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Introduction

This User Guide is a Supports Coordinator/Data Staff supplement to the Vendor View Vendor User Guide. The operations of Vendor View are discussed in the Vendor User Guide and should be reviewed prior to using this document.

Accessing Vendor View for Agents

Each vendor using Vendor View must be registered and assigned a User ID and password to access the Vendor View web site. Agent users use their MICIS or COMPASS User ID and password and must have the Vendor View role assigned in their COMPASS User Account. To connect to Vendor View:

2. Click on the Vendor View link
3. Enter User ID and password (same as MICIS)
4. For security purposes, do not click “Remember my password”.
5. Click OK or hit enter

Selector Screen for Agents

Once the system recognizes your User ID and password, the Agent Vendor Selection screen is displayed.

1. Select a vendor from the drop down list (only internet vendors are displayed); this will display Vendor View as the chosen vendor sees it.
   OR
2. Leave the default of “View All Vendors” (to see information for all vendors)
3. Click the [Next] button

Note that messages always show for the agent user (regardless of whether in a selected vendor or all vendor view), and the Failed Fax tab is available only with the “Viewing All Vendors” option.

The screen heading for an agent user will say “Viewing All Vendors” (if that was chosen) or a Vendor Name if a particular vendor was selected.

Agent Options for Vendor View

Agents can choose several options for the operation of Vendor View, including:

- What type of Assessment report each Vendor View vendor will receive
- Whether Assessment comments fields will be included on Vendor View Assessment reports
Notices Screen and Functions for Agents

There are two differences in the Agent’s Notice screens:

- There is no button to allow Agents to archive a notice; only vendors can do that
- There is a button to “Remove Notice from Vendor”. See below for description.

Agent Notices Display and Functions

Notices are displayed in two sub-links: Current Notices and Archived Notices.

In the Agent display, all notices are listed for all vendors in the Notice screens, so a Vendor column has been added to the display. Once the vendor has reviewed and archived a notice, it no longer appears on the Current Notice list, but can be viewed on the Reviewed/Archive list.

A vendor search has been added to the Search capability, so the agent user can select all notices for a particular agent. The search occurs when the user clicks the Go button, with however many letters have been entered to the search box.

There is a column which indicates the fax date for fax vendors on the Archived Notices page. This date is added when the fax is sent.

Remove Notice From Vendor

Agents are not able to archive a notice; only vendors can do that. However, an agent user is able to delete a notice that should not be sent to vendor(s) because it was mistakenly created or should not be sent for whatever reason. Agent users will click the new “Remove Notice from Vendor” button after marking the checkbox for the notice(s) to be removed. When this is done, the User ID and date and time that the notice was removed are saved in the notice log for reference.

Note that this function is usually reserved for data staff, so others should not remove notices without checking with them.

Notice Creation

Notices are only created for participants with scheduled services (current or future care plan templates or scheduled exceptions in MICIS terms) for registered Vendor View vendors. Notices are created from different data entry and editing functions in Compass and MICIS, which are listed in the Vendor User Guide.

It is important to remember that until assessments have been marked as complete for the following sections, the vendors will not receive a New Assessment notice: SW Assessment, Caregivers, RN Assessment, Diseases, Medications, Medical Providers, Pharmacies. It is not necessary to mark the DME or POC as complete since vendors do not receive this information. Any changes to assessment
data once the vendor has received the notice and reviewed/printed the assessment will not be communicated to them. Therefore it is very important that no changes are made that the vendors need to know about after these sections are marked as complete.

Data staff and any others that make changes to records should be aware of several special notice creation issues, which are described in Appendix A.

**Message Features for Agents Only**

As with Vendor users, messages in Vendor View are not sent to a person. Agent staff must decide how the messages will be monitored, and who will be responsible for seeing that messages are delivered to the appropriate people.

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

*Vendor* is an added search criterion for Agent users.

**Send New Message**

In addition to the new message options for Vendors (Send a Standard Message and Send a Participant Message), Agents can also “Send a Participant Message to one or more vendors”. Selecting this option allows users to:

1. ) Select the participant associated with the message from the displayed list.
2. ) Once the participant is selected, the Agent name (for internal participant messages) and all of the participant’s vendors with open care plans appear in the “To:” list.

