LTSS Mississippi Organization Management

April 2014

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Table of Contents

1 Organization Management Background

1.1 Organizations

Organizations are a key element of LTSS. An organization may be any group that performs work in the system -provider agencies, operating agencies, LTC facilities, etc. Every LTSS user will have a staff profile, and every staff profile is created under an Organization Unit. Organization Units that can be associated with Medicaid provider numbers are linked to those providers and provider info is displayed in the Organization Unit Overview. For brevity, Organization Units are sometimes referred to as OUs.

1.2 Staff

All LTSS users must have a staff profile in order to login. The Staff profile includes several sections, such as General Information, Delegations, and User Roles. Only users with Administrator roles may create and manage staff within their organization. The Staff Profile also includes an attachment function to upload and download documents related to that staff.

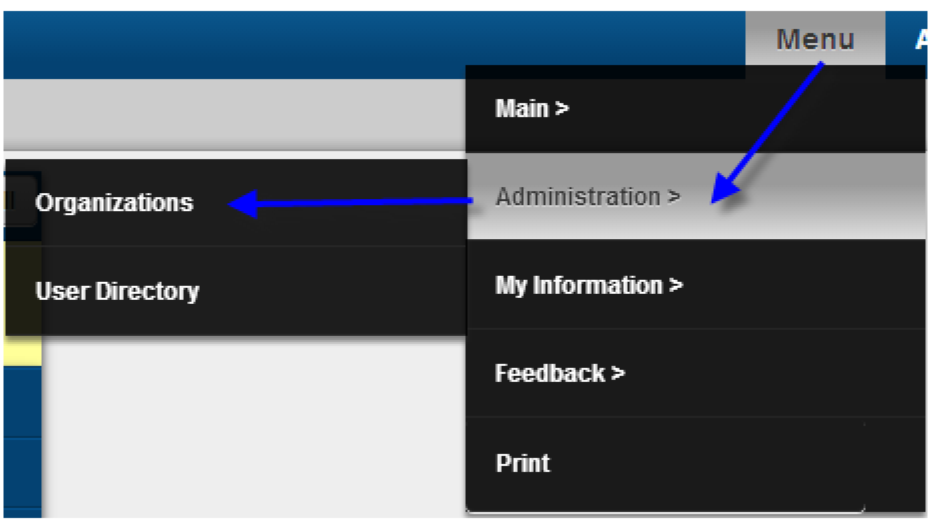
1.3 Providers

Provider numbers in MMIS which share a common Tax ID are linked under one Organization unit. For example, if there are 3 provider numbers registered with the same tax ID number in MMIS, all 3 will be listed under one Organization Unit Profile.

2 Organizations

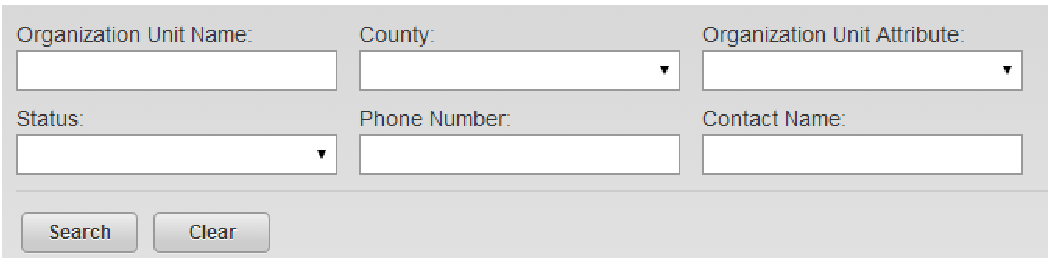
2.1 Navigation

If you have access, you can search for organizations by navigating to Menu, Administration, and Organizations.



2.2 Search Organizations

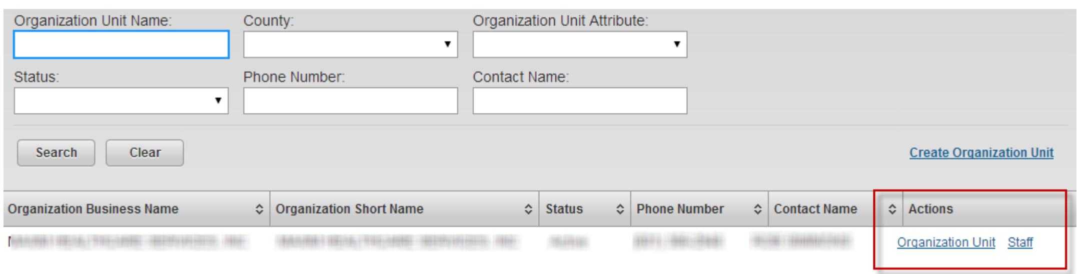
The search page (Organizations Tab) can be used to find and view Organizations based on Name, County, Organization Unit Attribute, Status (Active or Inactive), Phone#, or Contact Name. The search function can be used by entering any one of these items individually or by using a combination.



