

Chapter 35

Cost Cap Exception and Assistive Technology

Request Forms

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Important The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in submit for approved status.

The information that is required due to policy may be different from those that are system required.

Introduction

Purpose The process of submitting the Cost Cap Exception and Assistive Technology Request forms online within KAMIS will replace the current process of the Case Manager faxing to KDOA several documents, including the completed request form for review and approval.

IMPORTANT The case manager's e-mail address must be added to the e-mail field in the Organization Member's page in order for the case manager's name to display in the TCM Name field of the request form.

E-Mail Notifications An automated e-mail notification will be sent to the case manager's e-mail address on record in the Organization Member's page when one of the following actions occur:

- Approval of the Request
- Denial of the Request
- Additional or Corrected Information is needed for a determination
- A new or corrected document is needed to be uploaded for a determination

No HIPPA information will be included in this e-mail. The customer's KAMIS ID and the request form date is the only identifying information that will be referenced.

Responding to the E-Mail Notifications When an automated e-mail notification is received requesting action the following steps should be taken:

1. Sign-in to KDOA Web Applications / KAMIS
 2. Search for the appropriate customer (the e-mail will list the customers KAMIS ID).
 3. Access the current UAI/POC that contains the request form needing action.
 4. Enter the requested additional/corrected information in the Additional Notes region or upload the requested/corrected document(s).
-

Customer Case Log When the KDOA Program Manager takes one of the above actions that generates an automated e-mail, the message of the e-mail is also added to the customer case log for future reference and documentation.

Accessing the Forms

Introduction There are two options in accessing the Cost Cap Exception Request and Assistive Technology Request forms.

- Through the UAI Assessment
or
- Through the Plan of Care.

Once a form has been created, regardless through which access point the form was created, the form will be available through either the UAI or Plan of Care.

How To Follow the steps in the table below to access the Cost Cap Exception Request and Assistive Technology Request forms.

Step	Action	Result
1.	Perform a Person Search to locate the customer.	
2.	Access either the UAI Assessment form or the Plan of Care.	UAI Assessment or the Plan of Care displays.
3.	The form link is located on the following tabs: <ul style="list-style-type: none">• UAI – Customer - Main Tab• POC – Customer Information	

Continued on next page

Accessing the Forms (continued)

How To

continued

Step	Action	Result
4.	Click on the Create a new CCER or Create a new ASTEX Req. link to open the referenced form.	Form will open in a separate window.

KAMIS ID: 200353198 Name: JETSON, JUDY AAA/CME: 4 Assessment Nbr: 20654775 more...

UAI - Uniform Assessment Instrument Version 3 [Unmet Needs](#)

1 Customer 2 Functional Assessment 3 Nourish 4 Service Plan 5 Health Physical 6 Health Assessment 7 Health Evaluation 8 Environment 9 Financial 10 Support Service 11 Review [Print](#)

Form Status: WORK IN PROGRESS

AAA/CME 4 - JAYHAWK AREA AGENCY ON AGING

Assessor Search (Last, First): SPACELY, COSMO P. [enter]

Assessor: SPACELY, COSMO - SPACELY SERVICES.2007925

Assessor Phone: 785-296-4789

Assessment Date: 07/06/2010

Disaster Red Flag

Electric

Physical Assessment

Medicaid

Expedited Services

Expedited Ind: [dropdown]

Expedited Comment: [text area]

File Upload (0)

CCE/ASTEX Requests

[Create a new CCER](#) [Create a new ASTEX Req](#)

KAMIS ID: 200353198 Name: JETSON, JUDY Primary AAA/CME: 4 SSN: 556-11-5656 Assessment Date: 07/06/2010

POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#) [Unlock & Close](#)

Standard UAI

Customer Information

Customer: JETSON, JUDY Address: 101 SKYPAD AVENUE County: SN

SSN: 556115656 Medicaid#: [blank] Phone#: 7852964987

Emergency Contacts

Person's Original Effective Date: 07/04/2010

Customer's Current Status: ACTIVE

Assessment Type: UNIFORM ASSESSMENT INSTRUMENT

Assessment Date: 07/06/2010 Reassessment Due Date: 07/05/2011

Cost Cap Exception Request

[Create a new CCER](#)

Assistive Technology (ASTEX) Request

[Create a new ASTEX Req](#)

Accessing Existing Request Forms

Introduction Once a form has been created, it can be viewed through either the UAI Assessment or the Plan of Care.

How To Follow the steps in the table below to access an existing the Cost Cap Exception Request and Assistive Technology Request form.

Step	Action	Result
1.	Perform a Person Search to locate the customer.	
2.	Access the UAI Assessment form or the Plan of Care.	UAI Assessment or the Plan of Care displays.
3.	A table will be displayed listing all request forms by date under the appropriate heading.	
4.	Click on the request link to open the existing referenced form.	Form will open in a separate window.

KAMIS ID: 200353198 Name: JETSON, JUDY AAA/CME: 4 Assessment Nbr: 20654775 more...

UAI - Uniform Assessment Instrument Version 3 [Unmet Needs](#) [Plan of Care](#)

1 Customer 2 Functional Assessment 3 Nutrition 4 Service Plan 5 Health Physical 6 Health Prescribed 7 Health Evaluation 8 Environment 9 Financial 10 Support Service 10 Release Print View

Main Demographics

Form Status APPROVED

AAA/CME 4 - JAYHAWK AREA AGENCY ON AGING

Assessor SPACELY, COSMO - SPACELY SERVICES 2007925

Assessor Phone 785-295-4789

Assessment Date 07/06/2010

File Upload (0)

CCE/ASTEX Requests

Create a new CCER	Create a new ASTEX Req.
CCER created 07/29/10 02:29 PM	ASTEX Reg. created 07/30/10 03:14 PM

Req Disaster

KAMIS ID: 200353198 Name: JETSON, JUDY Primary AAA/CME: 4 SSN: 556-11-5656 Assessment Date: 07/06/2010

POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#) [Unlock & Close](#)

Standard UAI

Customer Information Line Items Data Entry Print View File Upload (0)

Customer JETSON, JUDY Address 101 SKYPAD AVENUE County SN

SSN 556115656 Medicaid# 00123456789 Phone# 7852954987

Cost Cap Exception Request

Create a new CCER

CCER created 07/29/10 02:29 PM

Assistive Technology (ASTEX) Request

Create a new ASTEX Req.

ASTEX Reg. created 07/30/10 03:14 PM

Emergency Contacts

Person's Original Effective Date 07/04/2010

Customer's Current Status ACTIVE

Assessment Type UNIFORM ASSESSMENT INSTRUMENT

Assessment Date 07/06/2010 Reassessment Due Date 07/05/2011

Cost Cap Exception – New Form

Initial Form Window

The below screen print is the form prior to any information being entered or created.

User Information

Request Information

Request Date defaults to the current date. Can be changed.

KDOA Review
KDOA access only.

