Vendor View for MICIS

Vendor User Guide

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Ann Arbor, Michigan
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Introduction

Vendor View was designed to automate some of the communications required between MI-Choice Waiver Agents and Vendors providing services to waiver participants. Many processes which authorize services, make service changes, stop services, and communications regarding service delivery and participant issues can be replaced with Vendor View functions.

Certain actions in the MI-Choice Information System (MICIS) and COMPASS systems used by Waiver Agents will trigger notifications of service changes and other pertinent information for participating vendors in Vendor View. For example, a new care plan will trigger a new service notice for a particular vendor. In addition, new assessments or changes to address and phone number will trigger notifications for vendors.

Another feature of Vendor View supports the exchange of messages about participants and services between agents and vendors. Because Vendor View is housed on a secure, limited access web server, the information exchanged in messages is not available for access by non-authorized users.

Participant Privacy and Vendor View

Notices and participant information are available in Vendor View only for participating vendors that have a MICIS care plan template or scheduled exception for that participant.

Other privacy issues as addressed in Vendor View:

- Vendor View displays only the last four digits of the participant ID, to protect privacy
- Vendors can run participant reports for 182 days after last care plan closes; reports are not available indefinitely
- Vendors can only see information from the time they served that person: e.g. if a new assessment occurred after the vendor’s service, the new assessment is not available to that vendor, who can only see the last assessment from their service time
- Vendors cannot see services of other vendors serving their participants
- Each Vendor View user must have their own User ID and password
Minimum System Requirements

Vendors will need to determine whether their office can support internet connectivity to Vendor View, or whether to use faxing for communications. Some vendors have used Vendor View as a reason to upgrade their internet connectivity, although all types of connection can be used, from dial-up to DSL or cable.

Internet vendors must connect with workstations running Windows 2000/XP/Vista/7. Windows 98 and Windows ME are not supported by the Vendor View internet software. If these are the only workstations available, vendors will need to register as fax vendors.

Agents might decide that vendors with small caseloads or certain services should not participate in Vendor View, or should only participate as fax vendors. These issues can be discussed with the Agent.

Accessing Vendor View

Each vendor using Vendor View must be registered and assigned a User ID and password to access the Vendor View web site. To connect to Vendor View:

1. Enter the Vendor View URL address in your web browser (URL address is sent to users with the Welcome email on the start date of Vendor View)
2. Enter User ID
3. Enter password. For security purposes, do not click “Remember my password”.
4. Click OK or hit enter

Vendor View News

At times CIM will post news regarding Vendor View that will appear upon login for both agent and vendor users. This notice will only be displayed for a few days. Examples of what might appear in the news are:

1. When the system will not be available because CIM is performing work on the server, upgrading the software or the server is unavailable for other reasons, the news will let all users know that, and will indicate when the system should be available.

2. Software news will inform users of system changes and features, such as new releases details, and will provide links to release notes or other materials for review.
Selector Screen for Vendors

Once the system recognizes your User ID and password, the Agent Selector screen is displayed for vendors. If a vendor is using Vendor View in conjunction with more than one Agent, a drop-down list of the Agents appears on this screen. The vendor user will select the appropriate agent from the drop-down list, and if the correct default Agent and Vendor names are displayed, users can simply click [Next] to continue.

If a vendor user is able to view more than one vendor’s records (e.g. program supervisors for more than one Vendor View site), a drop down list of available vendors is displayed under the Agent selection. These users will then select the appropriate vendor to view.

Once a vendor has chosen an agent (and possibly a vendor) to work with, the system displays both the vendor and agent names at the top of all screens. Also, the agent phone number is displayed for vendors.

Vendor View Demos

Vendor View demonstrations are available to provide an introduction to Vendor View functions at a time convenient for users. **CIM still plans to conduct on-site training when an agent first implements Vendor View, but the on-line demos will be used for all of the vendors that join the agent after implementation.**

The button to the training demo is provided on the Vendor View Selector Screen page in the upper left corner (Vendor View Demo) after log in. The training is a combination of spoken information and screen and report displays, and is broken into sections so a user can review different sections at different times. Instructions for the training are found below the links to the sections.

Notices

The Notices tab is split into two sub-links: Current Notices and Archived Notices. When first signing on to Vendor View, the user is taken to the Current Notices sub-link. The two sub-links displays are similar (note differences below).

The Current Notices screen displays all active notices that have not yet been reviewed and archived by the vendor. **As events occur in the MICIS and COMPASS systems, notices are automatically posted on the Current Notices screen,** with the most recently posted notice on the top.
Notice Creation

Notices are only created for participants with scheduled services (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 MICIS and COMPASS, generally including:

- New assessment (triggered by all {re}assessments for vendors receiving assessment reports; Assessment notices are not created until SW Assessment, Caregivers, RN Assessment, Diseases, Medications, Medical Providers, Pharmacies complete boxes are checked)
- Change to participant address or phone number
- Any change to the Care Setting status (e.g. enter the hospital or return home), including new, changed or removed statuses
- New, changed, deleted or stopped care plan and/or service schedule
- Care plan service, procedure, and/or standard remark change
- Care plan note change (if desired by agent user)
- New, changed or deleted care plan tasks or times
- Participant at Risk change
- Days/Times may vary
- Participant closed

Note that if a stop date is changed in a prior service period and the same service starts again later, a special message appears in the notice indicating that a “more recent service authorization exists for this service. Run notice report for details”. A service is considered “matched” whether or not the procedure/modifier or standard remark match in the earlier and later services; e.g., a hot and liquid meal would be considered the same service for this test.