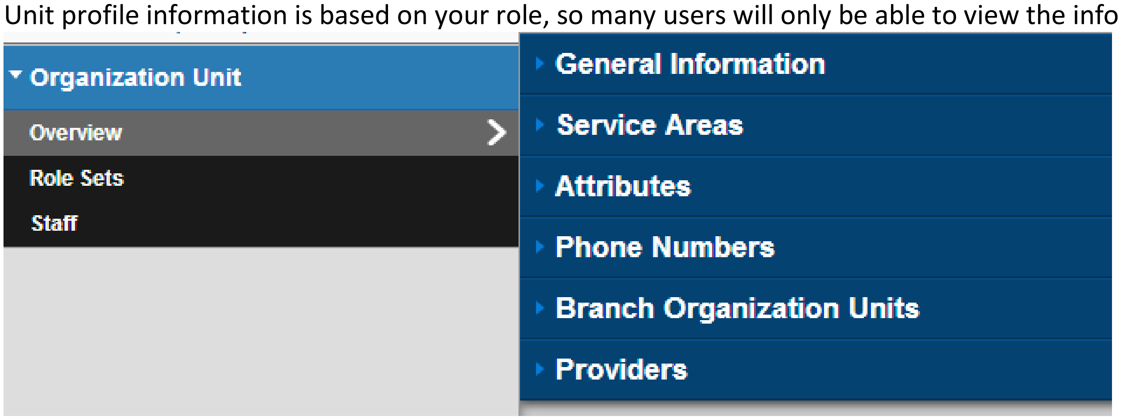
The Search results are grouped alphabetically by Organization Name.

2.3 View Organization Unit

You can view an Organization Unit's profile or Staff by clicking the desired link located under the Actions column to the far right of the search results.

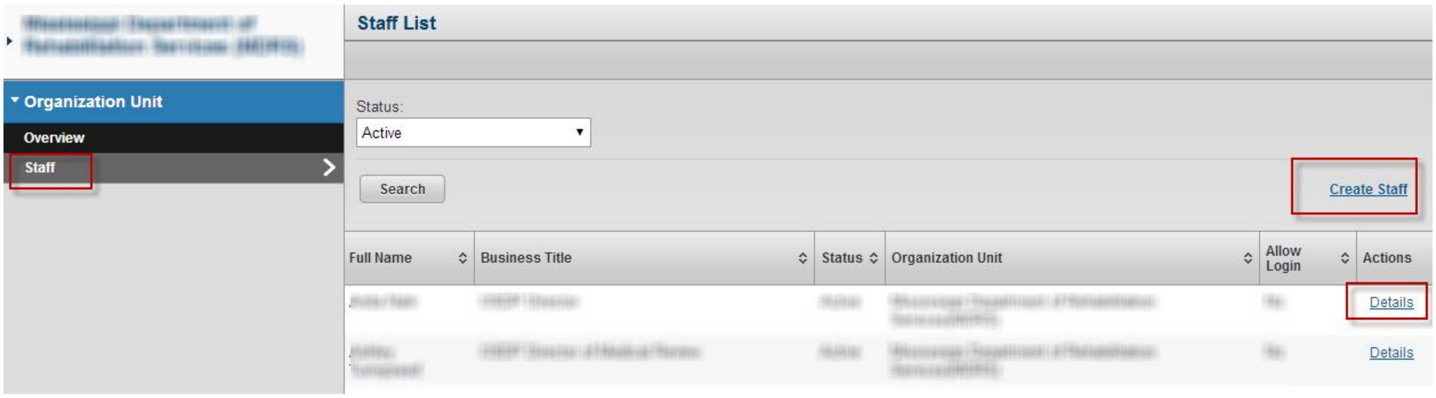


By selecting the "Organization Unit" link you can view the Organization Unit Overview. You can expand any section by clicking on the blue panel bar or view all the details by clicking the "Expand All" button. The ability to edit Organization Unit profile information is based on your role, so many users will only be able to view the information.



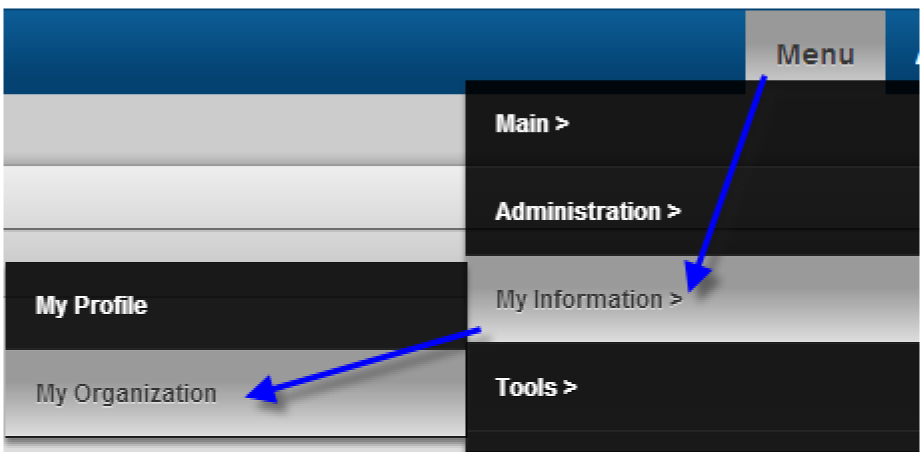
3 Staff

Each Organization Unit has a link on Left side navigation for Overview and Staff. By selecting the “Staff” link you are taken to a list of the staff assigned to the organization unit. The list can be filtered by status of “Active” or “Inactive”. You may review the Organization Unit’s Staff by selecting the Details link to the right of the search results. The ability to edit Organization Unit Staff information is based on user role.

