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STAFF

Staff

Add Staff

Use these instructions to add Staff, update Staff and System User information including user name, address, and system function authorization *PLEASE NOTE – It is extremely important that you thoroughly search the System before adding the Staff Member. By conducting a thorough search, you reduce the possibility of duplicate Staff records.

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu

The Staff Member List screen will be displayed.

- Click the [Add Staff Member](#) link in the Staff Member Header:

Click here to add Staff Member

The following screen will be displayed:

Staff Information

- Enter the following information:
 - Primary Provider – Click the [lookup](#) button to search and select the Primary Provider
 - CMH Affiliate – Use the [drop-down](#) menu to select affiliate

- First Name
- Last Name
- AKA – Optional
- Date of Birth
- Gender – Click the appropriate radio button to indicate Male or Female
- Phone
- Fax
- Email
- Hire Date
- Termination Date
- Employee ID
- Staff Type – Use the drop-down menu to select staff type
- Supervisor – Click the button to search and select the Staff's supervisor
- This staff member can view all To Do Lists Provider Contact Person Types – Place a checkmark in the checkbox to indicate
- This staff should be notified of authorizations – Place checkmark in the checkbox to indicate
- Exclude from Billing – Place checkmark in the checkbox to indicate
 - ◆ Enter reason for billing exclusion in text field provided.
- Click the button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The button is located in the bottom left-hand corner of the screen.



Edit Staff

Use these instructions to update the Provider's staff information. The Provider Staff member record will open in an editable format.

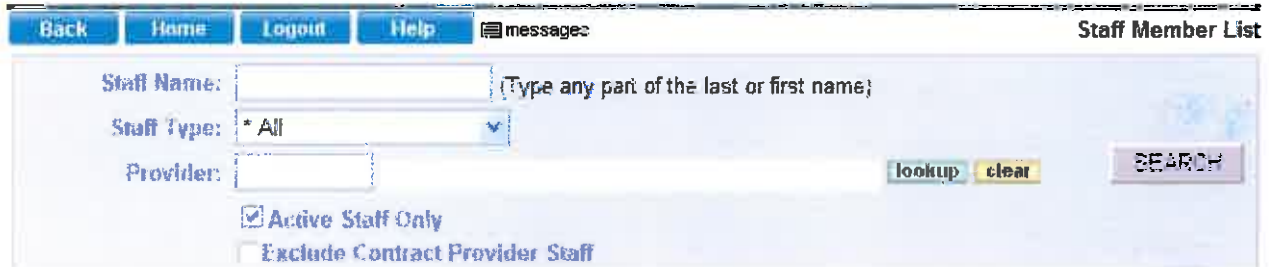
****IMPORTANT****

- **For leaves of absence, exceeding seven days, end date all assigned locations as of the 8th day. Upon employee return from LOA remove end date of assigned locations. (This applies to extended leaves of absence, but does not apply to planned vacations.)**
- **For terminations immediately enter termination date and end date assigned locations.**

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu
- The Provider List screen will be displayed.
- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff's first or last name

- **Staff Type** – use the  drop-down menu to select staff type
- **Provider** – use the  button to search and select a provider
- **Active Staff Only**– the checkbox is checked by default to only display active Staff.

- Once you have entered the search information, click the  button.



A list of the staff members will be displayed.



- Click the [Change](#) link located to the right of the Staff Member information.



1 Staff Member

Name/User ID	Type	Affiliate	Location	
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	B. R. A. G.	Change View Credentials Enrollments Assigned Locations

 Click here to edit Staff information


- The record will open in an editable format. Make the necessary changes to the record.
- Click the  button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The  button is located in the bottom left-hand corner of the screen.

View Staff

Use these instructions to view the Provider’s staff information. No changes can be made while in the “View” mode. The “View” mode is often referred to as “read-only”.

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu

The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff’s first or last name
 - **Staff Type** – use the  drop-down menu to select staff type

- **Provider** – use the **lookup** button to search and select a provider
- **Active Staff Only**– the checkbox is checked by default to only display active Staff.
- Once you have entered the search information, click the **SEARCH** button.