Sort order of Agent name and vendors is as follows:

a. Agent name (for internal participant messages)

b. Internet vendors with open care plans appear with an asterisk to the left of their name on the top of the list. An open care plan is one that is open today or in the future, regardless of the presence of a currently open template or scheduled exception. However, in order to appear, the care plan must have HAD a template or scheduled exception at some point, even if it is not open on the date the message is sent.

c. Internet vendors with care plans that are not open today or in the future but stopped in the last 6 months will appear without an asterisk.

3. ) Select the agent or vendor(s) to receive the message from this list by using [Click] and then [Shift] [Click] to add more vendors.

Note that these vendors will NOT appear on this list:

1.) Fax vendors
2.) Vendors with a care plan that never had a template or scheduled exception
3.) Vendors with care plans that stopped more than six months ago
Post New Message as COMPASS Progress Note

Agent users can click the checkbox entitled “Post this message as a Progress Note for the participant” to have the outgoing message posted automatically as a COMPASS Progress Note. The Progress Note will be synced to the laptop computers during the next sync.

The Progress Note is created as follows:

- SC Initials = “VVW”
- Vendor name used as the contact name for Vendor recipients. Agent name used as the contact name for Agent recipients (internal messages)
- Contact Method = “Vendor View”
- Contact Person = “Vendor Staff Person”
- Progress Note = body of message (subject is excluded)
- Date and Time – date and time of the message posting

Note that Delete Message will NOT delete a Progress Note that was automatically created from a message using the Progress Note checkbox.

Message Groups

Message Groups allow Agents to create and send the same message to groups of vendors, without the need to select every one individually for sending. Message Groups appear in red in the “To” list in addition to individual vendors.

Agent staffs are able to send messages internally to other staff members by highlighting the Agent name that is listed in blue in the “To:” list. These messages are marked as “Internal” rather than the “In” or “Out” designation. This feature is useful for remote Supports Coordinators to be able to send messages to the central office staff.

Create a New Message Group

Step 1: Click on the Message Groups sub-link (on Messages tab).
Step 2: A list of all existing groups is displayed, with the number of vendors in the list displayed in a column on the right.
Step 3: Click Add New under the Message Group box.
Step 4: Enter new group name in the displayed box, and click Add to the right. An error message will display if the group name exists.
Step 5: Click [Exit] to return to the prior page.

Add or Remove Vendors in a Message Group

Step 1: Click Manage Group next to the new group name.
Step 2: A page will appear with all of the available internet-only vendor names and IDs on the left side (Unassigned Vendors), and a blank list on the right side (Assigned Vendors).

Step 3: To add a vendor to the group, click the right arrow in the Add column next to the vendor name in the unassigned list. The vendor name will appear in the Assigned list.

Step 4: To remove a vendor from the group, click the left arrow in the Remove column next to the vendor name in the Assigned list. The vendor name will appear in the unassigned list.

Step 5: Click [Done] when the list is complete to return to the prior page.

Change Message Group Name

Step 1: Make the name changes in the white box.
Step 2: Click Update Checked under the Message Group.
Note if you make a change in the name, the system automatically checks the box, and will not let you leave the page until the changes are saved.

Step 3: Cancel Changes will undo all of the changes made since the Update Checked was last clicked.

Step 4: Click Update Checked when changes are completed.

Delete a Message Group

Step 1: Check the box to the left of the vendor name.
Step 2: Click Delete Checked under the Message Group box.

Review the Vendors in a Group

Step 1: Click Vendor List next to Vendor name.
Step 2: System displays a list of vendors with the Message Group name.
Step 3: If you want to print the list, click Print this Page link.
Step 4: Click Exit to return to the prior page.

Send a Message to Message Group(s)

Step 1: When a new message is created, the Message Group names appear in the “To” box in red.
Step 2: Select the name(s) of the group(s) to receive the message by clicking on the name. <Ctrl> Click will add more names to the list.
Step 3: Type the message and click Send.

The Messages tab allows agents and internet vendors to communicate about services and participants in a secure fashion that will prevent unauthorized access to participant protected health information.
FAX Vendors

Fax Process

Although internet vendors have many more features available in Vendor View, the system can still be used for vendors that do not have access to the internet. When an action in MICIS or Compass would create a notice for an internet Vendor View user, fax report(s) will be automatically created by Vendor View for fax vendors.

