant. User must have the COMPASS Assistant permission in Tools/Manage Users in order to access this feature. Users also must have Add/Change permission for Case - Intake/Episode to make the change. Users do NOT need to have the related Agent – Providers permission to perform merges.

Clicking Compass Assistant from the Tools menu brings up this screen below; click on left link to bring up appropriate function.



Agent Provider Merge will allow you to select one or more providers and change them to a new provider on the right. This will change the assessment records providers in existing cases where they were used. Previously, you were unable to remove incorrectly spelled providers if they were used in a case record. With the merge function, you are able to merge the case records using that provider to the correctly spelled provider.

This feature should be used to clean up your previously used providers that have the same or similar names that were entered incorrectly separately. This will delete the merged provider. This should NOT be used to change providers to an entirely different provider for assessments. For instance, you would not change retired providers to the provider that took over the building, company, or practice. This would remove the history of the person seeing the retired provider and falsely show a different provider that they may never have seen.

To merge providers, choose Provider Merge from the left panel of Compass Assistant and the following screen will be shown:

1. Select one or more providers from the left side labeled 'Providers To Be Merged From'. Use Shift+click or Ctrl+Click to select multiple providers.
2. Select provider on the right side labeled 'Provider To Be Merged Into'
3. Click Merge Providers button
 - a. If you select to merge a provider that has no assessments using the provider(s) on the left side, then you will receive an error:

⚠ No providers found which require merging for the selected provider merge profile.

If you want to delete this provider you can do so from Tools> Agent Specific Data> Agent Providers.

- b. If you select a provider that was selected on the left, you will receive an error message:

⚠ To be merged into provider ABC Family Pharmacy not allowed to also be in the to be merged from list

Remove the selection of the provider on the left (use Ctrl+click if have chosen many providers) or change the Provider to be merged into.

- c. If you select providers on the left that were both used in the same assessment record or the proposed provider to be merged into was also used, this would cause a duplicate record. If this will occur, you will receive an error message:

⚠ Merging with provider would result in duplicates for 1 assessment(s)

- i. Click the Display Duplicates button

- ii. Go into that assessment record and remove the duplicate or you will be unable to perform this change
4. Once there are no errors, you will receive a confirmation window to show you all the providers you chose to merge. Please carefully review this list since there is NO undo option.
 5. Click Continue if you want to proceed with the change. Cancel if you need to make changes to either list.
 6. When it's complete, you will receive a message under the Merge Providers button:

Merging provider completed without error.

Merge Provider History

History found under the Agent Provider Merge category displays the provider merges that have been made using COMPASS Assistant. The Merge Provider History shows all changes in reverse order of change date to show a complete history of all COMPASS Assistant changes ever made. This is where users can find what changes were made using the Merge Provider functions.

Merge Provider History				
Provider Type	Provider Being Merged Into	User ID	Process Date	Providers Merged
Dme	Lots 'O DME	OWENME	11/07/2015 03:15:48 PM	DME 2 U DME R Us Quik DME Quick DME
Dme	Lots 'O DME	OWENME	11/07/2015 03:14:18 PM	Lots o DME
Pharmacy	CVS - Main St	OWENME	11/07/2015 03:09:14 PM	CVS
Medical	Dr. Quinn	OWENME	11/07/2015 02:44:52 PM	Doctor Quinn
Medical	Doctor Quinn	OWENME	11/07/2015 02:44:38 PM	Dr. Quinn

Merge Provider History Details

Provider Type – This shows the type of change made; Pharmacy, Medical or DME

Provider Being Merged Into – This is the provider the records were changed to

User ID – Login ID of user making change

Process Date – Date and time change was initiated

Providers Merged – This lists the provider(s) that were changed

Compass neXt



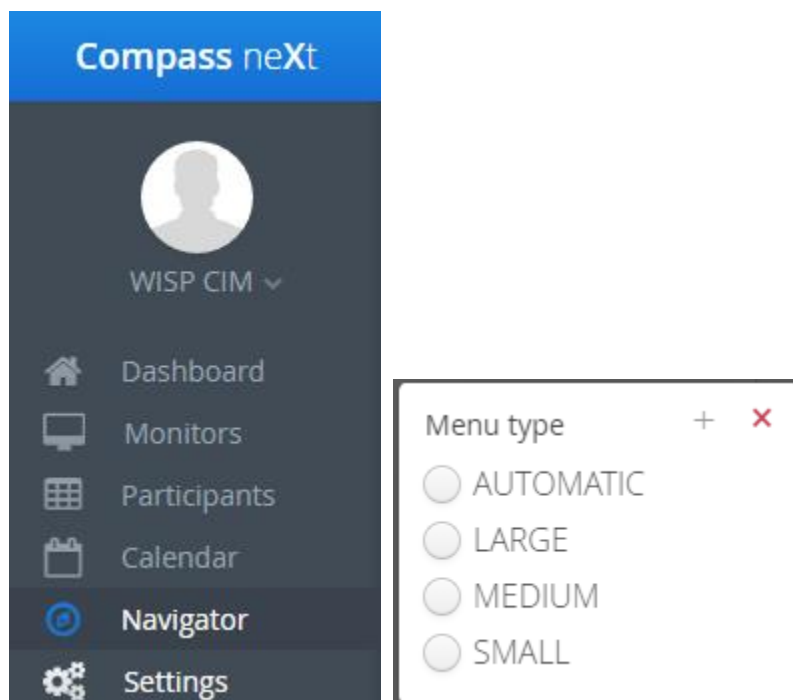
Compass neXt Introduction

Compass neXt was designed to optimize work flow and to help users better plan their activity while alerting them to conditions that may need addressing. Compass neXt focuses on quick information access for various user functions while maintaining a participant centered view which allows instant access to key participant information and functions.

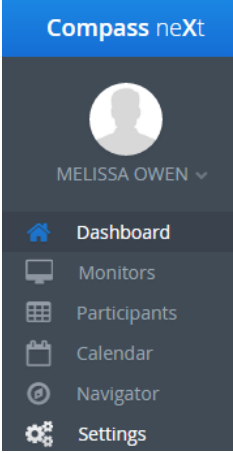
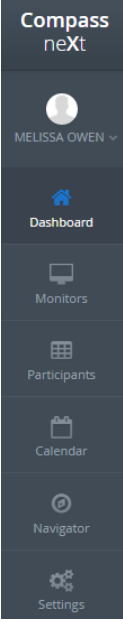
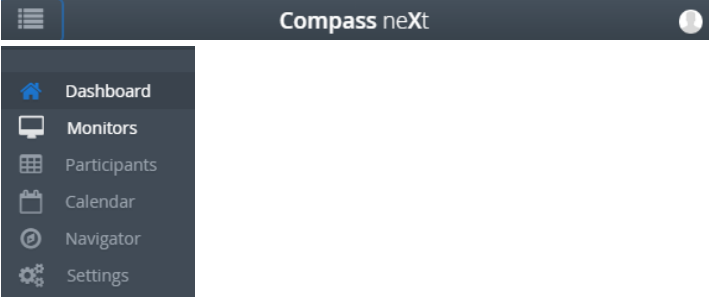
Users that have the Compass neXt permission will show Compass neXt immediately after login. Note that this is not available in Compass GO. There are several features:

- Dashboard – displays several informational widgets as well as to-do items
- Monitors – reports participant information for Waiver Pending and Institutionalized Participants
- Participants – search capability of anyone in your agency
- Calendar – displays to-do reminders in a calendar format
- Navigator – navigates to traditional Compass
- ADT/CCD Notices – displays ADT and CCD notices
- Settings – change display of navigational panel

Compass neXt has a navigational panel that shows throughout Compass. The display of the panel will change based on your screen resolution and whether you have the size of text, apps, and other items set other than 100% in the system display options, or if your browser is not maximized. Users can also change this panel manually using the Settings option.