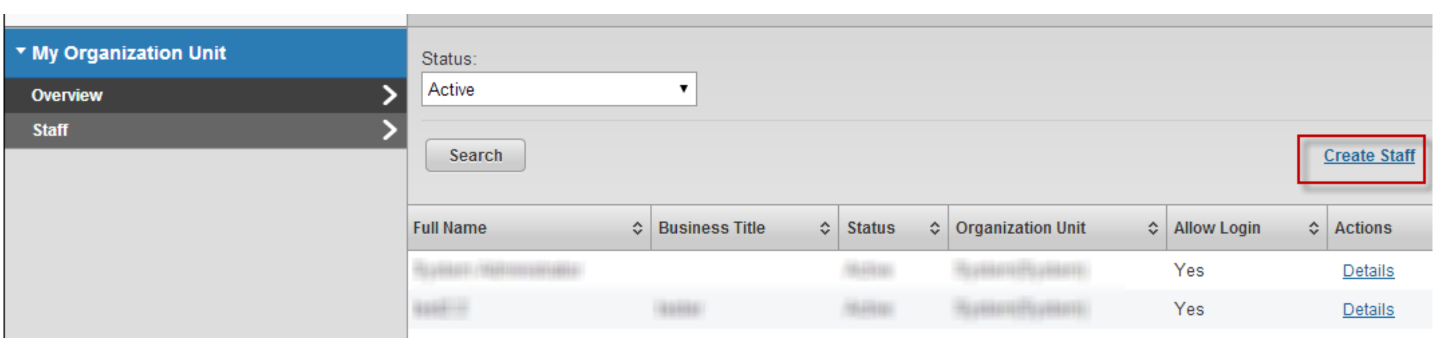


3.1 Create Staff

To create Staff for their Organization, Administrators begin by navigation to Menu, My Information, My Organization.



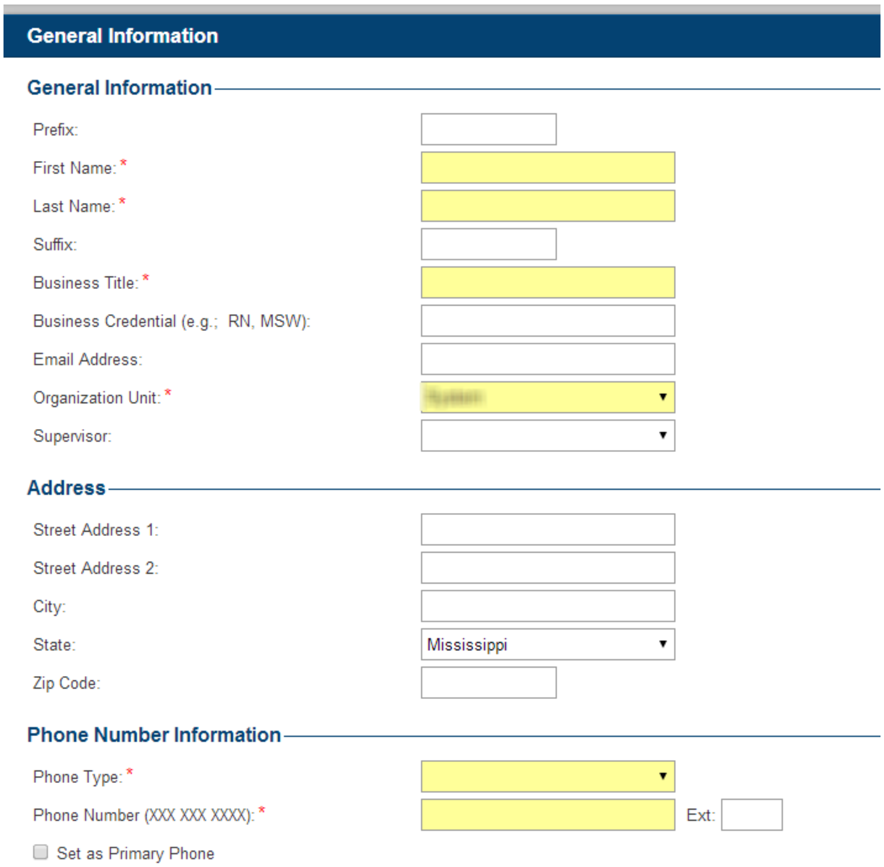
Next, click “Create Staff”



3.2 Staff Overview

3.2.1 General Information

Complete the required fields in General Information and click “Save”



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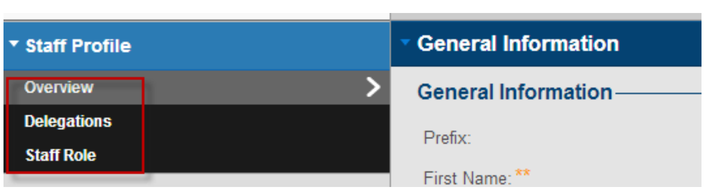
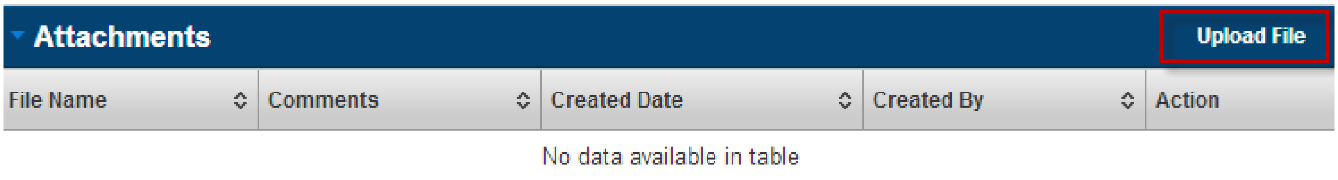
Clicking Save in the top right of the screen directs the administrator to the new Staff Profile Overview. From there, the system displays the staff profile overview and administrators can manage Delegations and Roles for this person.