Vendor View Fax Process:

- Fax reports are automatically created to send when a notice event occurs for a fax vendor in MICIS or COMPASS
- Vendor View polls for notices to be faxed once an hour, and submits reports to the report creation process
- After the report is ready, faxes are attempted 6 times 10 minutes apart, and successful faxes are automatically archived with the fax date in the record
- Faxes that do not succeed in 6 attempts and considered Failed Faxes, and are added to the agent’s Failed Fax web page, with email notification that one occurred

Key Fax Information:

- For vendors receiving assessment reports, the full Assessment report is faxed when the first service is established for a vendor, but the Assessment Comparison report is faxed for each subsequent assessment
- Medications, Caregivers and Medical Provider/Pharmacy reports are all faxed with assessment and assessment comparison reports to vendors that receive them
- The system is able to suppress subsequent notices about the same event if the original fax has not yet been sent, and recognizes notices that would send the same fax and suppresses the second one
- Fax vendors cannot send or receive messages using Vendor View
- Agents cannot generate reports for fax vendors in Vendor View

Failed Faxes

Agents are able to monitor any faxes that have not successfully been sent to vendors. If the fax fails after six attempts, an email is sent to notify the agent of a failed fax, and an entry is made in the agent’s Failed Faxes web page.

Agents should monitor this page periodically to see if any faxes have failed. Agents have the option to Resend a failed fax, or Ignore a failed fax by checking the fax and clicking the Resend or Ignore buttons. A fax could be marked as ignored if the agent knows that the necessary information has already been communicated with the vendor, for example. Ignored faxes are saved in an archive with the User ID of the person who clicked the Ignore button.
Tools

The Tools tab uses sub-links to allow users to maintain supports coordinators, vendors, and vendor users. The function of these sub-links is described below.

Supports Coordinators

Agents maintain the Supports Coordinators list in COMPASS. The information comes from COMPASS Manage Users for anyone who has SC initials. If any information is incorrect or missing that should be included (such as phone number), simply update the user’s account in COMPASS.

Add New Vendors

This function allows agents to add new vendors to Vendor View. After clicking the “Add New” button on the bottom of the page, users highlight and select a vendor from the drop down list. Note that vendors in the drop down list are MICIS vendors that are not already Vendor View vendors.

Users add vendor contact information (name, phone and email address), type of vendor (internet or fax), fax numbers, and type of assessment. The vendor contact person information is needed in order for the vendor to receive certain emailed reports from Vendor View, like vendor and user lists (when the user has no email address). Once changes are made, click the “Save Vendor/Add Users” button, and for internet vendors, the system will automatically take the user to the “Add Users” sub-link (see below).

Manage Vendors

Information for an established Vendor View vendor can be changed using this sub-link. After clicking the “Edit Vendor” button on the bottom of the page, the Vendor View vendor is highlighted and selected from the drop down list, and necessary changes are made and completed using new buttons at the bottom of the page.

Delete Vendor and All Users

This button will delete the selected Vendor View vendor and all associated users. The button asks for confirmation for the delete before proceeding. Note that the vendor and users are deleted from active use, but historical notice information for this vendor remains in Vendor View.

Note that users are not deleted from Vendor View entirely if they have access with another Vendor View agent or vendor. This feature will only remove the user’s ability to access the deleted vendor.
Save Changes

This button saves any changes made in the Vendor record.

Cancel Changes

This button cancels changes and returns the record to its pre-edit mode (grayed out). Users will need to click “Edit Vendor” to make additional edits.

Add Users

Vendor View users are added on this sub-link. Agents are automatically taken to this sub-link once a new vendor is saved, or can click on this sub-link to add new users at any time. **Important: an internet vendor must have at least one user to receive email reminders.**

First and last names are entered, and the system checks last name and first initial to see this person might already be a Vendor View user (e.g. with another agent). Depending on the results of that check, a different screen will appear.

New User to Vendor View

If the last name and first initial do not exist in Vendor View, the system will bring up a screen to select the vendor (automatically supplied if coming from adding a new vendor). The user will enter the password, indicate whether the person should receive notice and message emails, and the email address and phone number. The “Save User” button will save the new information.

Existing User in Vendor View

If the last name and first initial exist in Vendor View, the system will bring up a screen that indicates “**The following Vendor View users already exist with the same last name and a similar first name. Please select an existing user or click the "Add New" button to create a new user.”**

A name match will usually occur because Vendor View is being used in conjunction with a different waiver agent, and the same person is already a user in Vendor View. If the agent knows this is the same person, they will click the checkbox next to the matching name, select the vendor name, indicate whether the person should receive notice emails, and enter the email address. The “Save User” button will save the person with their existing password and associate them with the new vendor.