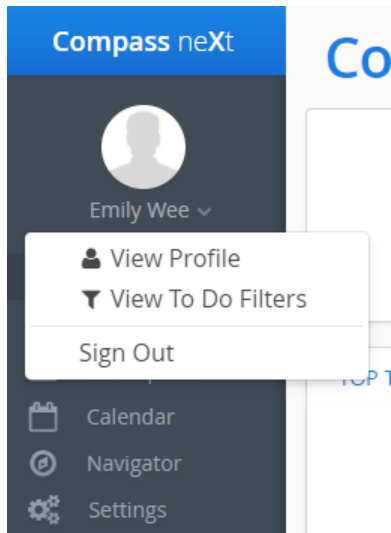
Automatic will automatically choose the navigational panel, other options described in table below.

High resolution at maximized browser or select Large on Settings	Moderate resolution/ browser not maximized or select Medium on Settings	Low resolution, browser not maximized or select Small on Settings
		
Left Panel	Left Panel	Top panel

Compass neXt allows for navigation to Compass. If the user doesn't have permission to information in Compass, they will not be able to access the information. Assess related items will take you to the case file and show you Participant (if you have Participant view permission). Otherwise you will receive an unexpected error that you do not have permission to access the resource.

Logging Out of Compass neXt

Users that have the Compass neXt permission will no longer have the logout menu item on the top right of Compass. You must use the Compass neXt navigational panel to log out. Click the drop down next to your name and then click Sign Out. This will end your connection to the server.



View Profile or To-Do Filters

The profile shows part of your Manage Users information. To-Do Filters show the to-do filters for your user ID.

 A screenshot of a web window titled "Profile" and "To Do Filters". The "Profile" tab is active. On the left is a grey silhouette of a person. To the right, the following information is displayed:

User Name:	OWENME
First Name:	MELISSA
Last Name:	OWEN
SC Initials:	
StartDate:	03/20/2001
CONTACT INFORMATION	
Phone Number:	734-930-0855
Email Address:	

 A screenshot of a web window titled "Profile" and "To Do Filters". The "To Do Filters" tab is active. It displays a list of 20 filters, each with an unchecked checkbox:

<input type="checkbox"/> Annual Release Info Signed Due	<input type="checkbox"/> Annual SD Budget Due
<input type="checkbox"/> Assess Date Missing	<input type="checkbox"/> Assess Not Finalized
<input type="checkbox"/> Counseling Renewal Due	<input type="checkbox"/> Hospitalized Reminder
<input type="checkbox"/> LOCD Renewal Due	<input type="checkbox"/> Liquid Nutrition Replacement
<input type="checkbox"/> Liquid Nutrition Supplement	<input type="checkbox"/> MA Redetermination
<input type="checkbox"/> Monitoring Contact	<input type="checkbox"/> Next Assess
<input type="checkbox"/> Oxygen Renewal Due	<input type="checkbox"/> PDN Renewal Due
<input type="checkbox"/> Person-Centered Planning Meeting	<input type="checkbox"/> Section 8 Housing Voucher Renewal Due
<input type="checkbox"/> User Added Reminder	<input type="checkbox"/> User Added Reminder - Mobile

 At the bottom center of the window is a "Clear" button.

To-Do Filters

To-Do Item filtering will be based on user/group preferences. A user's personal filter preferences will be saved in between sessions, logging out will not reset the filter selections.

Users can update their own preferences to filter/unfilter To-Do items based on type. In addition to the user-set filters, there is an "auto filter", which will use the agency-wide Flex configurations and update the Agencies group To-Do filter preferences when the field or fields that drive a To-Do item have been flexed out. For example, if an agency flexed out the Annual SD Budget Due field, no users from that agency will be able to see the Annual SD Budget To-Do and Annual SD Budget Due will be removed from the list of To-Dos you can filter. Users can not unfilter To-Do items that are filtered on the Agency level, users can only further filter items that are not filtered at the Agency level. There is a reset to default button that will remove any user specific To-Do filters. If there is a case where a participant belongs to multiple agencies and one agency has the field flexed out and the others do not, the agency who has the field flexed out will not see the To-Do item.