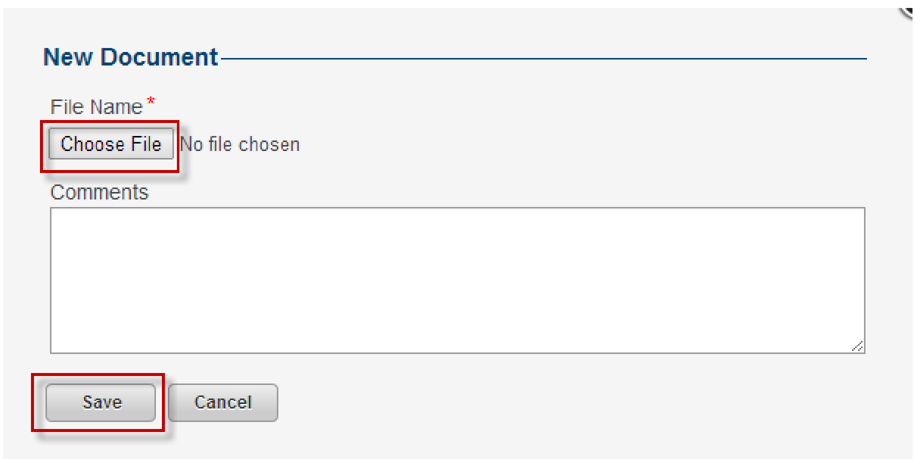


3.2.2 Staff Attachments

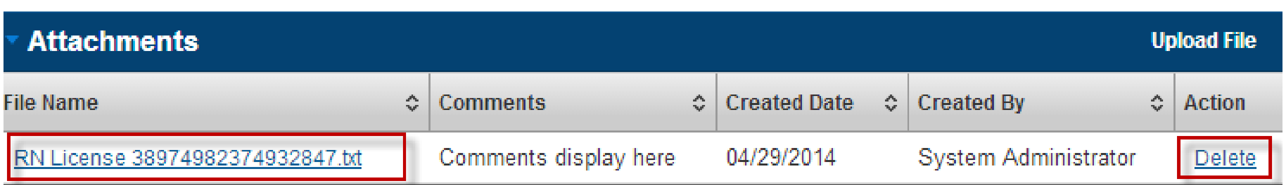
Under the Staff Profile Overview, the attachments section allows users to upload and download documents pertinent to the staff. Add documents by clicking “Upload File”.



A pop-up prompts you to “Choose File” and includes a section for optional comments related to the file. When you have selected the file to upload, click “Save”.

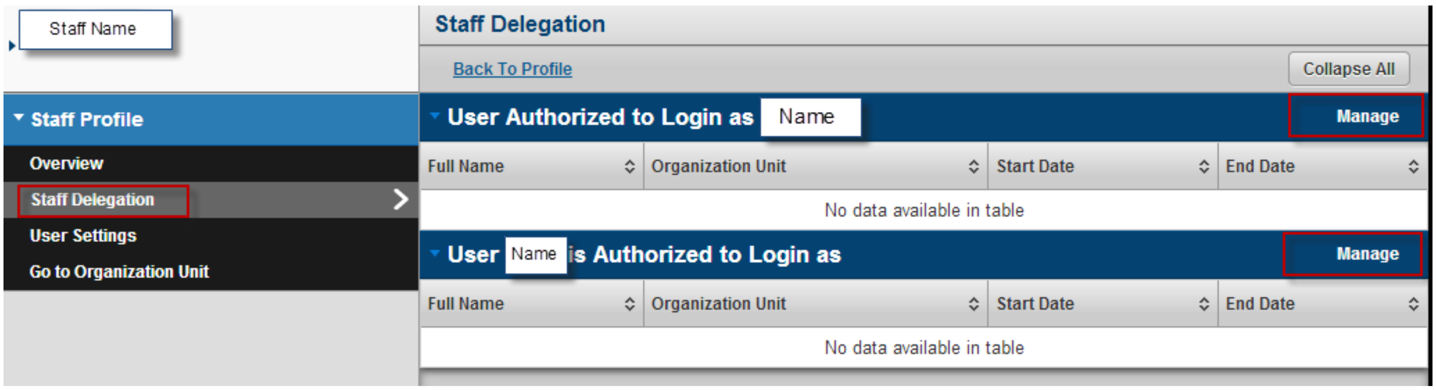


Upon saving, uploaded documents appear in the Attachments list. Click on a file name to download. A delete button is available on the far right of each attachment in the list.

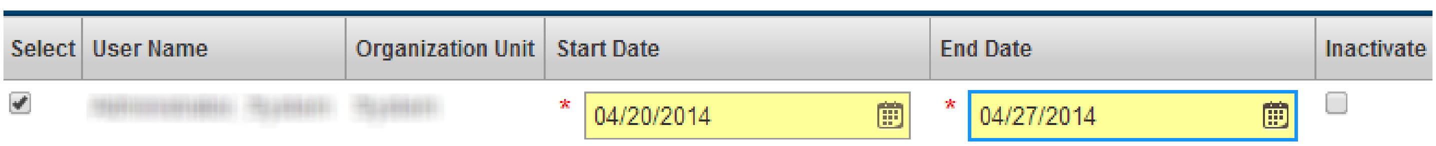


3.3 Delegations

Managing delegations allows users in the same organization to login on behalf of each other for a predefined period of time. Administrators can choose to manage “User(s) Authorized to Login as (staff name)” or “(Staff name) is Authorized to Login as Following Users”.