If the person is NOT the same as anyone on the list, click the “Add New” button to add a new user by returning to the new user screen.
Manage Users

Information for established Vendor View users can be changed using this sub-link. After highlighting a vendor from the drop down list, the Manage Vendor View Users screen appears. Necessary changes are made and completed using buttons on this screen.

Send User List

This button sends an email to the vendor’s contact email address at the next email time (either 11:30 a.m. or 3:30 p.m.). The email includes a list of all Vendor View users, with their name, user ID, and email address. If the person is not to receive email reminders, the list will say “No email address = no notifications.”

Delete Selected Users

To delete a user, click the checkbox next to the name, and click the “Delete Selected Users” button. The system asks for confirmation, and will then remove the person from the vendor’s user list.

Save or Cancel Changes

After clicking the checkbox next to the user and making necessary changes in the user’s phone, email address, password or whether the user should receive notice and message emails, click the “Save Changes” button to save your changes. “Cancel Changes” will undo changes and return the listing to its prior state.

Note that if a user calls and doesn’t remember their password, the simplest thing to do is reset the password in the Manage Users section. If the user is still not able to get in, they might have tried too many times, at which point the system locks them out. If this happens, please contact CIM to remove the lock on their User ID.
Appendix A: Special Logging Issues

Address and Phone Number Changes

It is important that any address/phone number changes are made in the Address/Participant records prior to the next assessment. If new assessments are used to communicate such changes, the vendor will not be notified in a timely manner.

Care Setting Changes

A care setting is logged if:

- A Care Setting end date is null or is greater than or equal to today's date
- One or more of the vendor's care plan stop dates is greater than or equal to today's date, and a service is in place today or in the future
- A care setting status end date is null and the begin date less than or equal to care plan stop date
  OR the Care Setting end date is not null and the begin date is between the care plan start and stop date
- The vendor has a template stop date or scheduled exception date >= today's date

Therefore there is a situation where notices will occur, but the vendor may not see any changes. If the vendor has an active service and the care setting status changes for dates earlier than today, they are notified there was a change and there hasn't been a recent change at all, because a "new" record is entered for the current status.

For example, Vendor A provides homemaking which started this week. Currently the participant is home. However, the agent finds out that last week the participant was in the hospital for a couple of days. When the agent enters the hospital status and the subsequent home status, Vendor A will be notified of a change even though they won't see the hospital status in their care settings report (the hospital stay was before their service so it will be omitted). They will however see an updated date on the home status date (if they had run the report before).

Another example is that Vendor B provides PERS service and has for years. There was a status for Other in the care setting status from 2 years ago. In a review, data staffs notice that it should have been a Hospital status and make the change. This change will notify the PERS vendor of a care setting change and will see the change (if they remember what it used to be) but none of it is recent. However since they're still an active vendor and there is a care setting status that is still open, they are notified (because of the way Compass works when saving statuses).

Bottom line for Agents: You need to be careful on entering/editing old care setting status records. They will cause the active vendors to receive notices even though the change that was made doesn't apply to them. If this occurs, remember you can “Remove Notice from Vendor”.
Copy Care Plan and Copy Template

Copy Care Plan function was created to allow agents to make changes to care plans that do not automatically create notices in Vendor View. A change of a fund source, for example, may or may not need to create a notice for a vendor. The Copy Care Plan function asks Vendor View agents whether they wish to have notices sent for the actions taken in MICIS. Also, the process suppresses separate stop and start notices when necessary.

A revised Copy Template function operates in the same way as Copy Care Plan; this function allows agents to indicate whether or not a notice should be sent, and suppresses the stop notices for service schedule changes. Using this function results in only logging the new service schedule and not the stop to the old schedule.

Prompts for Prior Care Plan and Template Changes

Data staff are asked whether to send notices when a change is made to a care plan or template affecting dates earlier than today. Although the change will become part of the service record of the vendor, it might not be necessary to create a notice, for example, if the change is being made based on information received from the vendor. Each agency should discuss whether notices for service changes earlier than today should be created, so data staff will have direction to proceed.

Year End Turn and Rate Change

Year End Turn and Rate Change processes in MICIS are events that do not trigger Vendor View notices. For this reason it is important to notify vendors that services will continue after the default 9/30 stop date when Year End Turn is run. (This is an excellent use of the Vendor View Message function!)

COMPASS Assistant or Assessment Changes

COMPASS Assistant changes to SSN or Intake Date will not trigger notices to vendors. Changes to COMPASS Assessments are also not triggered to notify vendors even if the assessment date is changed. Only new assessment dates marked as “completed” notify vendors.