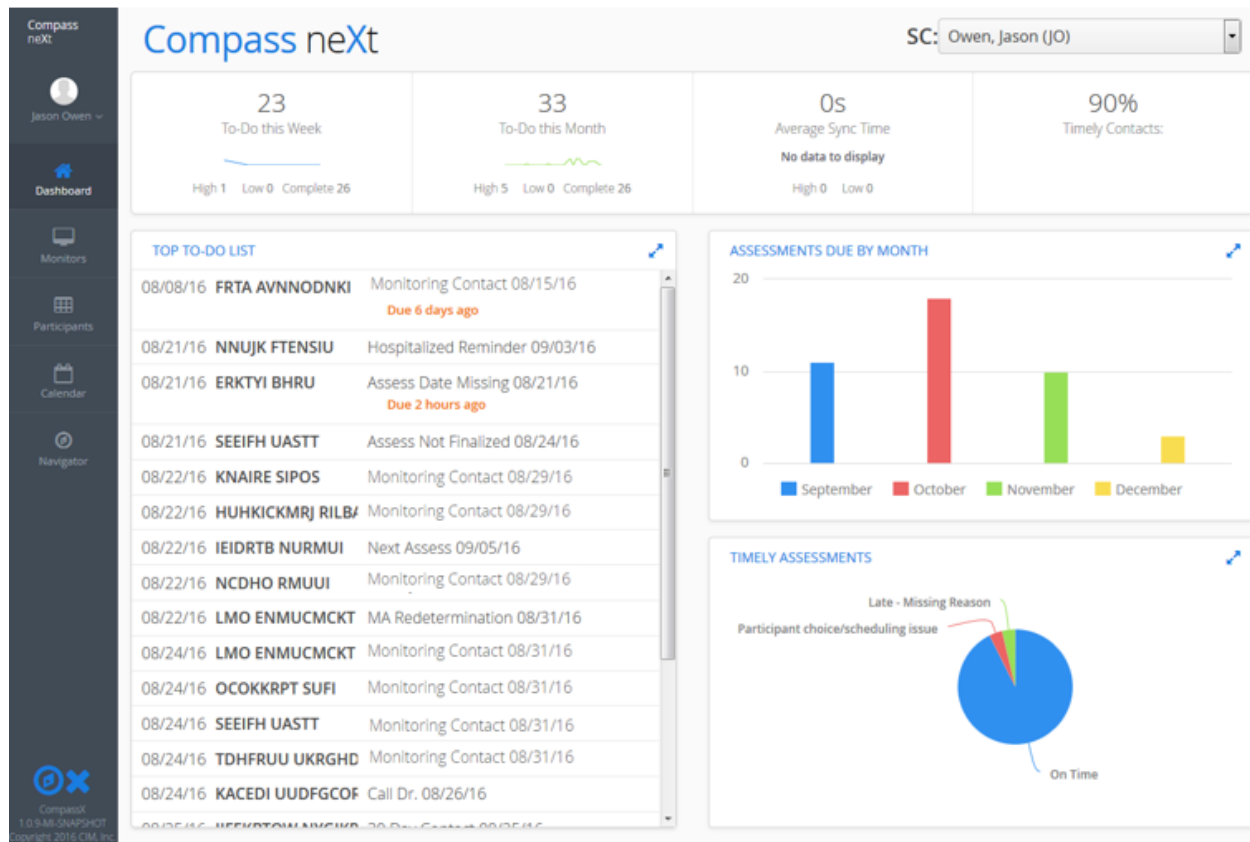
See the *Compass Case File User Guide, Case File Functions*, section "Filtering from Case File" for more information on filtering from the casefile and filtering in mobile.

Dashboard

The dashboard is designed to give users "status at a glance", as well as to put actionable information in front of the users to help inform their daily decision making without having to hunt.

The information presented is meant to highlight conditions that may need action and or planning to improve. For example, a spike in the To-Do this Month chart would alert a user that they are over committed on a day and may need to reschedule some events. The Assessments chart may highlight a month that has excessive assessments due and the user may need to enlist more resources to complete them all.

The dashboard is intended for use by Supports Coordinators currently; other staff can view, but there is not a method to aggregate this information in the dashboard. If the user has SC initials entered in Manage Users, then their name will be the default selection in the SC drop down on the top right. If no SC initials exist for the user logged in, they will have a blank dashboard. Anyone with Compass neXt permission can select any SC in their agency to view that SC's dashboard. All information on the dashboard applies to the SC selected. **All cases shown for the SC on the dashboard are cases that the SC is the primary supports coordinator only.**



Dashboard Features

To-Do this Week

This widget displays the count of to-do's with reminder dates up through the end of the current week (Sunday), including overdue to-do items. The High and Low figure the highest and lowest number of to-do items on one day in the 5 day work week. Complete shows how many to-do items have been completed in the week. The number of to-do's will decrease during the week as items are completed.

Spikes in this chart can indicate a day of heavy activity that may need addressing.

If you click on the graph, you will navigate to the Calendar in the week view which will show you the to-do's for the week, but may not add up to the count since to-do items not completed in prior weeks are included in the count.

To-Do this Month

The To-Do this Month widget is similar to the To-Do this Week widget, except this calculates to the end of the current month instead of week. The High/Low counts do include all 7 days of the week in this view. The number of to-do's will decrease during the month as items are completed. If you click on this graph, instead of going to the week view of the Calendar, it will show the month view. As the "to-do this week", this also includes to-do's not yet completed in prior months.

Spikes in this chart can indicate a day of heavy activity that may need addressing.

Average Sync Time

This chart can help in planning how much time to allot for mobile syncing.

The Average Sync Time widget shows the average of total processing time of syncs completed in the current month for the selected SC. The high and low are the longest and shortest times in the current month.

Timely Contacts

This widget helps to illuminate on-time contacts rate and can alert the users to any process issues having to do with keeping contacts on time.

The Timely Contacts widget is a percentage of the monitoring contacts that have been done on time in the last quarter. This only looks at participants that were in the following programs for the entire period between contacts: WA-Y, WA-P, WA-PB, WA-D, WA-I, WA-Fin-I, NFT, AASA/CM, AASA/TCM, Veterans, and all MHL programs except Meridian and UPHP-AHH. If the person switched to a program not in this list in between monitoring contacts, the contact is not counted in the percentage.

Monitoring contacts are considered on-time when either a Monitoring Contact Progress Note, Person-Centered Planning Meeting Progress Note, or an assessment is completed by the Monitoring Contact due date. The default due date is 30 days; however, some participants do not require the standard interval of 30 days to be contacted by their support's coordinator. Optionally, the field "How often should SC contact you?" can be completed within a Supports Coordination Purchased WA or Purchased Other intervention to indicate those preferences. Please see the Communication Plan section in the Compass Case File user guide for more information.

If the contact is not done on or before the due date, then the contact is not considered timely. No detail is available for the contacts that make up this percentage, but you can run the SC Monthly Performance script in Clearaccess to find the late monitoring contacts.

Note that late entries should have the progress note date/time as of the actual contact, not the time it was entered late. Otherwise, these will affect your timely contacts percentage.

Top To-Do List

The Top To-Do List is a sorted list of the top 20 To-Do items which is prioritized by reminder date. It can be used as a work list or just as a reminder of tasks that may become "overdue". When used as a work list, the software provides guidance on how to complete the given task with links that enable the user to see any related participant tasks and to quickly navigate to the area in the system that allows the tasks to be completed.

The first column is the reminder date and time, followed by the person's name, the to-do information with the due date behind it. If the due date is prior to today's date, the system prints a message below indicating how long ago the to-do was supposed to be done.