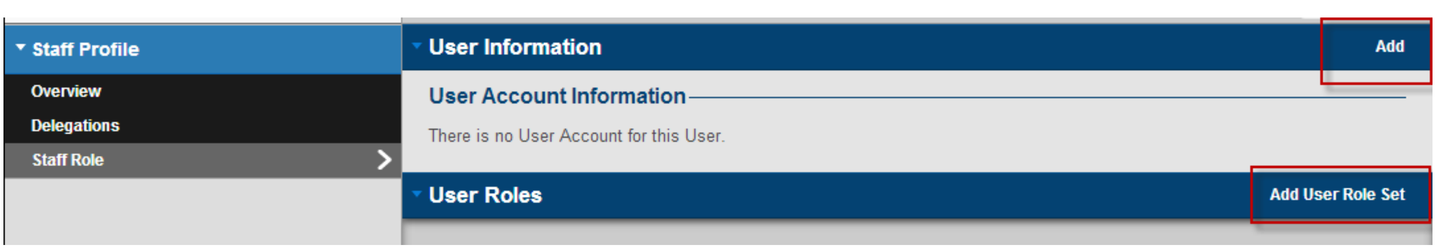
With the “Manage” buttons the administrator can choose from among staff in the organization and set permissions with a start and end date. After clicking “Manage”, a list of active staff is displayed. Click the checkbox next to the staff name in the list, enter a start and end date, and click save. Use the Inactivate checkbox to the far right to revoke delegation permission at any time for staff.



Note: the End Date refers to the day the delegation has ended, not the last day available to delegate. For example, if you want a delegation period to start on 4/20/2014 and for the last day to be 4/26/2014, then the end date would be 4/27/2014- the day that the delegation has ended. Users can manage “Users Authorized to login as Me” from their “My Profile” page, but Administrators can view and edit all delegations in their organization.

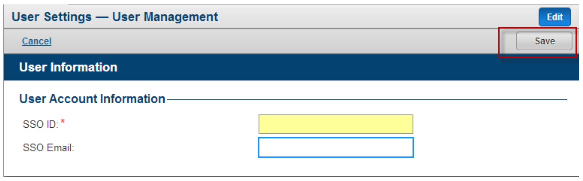
3.4 Staff Role

The Staff Role section of a staff profile allows administrators to set Login names (usernames) and specific organizational roles. In Staff Profile- Staff Role section, click Add to set a username and associated email address. This email address will be used to help reset or change passwords.

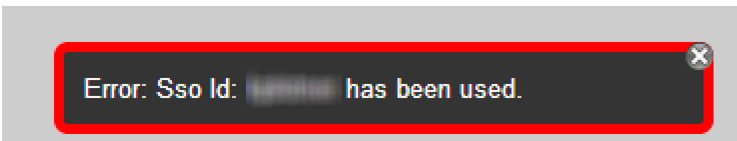


3.4.1 User Information

Enter a Login name (SSO ID) and email address, and click save.



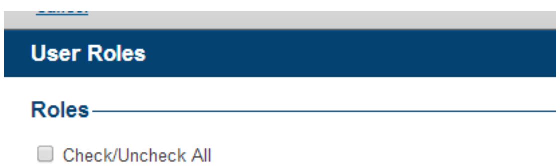
Each LTSS user must have a unique username, so if the one you entered is already in use, you will see this error message on the bottom right of the page. Modify the username and try to save again.



Some common username conventions are first initial and last name, firstname.lastname, or email address. Organization Administrators are free to choose sensible usernames that staff can remember.

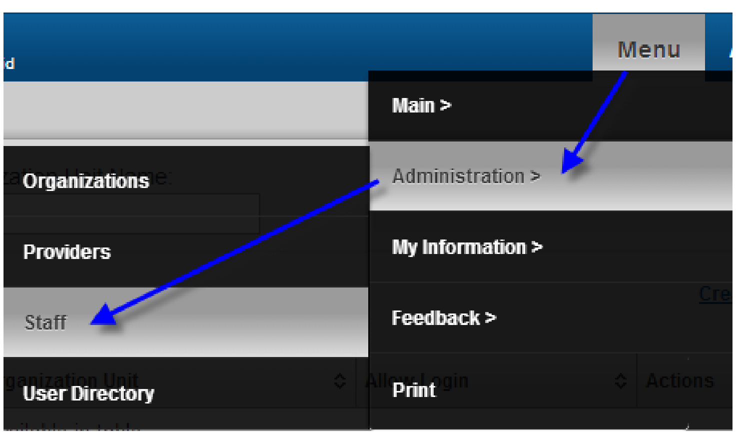
3.4.2 User Roles

Select a user role to provide each staff member with an appropriate level of access. If you do not see appropriate staff roles, or if you are unsure what each role accesses, contact the LTSS Helpdesk for support.