If a notice was added, but then the service was removed due to a cancelled service, the notice will occasionally remain depending on when and how the template was removed. This causes vendors to receive the top level information about the person’s name, address, phone, and supports coordinators along with “No Data to Report”. Please check the current notices after removing a template and remove any notices from the vendor that are no longer current.
**Notice Screen Display**

In addition to participant information, the Notice displays include the following columns:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check box</td>
<td>This column is used to <strong>mark the notice(s) to generate the associated report or archive the notice</strong>. Clicking the top checkbox results in all notices being checked (or unchecked).</td>
</tr>
<tr>
<td>County</td>
<td>County code of the participant is displayed. A drop down list of counties is available in the County search criteria box on the top of the screen to obtain the associated county name.</td>
</tr>
<tr>
<td>Current Service</td>
<td>For service notices only, this column includes:</td>
</tr>
<tr>
<td></td>
<td>• Service name (short service name defined by agent)</td>
</tr>
<tr>
<td></td>
<td>• HCPCS code</td>
</tr>
<tr>
<td></td>
<td>• Procedure/Modifier code (or dash if none)</td>
</tr>
<tr>
<td></td>
<td>• Standard Remark code (or dash if none)</td>
</tr>
<tr>
<td>Action Detail</td>
<td>Summarizes the action that resulted in the notice.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Date on which the action takes effect (or today for some notices).</td>
</tr>
<tr>
<td>Email Date</td>
<td>(Current Notices only) Date the notice reminder email was sent to the vendor. Email date in Archived Notices is either the day of or the day after the notice was created.</td>
</tr>
<tr>
<td>Care Mgr</td>
<td>Initials of primary and secondary Supports coordinators</td>
</tr>
<tr>
<td>Notice Create Date</td>
<td>Date the notice was created (entry or edit date in MICIS or COMPASS)</td>
</tr>
<tr>
<td>Reviewed By</td>
<td>( Archived Notices only) User ID of person who reviewed and archived the notice.</td>
</tr>
<tr>
<td>Reviewed Date</td>
<td>( Archived Notices only) Date notice was reviewed and archived.</td>
</tr>
</tbody>
</table>
**Notice Screen Functions**

Several functions are available on the Notice screen.

**Search**
Using left search box, users can search for:
- Last four digits of Participant ID
- Last Name string (as many letters as desired)

**County**
Using County search box, users can search for:
- County, to limit the search to participants in the selected county

**Go**
Once the type of search is selected and the value entered, click “Go” (or hit the Enter key) to conduct the search.

**Display All**
This button returns screen to complete listing of all notices.

**Messages**
A new message is one that has not been marked as “Read”. Notice screen will display in red the number of new messages (if any) like this:

   Messages: 2 new messages
Generating Notice Reports

The Current Notices “Generate Reports” button will generate appropriate reports for any checked notices. For example, new services will generate a Service Authorization report, changes to care setting will generate a Care Setting report and a new assessment will generate an Assessment or Assessment Comparison report.

Key Notice Report Generation Information:

- Service reports generated from the Notice page automatically INCLUDE Cost/Unit information. Vendors can generate these same reports without Cost/Unit from the Services Reports tab.
- Report generation from the Notice page has been designed to produce only one report if there are multiple notices pertaining to the same service.
- Action Detail information is printed on reports generated from Current Notices sub-link, but not on reports generated from Service Report tab.

Archiving Notices

The vendor indicates that a notice has been received and will be acted upon by archiving that notice. User ID of the person archiving the notice is saved in the archived record, as well as the date of the archive. At the end of the day, agents will check the “Current Notices” sub-link to see which notices have not yet been archived, and will take appropriate action to be sure the vendor sees the notice information. Notices can be archived as part of or after the report generation process.

Important: The Reviewed/Archive function tells the agent that a notice has been received and will be handled by the vendor. Only vendors can use this button to archive notices. DO NOT archive a notice unless the notice has been reviewed and can be handled. The User ID and date/time the notice was archived is saved for reference.

Archived notices can be found by clicking the Archived Notices sub-link under the main Notice tab.

To Archive a Notice after Report Generation:

Step 1: After reports are generated, check the notice(s) to be archived in the left checkbox column. (Note that checkmarks remain in checkboxes after reports are printed; to archive the same notices, move to step 2. To archive only some of the reported notices, remove checkmarks as necessary).

Step 2: Click the [Reviewed/Archive] button to move notices to Archive.
To Archive a Notice with Report Generation:

Step 1: Check the notice(s) to be reported and archived in the left checkbox column
Step 2: Click the [Generate Reports/Review/Archive] button.