Upload File
Adjustable
Frame

https://webapps.agng.ky.gov/?p=104202.5:7726248994605220:::1-PT_ASSESSMENT_SEQ_NBBI_PT_SURT_IDOC - Windows Internet Explorer

TRANSDUCER Login

KAMIS ID: 200353198 Name: JETSON, JUDY Primary AA/CME: 4 SSN: 556-11-5656 Assessment Date: 07/09/2010 Medicaid#: 00123456789

Cost Cap Exception Request

Create

Request Date: 07/29/2010
Form Status: WORK IN PROGRESS

POC Level: 2 (\$1,965.01 - \$3,999.99) 3 (\$4,000.00 or greater)

Customer Type: 1 - NEW HCSBYE CUSTOMER
 2 - CURRENT HCSBYE CUSTOMER WHO NOW REQUIRES A PLAN OF CARE OVER THE COST CAP
 3 - CURRENT HCSBYE CUSTOMER WITH APPROVED COST CAP EXCEPTION BUT REQUIRES AN INCREASE TO THE APPROVED AMOUNT

CCE Explanation:

0 of 2000

NOTE: Email for Case Manager must be entered in Organization Member with KAMIS.

TCM Name: -SELECT-

Cost Cap Criteria: 1 - EXPERIENCING AN ACUTE MEDICAL EPISODE CONSIDERED TO BE LESS THAN SIX MONTHS IN LENGTH
 2 - NEW CUSTOMER DETERMINED TO NEED HOURS OF SERVICE DUE TO CHRONIC CONDITION, WHICH HAS CREATED A HEALTH AND WELFARE ISSUE
 3 - CURRENT CUSTOMER DETERMINED TO NEED ADDITIONAL HOURS OF SERVICE DUE TO DOCUMENTED DECLINE IN FUNCTIONAL CAPACITY OR DOCUMENTED CHANGE IN SOCIAL CIRCUMSTANCES, WHICH HAS CREATED HEALTH/WELFARE ISSUE
 4 - CUSTOMER IS IN END STAGES OF A TERMINAL ILLNESS (E.G., AIDS, ALZHEIMER'S, COPD OR CANCER)

Added by: on Modified by: on

KDOA Review
KDOA Approval Ind: [] KDOA Effective Date:
KDOA Approval Cost:
KDOA Comments:
Decision by: on

Upload File Adjustable Frame

To adjust the size of the lower frame, please the cursor on the line, left mouse click and drag the line to the desired size.

Cost Cap Exception – Completed Form

Completed Form Window The below screen print is the form after information has been entered and the form has been submitted for approval.

User Information

Request Information

KDOA Review
KDOA access only. Indicates form status.

Additional Notes Region
Notes can be added at any time regardless of form status

TRAININGUSER Logout

KAMIS ID: 200353198 Name: JETSON, JUDY Primary AAA/CME: 4 SSN: 550-11-5856 Assessment Date: 07/09/2010 Medicaid#: 00123456789

Cost Cap Exception Request

[Apply Changes](#)

- Request Date 07/29/2010
- Form Status SUBMIT FOR APPROVAL
- POC Level 2 (\$1,985.01 - \$3,999.99)

Customer Type 2 - CURRENT HCBS/IFE CUSTOMER WHO NOW REQUIRES A PLAN OF CARE OVER THE COST CAP

CCE Explanation Customer has had total hip replacement and is moving back home. Needs additional services for a 2-3 month period

NOTE: Email for Case Manager must be entered in Organization Member within KAMIS

TCM Name SPACELY, COSMO - SPACELY SERVICES <kamsil@aging.ks.gov>

Cost Cap Criteria

- 1 - EXPERIENCING AN ACUTE MEDICAL EPISODE CONSIDERED TO BE LESS THAN SIX MONTHS IN LENGTH
- 2 - NEW CUSTOMER DETERMINED TO NEED HOURS OF SERVICE DUE TO CHRONIC CONDITION, WHICH HAS CREATED A HEALTH AND WELFARE ISSUE
- 3 - CURRENT CUSTOMER DETERMINED TO NEED ADDITIONAL HOURS OF SERVICE DUE TO DOCUMENTED DECLINE IN FUNCTIONAL CAPACITY, OR DOCUMENTED CHANGE IN SOCIAL CIRCUMSTANCES, WHICH HAS CREATED HEALTH/WELFARE ISSUE
- 4 - CUSTOMER IS IN END STAGES OF A TERMINAL ILLNESS (E.G., AIDS, ALZHEIMER'S, COPD OR CANCER)

Added by TRAININGUSER on 07/29/2010 Modified by DEBYZIMMERMAN on 07/30/2010

KDOA Review

KDOA Approval Ind Approved KDOA Effective Date 07/30/2010

KDOA Approval Cost 2930

KDOA Comments

Decision by DEBYZIMMERMAN on 07/30/2010

Additional Notes

Display Only Via Road Notes: Yes No [Post Additional Information](#)

Attached the worksheet. If you need any more information, please let me know.

from: Training User [CME 04 *] 07/29/2010 02:49:50 PM

Upload File - File size limited to 1mb! [Browse...](#) File(s) uploaded 06/08/10 10:12:55 PM

File Name [Post/Delete File](#)

Application: CCE to 106

name	delete	size	source	added	by
Customer Service Worksheet - J.Jetson	<input type="checkbox"/>	110,087	55-009_Customer_Service_Worksheet_Jetson.pdf	07/29/2010 02:49:04	TRAININGUSER

Upload File Adjustable Frame

Cost Cap Exception Process

How To Create the Form Follow the steps in the table below to create the Cost Cap Exception Request form. Once created two additional regions, Additional Notes and File Upload will display.

Note The changes in services or units should be entered on the Plan of Care in KAMIS and referred to the assigned KDOA Approver.

Step	Action	Result
1.	Access the form as previously instructed.	New form is displayed.
2.	Complete all fields on the form.	All fields are required.
3.	Click on the Create button.	Form will be saved with a status of Work in Progress. The Additional Notes and the Upload File regions are displayed and available.
4.	Enter any additional comments in the Additional Notes area. Detailed Instructions on Page 18.	The notes will remain on all Cost Cap Exception Request forms associated with the UAI/POC.
5.	Upload the required documents of the paper Plan of Care and the Customer Service Worksheet. Detailed Instructions on Page 20.	The uploaded document will remain only on this version of the Cost Cap Exception Request form.
6.	Once all information is entered. Using the drop down selection field, change the Form Status to Submit for Approval .	