There are 17 system reminders, some of which may not be seen if the agency has flexed out the related fields:

- **MA Redetermination** – the Medicaid redetermination is due on this date. This uses the Medicaid Re/Certification date found in the Participant record. The read-only date is set from CHAMPS 271 eligibility response files. If the date above entered by the user is later than the date received from CHAMPS, the system will use the date input by the user instead as the due date
- **LOCD Renewal Due** – the LOCD renewal is due on this date; this date is found in the Participant record
- **Annual Enrollment Due** – the annual enrollment to field office is due on this date; this date is found in the Participant record
- **Annual Release Info Signed Due** – the annual release of information is due on this date; this date is found in the Participant record
- **Liquid Nutrition Supplement** – the liquid nutrition supplement Renewal is due on this date; this date is found in the Participant record
- **Liquid Nutrition Replacement** – the liquid nutrition replacement is due on this date; this date is found in the Participant record
- **Oxygen Renewal Due** – the oxygen renewal is due on this date; this date is found in the Participant record
- **Annual SD Budget Due** – the annual SD budget is due on this date; this date is found in the Participant record
- **PDN Renewal Due** – the PDN renewal is due on this date; this date is found in the Participant record
- **Counseling Renewal Due** – the counseling renewal is due on this date; this date is found in the Participant record
- **Section 8 Housing Voucher Renewal Due** – the Section 8 Housing Voucher renewal is due on this date; this date is found in the Participant record
- **Assess Date Missing** – the Next Assessment record has the SW or RN certification checkbox marked in sections H or T and assumes the assessment is in progress; the due date is the date the SW/RN checkbox was marked. This could happen accidentally if the assessment was finalized online, and then Compass GO was synced when it should have synced first. This would mean data is potentially missing from the dated assessment that was just finalized

- **Assess Not Finalized** – the Next Assessment record has the assigned assess date filled in, but the assessment is not yet finalized; the due date is 3 days after the assigned assess date. This is to remind you of an incomplete assessment
- **Next Assess** – the next assessment is due on this date. By default, the due date will be based on the assessment interval in the Open Status from the last finalized assessment. However, when the field “How often should the SC assess you?” is completed within a Supports Coordination Purchased WA or Purchased Other intervention then the due date will be based on the interval entered in the field from the last finalized assessment. Please see the Communication Plan section in the Case File user guide for more information. When the Care Setting status is set to Nursing Home then the Next Assess due will be removed. If the program status is WA-Y, WA-P, WA-PB, WA-D, WA-I, or WA Fin-I at any point within the episode then the next assessment must be completed within 7 days of leaving the nursing home. This means an assessment may be completed 7 days prior or 7 days after leaving the nursing home. If the participant has never had a WA-* Program Status within the episode then the next assessment is due will be based on the interval above. If both a NFT program status and a Nursing Home status exist with the same stop date then the due date will be based on the assessment interval.
- **Monitoring Contact** – the date the monitoring day contact is due. The default due date is 30 days. However, when the field “How often should the SC contact you?” is completed within a Support Coordination Purchased WA or Purchased Other intervention then the due date will be based on the interval entered in the field from the last Monitoring Contact Progress Note, PCP Meeting Progress Note, or a finalized assessment - whichever is most recent. Please see the Communication Plan section in the Case File user guide for more information. This only appears for participants currently enrolled in WA-Y, WA-P, WA-PB, WA-D, WA-I, WA Fin-I, NFT, AASA/CM, AASA/TCM, Veterans and all MHL programs except Meridian-C WA, Meridian-PCS, and UPHP-AHH.
- **PCP Meeting**– the person-centered planning meeting is due. The default due date is 180 days. However, when the field “How often should the SC have person-centered planning meeting?” is completed within a Support Coordination Purchased WA or Purchased Other intervention then the due date will be based on the interval entered in the field from the last PCP Meeting Progress Note or the last finalized assessment - whichever is most recent. Please see the Communication Plan section in the Case File user guide for more information. This only applies to participants currently enrolled in WAY-Y, WA-P, WA-PB, WA-D, WA-I, and WA Fin-I.
- **Hospitalized Reminder** – the person is currently in the hospital and will have been for 30 days on this date.

Communication Plan

There is a need for individual participants to be able to specify how often they would like to be contacted, assessed, and met with. The existing Communication Plan fields in the PCSP SC Intervention

is the official designated place to indicate those preferences. If there is a number of days entered in any of the fields below that is different than the standard 30 days or the Open Status interval, then the associated Compass NeXt to-do due dates need to be updated to reflect the participant's preference. For more information regarding the rules and processes please see the Communication Plan section in the Compass Case File user guide.

System reminders have a default due date time of 5:00 pm and a default reminder time of 8:00 am. Each system reminder has the reminder date automatically set to a number of days prior to the due date:


- **MA Redetermination** – 45 days prior
- **LOCD Renewal Due** – 30 days prior
- **Annual Enrollment Due** – 30 days prior
- **Annual Release Info Signed Due** – 30 days prior
- **Liquid Nutrition Supplement** – 30 days prior
- **Liquid Nutrition Replacement** – 30 days prior
- **Oxygen Renewal Due** – 30 days prior
- **Annual SD Budget Due** – 30 days prior
- **PDN Renewal Due** – 14 days prior
- **Counseling Renewal Due** – 14 days prior
- **Section 8 Housing Voucher Renewal Due** – 14 days prior
- **Assess Date Missing** – same as due date; immediately
- **Assess Not Finalized** – same as due date; 3 days after the assigned assess date
- **Next Assess** – 14 days prior (or date the care setting was entered that person came home from Nursing Home)
- **Monitoring Contact** – 7 days prior
- **Person-Centered Planning Meeting**— 14 days prior
- **Hospitalized Reminder** – 17 days of hospitalization

There are also user-entered to-do items that will appear on this list. The due and reminder dates are set by the user so are customizable per item.

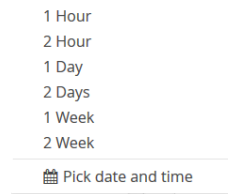
Navigation in the To-Do List

Users are able to navigate from a specific to-do item. Double clicking on the row will bring up the Participant Summary (see below for more information). Hover over the row will bring up the following

navigation selections:




is to change the reminder date/time (the left column).



Select an existing option from the list or click Pick date and time to bring up a calendar to choose the date/time. If you choose a reminder date that is after the due date, the system will warn you, but it can be set later. This is for cases where the participant is not available by the due date or other unforeseen circumstances.



is to “complete” the to-do item. Each type of reminder navigates to different locations to complete

MA Redetermination	Navigates to the Participant record
LOCD Renewal Due	Navigates to the Participant record
Annual Enrollment Due	Navigates to the Participant record
Annual Release Info Signed Due	Navigates to the Participant record
Liquid Nutrition Supplement	Navigates to the Participant record
Liquid Nutrition Replacement	Navigates to the Participant record
Oxygen Renewal Due	Navigates to the Participant record
Annual SD Budget Due	Navigates to the Participant record
PDN Renewal Due	Navigates to the Participant record
Counseling Renewal Due	Navigates to the Participant record
Section 8 Housing Voucher Renewal Due	Navigates to the Participant record
Assess Date Missing	Navigates to the Next Assessment record
Assess Not Finalized	Navigates to the Next Assessment record
Next Assess	Navigates to the Next Assessment record
Monitoring Contact	Brings up a progress note already marked as a Monitoring Contact to enter

Person-Centered Planning Meeting	Brings up a progress note already marked as a Person-Centered Planning Meeting to enter
Hospitalized	Navigates to the Status record
User-Added	Brings up a window to complete the to-do, enter a progress note, and/or add a follow-up to-do item

Monitoring Contact Complete Process

When clicking the check mark on a Monitoring Contact, the system will bring up the following window:

☑ Complete To-Do Item - Progress Note Details
✕

<p>Have you had any new health problems recently? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Do you have any concerns or needs that we can help you with at this time? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Have you gone to the Emergency Room or been admitted to the hospital recently? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Are you happy with your current living arrangements? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Have you received any letters from MDHHS recently or need assistance completing the application? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Have you had any changes in your Medicaid? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Are you satisfied with your services being provided at this time? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Are your services being delivered according to your PCSP? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Notes: <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div> </p>	<p>Are your caregivers prompt and do they treat you with respect and dignity? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Has there been a change in your eating or sleeping patterns recently? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Have you fallen recently? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Has anyone hit, threatened to hit, or talked to you in a mean way recently? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Have your medications changed recently? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Have you seen your doctor recently? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p> <p>Are you receiving any therapy such as PT, OT or ST? <input checked="" type="radio"/> No Selection <input type="radio"/> No <input type="radio"/> Yes</p>
---	---

Simply enter the monitoring contact note and any other information in Notes and click Next.