**Notice Email to Vendors**

 Twice each day (at 11:30 a.m. and 3:30 p.m.), the Vendor View system finds new, unarchived notices created since the last email, and sends a generic email to any non-fax vendor that has new notices. This email is sent from VendorView@ciminc.com to the email address(es) provided by each vendor at registration.

The subject of the email is “Vendor View: New Notices Available”, with this text:

*Please log on to Vendor View to review your NEW NOTICE(s) from the following agencies:*

- **Agent:** 55 – TEST AGENT  
  **Vendor:** 123 – HAPPY HOME CARE

*Click the link below or open your internet browser and copy this link into the address bar:*

  https://portal.ciminc.com/vendorview.html

*If you have any questions or need assistance please contact the CIM Helpdesk at VendorView@ciminc.com or (734) 930-0855.*

No participant information is provided in this email in order to protect participant privacy. Vendor View itself contains the participant information being shared.

Each vendor can have **as many email addresses as needed** to receive emails from Vendor View. CIM suggests that one person is assigned the task of monitoring Vendor View and seeing that appropriate information is delivered within the vendor agency. Other email addresses should be provided as back-up to this assigned person.

Note that it is **not necessary to receive an email to review new notices**. Notices are posted in Vendor View as soon as they are created by actions in MICIS or COMPASS. The purpose of the email is a reminder that there are new notices in case the vendor staff is not monitoring the web site.
Participants

Participants screen has the same search functions as the Notice Screen (see above for details), including Search last name or last four digits of ID, County selection, and Display All.

Participants Tab Information:
- Only active participants are listed, based on a current service being provided by the vendor. A current service is defined in MICIS as a care plan with either a template or scheduled exception.
- The list is sorted alphabetically by last name.
- “Printer Friendly” button on the top right of the screen will produce a printable copy of the displayed Participants list. On the printer friendly pop-up, there is a link to “Print this Page” or “Exit” back to Vendor View.

Participant and Service Reports

The Participant and Service Reports pages are used to generate reports at any time, independent of notices. Any participants served by the vendor in the past six months or scheduled for the future are available on the Reports pages.

Participants are identified on the left, and columns on the right side of the screen with checkboxes are used to generate reports. Clicking the top checkbox will result in the generation of that report for all participants, while individual checkboxes are used to generate reports for selected participant(s).

Reports generated from either of the Reports screens do not include notice information on the top, as do the same reports generated from the notice page.

Participant Reports

Participant Reports include (samples at end of document):
- Assessment (full assessment without financials; available to vendors set up by agents to receive an assessment report; report is most recent assessment completed for time vendor served participant)
- Assessment Comparison (available if the vendor has served the participant for the time covering the two assessments; displays only fields that have changed since prior assessment)
- Care Settings (e.g. times at home, in hospital, etc.)
- Current Medications/Allergies
- Current Caregivers
- Current Medical Providers/Pharmacies
Key participant report information:

- Vendors not set up to receive assessment reports will have an “X” in those report columns, as well as in the Medications, Caregivers and Medical Providers/Pharmacies reports
- Medications, Caregivers, and Medical Providers/Pharmacies reports are automatically produced with an Assessment or Assessment Comparison report generated from the Notices screen, but NOT from the Participant Reports screen
- Vendors will receive a message “No data to report” on the initial assess report until the Waiver Agent marks the SW and RN assessment and associated medications, caregivers, diseases, medical providers and pharmacies as completed. New assessments will not be available until they are “completed”; vendors will continue to view older assessments until the new one is “completed”.
- Reports only display information for the time period of the vendor service

**Service Reports**

Service Reports include (samples at end of document):

- **Service Authorization** (different format for each template type)
- **Service Summary** (combined service authorizations for date range)
- **Scheduled Exceptions** (all exceptions, even ones that did not create notice, with any posted notes)
- **Care Plan Calendar** ((see below for note about multiple service schedules in one month)
- **Notice Report** (all notices for a person the Reviewer ID and review date)
- **Message Report** (all messages for a person with Read By User ID and Read Date & Time)

On the Service Reports tab, selection criteria for reports are on the top of the screen. Users can select:

- a time period (in months)
- to include or exclude Cost/Unit information (exclude is default)

Key service report information:

- **Reporting period defaults to 3 months**: current, prior, and next
- **A report will print “No Data to Report”** if there is no template or scheduled exception in the month
- “**Times may vary**” or “**Days may vary**” appear under the service schedule if appropriate
• Any notes pertaining to the service, tasks or service times will appear on the Service Authorization, Service Summary, and the Care Plan Calendar reports.

• Participant at Risk appears on top of the service reports if applicable

• Care Plan Calendar Report will not print any data if there is:
  o no template for the month
  o no service scheduled in the month
  o template stops before the scheduled event (e.g. template stops on the 15th for a service scheduled to occur on the last date of month)

• On Care Plan Calendar Report, if multiple service schedules in the month, each schedule will be shown, but only the times and tasks associated with the last schedule for the service in the month are displayed. See Service Authorization report for details about all schedules.