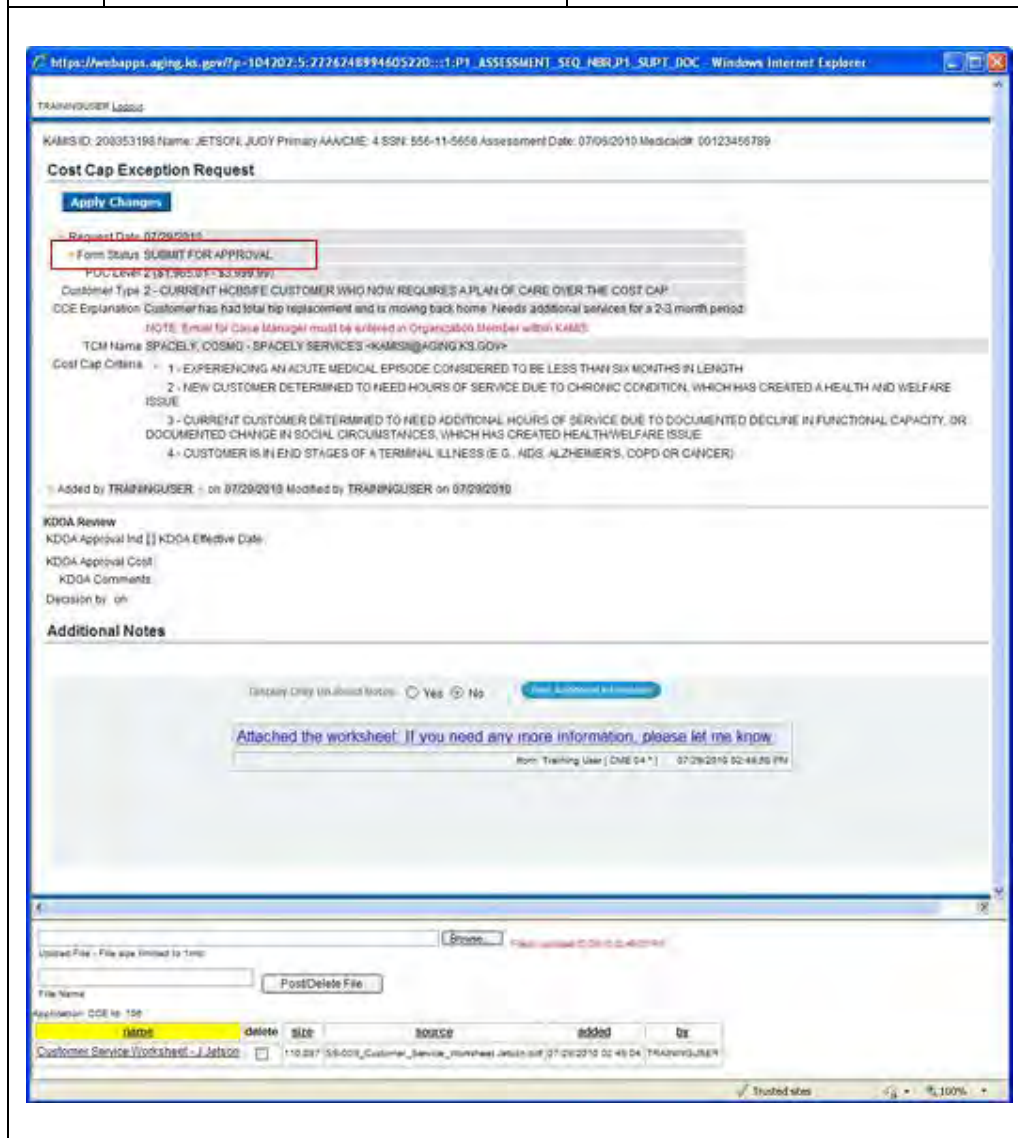
Continued on next page

Cost Cap Exception Process (continued)

How To

continued

Step	Action	Result
7.	Click on the Apply Changes button.	Form fields are disabled and the form is submitted to KDOA for review.



Note

When the request form is saved with the status of Submit for Approval the form will be placed on the Cost Cap Exception worklist for KDOA action.

Assistive Technology – New Form

Initial Form Window

The below screen print is the form prior to any information being entered or created.

User Information

Request Information

Request Date defaults to the current date. Can be changed.

KDOA Review
KDOA access only.

Upload File
Adjustable
Frame

The screenshot shows a web browser window with the URL https://webapps.aging.ks.gov/?p=104203:5:2530005270741318:::1,2:P1_ASSESSMENT_SEQ_NBR,P1_SUPT_D. The page title is "TRAININGUSER Logout" and the breadcrumb is "ASTEX / Sources Denying Request". The user information is: KAMIS ID: 200353198 Name: JETSON, JUDY Primary AAA/CME: 4 SSN: 556-11-5656 Assessment Date: 07/06/2010 Medicaid#: 00123456789. The form title is "Assistive Technology Request". There is a "Create" button. The form fields are: Request Date: 08/05/2010; Form Status: WORK IN PROGRESS; NOTE: Email for Case Manager must be entered in Organization Member within KAMIS; TCM Name: --SELECT--; Explanation: (text area, 0 of 2000); Comments: (text area, 0 of 2000); Added by: on; Modified by: on; KDOA Review: Decision by: on; KDOA Approval Ind: [] KDOA Effective Date: End Date 09/30/2010; KDOA Approval Cost: MMIS Claims Paid Amount; KDOA Comments: (text area). At the bottom, there is an adjustable frame. A mouse cursor is positioned on the right side of the frame's border, with an arrow pointing to it from the text below.

To adjust the size of the lower frame, please the cursor on the line, left mouse click and drag the line to the desired size.

Assistive Technology – Completed Form

Completed Form Window The below screen print is the form after information has been entered and the form has been submitted for approval.

User Information

Request Information

KDOA Review
KDOA access only.

Additional Notes Region

Upload File Adjustable Frame

Sources Denying Request

System	Reason Denied
1 - KANSAS EQUIPMENT EXCHANGE	N/A
2 - MEDICAID DME	N/A
3 - FAMILY	Unable to perform
4 - SALVATION ARMY / GOODWILL	N/A
5 - CHURCHES	no manpower available
6 - MEDICARE	N/A
7 - OAA CAREGIVER PROGRAM	N/A
8 - SRS APS	N/A
9 - CILS	N/A
10 - OTHER	N/A

AT Items/Costs

Item Category	Other User	W/Provider	Item Cost	Medicare Cost	Total Cost	Status
RAMP	Front Entry	Ramps R Us	\$1,546.29	\$0.00	\$1,546.29	-

Additional Notes

Have contacted several area churches for this project. They do not have the manpower. Family is not able to perform this level of skill.

Assistive Technology Process

How To Create the Form Follow the steps in the table below to create the Assistive Technology Request form. Once created four additional regions will display.

