



HCSIS Frequently Asked Questions (BAS)

The purpose of the HCSIS Frequently Asked Questions (FAQ) guide is to supply users of the HCSIS system with an on-the-job resource for help when completing certain tasks and with general system resolution. Use the table of contents listed below to navigate to the desired module, sub-module or activity within HCSIS.

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General System & HCSIS Help Desk

What is the HCSIS URL?

<https://www.hcsis.state.pa.us>

How do I contact the HCSIS Help Desk? What are its hours of operation?

The HCSIS Help Desk operates Monday through Fridays from 8 AM to 5 PM. Users can contact the HCSIS Help Desk via phone, fax, and email. Contact details for the HCSIS Help Desk are listed below:

- Phone: 1-866-444-1264
- Fax: 1-717-540-0960
- E-mail: c-hhcsishd@state.pa.us

Will I need more than one user ID for HCSIS?

No. If you have been assigned multiple roles to perform different tasks in HCSIS, you will have one user ID with multiple scopes. In these situations, upon login, the user will be prompted with a “Scope Selection” screen that lists the available scopes assigned to their user ID. Additionally, if the user wishes to change scopes while they are already logged into HCSIS, they can do so by using the following menu path: *Tools > Misc. > Change Scope*.

What is scope, and how do I change my scope once I am logged into HCSIS?

Scope defines what data a user can view in HCSIS. For example, as a regional administrator of the Central Region, it would not make sense to see individuals that reside in the Southeast Region. Therefore, the user’s ID would have the scope for the Central region.

There are cases in which a user has multiple scopes. In these situations, upon login, the user will be prompted with a “Scope Selection” screen that lists the available scopes assigned to their user ID. Additionally, if the user wishes to change scopes while they are already logged into HCSIS, they can do so by using the following menu path: *Tools > Misc. > Change Scope*.

What is a Business Partner (BP) Administrator?

A BP Administrator is someone that has been identified in your region/agency as the person responsible for maintaining user profiles in IdentityManager and the Learning Management System (LMS). The BP Admin can create, modify and view user accounts.

Who should I contact to have my password reset?

Contact your BP Administrator to have your password reset. If you do not know who your BP Administrator is, ask your Supervisor or the person who tends to the computers where you work.

What does it mean to have a locked password? Why does this happen?

HCSIS will lock your password if you attempt to login and fail to type the correct user ID password combination three times in a row as a security precaution.

Who should I contact if my password is locked?

Contact the HCSIS Help Desk via e-mail. Please indicate “**Reset Password: <type your user ID here>**” in the subject line of the e-mail.

- **Note:** If your BP Administrator resets your password and you still cannot log into the system, then your account may be locked
- **Tip:** If you try to log into HCSIS and you receive an error stating that the Login ID and/or Password is incorrect, close your browser window and open a new one to try again; this will help lower the chances of you locking your ID

Why am I not receiving the password expiring/reset reminders?

Every 60 days, the password reset reminder popup box will appear to remind you that your password is going to expire. This popup box starts appearing 15 days prior to your password expiring, and after you click [Login] on the DPW Keystone screen.

If you are not seeing a reminder, verify that you do not have any popup blocker software installed or a popup blocker enabled on your computer. If a yellow bar appears under the address bar of your Internet window, you can right-click it to turn off the popup blocker.

Where can I learn more about the different modules in HCSIS?

The [Learning Management System \(LMS\)](#) link on the HCSIS main page will take you to the LMS where you can find the training materials for HCSIS. You will find documentation and tip sheets on the different modules within the LMS under the [My Curriculum](#) link.

I am getting an error message within HCSIS that I don't understand. What should I do?

Before contacting the HCSIS Help Desk, there are a couple things you should do to try and help resolve the issue.

- Review the training documentation found within the [Learning Management System \(LMS\)](#)
- Ask your Supervisor or a peer to see if they know how to resolve the issue

If you are unable to find information on the issue, or the error you received in HCSIS states to call the HCSIS Help Desk, please contact the HCSIS Help Desk.