**Report Download**

The Report Download tab includes all pending and completed reports that have been requested by your agency. Reports remain in the Report Download list for two days.

Key Reports Download information:

• When reports are requested, system moves to Reports Download page

• As appropriate, page displays three statuses: Pending (not done yet), Report Download (ready to open), or Previously Viewed (reports stay on list for two days)

• Click on report name to link to display a “File Download” page which gives option to “Open”, “Save,” or “Cancel” the report.

• If “Open” is selected, report is displayed in pdf format, from which report can be printed or saved.

• If “Save” is selected, users can change the system assigned file name (series of letters and numbers) to a recognizable name.
Messages

Agents and internet vendors are able to communicate about services and participants in a secure fashion that will prevent unauthorized access to participant protected health information by using Vendor View messages.

Vendor View does not currently support posting messages to a specific staff person at either agent or vendor; the staff monitoring Vendor View messages must distribute them within the organization. Each agency must decide how the messages system will be used internally.

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.

New and Read/Sent Messages Display

There are two sub-links that display messages: New Messages and Read/Sent Messages. Clicking on either sub-link will display the appropriate messages.

The Vendor View message screens display the following columns:

Checkbox Used to either mark message as read, create a printer friendly version, or delete a message. (Only delete incorrect messages, because delete removes the message from both sender and recipient view)

Type In, out or internal message (click on heading to sort)

Sent Date message was sent (click on heading to sort)

Sender Agency creating message (click on heading to sort)

Sender ID User ID of person sending message (click on heading to sort)

Recipient Agency receiving message (click on heading to sort)

Participant Name of participant associated with the message

Subject Whatever was typed by message sender

Body The message itself

Read by (Read/Sent Messages only) User ID of person marking message as read

Read Date & Time (Read/Sent Messages only) Date and time message was marked read
Search Messages

Sent Date Range is used to find messages within a specified time period. Select dates from the calendar, or enter them MM/DD/YYYY.

Vendors can search for a Participant ID (last four digits of SSN) or Last Name using the search box on the left. Users can also search for Type of message by selecting “Incoming” or “Outgoing” from the drop down or for messages that are either “Read” or “Not Read” by the Recipient using that drop down. “All” is the default for both of these search boxes.

Once the search selections are complete, use the Go button to search.

Display All button returns to the entire list of messages, and Reset Defaults blanks the search box and returns the drop downs to All.

Send New Message

Step 1: Click the Messages tab, and then click the Send New Message sub-link. “From” defaults to the sender vendor (or agent) name)

Step 2: Click on the type of message:
1. Send a Standard Message (for messages not associated with a participant)
2. Send a Participant Message (for messages about a particular participant)

Step 3: **Standard Message:** Select the recipient(s) agency from the displayed list. Multiple recipients can be highlighted by using [Ctrl] or [Shift] [Click].

**Note that only Vendor View agents will appear for a vendor, and only Vendor View registered internet vendors will appear for an agent.**

**Participant Message:** Select the recipient agency from the drop down list. Only one may be chosen for this type of message. Then select the participant from the drop down list (only participants served by the selected vendor in the last 182 days will be displayed).

Step 4: Enter the subject line (either a participant name or other issue)

Step 5: Enter the message text

Step 6: Click [Send] to send the message or [Cancel] to clear out the information. Either option will return to a blank Send New Message screen. Once the message has been sent, the text, “Message sent successfully”, will appear on top left of page.
Print a Message

Use the check box column to mark message(s) to be printed, and click the Printer Friendly button to create a printer friendly version of the checked Message(s). This can be done on either the New or Read/Sent messages sub-links. Links are available on this pop-up to either “Print this Page” or “Exit”.

Message(s) in the “Print Friendly” display can be copied and pasted into another application, such as a secure internal email system. To do this, highlight the message to be copied, press <Ctrl> <C>, move to the other application, and press <Ctrl> <V>.

Delete a Message

All users can delete a message once it is read, or if it was inadvertently sent to the wrong place. Remember that deleting a message removes it for both sender and recipient, so senders should not delete a good message unless they know it has been read.

To delete a message, mark the check box column next to the message(s) to be deleted, and click the Delete Message button above the message chart on the Read/Sent Messages page.

Mark a Message as Read

Step 1: Check the message(s) to be marked as read in the left checkbox column
Step 2: Click the [Mark Checked as Read] button.

Any checked messages are moved to the Read/Sent messages list found on the Read/Sent Messages sub-link. The user ID and date “read” is saved with the message for future tracking.

Important: The “Mark Checked as Read” function tells the Agent sender that a message has been received by the vendor. DO NOT click “Mark Checked as Read” for a message unless it has been read, or the sender will assume that the message has been received and can be acted upon.
Message Reminder Email Sent to Recipient Agency

Twice each day (at 11:30 a.m. and 3:30 p.m.), the Vendor View system polls for new messages created since the last email that have not been marked as read, and sends a generic email to the recipient vendor or agency. This email is sent from VendorView@ciminc.com to the email address(es) provided by the vendor or agent.