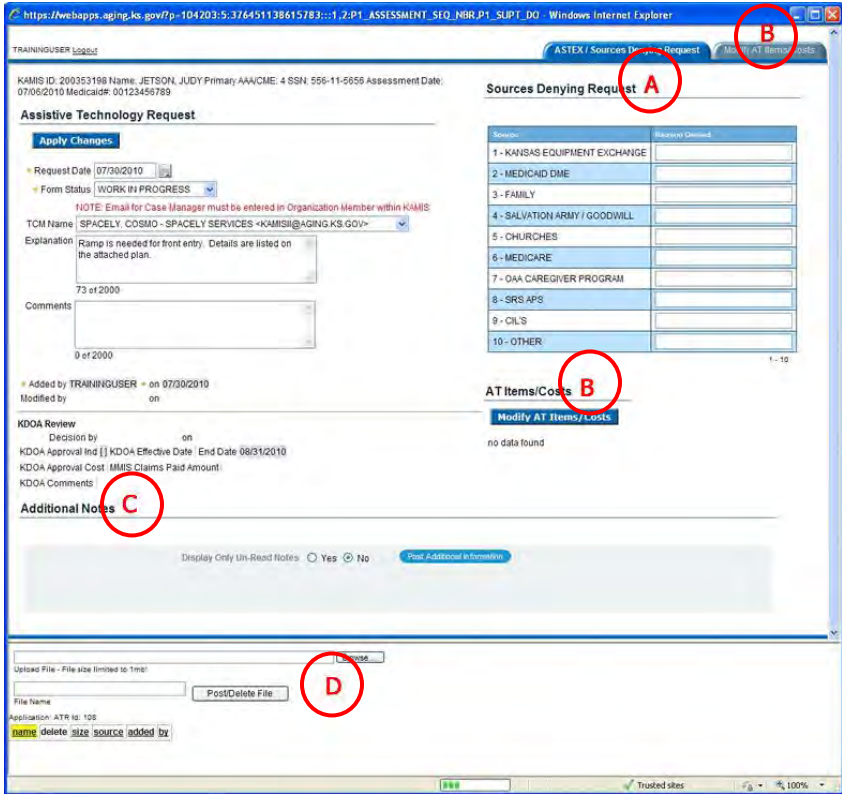
Note The Assistive Technology line item(s) should NOT be entered on the Plan of Care in KAMIS until the item(s) have been approved by KDOA.

Step	Action	Result
1.	Access the form as previously instructed.	New form is displayed.
2.	Enter the Date of the Form (default is the current date)	
3.	Select the TCM from the drop down field.	All fields are required.
4.	Enter the explanation of the item requested in the Explanation field.	Optional
5.	Enter any additional comments in the Comment field	Optional
6.	Click on the Create button.	Form will be saved with a status of Work in Progress.

Continued on next page

Assistive Technology Process (continued)

How To *continued*

Step	Action	Result
7.	<p>The following regions are displayed and available.</p> <ul style="list-style-type: none"> A. Sources Denying Request B. AT Items/Costs. The Modify AT Items/Cost tab is displayed. C. Additional Notes D. Upload File 	<p>Regions are marked with the corresponding letter in the graphic below.</p>
 <p>The screenshot shows the 'Assistive Technology Request' form in a web browser. Red circles highlight the following elements: <ul style="list-style-type: none"> A: 'Sources Denying Request' tab and the table below it. B: 'AT Items/Costs' tab and the 'Modify AT Items/Costs' button. C: 'Additional Notes' section. D: 'Upload File' section. </p>		
8.	<p>Complete the Sources Denying Request region. (A)</p>	

Continued on next page

Assistive Technology Process (continued)

How To

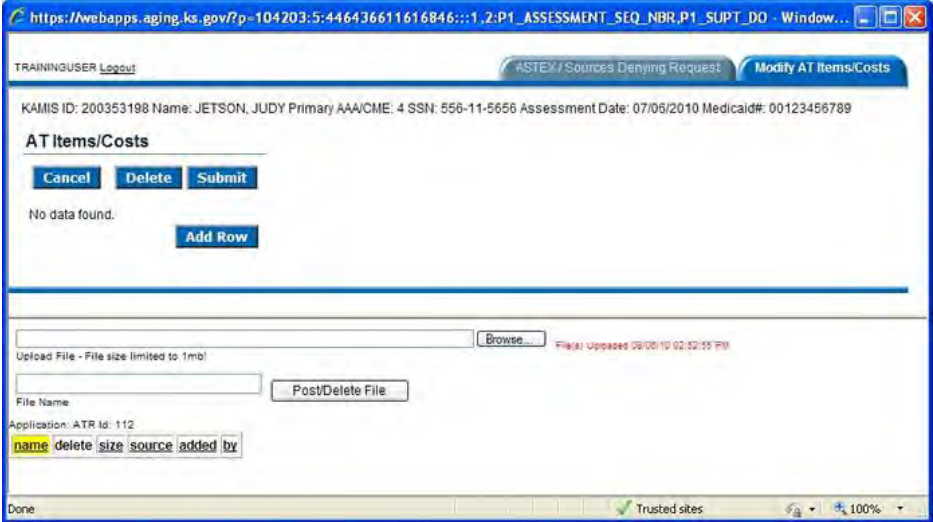
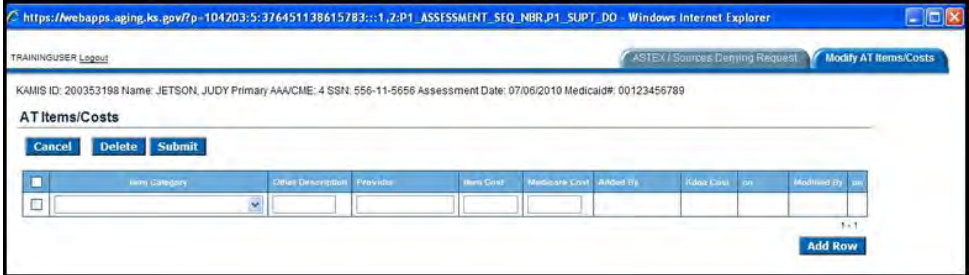
continued

Step	Action	Result																						
9.	Enter the Reason Denied for each of the 10 sources listed.																							
<p>Sources Denying Request</p> <hr/> <table border="1"> <thead> <tr> <th>Source</th> <th>Reason Denied</th> </tr> </thead> <tbody> <tr> <td>1 - KANSAS EQUIPMENT EXCHANGE</td> <td>N/A</td> </tr> <tr> <td>2 - MEDICAID DME</td> <td>N/A</td> </tr> <tr> <td>3 - FAMILY</td> <td>Unable to Perform this project</td> </tr> <tr> <td>4 - SALVATION ARMY / GOODWILL</td> <td>N/A</td> </tr> <tr> <td>5 - CHURCHES</td> <td>Unable to Perform this project</td> </tr> <tr> <td>6 - MEDICARE</td> <td>N/A</td> </tr> <tr> <td>7 - OAA CAREGIVER PROGRAM</td> <td>N/A</td> </tr> <tr> <td>8 - SRS APS</td> <td>N/A</td> </tr> <tr> <td>9 - CIL'S</td> <td>N/A</td> </tr> <tr> <td>10 - OTHER</td> <td></td> </tr> </tbody> </table> <p style="text-align: right;">1 - 10</p>			Source	Reason Denied	1 - KANSAS EQUIPMENT EXCHANGE	N/A	2 - MEDICAID DME	N/A	3 - FAMILY	Unable to Perform this project	4 - SALVATION ARMY / GOODWILL	N/A	5 - CHURCHES	Unable to Perform this project	6 - MEDICARE	N/A	7 - OAA CAREGIVER PROGRAM	N/A	8 - SRS APS	N/A	9 - CIL'S	N/A	10 - OTHER	
Source	Reason Denied																							
1 - KANSAS EQUIPMENT EXCHANGE	N/A																							
2 - MEDICAID DME	N/A																							
3 - FAMILY	Unable to Perform this project																							
4 - SALVATION ARMY / GOODWILL	N/A																							
5 - CHURCHES	Unable to Perform this project																							
6 - MEDICARE	N/A																							
7 - OAA CAREGIVER PROGRAM	N/A																							
8 - SRS APS	N/A																							
9 - CIL'S	N/A																							
10 - OTHER																								
10.	Click on the Apply Changes button.	Information is saved.																						
11.	Continue to the next section to add the requested items to the form.																							