A list of the staff members will be displayed.

- Click the **View** link located to the right of the Staff Member information.

1 Staff Member

Name/User ID	Type	Affiliate	Primary Location	Actions
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	B. R. A. G.	Change View Credentials Enrollments Assigned Locations

Click here to view Staff Member

- The record will open in a “read-only” format. No changes can be made to the data when in the “View” mode.
- Click the **CANCEL** button – Clicking this button will take you out of the screen. The **CANCEL** button is located in the bottom left-hand corner of the screen.

Credentials

Add Staff Credentials

- Click the **System Setup** link in the Main Menu
- Click the **Staff** link to the right of the Main Menu

The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff’s first or last name
 - **Staff Type** – use the drop-down menu to select staff type
 - **Provider** – use the **lookup** button to search and select a provider
 - **Active Staff Only**– the checkbox is checked by default to only display active Staff.

- Once you have entered the search information, click the **SEARCH** button.

A list of the staff members will be displayed.

- Click the [Credentials](#) link to the right of the Staff Member information.

1 Staff Member

Name/User ID	Type	Affiliate	Primary Location	
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	B R A G	Change View Credentials Enrollments Assigned Locations

Click here to access Credentials

The following screen will be displayed:

- Click the [Add Credential](#) link in the credential header:

The following screen will be displayed:

Provider B. R. A. G.	Location Type Contracted Service Location	Address 1376 E HURD RD CLIO, MI 48420-8420
Phone 810-670-0408	Fax 1-775-205-1651	

Staff Credentials

Staff Name Test Human Resources	Staff ID 16309
---	--------------------------

Staff Credentials

Effective Date

Expiration Date

Type the credentials as they should appear printed after the staff member's name

- Enter the following information:
 - **Effective Date** – Enter the effective date of the staff member’s credentials
 - **Expiration Date** – Enter the expiration date of the staff member’s credentials
 - **Credentials** – Type the credentials as they should appear printed after the staff member's name
- Click the button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The button is located in the bottom left-hand corner of the screen.

Add Staff License

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu

The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff’s first or last name
 - **Staff Type** – use the drop-down menu to select staff type
 - **Provider** – use the button to search and select a provider
 - **Active Staff Only**– the checkbox is checked by default to only display active Staff.
- Once you have entered the search information, click the button.

[Back](#) [Home](#) [Logout](#) [Help](#) messages Staff Member List

Staff Name: (Type any part of the last or first name)

Staff Type: * All ▼

Provider: lookup clear SEARCH

Active Staff Only
 Exclude Contract Provider Staff

A list of the staff members will be displayed.

- Click the [Credentials](#) link to the right of the Staff Member information.

Staff Name: (Type any part of the last or first name)

Staff Type: * All ▼

Provider: lookup clear SEARCH

Active Staff Only
 Exclude Contract Provider Staff

1 Staff Member

Name/User ID	Type	Affiliate	Primary Location	
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	B R A G	<div style="border: 1px solid red; padding: 2px; display: inline-block;">Click here to access Credentials</div> Change View Credentials Enrollments Assigned Locations

The following screen will be displayed:

- Click the [Add License](#) link in the credential header:

[Back](#) [Home](#) [Logout](#) [Help](#) messages Credential List

Staff Name: Test Human Resources Staff ID: 16309

Click here to add License

0 Credentials

Type	Effective Dates	Credentials	
			Add Credential Add License Add Degree Add Pin Add Taxonomy Add Billing Exclusion

The following screen will be displayed:

Provider B. R. A. G.	Location Type Contracted Service Location	Address 1376 E HURD RD CLIO, MI 48420-8420
Phone 810-670-0408	Fax 1-775-205-1651	

Staff Credentials

Staff Name Test Human Resources	Staff ID 16309
---	--------------------------

Staff License

Effective Date <input type="text"/>	Expiration Date <input type="text"/>	
License # <input type="text"/>	License Type ^ Select a License Type <input type="button" value="v"/>	State Code <input type="text"/>
<input type="button" value="SAVE"/> <input type="button" value="Cancel"/>		

- Enter the following information:
 - **Effective Date** – Enter the effective date of the staff member’s license
 - **Expiration Date** – Enter the expiration date of the staff member’s license
 - **License #** – Enter the Staff Member’s License number
 - **License Type:** Use the drop-down menu to select License type.
 - **State Code:** Enter the state code
- Click the button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The button is located in the bottom left-hand corner of the screen.