Then the system will bring up the following window:

Complete To-Do Item - Progress Note Details ×

Date/Time: Note Type:

Stop Date/Time:

Notes*

Supports Coordinator Initials: Person Contacted:

Contact Method: Contact Name:

Contact Reason: Area Code/Phone:

If "Other", describe: Duration of Contact (in minutes):

Once completed and Save is selected this will enter the Progress Note in Compass for you without leaving the dashboard and automatically marks the note as a Monitoring Contact. If you were unable to complete the monitoring contact, simply select Cancel.

User-Added To-Do Complete Process

When clicking the check mark on a user-added to-do item, the system will bring up the following window:

Complete To-Do Item - Optional Progress Note Details ×

Create a follow-up ToDo Item due on: Confirm ToDo Item Completion

Date/Time: Note Type:

Notes:

Supports Coordinator Initials: Person Contacted:


Contact Method: Contact Name:




Contact Reason: Area Code/Phone:

If "Other", describe: Duration of Contact (in minutes):





To complete the to-do item, you can simply click the Confirm ToDo Item Completion checkbox and click Save. However, you can optionally enter a progress note below that. On the top left is also a date you can indicate you want to create a follow-up to-do item. Simply click the calendar and choose the due date and the system will create the follow-up to-do for you. It will add the text, "Follow-up on " prior to the to-do item text that exists now.

You can do all 3 actions at once (complete to-do, add follow-up, create progress note) or a combination on this page or one action alone. It will not create a progress note if just the date/time and Supports Coordinator Initials is left on the page, only if you enter notes will it add a progress note. It will not add a follow-up to-do item if the date field is left blank. Note that if you confirm the to-do item completion and click Save, that the to-do will disappear from the Top To-Do List, so any progress note or follow-up date you want to add will need to be entered manually.

 offers the following options for all types of to-do items:




-  Edit ToDo Item
-  To Case File
-  Participant Summary

And for MA Redetermination to-do items only:

-  Edit ToDo Item
-  Suppress ToDo Item
-  To Case File
-  Participant Summary

Edit ToDo Item will open the to-do item details. Users can change the title (used on the to-do list), description, and reminder dates. Users can only delete, change due dates, or mark complete for User-Added to-do items. System added reminders are all done through editing of the participant's case file or status.

To-Do Item Detail + x

Title:

Description:

<p style="margin: 5px 0;">Due on: <input style="width: 150px;" type="text" value="08/26/16 05:00 PM"/></p> <p style="margin: 5px 0;"><input type="checkbox"/> Complete</p> <p style="margin: 5px 0;">Completed by: <input style="width: 150px;" type="text"/></p> <p style="margin: 5px 0;">Completed on: <input style="width: 150px;" type="text"/></p>	<p style="margin: 5px 0;">Remind me on: <input style="width: 150px;" type="text" value="08/24/16 08:00 AM"/></p> <p style="margin: 5px 0;">Entered by: <input style="width: 150px;" type="text" value="OLSONJU"/></p> <p style="margin: 5px 0;">Entered on: <input style="width: 150px;" type="text" value="8/21/16 06:01 PM"/></p>
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will take you to the Participant Summary



will navigate like the other check mark from the to-do item as described above



will show you information on how to complete the to-do item at the bottom right of the page

Suppress ToDo Item will suppress the MA Redetermination to-do item when clicked, which will immediately remove the to-do item from the Top To-Do List and Weekly/Monthly counts

To Case File will take you to the person's case file in Compass

Participant Summary will open the Participant Summary window

Assessments Due by Month

The Assessments Due by Month widget is a graph of assessments due by month. This chart can help avoid overdue assessments and facilitate better resource planning.

If you hover over the bars, the count of assessments will be displayed. This can help with planning to work ahead if many are due in the following month or needing to plan for vacations. No detail is available for the assessments that make up this graph, but you can use the Case File Selector, filter by the Primary Supports Coordinator, and sort by Next Assess Due date for the detail.


Timely Assessments

The Timely Assessments widget is a pie chart of the assessments due in the last 90 days from 'today' in relation to the assessment interval. This is not limited to any program. If the assessment was late including assessments that are overdue and not finalized yet, the pie chart will reflect the late reason entered in the SW assessment if finalized, otherwise it will be reflected as "Late – Missing Reason" until finalized. Changes in supports coordinators are calculated for as well; the assigned assess date and the due date must occur while you are the primary supports coordinator in order to count towards your percentage. See the Case File User Guide for how the next assessment due is calculated.

If you hover your mouse over the pie chart, you will see the count of each as well as the percentage. No detail is available for the assessments that make up this chart, but you can run the SC Monthly Performance script in Clearaccess to find the late assessments.



shown in the top right corner of the Top To-Do List, Assessments Due by Month, and Timely

Assessments widgets allows you to maximize the widget to the size of your browser page. Clicking 

will minimize the widget back down.

Participant Summary

The Participant Summary is available throughout Compass neXt. This shows the most recent information for the person in your agency as shown below. This will show Waiting List information instead of the Episode information if the person has never been open. The To-Do List for the person is shown on the left. The red background indicates the to-do is overdue. This will list all to-do's for the person, not just those coming soon. Clicking the to-do will open the to-do item for editing.

You can also add this person to the SC's sync by checking the Add to Compass GO Sync List. This is an alternative way to using the Sync Selector in Compass GO. When the SC selected in Compass neXt syncs again, they will have the person offline. Note that this is not available when there is no episode open in the last 30 days for the person.

SHORTCAKE, STRAWBERRY, SSN: _____, Date of Birth: 05/05/1955 ✕

+
🔍
🏠
📅
📝
🔗

Critical Information:

🚩 Contact guardian Beth for care coordination, monthly contact and to schedule reassessments.