Assistive Technology Process – Adding Items

How To

Once the Assistive Technology Request page has had several of the regions completed, follow the steps in the table below to add the item(s) to the request.

Step	Action	Result
1.	To add items to the request, click on the Modify AT Items/Costs button (B) under the AT Items/Costs region.	Will forward to the Modify AT Items/Cost page.
		
2.	Click on Add Row button.	Blank Row will be displayed
		
3.	Select the Item Category from then drop down listing.	
4.	Enter an additional Description if needed.	
5.	Enter the Provider of the item.	

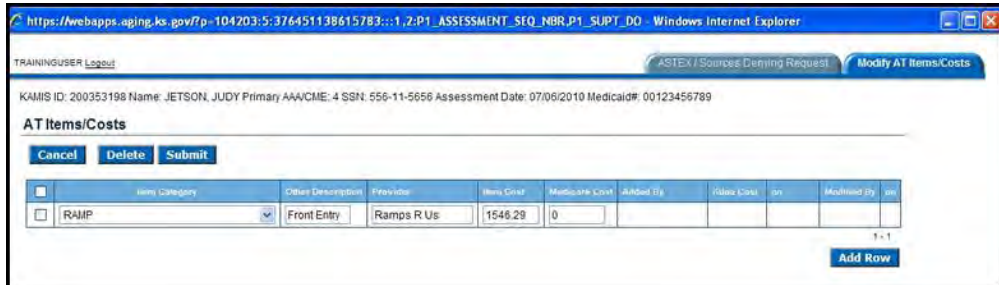
Continued on next page

Assistive Technology Process – Adding Items (continued)

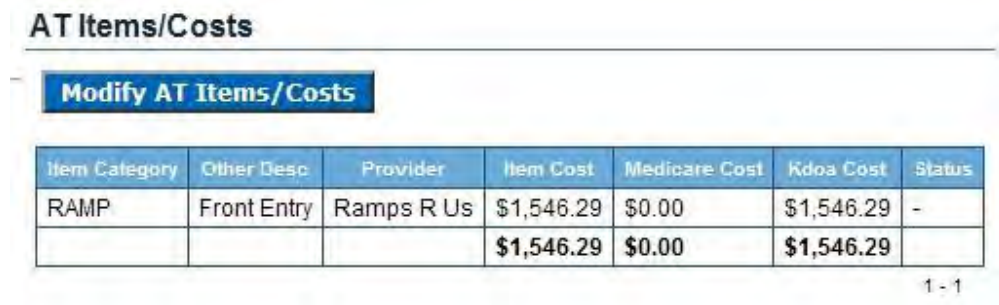
How To

continued

Step	Action	Result
6.	Enter the total Item Cost .	
7.	Enter the medicare portion of the amount in the Medicare Cost field.	



8.	If additional items are being requested, click on the Add Row button. Repeat steps 2-7 until all items are entered.	
9.	If an item needs to be deleted, click on the check box at the left side of the table (selects the item) and click on the Delete button.	Item is removed from the list.
10.	Click on Submit button which will complete the item entry.	Will be returned back to the Assistive Technology Page. A table will display will all item(s) listed under the AT Items/Costs region.



Assistive Technology Process – Completing the Request

How To

Once the Assistive Technology Request page is displayed, follow the steps in the table below to complete the rest of the information on the request.

Step	Action	Result
1.	Enter any additional comments in the Additional Notes region. (C) Detailed Instructions on Page 18.	The notes will remain on all Assistive Technology Request forms associated with the UAI/POC.
2.	Upload the required documents of any bids and home modification proposals. (D) Detailed Instructions on Page 20.	The uploaded document(s) will remain only on this version of the Assistive Technology Request form.
3.	Once all information is entered. Change the Form Status to Submit for Approval .	

Continued on next page

Assistive Technology Process – Completing the Request (continued)

How To

continued

Step	Action	Result
4.	Click on the Apply Changes button.	Form fields are disabled and the form is submitted to KDOA for review and approval.

Assistive Technology Request

Apply Changes

Request Date: 07/30/2010

Form Status: **SUBMIT FOR APPROVAL**

NOTE: Sponsor user Manager must be entered in Organization Member within KAMIS

TCM Name: SPACELY, COSMO - SPACELY SERVICES - KANSAS@AQING.KS.GOV/

Explanation: Ramp is needed for front entry. Details are listed on the attached plan.

Comments

Added by TRAININGUSER on 07/30/2010
Modified by TRAININGUSER on 07/30/2010

Sources Denying Request

Source	Available
1 - KANSAS EQUIPMENT EXCHANGE	N/A
2 - MEDICAID DME	N/A
3 - FAMILY	Unable to perform
4 - SALVATION ARMY / GOODWILL	N/A
5 - CHURCHES	no manpower available
6 - MEDICARE	N/A
7 - DAA CAREGIVER PROGRAM	N/A
8 - SRS APS	N/A
9 - CILS	N/A
10 - OTHER	

AT Items/Costs

Item Category	Other Desc	Provider	Item Cost	Medicare Cost	State Cost	Status
RAMP	Front Entry	Ramps R Us	\$1,546.29	\$0.00	\$1,546.29	-

Additional Notes

Display Only Un-Read Notes Yes No [Post Additional Information](#)

Have contacted several area churches for this project. They do not have the manpower. Family is not able to perform this level of skill.