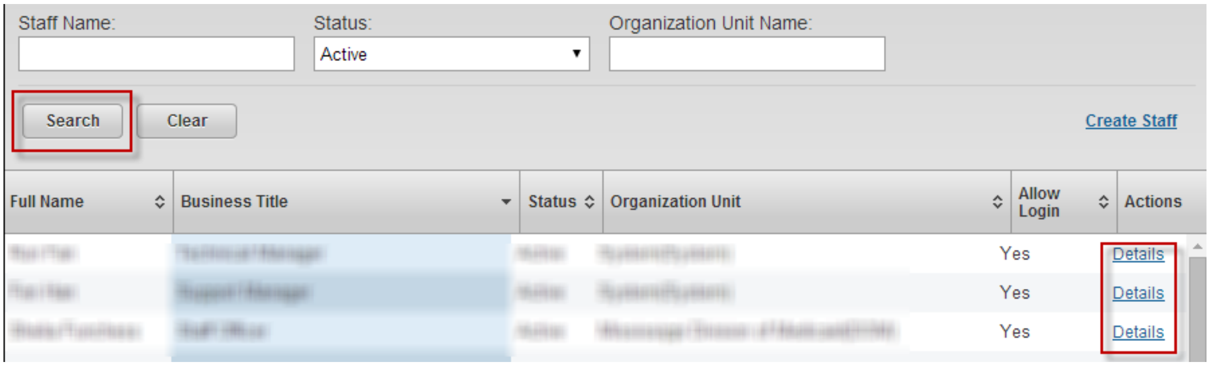


3.5 Search All Staff

Some users may search and view all staff profiles by navigating to Menu, Administration, Staff.



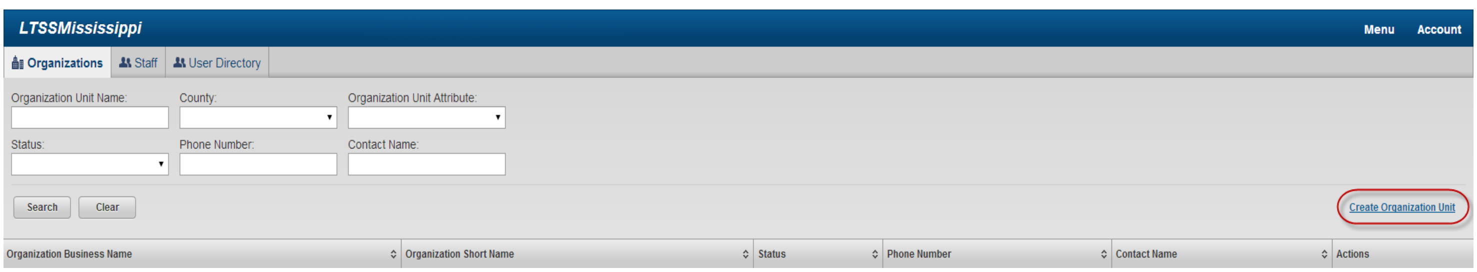
Enter any search filters and click "Search". Results are displayed below.



Click on Details to the right of a staff name to navigate to the staff profile. For users who can access this, managing staff profiles is the same as described above in section 3.2 through 3.4.

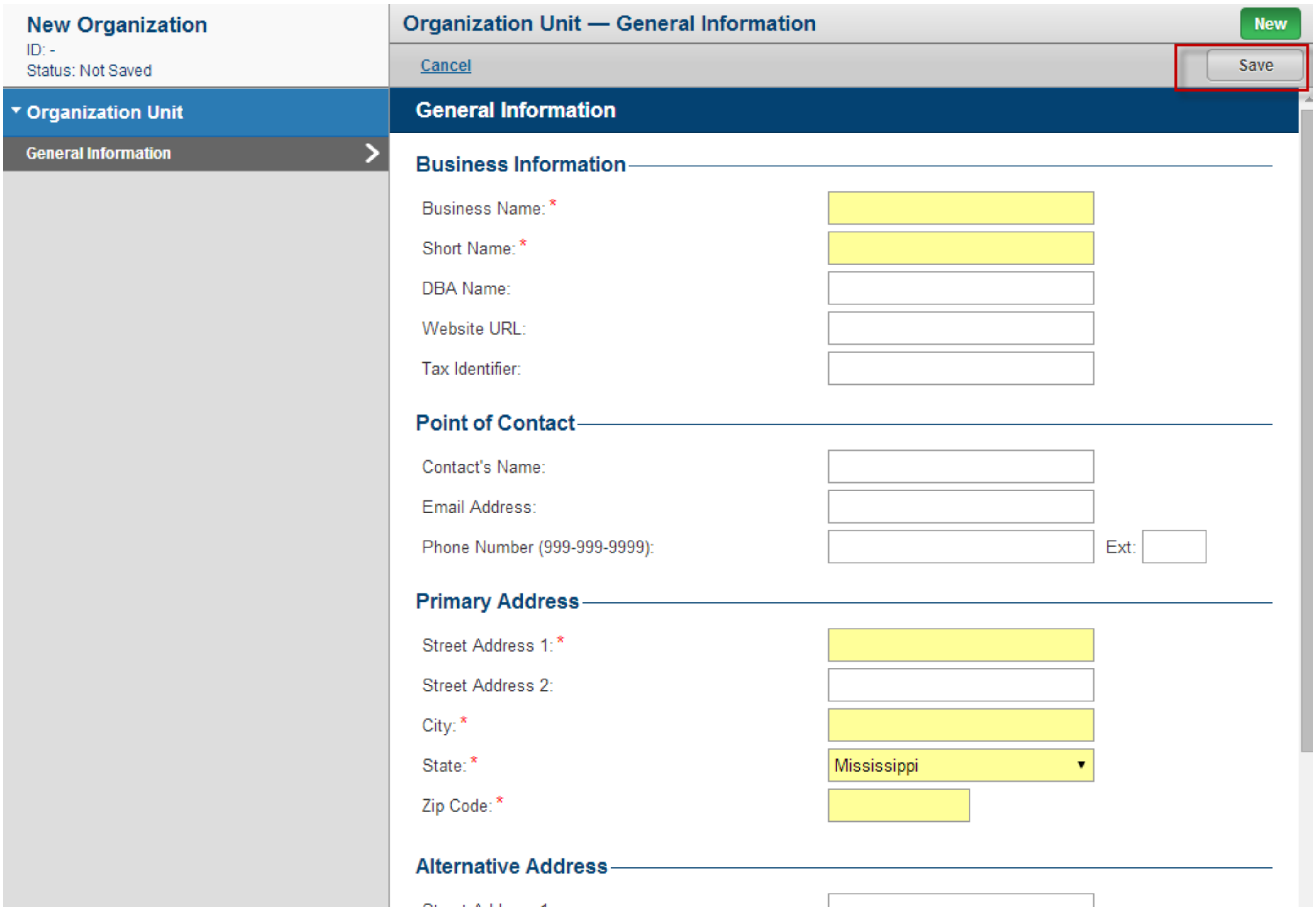
4 DOM Administrators – Creating Organization Units