<p>To-Do List</p> <ul style="list-style-type: none"> <li style="background-color: #f08080; padding: 5px; margin-bottom: 5px;">Annual Enrollment Due 03/25/18 <li style="background-color: #f08080; padding: 5px; margin-bottom: 5px;">Monitoring Contact 09/21/19 <li style="background-color: #4169E1; color: white; padding: 5px; margin-bottom: 5px;">MA Redetermination 10/31/19 <li style="background-color: #4169E1; color: white; padding: 5px;">Annual Release Info Signed Due 1 	<p>Medicaid ID:</p> <p>County: GRAND TRAVERSE</p> <p>Phone Number: (444) 444-4444</p> <p>Preferred Method of Communication</p> <p>Phone: Beth - (555) 555-5555</p> <p>Program Status: 04/05/2018 - WA-I</p> <p>Open Status: 06/20/2017 - Active</p> <p>Care Setting Status: 04/05/2018 - Nursing Home</p> <p>Primary SC: BOSLEY, MICHAEL</p> <p>Secondary SC: BARRONS, KIRSTEN</p> <p style="text-align: center;"><input type="checkbox"/> Add to CompassGO Sync List</p>
---	--

The icons along the top will navigate you to areas in Compass.

+ Add a to-do item – only available if episode exists

Add To-Do Item + ✕

Title:






Description:

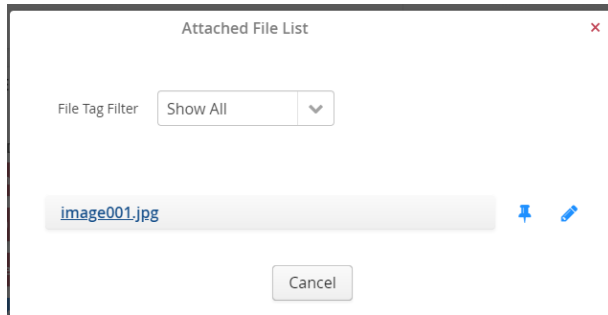
Due on:

Remind me on:

 Go to the Participant record

 Go to Statewide Search

-  Go to Status – only available if episode exists
-  Go to the Next Assessment – only available if episode exists
-  Go to Progress Notes – only available if episode exists
-  Add a Progress Note – only available if episode exists – see Progress Notes in the Compass Case File User Guide
-  View Attached Files for participant – see Attached Files in the Compass Case File User Guide



Click the filename that is underlined to download the file. Click the pushpin icon to go to where this file is attached. Click the pencil icon to edit the details of the file. Note that files cannot be uploaded here.

Monitors

Monitors are another option to see lists of information. Currently there are two monitors.

Institutionalized Participants

The default page for monitors is the Institutionalized Participants. This shows participants that are currently in the Hospital or Nursing Facility. For the Nursing Facility, we are excluding clients that have no program status or are currently a NFT status since those are not active participants yet to monitor. If the days institutionalized is over 30 days, the count will have the warning symbol and be red font. Clicking on the person row will take you to the Participant Summary.

Compass neXt

Jason Owen ▾

Monitors

SC: Owen, Jason (JO) ▾

[Institutionalized Participants](#) ★ [Waiver Pending Participants](#)

Hospitalized Participants

Name	Medicaid ID	Date Institutionalized	Days Institutionalized
FTENSIU, NNUJK	3610608721	08/05/2016	17

Nursing Facility Participants

Name	Medicaid ID	Date Institutionalized	Days Institutionalized
TCOFTMS, JUI		05/11/2016	▲ 103

Waiver Pending Participants

The Waiver Pending Participants shows participants who are WA-P or WA-PB in the program status. This includes stopped WA-P or WA-PB statuses and closed participants. All WA-P and WA-PB statuses should be resolved as it is not a permanent status. Clicking the person row will take you to the Participant Summary.

Compass neXt

Jason Owen ▾

Monitors

SC: Owen, Jason (JO) ▾

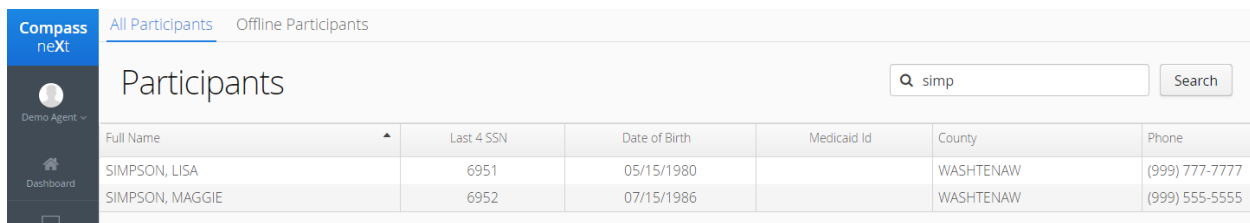
[Institutionalized Participants](#) ★ [Waiver Pending Participants](#)

Name	Medicaid ID	WA-P Start	WA-P Stop	Closed
ENMUCMCKT, LMO	1181020210	04/06/2016	04/30/2016	
SUFI, OCOKKRPT	2023920705	08/01/2016		

Participants

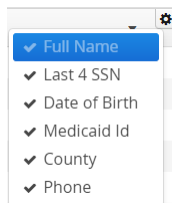
Participants is a method to search for participants in your agency. This will search any and all types of participants including those only on the Waiting List and closed participants. It's a way to not have to know if they are closed or open or if they ever opened in your agency and able to find their record. Any column is searchable. If you would like to see all participants in a certain county, search on that. You can search by name, last 4 SSN, date of birth, phone number, or Medicaid ID. You can search by partial names or you can also search for a person's full name (first middle last or first last or last first). If the field has a space in it and you want to pull exactly that and only that, use double quotes around the search. For a phone number search, you must include the area code, but do not need formatting. For example, 9991234567 will find phone number (999) 123-4567. You can also search 999-123-4567, 999.123.4567 or (999) 123-4567 and get the same result.

Each column is sortable if you click on the column header. Clicking on a person row will open the Participant Summary. See example of search results below.



Full Name	Last 4 SSN	Date of Birth	Medicaid Id	County	Phone
SIMPSON, LISA	6951	05/15/1980		WASHTENAW	(999) 777-7777
SIMPSON, MAGGIE	6952	07/15/1986		WASHTENAW	(999) 555-5555

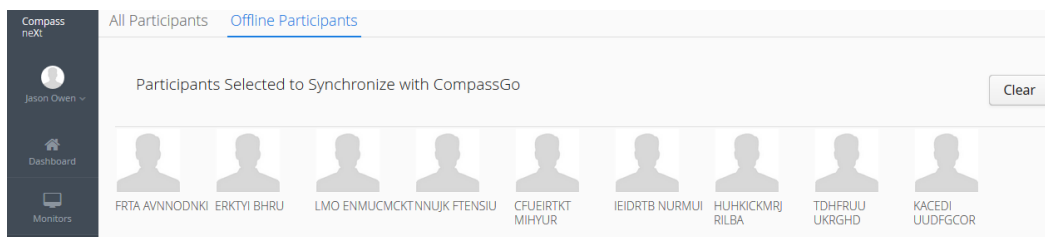
You can also remove columns from view if you click above the scroll bar on the top right, a gear icon will appear, click that and the menu will show as below. Uncheck or check any columns you would like to see.