Application: ATR 12 108

name	delete	size	source	added	by
Ramp Estimate	<input type="checkbox"/>	110,067	Ramps R Us Estimate - J. Jetson.pdf	07/30/2010 03:33:15	TRAININGUSER

Note


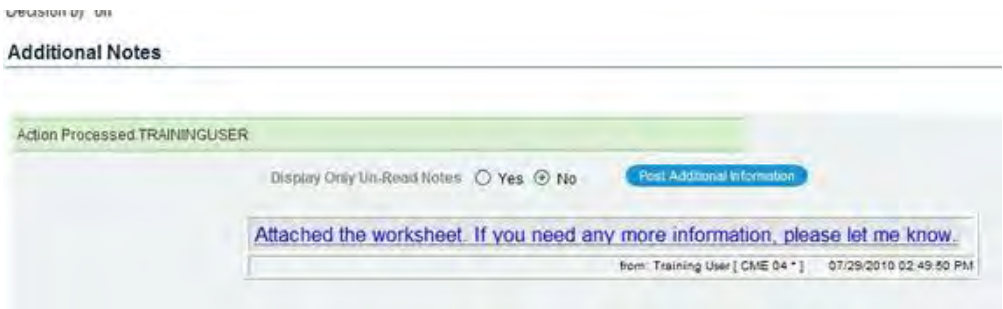
When the request form is saved with the status of Submit for Approval the form will be placed on the Assistive Technology worklist for KDOA action.

Additional Notes – Adding a New Note

Introduction The Additional Notes region is a secured communication tool to post notes or comments on the specific form.

The region will only displays after the form has been created.

How to The following are the steps to add a note to the form.

Step	Action	Results
1.	At the bottom of the top frame is the Additional Notes Region.	All notes are displayed as the default.
2.	To add a new note, click on the Post Additional Information button.	A note comment box will display.
		
3.	Type the note.	
4.	Click on the Post New Entry button.	Note is posted to the Additional Notes listing.
 <p>Note: The Users name, CME, date and time posted will automatically be added when the note is posted.</p>		

Additional Notes – Reading

Introduction

Once the note is posted, the text of the note will display in different font types and colors, depending upon the status of the note.

Large Blue Letters - indicates that a note was posted by another person but you have not read the note.

Large Red Letters - indicates that you entered a note however the note has not been read.

Regular size, black letters - indicates that the note has been read by you or another person.

How to

The following are the steps to indicate that you have read a note.

Step	Action	Results
1.	At the bottom of the top frame is the Additional Notes Region.	All notes are displayed as the default.
2.	Select the filter option of what type of notes to display. <ul style="list-style-type: none"> • Yes – Displays all the Unread Notes • No – Displays all Notes (Default Setting) 	Notes are listed in date order with the most current at the top.
3.	Click on the blue text of a note to mark the note as read.	Note format is changed to regular text marking the note as read.



File Upload – Attaching File


Introduction For approval determination, the following types of documents are required to be uploaded into KAMIS.

- **Cost Cap Exception Request:**
 - Clock Draw Page of the UAI Assessment (Page 4)
 - Paper version Plan of Care
 - Customer Service Worksheet

- **Assistive Technology Request:**
 - Bids
 - Home Modification Proposals

The Upload File frame only displays after the form has been created.

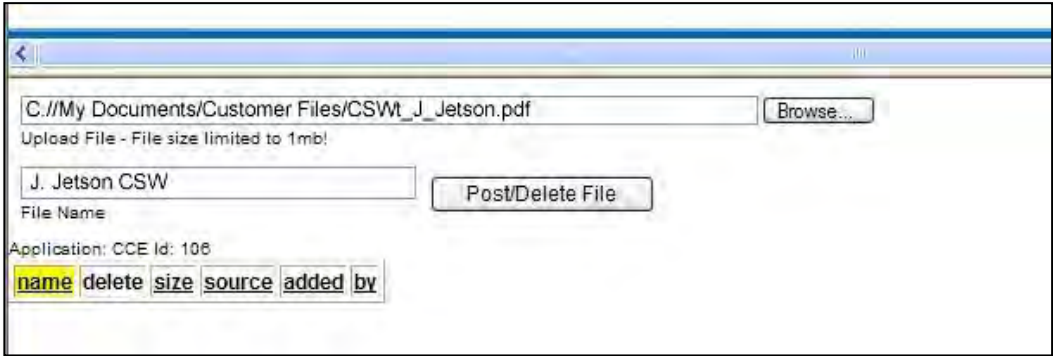
How to Follow the steps below to attach a file to a specific request form.

Step	Action	Result
1.	The Upload file application will display in the bottom adjustable frame of the form.	
 <p>The screenshot shows a web browser window with a file upload area. At the top, there is a text input field and a 'Browse' button. Below that is a 'Post/Delete File' button. A table with columns 'name', 'delete', 'size', and 'source' is visible, with 'added by' highlighted in yellow. At the bottom, there is a 'Done' button and a progress indicator.</p>		
2.	Click on the Browse button	Choose File to Upload dialog box displays.

Continued on next page

File Upload – Attaching File (continued)

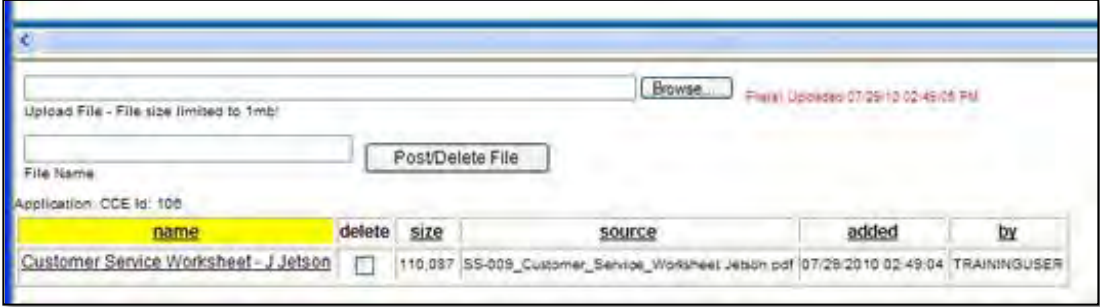
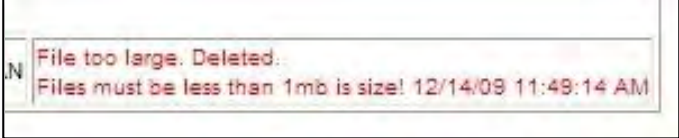
How to *continued*

Step	Action	Result										
3.	Browse to the saved document to be attached. Documents must be saved first.	For best results attach only the following type of documents:										
	<table border="1"> <thead> <tr> <th>Document Type</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Word</td> <td>Convert documents to pdf before attaching **</td> </tr> <tr> <td>Excel</td> <td>Convert documents to pdf before attaching **</td> </tr> <tr> <td>PDF (Acrobat)</td> <td>Attach with no additional steps needed</td> </tr> <tr> <td>Graphics</td> <td>Attach JPG or GIF type graphics – do not attach TIF (Electronic FAX) files</td> </tr> </tbody> </table> <p>**Office 2007 and 2010 has a save as option to save files to a pdf format. There are freeware products available to convert files to a pdf format. However, caution should be used when installing and using freeware products.</p>		Document Type	Action	Word	Convert documents to pdf before attaching **	Excel	Convert documents to pdf before attaching **	PDF (Acrobat)	Attach with no additional steps needed	Graphics	Attach JPG or GIF type graphics – do not attach TIF (Electronic FAX) files
Document Type	Action											
Word	Convert documents to pdf before attaching **											
Excel	Convert documents to pdf before attaching **											
PDF (Acrobat)	Attach with no additional steps needed											
Graphics	Attach JPG or GIF type graphics – do not attach TIF (Electronic FAX) files											
4.	On the Choose File to Upload dialog box, click on Open button	File is selected and entered into the Upload File field.										
5.	Enter a Name in the File Name field.	Use an identifying name of the file. i.e. – CSW; POC; ABC Services Bid Proposal, etc.										
												