Add Staff Degree

- Click the [System Setup](#) link in the Main Menu
 - Click the [Staff](#) link to the right of the Main Menu
- The Provider List screen will be displayed.
- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff’s first or last name
 - **Staff Type** – use the drop-down menu to select staff type
 - **Provider** – use the button to search and select a provider
 - **Active Staff Only**– the checkbox is checked by default to only display active Staff.
 - Once you have entered the search information, click the button.

[Back](#) [Home](#) [Logout](#) [Help](#) messages Staff Member List

Staff Name: (Type any part of the last or first name)

Staff Type: * All

Provider: [lookup](#) [clear](#) [SEARCH](#)

Active Staff Only
 Exclude Contract Provider Staff

A list of the staff members will be displayed.

- Click the [Credentials](#) link to the right of the Staff Member information.

Staff Name: (Type any part of the last or first name)

Staff Type: * All

Provider: [lookup](#) [clear](#) [SEARCH](#)

Active Staff Only
 Exclude Contract Provider Staff

1 Staff Member

Name/User ID	Type	Affiliate	Primary Location	
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	B. R. A. G	Change View Credentials Enrollments Assigned Locations

Click here to access Credentials

The following screen will be displayed:

- Click the [Add Degree](#) link in the credential header:

[Back](#) [Home](#) [Logout](#) [Help](#) messages Credential List

Staff Name: Test Human Resources Staff ID: 16309

0 Credentials

[Click here to add Degree](#)

Type	Effective Dates	Credentials	
			Add Credential Add License Add Degree Add Pin Add Taxonomy Add Billing Exclusion

The following screen will be displayed:

Provider B. R. A. G. Phone 810-670-0408	Location Type Contracted Service Location Fax 1-775-205-1651	Address 1376 E HURD RD CLIO, MI 48420-8420
--	---	---

Staff Credentials	
Staff Name Test Human Resources	Staff ID 16309

Staff Degree
Effective Date <input type="text"/>
Education Degree * Select a Degree <input type="button" value="v"/>
<input type="button" value="SAVE"/> <input type="button" value="Cancel"/>

- Enter the following information:
 - **Effective Date** – Enter the effective date of the staff member’s Education Degree
 - **Education Degree:** Use the drop-down menu to select the staff member’s Degree
- Click the button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The button is located in the bottom left-hand corner of the screen.

Add PIN

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu

The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff’s first or last name
 - **Staff Type** – use the drop-down menu to select staff type
 - **Provider** – use the button to search and select a provider
 - **Active Staff Only**– the checkbox is checked by default to only display active Staff.
- Once you have entered the search information, click the button.

Back	Home	Logout	Help	messages	Staff Member List
Staff Name:	<input type="text"/>	(Type any part of the last or first name)			
Staff Type:	* All <input type="button" value="v"/>				
Provider:	<input type="text"/>	<input type="button" value="lookup"/>	<input type="button" value="clear"/>	<input type="button" value="SEARCH"/>	
<input checked="" type="checkbox"/> Active Staff Only <input type="checkbox"/> Exclude Contract Provider Staff					

A list of the staff members will be displayed.

- Click the [Credentials](#) link to the right of the Staff Member information.