The subject of the email is “Vendor View: New Messages are Available”, and the text of the email is:

_Please log on to Vendor View to review your NEW MESSAGE(s) from the following agencies:_

- **Agent:** 55 – TEST AGENT     **Vendor:** 123 –HAPPY HOME CARE

_Click the link below or open your internet browser and copy this link into the address bar:_

  https://portal.ciminc.com/vendorview.html

_If you have any questions or need assistance please contact the CIM Helpdesk at VendorView@ciminc.com or (734) 930-0855._

No participant information is provided in this message in order to protect participant privacy.
User/Vendor Changes and Additions

Each person that uses Vendor View must have their own user ID and password to comply with HIPAA. When new users need to be added or any information changes (such as user email addresses, vendor name), the vendor should contact the agent for changes. The agent's phone number is listed at the top of the Vendor View screen.

All new users will receive a “Welcome to Vendor View” email at the next email time of 11:30 am or 3:30 pm. The email will look like this:

To: <User’s Name> at <Vendor Name>

Welcome to Vendor View as an internet vendor with <Agent Name>

**IMPORTANT:** Please remember that when notices are posted, Review/Archive marks the notices as handled by your agency, so be sure to do this after you have run the reports. If there are unreviewed notices at 11:30 am or 3:30 pm, you will receive a reminder email that you need to login to Vendor View to review. However, you are not limited to waiting for this email. You can run Vendor View whenever and wherever you want!

**Getting Started:**
First, Click the link below or open your internet browser and copy this link into the address bar:


Next you will need to Bookmark (add to your Favorites) this webpage. If you need assistance doing this, please contact the CIM Helpdesk at (734) 930-0855.

Now it's time to click the Vendor View link!

**Login for New Users:**
Once you go to the web address above, you will be prompted to enter your User ID and password. Your User ID is <USER ID>. The system accepts either upper or lower case letters.

Use the password you filled out on the Vendor View enrollment form. Please contact <Agent Name> at <Agent Phone> if you forgot your password.

Once you login to Vendor View, please take the time to Change your Password using the Change Password tab, to keep the system more secure.

**Login for Existing Users:**
For users that are able to access Vendor View with more than one agent, you will
use the SAME USER ID and PASSWORD for all Agents. The password will be the same as you are currently using with the other agent, not necessarily the one you indicated on your enrollment form for <Agent Name>.

*Getting Help:*  
If you need assistance using Vendor View, you can click the Help link on the top right of Vendor View to see the current Vendor View User Guide (attached).

### Change Password

The Change Password tab allows a vendor user to change their Vendor View password by entering the new password twice, and clicking the “Submit” button.

### Change Role

The Change Role tab moves the user to the initial screen, where user can choose another agent and/or vendor (if they are registered to more than one agent and/or vendor).

### Contact Us

Contains contact information for technical assistance from the Center for Information Management, Inc. (CIM). CIM’s email link, VendorView@ciminc.com, and phone number are displayed. This is not the contact if you have questions regarding a participant or schedule. Those questions need to be directed to the Waiver Agent.

### Supports Coordinators

The Supports Coordinators tab in provides a reference to Supports Coordinator names, and optional phone numbers. The list can be sorted by Supports Coordinator initials or last names; vendors can print the page to obtain a paper copy of Supports Coordinator names.

**Print Supports Coordinator List**

Click the Print Friendly button to create a printer friendly version of the Supports Coordinators. Links are available on this pop-up to either “Print this Page” or “Exit”.

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FAX Vendors

Vendor View can be used by vendors that do not have access to the internet. These vendors are set up to receive faxed notices from Vendor View. When an action in MICIS or COMPASS would create a notice for an internet vendor, fax report(s) will be created for fax vendors.

Key FAX Information:
- Fax reports are created to send when a notice event occurs in MICIS or COMPASS
- System polls for notices to be faxed once an hour, and submits reports to the report creation process.
- Assessment report is faxed when first service is established for the vendor
- Assessment Comparison report is faxed for each subsequent assessment
- Medications, Caregivers and Medical Providers/Pharmacy reports are all faxed with assessment reports to appropriate vendors
- Faxes are attempted 6 times 10 minutes apart, and successful faxes are archived with the fax date
- Failed faxes are entered to Agents Failed Fax web page, with email notification

Help Link

The Help link on the top right hand corner of each Vendor View page connects the user to this User Guide which is kept up to date as new releases are published.
### Section  Assessment Section

<table>
<thead>
<tr>
<th>Section</th>
<th>Complete</th>
<th>Completed By</th>
<th>Completed Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment Date</td>
<td>10/15/2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign Assessment Date</td>
<td>10/15/2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SW Assessment</td>
<td>Yes</td>
<td>DEMOA</td>
<td>2015-1-21.14.22. 15. 239000000</td>
</tr>
<tr>
<td>Complete</td>
<td></td>
<td></td>
<td></td>
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</table>

Click the Finalize Assessment button to make a permanent copy of the Next Assessment. The Assessment Date you specified in this record will be assigned to the new finalized assessment.