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File Upload – Attaching File (continued)

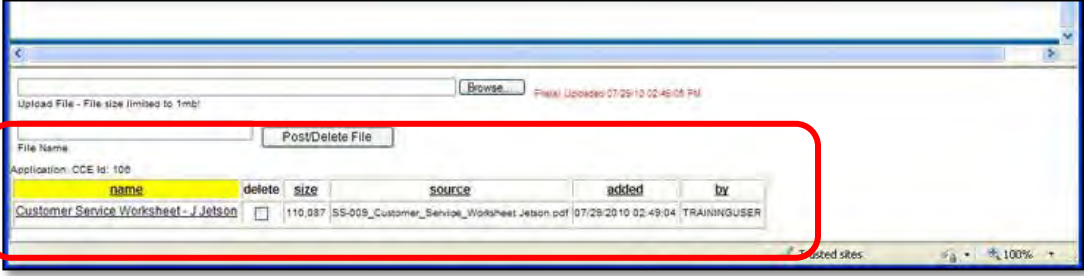
How to *continued*

Step	Action	Result
6.	Click on the Post/Delete File button	Completes the upload. Table of the attached file(s) is displayed.
 <p>The screenshot shows a web interface for file uploads. At the top, there is a 'Browse...' button and a 'Post/Delete File' button. Below the buttons, a table displays the uploaded files. The table has columns for 'name', 'delete', 'size', 'source', 'added', and 'by'. One file is listed: 'Customer Service Worksheet - J Jetson' with a size of 110,087 bytes, source 'SS-005_Customer_Service_Worksheet_Jetson.pdf', added on '07/26/2010 02:49:04', and by 'TRAININGUSER'.</p>		
<p>Note: If the single file is too large (1 mg or 1,000 kb) a warning notice will be displayed that the file was too large and was deleted.</p>  <p>The warning message is displayed in a red box with a white background. It reads: 'File too large. Deleted. Files must be less than 1mb in size! 12/14/08 11:49:14 AM'.</p>		
7.	Repeat until all required documents are attached to the form.	

File Upload – Viewing File

Introduction All attached files can be viewed once uploaded to the form.

How to Follow the steps below to view an attached file.

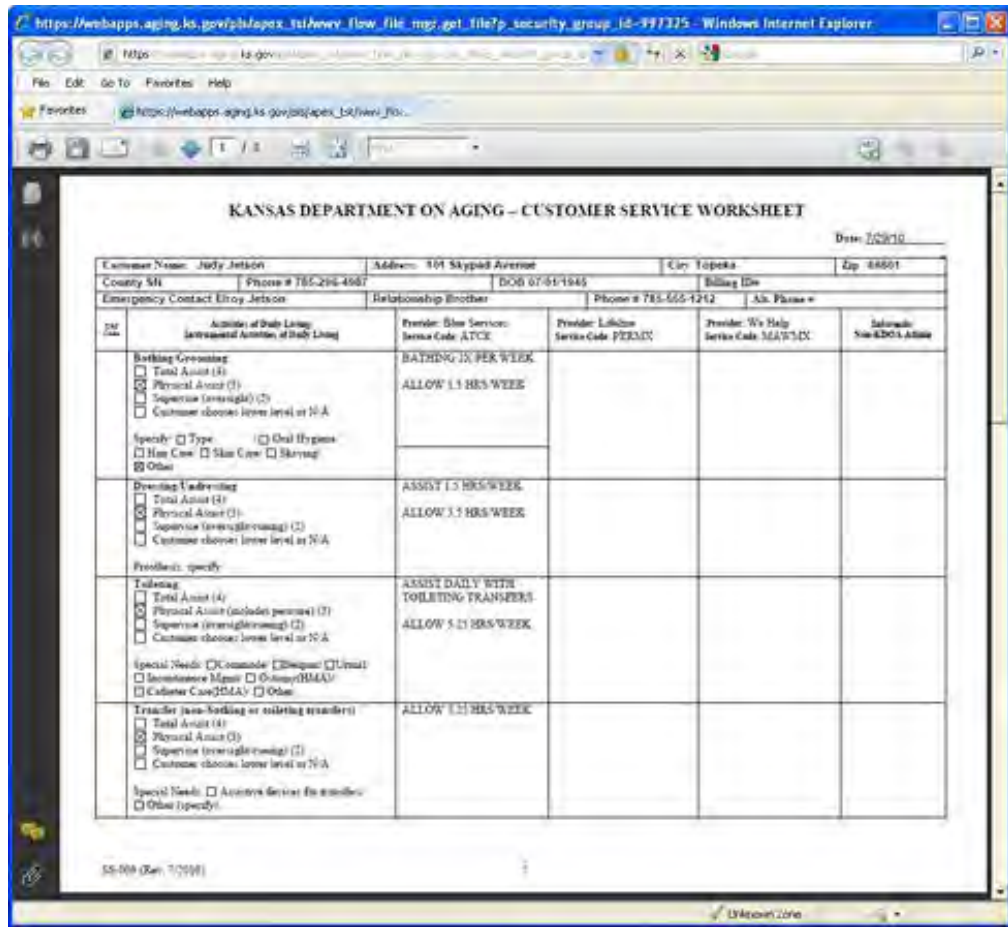
Step	Action	Result
1.	Select the form from the listing.	The form will open in a separate window. In the bottom frame, the table will display all the attached files.
		
2.	Click on the file name	"Customer Service Worksheet – J Jetson" in the above example.

Continued on next page

File Upload – Viewing File (continued)

How to *continued*

Step	Action	Result
3.	The document will open in a separate window.	

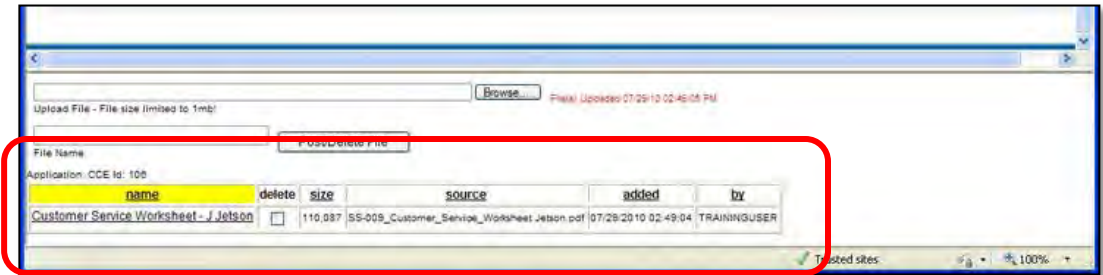


4.	To return to the Application, click on the "X" to close the separate browser window.	
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File Upload – Deleting File

Introduction Any attached files can be deleted by the person who attached the file to the form.