Only Division of Medicaid (DOM) Administrator users have access to create new, unrelated, Organization Units. To do so, navigate to Organizations through the Menu in the top right of the page. From here, you can select the "Create Organization Unit" link on the far right to begin the creation process; General Information, Service Areas, Attributes, and Phone Number(s).



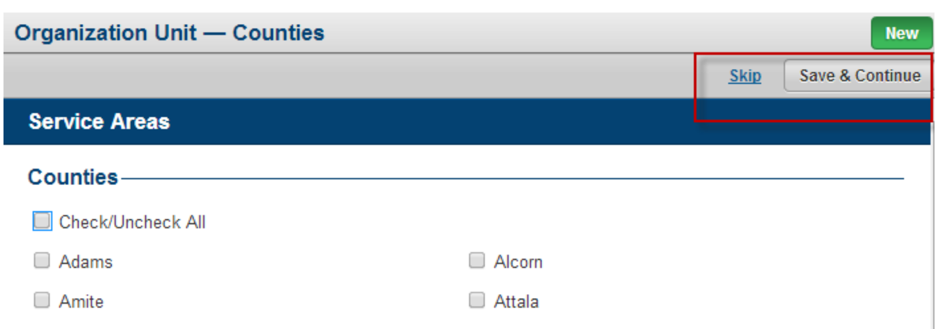
4.1 General Information

Enter information for the new organization and click Save.



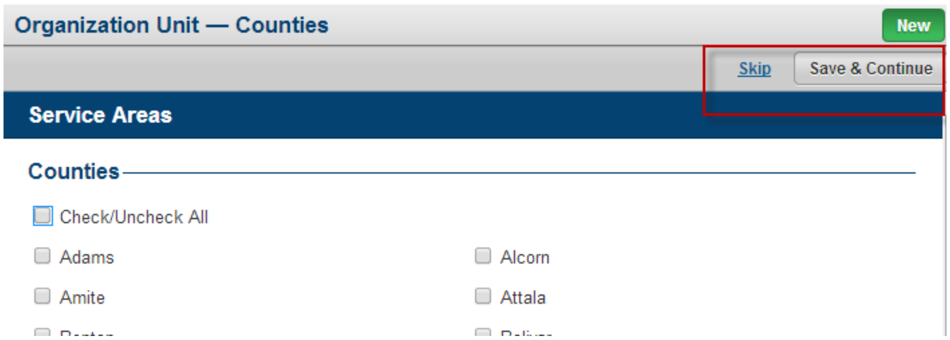
4.2 Service Areas

After Saving the Organization's General Information, use checkboxes to select the Counties in which this organization works. For all Counties, click "Check/Uncheck All". When complete, click "Save and Continue".



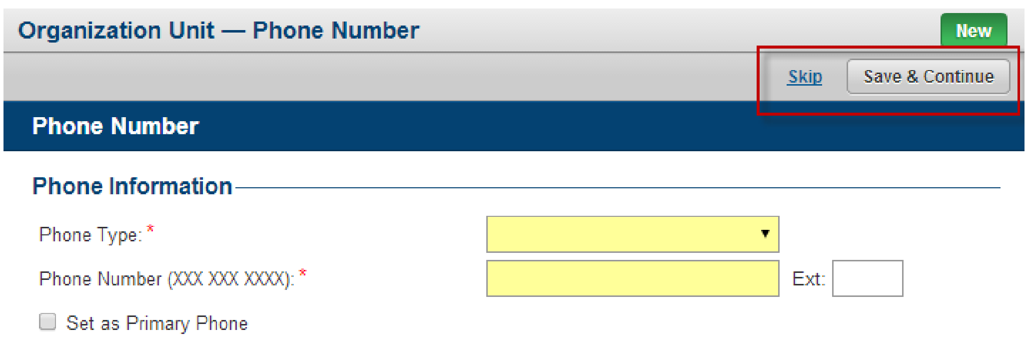
4.3 Attributes

After saving service areas (counties), use checkboxes to select attributes for the organization. Attributes are used to determine which modules in LTSS different organizations can access.



4.4 Phone Numbers

Select a phone type from the dropdown, enter the phone number, and use the checkbox to set this number as primary for the organization. When complete, click "Save and Continue".