Offline Participants

Click Offline Participants tab to see the participants that are selected to sync to Compass GO.

If you click on the person, it will bring up the Participant Summary. You can uncheck Add to Compass GO Sync if you want to remove them from your sync. Clicking the Clear button will remove all the participants from your sync selection. Note that you have to sync Compass GO to update to this list of participants. This only works correctly if you are logged in as a Supports Coordinator.





















Participants Selected to Synchronize with CompassGo								
FRTA AVNNODNKI	ERKTYI BHRU	LMO ENMUCMCKT NNUJK FTENSIU	CFUEIRTKT MIHYUR	IEIDRTB NURMUI	HUHKICKMRJ RILBA	TDHFRUU UKRGHD	KACEDI UUDFGCOR	

Calendar

The calendar is a way to view the to-do reminders in a calendar view. To-do's default to a one hour timeframe. The reminder date/time is what is used to place the item on the calendar. You are able to click and drag the reminder to different times/dates and extend or reduce the time. There are 4 different views of the calendar: Day, Week, Month, and Agenda. Click on these to change the view. You can navigate to different time periods by using the left/right arrows on the top left.

Each type of to-do item is a different color.

 MA Redetermination	 Counseling Renewal Due
 LOCD Renewal	 Section 8 Housing Voucher Renewal
 Annual Enrollment Due	 Assess Date Missing
 Annual Release Info Signed Due	 Assess Not Finalized
 Liquid Nutrition Supplement	 Next Assess
 Liquid Nutrition Replacement	 Monitoring Contact
 Oxygen Renewal Due	 Person-Centered Planning Meeting
 Annual SD Budget Due	 Hospitalized
 PDN Renewal Due	 User-Added

Hover over the calendar entry to see the type of to-do. Click the calendar entry to open up the participant summary. You can click the to-do items on the left if you want to make changes.

Currently, you cannot add appointments to the calendar except for in the form of a to-do. In the future, this may replace local calendars you use to schedule your day.

Navigator

Clicking the Navigator on the left panel will take you to Compass Case File Selector.

ADT/CCD Notices

ADT/CCD Notices is covered in the Case File User Guide under the Connect2Care section.

Appendices



- ⊕ *Agent List*
- ⊕ *Programs*
- ⊕ *Counties*
- ⊕ *Glossary*

Agent List

Code	Agent Name
02	REGION 2 AREA AGENCY ON AGING
04	REGION IV AREA AGENCY ON AGING
05	VALLEY AREA AGENCY ON AGING
06	TRI COUNTY OFFICE ON AGING
07	REGION VII AREA AGENCY ON AGING
08	AAA OF WESTERN MICHIGAN - REGION 8
09	REGION 9 AREA AGENCY ON AGING
10	AREA AGENCY ON AGING OF NORTHWEST MICHIGAN
11	UPCAP AREA AGENCY ON AGING
14	SENIOR RESOURCES
1A	DETROIT AREA AGENCY ON AGING
1B	AREA AGENCY ON AGING 1-B
1C	THE SENIOR ALLIANCE
21	RELIANCE COMMUNITY CARE PARTNERS
22	THE INFORMATION CENTER
23	MORC
26	SENIOR SERVICES, INC.
27	A & D HOME HEALTH
30	NORTHERN LAKES CMH – NORTHERN HEALTH CARE MGMT.
3A	AREA AGENCY ON AGING REGION IIIA
3B	REGION 3B AREA AGENCY ON AGING
3C	BRANCH-ST. JOSEPH AREA AGENCY ON AGING (IIIC)
60	ANN ARBOR CIL (AACIL)
61	BLUE WATER CIL (BWCIL)
62	CAPITAL AREA CIL, LANSING (CACIL)
63	DISABILITY ADVOCATES OF KENT COUNTY (DAKC)
64	DISABILITY CONNECTIONS, JACKSON (DCJ)
65	DISABILITY CONNECTION/W MICHIGAN (DC)
66	DISABILITY NETWORK OAKLAND AND MACOMB (DNOM)
67	DISABILITY NETWORK LAKESHORE (DN/L)
68	DISABILITY NETWORK MID-MICHIGAN (DN/MM)
69	DISABILITY NETWORK SOUTHWEST MICHIGAN (DN/SW)
70	DISABILITY NETWORK NORTHERN MICHIGAN (DN/NM)
71	DISABILITY NETWORK WAYNE COUNTY-DETROIT (DW/WCD)
72	SUPERIOR ALLIANCE FOR INDEPENDENT LIVING (SAIL)
73	THE DISABILITY NETWORK, FLINT (TDN)

Programs

Code	Program Desc	Program Long Desc
1	WA-Y	Waiver Yes - Eligible
2	WA-P	Waiver Pending
67	WA-PB	WA-Pending Bridges
68	WA-D	WA-Divestment
3	WA-I	Waiver Ineligible
14	WA Fin-I	Waiver Financially Ineligible
4	AASA/CM	AASA Care Management
5	AASA/TCM	AASA Targeted Case Management
15	AASA/CLP	AASA Community Living Program
75	AASA/Options Counseling	AASA/Options Counseling
76	AASA/Medication Management	AASA/Medication Management
6	Case Coord	Case Coordination
19	Care Trans	Care Transitions
20	Coventry	Coventry
7	Pvt Pay	Private Pay
78	Transition Navigation	Transition Navigation
13	NFT	Nursing Facility Transition
12	CG Respite	Caregiver Respite
17	Veterans	Veterans Admin HCBS
71	HAH	Health Access Hub
16	HDM	Home Delivered Meals
8	LCM 1	Local Case Management 1
9	LCM 2	Local Case Management 2
10	LCM 3	Local Case Management 3
11	LCM 4	Local Case Management 4
77	LCM 5	Local Case Management 5
69	LSH	Let's Stay Home
18	PACE	PACE Program Client
74	PERS	Personal Emergency Response Systems
73	Senior Millage	Senior Millage
21	MOW Hot/Frz	Hot/Frozen Meals on Wheels
22	MOW Liquid	Liquid Meals on Wheels
23	FoD MOW	Friends of Detroit Meals on Wheels
24	Wayne MMOW	Wayne Metro Meals on Wheels
25	Wayne Vets	Wayne County Veterans
26	Meridian-PCS	Meridian-PCS