How to Follow the steps below to delete an attached file.

Step	Action	Result												
1.	Select the form from the listing.	The form will open in a separate window. In the bottom frame, the table will display all the attached files.												
 <p>The screenshot shows a web browser window with a file upload interface. At the top, there is a text input field for the file name and a 'Browse...' button. Below this, there is a 'Post/Delete File' button. A table displays the following information:</p> <table border="1"><thead><tr><th>name</th><th>delete</th><th>size</th><th>source</th><th>added</th><th>by</th></tr></thead><tbody><tr><td>Customer Service Worksheet - J Jetson</td><td><input type="checkbox"/></td><td>110,087</td><td>SS-009_Customer_Service_Worksheet Jetson.pdf</td><td>07/29/2010 02:49:04</td><td>TRAININGUSER</td></tr></tbody></table>			name	delete	size	source	added	by	Customer Service Worksheet - J Jetson	<input type="checkbox"/>	110,087	SS-009_Customer_Service_Worksheet Jetson.pdf	07/29/2010 02:49:04	TRAININGUSER
name	delete	size	source	added	by									
Customer Service Worksheet - J Jetson	<input type="checkbox"/>	110,087	SS-009_Customer_Service_Worksheet Jetson.pdf	07/29/2010 02:49:04	TRAININGUSER									
2.	Click on the check box under the delete column. Click the Post/Delete File button.	File is deleted from the form.												

Approved / Denied Status of Request

Introduction Once KDOA either approves or denies the request, an automated e-mail will be sent to the Case Manager. Also, the request form will indicate the status as well as a notation in the Customers Case Log.

How to Follow the steps below to view the status of a request form.

Step	Action	Result
1.	Select the form from the listing.	The form will open in a separate window.
2.	The status will display in the KDOA Review region.	

Below is a graphic of the Approved status and the automated e-mail notification.

DOCUMENTED CHANGE IN SOCIAL CIRCUMSTANCES, WHICH HAS CREATED HEALTH/WELF/ 4 - CUSTOMER IS IN END STAGES OF A TERMINAL ILLNESS (E.G., AIDS, ALZHEIMER'S, COI

Added by TRAININGUSER on 07/29/2010 Modified by TRAININGUSER on 07/30/2010

KDOA Review
 KDOA Approval Ind Approved KDOA Effective Date 07/30/2010
 KDOA Approval Cost 2930
 KDOA Comments
 Decision by KDOA APPROVERS NAME on 07/30/2010

Additional Notes

File Edit View Actions Tools Window Help

Close Reply Forward [trash icon] [envelope icon] [print icon] [fax icon]

Mail Properties Personalize Message Source

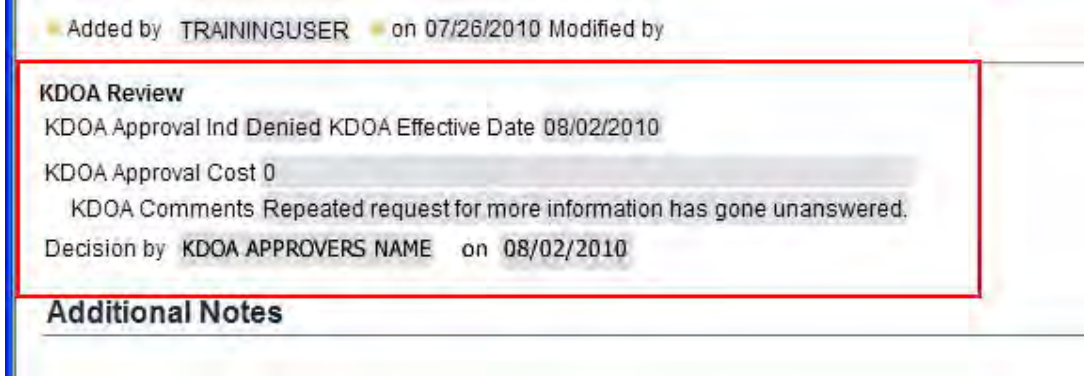
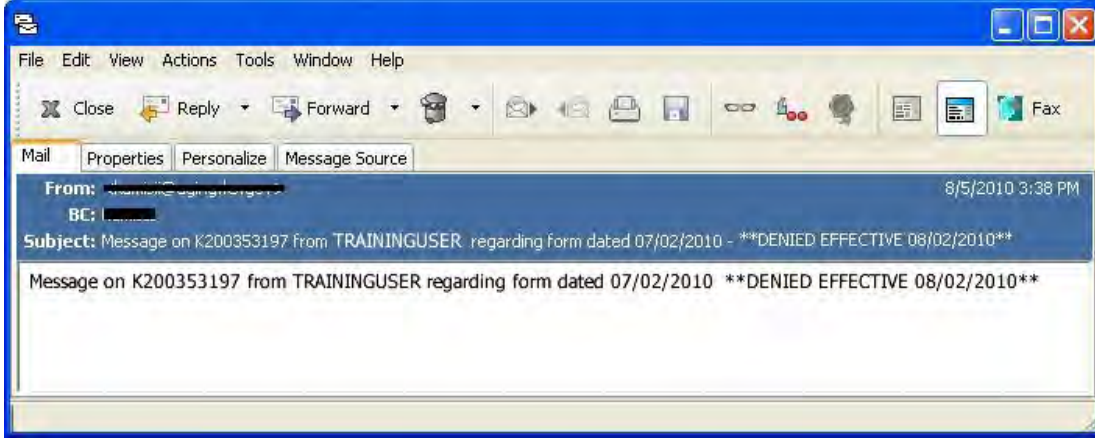
From: [redacted] 8/5/2010 3:38 PM
BC: [redacted]
Subject: Message on K200353197 from TRAININGUSER regarding form dated 07/02/2010 - ****APPROVED EFFECTIVE 08/01/2010****

Message on K200353197 from TRAININGUSER regarding form dated 07/02/2010 - ****APPROVED EFFECTIVE 08/01/2010****

Continued on next page

Approved / Denied Status of Request (continued)

How to *continued*

Step	Action	Result
Below is a graphic of the Denied status and the automated e-mail notification.		
		
		

Closing a Request Form

Introduction The Request forms are launched in a separate window. Therefore, KAMIS is still available in the background.

How to Follow the steps below to close the request form.

Step	Action	Result
1.	To close the request form, simply click on the "X" of the form browser window.	Window will close.