I found invalid data in HCSIS that I cannot change. What can I do to have it corrected?

In some instances, your Supervisor and/or BAS Regional Office may have more access rights than you in HCSIS to change data. Contact them first to see if they can make the needed adjustments. If they cannot, contact the HCSIS Help Desk for assistance.

I have the same job duties as someone else in my organization, but the other person can perform more functions in HCSIS than I can. Why?

Each User ID is assigned roles that allow you to perform certain functions within HCSIS. If you feel you should be able to do something in HCSIS that you cannot, discuss this with your Supervisor. If your Supervisor decides that you should have additional roles, you or your Supervisor should contact your BP Administrator and request the additional role(s) be added to your user ID. If you do not know your BP Administrator, ask your Supervisor or the person who attends to the computers where you work.

Is HCSIS Bobby/JAWS compliant?

HCSIS is Bobby approved (Bobby is a tool that certifies that an information system is compliant with assistive technology such as JAWS) and ADA (Americans with Disabilities Act) compliant. Please note that HCSIS works best with the most recent versions of JAWS and you may be required to update to the most recent version of JAWS to use HCSIS fully.

Can the timeout period be extended so that users don't have to logout and login again so often?

No, the timeout period is built into HCSIS as a security measure to protect the individual's information and will not be extended at this time. This time is updated when a user moves from one page to another or clicks the [Save] button – therefore, it is very important to save your information often, especially if you are working on one page for an extended period of time.

Who should I contact regarding LMS IDs?

Contact your local BP Administrator for LMS Access. Your BP Administrator can assign you an LMS ID and password so you have access to all the training materials and courses for HCSIS.

I have to perform a task in HCSIS but I do not know what to do. Where should I go for help?

Before contacting the HCSIS Help Desk, there are a couple things you should do to learn how to perform a certain task in HCSIS:

- Review the training documentation found on the [Learning Management System \(LMS\)](#)
- Ask your Supervisor or your peers to see if they know how to perform the task

If you are unable to find information on how to perform the task, please contact the HCSIS Help Desk.

What is a data fix? What is the process for requesting one?

A data fix is defined as a Program Change Request (PCR) that modifies production data for the HCSIS application. A user would need a data fix if there is a data defect that needed to be corrected internally (i.e. can't be fixed with an [Edit] button).

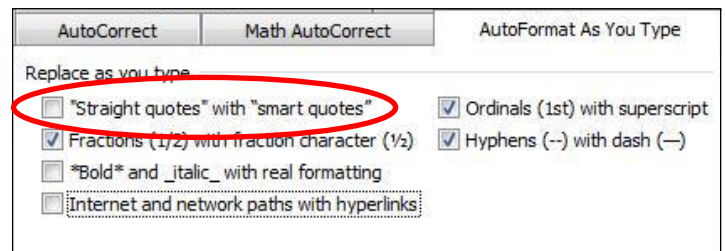
Any user who encounters a data error in HCSIS should call the HCSIS Help Desk to explain the situation. If a data fix is necessary, the HCSIS Help Desk will create a PCR. The program office is then responsible for reviewing and prioritizing the PCR based on its urgency and explanation captured in PCR notes. There is no specified timeframe for PCRs to be completed.

How can users eliminate punctuation errors when copying and pasting into HCSIS?

If you copy and paste text into HCSIS from an existing Word document, you may see upside-down question marks after saving the copied text. Perform the below steps to prevent this from occurring:

In Word 2003:

1. Click Tools > AutoCorrect Options > AutoFormat As You Type
2. Uncheck "**Straight quotes**" with "Smart quotes"
3. Click [OK]

**In Word 2007:**

1. Click the [Office] button in the top-left corner
2. Choose **Word Options** in the bottom right
3. Select **Proofing** in the left pane and **AutoCorrect Options** in the right pane
4. Click **AutoFormat As You Type**
5. Uncheck "**Straight quotes**" with "Smart quotes"
6. Click [OK] twice

What are alerts? What is the difference between a smart alert and a For Your Information (FYI) alert?