Finalized by: DEMOA
Finalized Date/Time: 2015-1-21.14.22. 29. 323000000
### Next Reminder

Enter any reminders related to the next assessment with this person:

- Check to see if balance is any better. Was declining at this assessment.

### Section FS: Identifying Info

<table>
<thead>
<tr>
<th>Marital Status at this Assessment:</th>
<th>Married</th>
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<tbody>
<tr>
<td>Spouse Last Name:</td>
<td>Lane</td>
</tr>
<tr>
<td>Spouse First Name:</td>
<td>Lois</td>
</tr>
<tr>
<td>Person rights and responsibilities explained:</td>
<td>Yes</td>
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<tr>
<td>Residential / Living Status at Time of Assessment:</td>
<td>Private home / apartment / rented room</td>
</tr>
<tr>
<td>Who person lived with at time of referral (assessment) or currently lives with (reassessment):</td>
<td>With spouse/partner only</td>
</tr>
<tr>
<td>Is person a primary caregiver for someone else?</td>
<td>No</td>
</tr>
<tr>
<td>Residential History Over Last 5 Years (Code for all settings person lived in during 5 YEARS prior to date case opened):</td>
<td>No</td>
</tr>
<tr>
<td>Long-term care facility--e.g., nursing home:</td>
<td>No</td>
</tr>
<tr>
<td>Mental health residence--e.g., psychiatric group home:</td>
<td>No</td>
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<tr>
<td>Psychiatric hospital or unit:</td>
<td>No</td>
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<tr>
<td>Board and care home, assisted living:</td>
<td>No</td>
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<tr>
<td>Setting for persons with intellectual disability:</td>
<td>No</td>
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<tr>
<td>Surrogate Decision Maker: Person has Legal Guardian:</td>
<td>Yes</td>
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</table>

### Section A: Identifying Info

<table>
<thead>
<tr>
<th>Place of Assessment:</th>
<th>Home</th>
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<tbody>
<tr>
<td>Assessment Reason:</td>
<td>First assessment - An assessment that is done at the time of entry into the home care system, or when initially determining eligibility for home care/home health services.</td>
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</tbody>
</table>

| Person's expressed goals of care: | Person would like to become more independent and not rely fully on spouse. |

### Section B: Social Functioning

<table>
<thead>
<tr>
<th>Social Relationships[Note: Whenever possible, ask person]</th>
<th>In last 3 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participation in social activities of long-standing interest:</td>
<td>In last 3 days</td>
</tr>
<tr>
<td>Visit with a long-standing social relation or family member:</td>
<td>In last 3 days</td>
</tr>
<tr>
<td>Other interaction with long-standing social relation or family member--e.g., telephone, e-mail:</td>
<td></td>
</tr>
<tr>
<td>Conflict or anger with family/friends:</td>
<td>More than 30 days ago</td>
</tr>
<tr>
<td>Fearful of a family member or close acquaintance:</td>
<td>Never</td>
</tr>
<tr>
<td>Neglected, abused, or mistreated:</td>
<td>Never</td>
</tr>
</tbody>
</table>

| Change in Social Activities in LAST 90 DAYS (Or since last assessment if less than 90 days ago). Decline in the level of participation in social, religious, occupational or other preferred activities.If there was a decline, person distressed by this fact: | No decline |

<table>
<thead>
<tr>
<th>Isolation</th>
<th>Less than 1 hour</th>
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</thead>
<tbody>
<tr>
<td>Length of time person is alone during the day (morning and afternoon):</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Person says or indicates that he/she feels lonely:</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major life stressors in last 90 days (e.g., episode of severe personal illness; death or severe illness of close family member/friend; loss of home; major loss of income/assets; victim of a crime such as robbery or assault; loss of driving license/car):</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Comments

- Update for this visit:
  - Balance issues are of concern and causing stress to pt
Assessment Comparison Report

Section Reminder

Previous Reminder
Reminder notes entered at previous assessment:

Check to see if balance is any better. Was declining at this assessment.
No Response

Next Reminder
Enter any reminders related to the next assessment with this person:

No Response
Check to see if balance is any better. Was declining at this assessment.

Section I: Disease/Disabilities

Disease Diagnoses
Cardiac or Pulmonary
Congestive heart failure:

Diagnosis present, receiving active treatment

Psychiatric/Mood
Anxiety:

Diagnosis present, receiving active treatment

Diagnosis present, monitored but no active treatment

Section J: Health Conditions

Balance
Difficult or unable to move self to standing position unassisted:
Exhibited on 1 of last 3 days

Difficult or unable to turn self around and face the opposite direction when standing:
Present but not exhibited in last 3 days
Exhibited on 1 of last 3 days
Exhibited daily in last 3 days

Dizziness:
Exhibited on 1 of last 3 days
Exhibited daily in last 3 days

Unsteady Gait:
Exhibited on 1 of last 3 days
Exhibited daily in last 3 days

Section A: Identifying Info

Place of Assessment:
Home

Assessment Reason:
No Response

First assessment - An assessment that is done at the time of entry into the home care system, or when initially determining eligibility for home care/home health services.