70	Meridian-C WA	Meridian-C Waiver
27	UPHP-AHH	UPHP-AHH
28	UPHP-C WA	UPHP-C Waiver
45	UPHP-P	UPHP-P
46	UPHP-I	UPHP-P
30	AmH-C WA	AmeriHealth-C Waiver
31	AmH-PCS	AmeriHealth-PCS
52	AmH-PCS-L	AmeriHealth-PCS-Low
53	AmH-PCS-M	AmeriHealth-PCS-Moderate
54	AmH-PCS-H	AmeriHealth-PCS-High
40	AmH-P	AmeriHealth-Pending
47	AmH-I	AmeriHealth-I
32	Fidelis-C WA	Fidelis-C Waiver
33	Fidelis-PCS	Fidelis-PCS
55	Fid-PCS-L	Fidelis-PCS-Low
56	Fid-PCS-M	Fidelis-PCS-Moderate
57	Fid-PCS-H	Fidelis-PCS-High
41	Fidelis-P	Fidelis-Pending
48	Fidelis-I	Fidelis-I
34	HAP-C WA	HAP Midwest-C Waiver
35	HAP-PCS	HAP Midwest-PCS
58	HAP-PCS-L	HAP Midwest-PCS-Low
59	HAP-PCS-M	HAP Midwest-PCS-Moderate
60	HAP-PCS-H	HAP Midwest-PCS-High
42	HAP-P	HAP Midwest-Pending
49	HAP-I	HAP Midwest-I
36	Molina-C WA	Molina-C Waiver
37	Molina-PCS	Molina-PCS
61	Molina-PCS-L	Molina-PCS-Low
62	Molina-PCS-M	Molina-PCS-Moderate
63	Molina-PCS-H	Molina-PCS-High
43	Molina-P	Molina-Pending
50	Molina-I	Molina-I
38	Aetna-C WA	Aetna-C Waiver
39	Aetna-PCS	Aetna-PCS
64	Aetna-PCS-L	Aetna-PCS-Low
65	Aetna-PCS-M	Aetna-PCS-Moderate
66	Aetna-PCS-H	Aetna-PCS-High
44	Aetna-P	Aetna-Pending
51	Aetna-I	Aetna-I

Counties

Michigan Counties

County Code	County Name
00	OUT OF STATE
01	ALCONA
02	ALGER
03	ALLEGAN
04	ALPENA
05	ANTRIM
06	ARENAC
07	BARAGA
08	BARRY
09	BAY
10	BENZIE
11	BERRIEN
12	BRANCH
13	CALHOUN
14	CASS
15	CHARLEVOIX
16	CHEBOYGAN
17	CHIPPEWA
18	CLARE
19	CLINTON
20	CRAWFORD
21	DELTA
22	DICKINSON
23	EATON
24	EMMET
25	GENESEE
26	GLADWIN
27	GOGEBIC
28	GRAND TRAVERSE
29	GRATIOT

County Code	County Name
30	HILLSDALE
31	HOUGHTON
32	HURON
33	INGHAM
34	IONIA
35	IOSCO
36	IRON
37	ISABELLA
38	JACKSON
39	KALAMAZOO
40	KALKASKA
41	KENT
42	KEWEENAW
43	LAKE
44	LAPEER
45	LEELANAU
46	LENAWEE
47	LIVINGSTON
48	LUCE
49	MACKINAC
50	MACOMB
51	MANISTEE
52	MARQUETTE
53	MASON
54	MESCOSTA
55	MENOMINEE
56	MIDLAND
57	MISSAUKEE
58	MONROE
59	MONTCALM

County Code	County Name
60	MONTMORENCY
61	MUSKEGON
62	NEWAYGO
63	OAKLAND
64	OCEANA
65	OGEMAW
66	ONTONAGON
67	OSCEOLA
68	OSCODA
69	OTSEGO
70	OTTAWA
71	PRESQUE ISLE
72	ROSCOMMON
73	SAGINAW
74	ST. CLAIR
75	ST. JOSEPH
76	SANILAC
77	SCHOOLCRAFT
78	SHIAWASSEE
79	TUSCOLA
80	VAN BUREN
81	WASHTENAW
82	WAYNE - PSA 1A
83	WEXFORD
99	UNKNOWN

Wisconsin Counties

County Code	County Name	County Code	County Name	County Code	County Name
89	ASHLAND	92	IRON	95	MENOMINEE
90	FLORENCE	93	LANGLADE	96	OCONTO
91	FOREST	94	MARINETTE	97	ONEIDA
98	VILAS				

Glossary

Agent: Waiver Agent, Area Agency on Aging, PACE, or Center for Independent Living.

Browser: A software program that accesses and displays data available on the Internet. Microsoft's Internet Explorer is the most popular browser; Mozilla Firefox is recommended for COMPASS.

CAPS & Triggers: interRAI algorithms for Clinical Assessment Protocols and the triggers that caused the CAP to calculate. CAPS reports are available in the Reports Portal.

Diversion: Placement in a community setting that will eliminate the need to enter a nursing facility. In the NFT Portal, a diversion is a type of exception that must be approved by MDHHS.

Episode: A period of time a person is served starting with the intake date through the close date. Each time a person has a new intake record entered, a new episode begins.

Exception: A reason to deviate from the standard NFT rules; must be approved by MDHHS

Field: A cell that stores your response to a question. Fields include dates, numbers, and text. Status start dates, stop dates, and statuses are all fields.

Imminent Risk: A NFT form that must be submitted with a Diversion exception. MDHHS will only approve a person for diversion if they are at imminent risk of nursing facility admission.

Intake: The beginning of the episode. No dates in the episode can be prior to this date.

interRAI: A "collaborative network of researchers in over 30 countries committed to improving health care for persons who are elderly, frail, or disabled." (www.interrai.org)

MSA: Medical Services Administration. Administers Medicaid for Michigan; under MDHHS umbrella.

MSB: MICIS Service Bureau. Global term used to refer to CIM's suite of applications for Michigan.

MDHHS: Michigan Department of Health and Human Services.

MICIS: MI-Choice Information System. This is the MSB application in use for over ten years that is being replaced with COMPASS.

NFT: Nursing Facility Transition, project designed to assist people to return to the community from NF.

Participant: Person being screened, assessed, and monitored (formerly known as client).

Priority: Assigned level of priority for Waiting List participants from 1 – 4. Standard definitions existing for Waiver priorities, but agents can assign priorities 1 – 4 for other programs if they wish.

Quality Indicators: interRAI algorithm to indicate issues that may impact a person's quality of life. Quality Indicator reports are available in the Reports Portal.

RUG III HC: interRAI algorithms for Resource Utilization Groups in Home Care to indicate the acuity of the participant. RUG III HC reports are available in the Reports Portal.

Session: The session begins when you log into one of the MSB applications

SSP: Significant Support Participant

Status: Indicates the participant's state including if they are open or closed, program enrollment, location of care, and financial eligibility.

Transition: Moving from a nursing facility to a community setting.

Transitioneer: Person who transitions.

Vendor View: Reports portal for vendors to access Service Authorizations, Care Setting Status, and Assessments. The internet option provides secure messaging between the vendors and agent.