An alert is an electronic message triggered from an action in HCSIS to inform the user of an event that occurred or did not occur as expected within the system. A smart alert will have a hyperlink in the text that will navigate the user to the module in HCSIS where an action needs to take place. An FYI alert is just text that updates a user of an action that has taken or needs to take place.

Who should I contact with enhancement ideas for HCSIS?

If you think of ideas on how to enhance HCSIS for all users, please discuss them with your direct Supervisor. If your Supervisor agrees with your request, they should voice the comment to the program office.

Are there free classes available on-line to improve my typing skills?

Free online typing classes are available by searching on any web search engine (example: www.yahoo.com or www.google.com) for "free online typing classes".

Clearance and Demographics

I am not sure what to enter for Primary Race and Ethnicity? What should I do?

There is no "N/A" option in HCSIS during clearance. If an individual's race and/or ethnicity is unknown, perform further investigation in order to gather accurate information before clearing the individual.

During the Clearance process I misspelled an individual's name. What should I do?

Navigate the Demographics Details screen and update the individual's name with the correct spelling. The individual's name will now appear spelled correctly throughout the system.

I cannot find an individual who was assigned to me in HCSIS when I search. Why?

The individual could have possibly been cleared into HCSIS but not assigned to your caseload. Your SC Supervisor should assign the individual to your caseload. Please reference the [My Curriculum](#) link on the LMS for information about assigning individuals to caseloads and the Case Management Wizard.

Eligibility

What status do you mark for an individual who is in tracking, but currently not eligible?

If an individual is going to be in tracking set the Eligibility as Pending. Add comments that indicate why BAS is tracking the individual.

What do I do if an individual's eligibility changes (or if eligibility was incorrectly recorded)?

If an individual's eligibility changes after it has been recorded in HCSIS, update the system appropriately by checking the information on the *Eligibility Determination (Individual > Eligibility > Elig. Determination)* screens. Additionally, if the individual has utilization on their plan (i.e. providers have billed for services rendered), the Regional Financial Manager should split the appropriate service(s) on the *Authorize Service* screen to reflect the change in the Waiver/Program information.

If there is additional follow-up needed for an individual, how should I display their eligibility in HCSIS?

If additional follow-up is needed for an individual set the Eligibility as Pending. Add comments that indicate what additional information is required.

I have an individual who is being discharged from a nursing facility that works with a managed care organization under Community HealthChoices and is to begin receiving BAS services. How can I transfer this individual to BAS without any interruption in services?

Individuals may begin receiving fee-for-service (FFS) waiver services starting the same day that they are discharged from a nursing facility where they have received services under a managed care organization participating in Community HealthChoices. To accommodate this policy, HCSIS allows the start date of the new FFS waiver service to overlap the end date of the CHC-waiver nursing-facility service by one day only. Enter the end date of the NF services as the begin date for the enrollment on the *Waiver/Program Enrollment* screen (*Individual > Eligibility > Elig. Determination > Waiver/Program Enrollment*). This overlap of eligibility can be entered into HCSIS only if the individual is being discharged from the nursing facility under the specific circumstances described here.

Plan

I receive an error when trying to end date a service that has been authorized. Am I able to end-date the service on the individual's plan?

If you are unable to change a service end date on an individual's plan and the service has been authorized, contact your supervisor to report the issue. The Regional Financial Manager may have pre-authorized a future service segment. If this is the case, the Regional Financial Manager should unauthorize the future service segment on the Authorize Service screen. Once the future service segment has been unauthorized, HCSIS will allow you to end-date the service as appropriate.

If a service is connected to multiple goals, do I need to add the service more than once?

No. Users can identify that a single service is associated with multiple outcomes by selecting multiple outcome phrases. This is done by holding down the Control (ctrl) key on the keyboard when entering information on the *Service Details* screen.

How do I modify/update service frequency and duration?