Section E: Cognitive
**Vendor View for MICIS**

**Current Caregivers Report**

Agent: DEMO AGENT

**Participant:** XXX-XX-5135 MAN,SUPER

**Address:**
555 KRYPTONITE BLVD
ANN ARBOR, MI 48103

**Phone:** (555) 555-8888

<table>
<thead>
<tr>
<th>Caregiver Name</th>
<th>Phone</th>
<th>Relation</th>
<th>Helper Type</th>
<th>Type of Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lane, Lois</td>
<td>(555) 555-8888</td>
<td>Spouse</td>
<td>Primary helper</td>
<td>Yes</td>
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</tbody>
</table>
# Current Medications and Allergies Report

**Agent:** DEMO AGENT

## Participant: XXX-XX-5135  MAN, SUPER

**Address:**
555 KRYPTONITE BLVD  
ANN ARBOR, MI 48103

**Phone:** (555) 555-8888

<table>
<thead>
<tr>
<th>Name/Strength</th>
<th>Route</th>
<th>Frequency</th>
<th>Start Date</th>
<th>Stop Date</th>
<th>Prescribed By</th>
<th>Purpose</th>
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<tbody>
<tr>
<td>COREG 25 MG/1</td>
<td>PO (By mouth/oral)</td>
<td>QD (Daily)</td>
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<td></td>
<td>Dr. House</td>
<td>Beta blocker</td>
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<tr>
<td>IMDUR 15 MG</td>
<td>PO (By mouth/oral)</td>
<td>QD (Daily)</td>
<td></td>
<td></td>
<td>Dr. House</td>
<td></td>
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<tr>
<td>LASIX 20 MG/1</td>
<td>PO (By mouth/oral)</td>
<td>OTH (Other)</td>
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<td></td>
<td>Dr. House</td>
<td>diuretic</td>
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<tr>
<td>PRISTIQ EXTENDED-RELEASE 50 MG/1</td>
<td>PO (By mouth/oral)</td>
<td>QD (Daily)</td>
<td></td>
<td></td>
<td>Dr. Phil</td>
<td>Anxiety</td>
</tr>
</tbody>
</table>

**Pharmaceutical Allergies:**
- Bactrim

**Environmental Allergies:**
- Seasonal, Kryptonite

**Food Allergies:**
- Tree nuts
## Vendor View for MICIS

### Current Medical Providers and Pharmacies Report

**Agent:** DEMO AGENT

<table>
<thead>
<tr>
<th>Participant:</th>
<th>XXX-XX-5135 MAN,SUPER</th>
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<tbody>
<tr>
<td>Address:</td>
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<td>(555) 555-8888</td>
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**Supports Coordinators:** DA

### Medical Providers

<table>
<thead>
<tr>
<th>Business Name</th>
<th>Last Name, First Name</th>
<th>Phone</th>
<th>Primary Physician</th>
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<tbody>
<tr>
<td>Dr. House</td>
<td>House, Gregory</td>
<td>(555) 555-1212</td>
<td>Yes</td>
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<td>Dr. Phil</td>
<td>McGraw, Phil</td>
<td>(777) 777-1515</td>
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### Pharmacies

<table>
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<th>Business Name</th>
<th>Phone</th>
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<td>CVS 1</td>
<td>(999) 888-9999</td>
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Vendor View for MICIS  
Weekly Service Authorization  
Agent: DEMO AGENT

XXX-XX-5127 WOMAN, SUPER  
255 LINE 1  
LINE 2  
ALLEN PARK, MI 49236

Primary Supports Coordinator: DA

Start Date: 10/01/2014  
Stop Date: 09/30/2015

Vendor: 12345 ABC HOME VENDOR  
Service: H2015 Comm. Support Svcs/15min  
Purchased Fund Source: 100 HCBS/ED WAIVER  
Care Plan Line Number: 1848531

<table>
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<tr>
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<th>Monday</th>
<th>Tuesday</th>
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<th>Thursday</th>
<th>Friday</th>
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Tasks: Bathing/Shower, Hair Care, Medication Cueing, Toileting, Transfer, Bed Linen Change/Make Bed, Clean Bathroom, Clean Floors, Clean Kitchen, Dust, Errands, Laundry, Meal Preparation, Transportation

Notice Detail (ascending order):

New service schedule for "H2015" for 10/01/2014 to 09/30/2015
Vendor View for MICIS
Scheduled Exception - Notice

Agent: DEMO AGENT
Phone: (555) 555-8888
Primary Supports Coordinator: DA

Vendor: ABC HOME VENDOR
Service: T1000 TD RN /15 min
Purchased Fund Source: 100 HCBS/ED WAIVER
Care Plan Line Number: 1848540

Scheduled Exception Date: 02/02/2015

Notice Detail (ascending order):

Scheduled exception: 02/02/2015 now 8 units at $8.00/unit
### Vendor View for MICIS
#### Care Plan Calendar Report