Staff Name: (Type any part of the last or first name)

Staff Type: * All

Provider:

Active Staff Only

Exclude Contract Provider Staff

1 Staff Member

Name/User ID	Type	Affiliate	Primary Location	
Test Human Resources (01_01)	Administrative	GENESEE COUNTY CMH	B. R. A. G.	Change View Credentials Enrollments Assigned Locations

Click here to access Credentials

The following screen will be displayed:

- Click the [Add Pin](#) link in the credential header:

Back Home Logout Help messages Credential List

Staff Name: Test Human Resources Staff ID: 16309

0 Credentials

Click here to add Pin

Type Effective Dates Credentials [Add Credential](#) [Add License](#) [Add Degree](#) [Add Pin](#) [Add Taxonomy](#) [Add Billing](#) [Exclusion](#)

The following screen will be displayed:

Provider	Location Type	Address
B. R. A. G.	Contracted Service Location	1376 E HURD RD CLIO, MI 48420-8420
Phone 810-670-0408	Fax 1-775-205-1651	

Staff Credentials

Staff Name: Test Human Resources Staff ID: 16309

Staff PIN

Effective Date: Expiration Date:

PIN: PIN Type: * Select a PIN Type

- Enter the following information:
 - Effective Date – Enter the effective date of the PIN
 - Expiration Date – Enter the expiration date of the PIN
 - PIN – Use the textbox provided to enter the PIN
 - PIN Type – Use the drop-down menu to select the PIN type

- Click the **SAVE** button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The **SAVE** button is located in the bottom left-hand corner of the screen.

Add Taxonomy

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu

The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - Staff Name** – enter the staff name. You may enter the first few letters of the staff's first or last name
 - Staff Type** – use the drop-down menu to select staff type
 - Provider** – use the **lookup** button to search and select a provider
 - Active Staff Only** – the checkbox is checked by default to only display active Staff.
- Once you have entered the search information, click the **SEARCH** button.

A list of the staff members will be displayed.

- Click the [Credentials](#) link to the right of the Staff Member information.

1 Staff Member

Name/User ID	Type	Affiliate	Primary Location	
Iest Human Resources (est_HR)	Administrative	GENESEE COUNTY CMH	B. R. A. G.	Add Staff Member Change View Credentials Enrollments Assigned Locations

Click here to access Credentials

The following screen will be displayed:

- Click the [Add Taxonomy](#) link in the credential header:

Back	Home	Logout	Help	messages	Credential List
Staff Name Test Human Resources				Staff ID 16309	
<div style="border: 1px solid red; padding: 5px; display: inline-block;">Click here to add Taxonomy</div>					
0 Credentials					
Type	Effective Dates	Credentials	Add Credential	Add License	Add Degree
			Add Pin	Add Taxonomy	Add Billing Exclusion

The following screen will be displayed:

Provider B. R. A. G.	Location Type Contracted Service Location	Address 1376 E HURD RD CLIO, MI 48420-8420
Phone 810-670-0408	Fax 1-775-205-1651	

Staff Credentials	
Staff Name Test Human Resources	Staff ID 16309

Staff Taxonomy	
Effective Date <input type="text"/>	Expiration Date <input type="text"/>
Taxonomy Code * Select a Taxonomy Code ▼	
<input type="button" value="SAVE"/>	<input type="button" value="Cancel"/>

- Enter the following information:
 - **Effective Date** – Enter the effective date of the Taxonomy
 - **Expiration Date** – Enter the expiration date of the Taxonomy
 - **Taxonomy Code** – Use the drop-down menu to select the Taxonomy Code
- Click the button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The button is located in the bottom left-hand corner of the screen.

Enrollments

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu

The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff's first or last name
 - **Staff Type** – use the ▼ drop-down menu to select staff type
 - **Provider** – use the button to search and select a provider
 - **Active Staff Only** – the checkbox is checked by default to only display active Staff.

- Once you have entered the search information, click the **SEARCH** button.

Back Home Logout Help messages Staff Member List

Staff Name: (Type any part of the last or first name)

Staff Type:

Provider:

Active Staff Only
 Exclude Contract Provider Staff

A list of the staff members will be displayed.

- Click the [Enrollments](#) link to the right of the Staff Member information.