4.5 Overview

You may add additional phone numbers or edit any of the Organization Unit information from the overview screen. Clicking the "Deactivate" button will make the organization and its staff inactive in LTSS. This can be reversed by clicking Activate.

4.6 Branch Organization Management

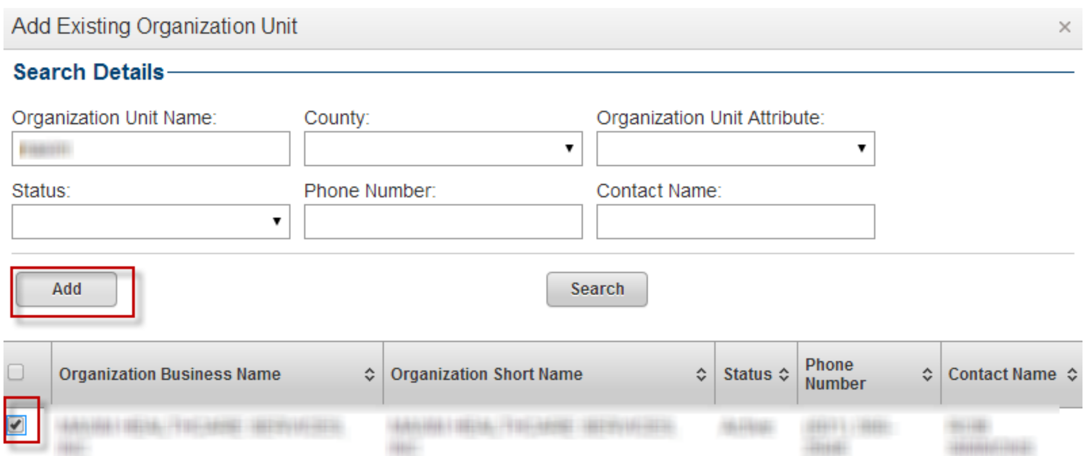
In the section “Branch Organization Units”, use the links on the right of the panel bar to either create a new branch for this OU or to link an already existing organization as a branch of the one you are currently viewing.

4.6.1 Add New Organization

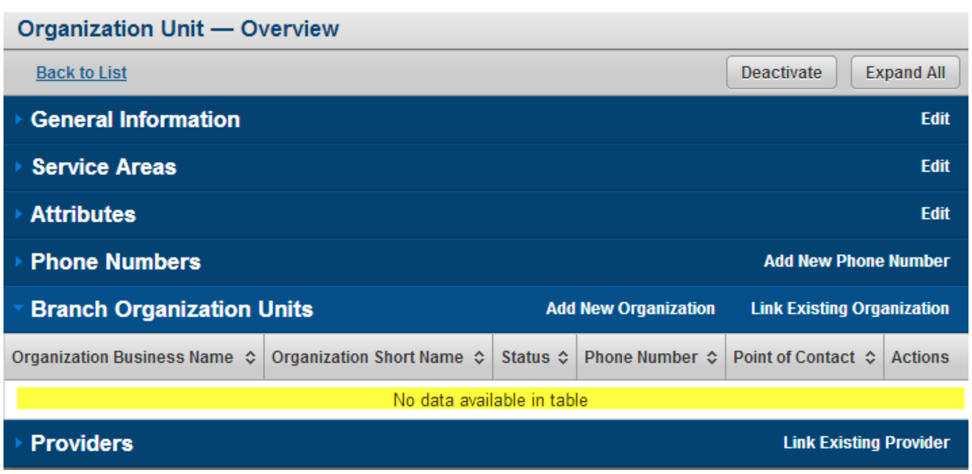
Clicking “Add New Organization” begins the process outlined in section 3.1 – 3.5. The new Organization will be listed as a branch of the organization it was added to.

4.6.2 Link Existing Organization

You may link an organization as a branch by searching LTSS and selecting the desired branch. Use the checkbox to select an organization in the search results and click

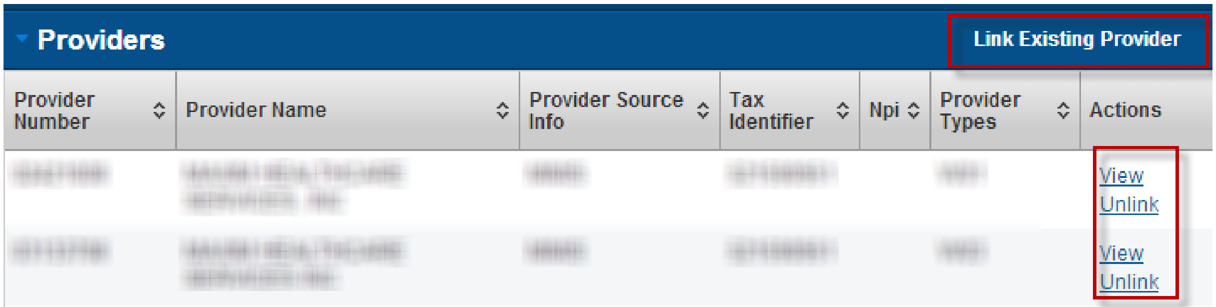


Branch Organization would show in the Overview as a list:



4.7 Providers

For Medicaid Providers, a list of their provider numbers and related information is displayed in the Organization Overview. DOM administrators can manage providers under an organization using the action links in the far right of each provider number row.


Providers
Link Existing Provider
Provider Number
Provider Name
Provider Source Info
Tax Identifier
Npi
Provider Types
Actions
View
Unlink
View
Unlink