- **Report Date Range:** 12/01/2014 to 02/28/2015
- **Include Cost/Unit:** No
- **Agent:** DEMO AGENT

---

**XXX-XX-5135 MAN,SUPER**
555 KRYPTONITE BLVD
ANN ARBOR, MI 48103

**Phone:** (555) 555-8888
**Primary Supports Coordinator:** DA

---

**Start Date:** 10/15/2014  
**Stop Date:** 09/30/2015

**Vendor:** 12345 ABC HOME VENDOR  
**Service:** T1000 TD RN /15 min  
**Purchased Fund Source:** 100 HCBS/ED WAIVER  
**Care Plan Line Number:** 1848540

**Total Units:** 56.00

---

#### February 2015

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**Tasks:** Blood Draw, Check Blood Sugar, Medication Set-up, Re-order Medications, Electronic Med Dispenser, Record Weight, Vital Signs

**Key:** Display is units/day and cost/unit.  
Asterisk (*) indicates scheduled exception.  
Times scheduled and Tasks information are reported from the latest service schedule in the month.

---

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## Vendor View for MICIS
### Service Authorization Summary

Include Cost/Unit: No  
Agent: DEMO AGENT  
Primary Supports Coordinator: DA  
XXX-XX-5127 WOMAN,SUPER  
255 LINE 1  
LINE 2  
ALLEN PARK, MI 49236

| Vendor | 12345  ABC HOME VENDOR  
Service | T1000  TE  LPN /15 min  
Purchased Fund Source | 100  HCBS/ED WAIVER  
Start Date | 10/15/2014  
Stop Date | 09/30/2015
<table>
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</tr>
<tr>
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</tbody>
</table>

| Vendor | 12345  ABC HOME VENDOR  
Service | H2015  Comm. Support Svcs/15min  
Purchased Fund Source | 100  HCBS/ED WAIVER  
Start Date | 10/01/2014  
Stop Date | 09/30/2015
<table>
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<tr>
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<tr>
<td><strong>Tasks:</strong></td>
<td>Bathing/Shower, Hair Care, Medication Cueing, Toileting, Transfer, Bed Linen Change/Make Bed, Clean Bathroom, Clean Floors, Clean Kitchen, Dust, Errands, Laundry, Meal Preparation, Transportation</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

---

Printed: 01/22/2015 12:39 PM  
Report: Service Authorization - Summary  
© 2015 Center for Information Management, Inc.  
Page 1 of 1  
XXX-XX-5127 WOMAN,SUPER
### Vendor View for MICIS

**Care Settings Report**

Agent: DEMO AGENT

<table>
<thead>
<tr>
<th>Participant</th>
<th>XXX-XX-5135  MAN,SUPER</th>
<th>Supports Coordinators</th>
<th>DA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>555 KRYPTONITE BLVD</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ANN ARBOR, MI 48103</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>(555) 555-8888</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Stop Date</th>
<th>Care Setting</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/20/2015</td>
<td></td>
<td>Hospital</td>
<td></td>
</tr>
<tr>
<td>10/15/2014</td>
<td>01/19/2015</td>
<td>Home</td>
<td></td>
</tr>
</tbody>
</table>
### Vendor View for MICIS
#### Participant Notice Report

**Agent:** DEMO AGENT  
**for**  
12/01/2014 to 02/28/2015  

**Participant:** XXX-XX-5135  
**Current Address:** 555 KRYPTONITE BLVD  
ANN ARBOR, MI 48103  
**Phone:** (555) 555-8888  

**Vendor:** ABC HOME VENDOR  

<table>
<thead>
<tr>
<th>Action Detail</th>
<th>Current Service</th>
<th>Effective Date</th>
<th>Notice Create Date/Time</th>
<th>Reviewed Date/Time</th>
<th>Reviewed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>New/Changed Care Setting</td>
<td></td>
<td></td>
<td>01/22/2015 11:09 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Assessment</td>
<td></td>
<td>01/12/2015</td>
<td>01/22/2015 11:04 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Phone Number</td>
<td></td>
<td>01/22/2015</td>
<td>01/22/2015 9:32 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Address</td>
<td></td>
<td>10/01/2014</td>
<td>01/22/2015 9:28 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduled exception: 02/02/2015 now 8 units at $8.00/unit</td>
<td>RN /15 min T1000 TD -</td>
<td>02/02/2015</td>
<td>01/22/2015 9:23 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service changed from &quot;S5150&quot; to &quot;T1000&quot; Procedure/Modifier changed from &quot; &quot; to &quot;TD&quot;</td>
<td>RN /15 min T1000 TD -</td>
<td>10/15/2014</td>
<td>01/22/2015 9:16 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New service schedule for &quot;S5150&quot; for 10/15/2014 to 09/30/2015</td>
<td>RN /15 min T1000 TD -</td>
<td>10/15/2014</td>
<td>01/22/2015 9:11 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Assessment</td>
<td></td>
<td>10/15/2014</td>
<td>01/22/2015 9:11 AM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Super Man went to hospital

Super Man went into the hospital on January 20th. Hold all services until returns home.