To modify/update service frequency and/or duration, a user should end date the service, then add the service again with the updated frequency and/or duration. Modifying or updating the service without end-dating it and adding it again will cause the plan to retro-actively update the service frequency and duration back to the original service start date.

How do I remove a service from the plan?

If a service was added to an individual's plan in error, but the service was authorized, the Regional Financial Manager should unauthorize the service. Additionally, the service must be deleted from the individual's plan by creating an Critical Revision plan revision.

How is utilization shown on the plan?

Once providers fully begin using PROMISe™ to submit claims, their utilization will be captured on the individual's *Service Details* screen.

Do providers have access to print/view plans?

Yes. The provider can download a plan if they are a service provider indicated on the individual's plan and also have the Provider ISP Reviewer role assigned to their user ID in IdentityManager.

Service Notes

What is the minimum amount of information needed in HCSIS to create a service note for an individual?

To enter service notes for an individual, the individual must be assigned to an SC's caseload in HCSIS. Service notes should be created for every contact the SC has with the individual.

If a Supports Coordinator (SC) does multiple activities in a day for one individual, i.e. a home visit, work in the office, calls to providers, etc., do they have to do separate notes for each activity?

Yes. SCs must enter a date, location of service, service type, category and sub-category for each service note that is completed for an individual. If any of these factors are different (i.e. the location changes etc.), the SC must complete a separate service note.

How can I, as an SC, view my service notes?

In order to accurately search for all of an SC's service notes, the user should navigate to the *Service Notes Search* screen and choose your name from the **Caseload** drop-down box.

If I entered a service note for the incorrect individual, what do I do?

Service notes that are entered for an incorrect individual cannot be deleted from HCSIS. In the event that this occurs, the user should immediately contact the Help Desk and report the incorrect service note. A PCR will then be created in order for the service note to be deleted from HCSIS.

Case Management Wizard

How is an individual's record transferred to a different Supports Coordinator (SC)?

An SC Supervisor should select the [Assign an individual to a Caseload](#) link within the Case Management Wizard. Please refer to the Case Management Wizard training on the Learning Management System (LMS) for more information.

If an individual moves to a new region, what needs to be done?

The individual's record must be transferred to the new region. Please reference the Case Management Wizard training on the LMS for complete instructions of this process.

If an individual becomes inactive (moves out of state etc.) what needs to be done?

An SC or SC Supervisor is able to close an individual's record in HCSIS using the Case Management Wizard. In the event that an individual's case needs to be closed, the SC should communicate with their SC Supervisor to notify them of the action. Please refer to the Case Management Wizard training on the LMS for more information.

SC

A Supports Coordinator (SC) is on vacation and I am helping with her caseload. How do I get access to her caseload in HCSIS?

An SC should have a backup SC assigned to an individual's case record. This task can be performed by an SC Supervisor on the *Caseload Facesheet* screen by clicking the **Access and Authorization** link.

How do I identify an individual's SC and/or SC Entity in HCSIS?

An individual's SC and SC Entity information can be found in two places. The Info link on the right side of the blue informational bar that appears across the top of most HCSIS screens will display the SC/SC Entity, or the user can navigate to the individual's facesheet (*SC > Individual Facesheet*).

I am an SC Supervisor. How do I setup an SC caseload?

To setup an SC caseload, navigate to the *Caseload Facesheet* screen in HCSIS. Please refer to the SC Supervisor training course under the My Curriculum link on the Learning Management System (LMS) for more information.

Reports

Why do I receive an error message when accessing HCSIS reports?

Before you can run reports in HCSIS, you must perform the following steps:

Note: These steps only need to be completed once, prior to the first time you run a report in HCSIS. From that point forward, the settings will be maintained.

- In Microsoft Internet Explorer (not in HCSIS), follow the menu path *Tools > Internet Options*. (If you use Netscape, these steps are not necessary.)
- In the Internet Options window, click on the Advanced tab.
- Scroll down to the Security section.
- Make sure there is a checkmark in the 'Do not save encrypted pages to disk' option.