Staff Name: (Type any part of the last or first name)

Staff Type:

Provider:

Active Staff Only
 Exclude Contract Provider Staff

1 Staff Member

Name/User ID	Type	Affiliate	Primary Location	
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	B. R. A. G.	Add Staff Member Change View Credentials Enrollments Assigned Locations

Click here to access Enrollments

The following screen will be displayed:

Click the [Add Insurance Enrollment](#) link in the Insurance Enrollment header

Back Home Logout Help messages Insurance Enrollment List

Staff Name: Test Human Resources Staff ID:

0 Insurance Enrollments

Insurance Company	Staff	Effective Dates	Review Date	
				Add Insurance Enrollment

Click here to add Enrollment

The following screen will be displayed:

Insurance Enrollment

Insurance Company:

Staff: 16309 Test Human Resources

Effective From Date: Effective Thru Date: Review Date:

Please check here if this Enrollment is no longer in use

Notes:

characters left: 1024

- Enter the following information:
 - **Insurance Company** – use the **lookup** button to search and select a insurance company
 - **Effective From Date** – Enter the effective from date of the enrollment
 - **Effective Thru Date** – Enter the effective thru date of the enrollment
 - **Review Date** – Enter the review date of the enrollment
 - **Check here if this Enrollment is no longer in use** – Place checkmark in the checkbox to indicate
 - **Notes** – Use the textbox provided to enter any notes
- Click the **SAVE** button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The **SAVE** button is located in the bottom left-hand corner of the screen.

Assigned Locations

IMPORTANT

- **For leaves of absence, exceeding seven days, end date all assigned locations as of the 8th day. Upon employee return from LOA remove end date of assigned locations. (This applies to extended leaves of absence, but does not apply to planned vacations.)**
- **For terminations immediately enter termination date and end date assigned locations.**

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu

The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - **Staff Name** – enter the staff name. You may enter the first few letters of the staff's first or last name
 - **Staff Type** – use the drop-down menu to select staff type
 - **Provider** – use the **lookup** button to search and select a provider
 - **Active Staff Only** – the checkbox is checked by default to only display active Staff.
- Once you have entered the search information, click the **SEARCH** button.

A list of the staff members will be displayed.

- Click the [Assigned Locations](#) link to the right of the Staff Member information.

Staff Name: (Type any part of the last or first name)
 Staff Type:
 Provider:
 Active Staff Only
 Exclude Contract Provider Staff

1 Staff Member

Name/User ID	Type	Affiliate		
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	B. R. A. G.	Click here to access Assigned Locations Change View Credentials Enrollments Assigned Locations

The following screen will be displayed:

Click the [Add Assigned Locations](#) link in the Insurance Enrollment header

Back Home Logout Help messages Assigned Location List

Staff Name: Test Human Resources Staff ID:

[Click here to add Assigned Location](#)

2 Assigned Locations

Location	Effective Dates	Is Primary?	Add Assigned Location

The following screen will be displayed:

Staff Location Assignment

Staff: 16309 Test Human Resources Assigned Location:

Effective Date: Expiration Date:


Is this the primary location?

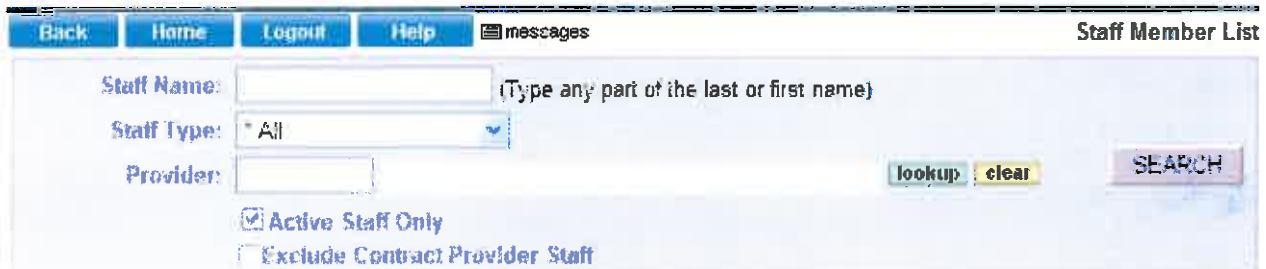
- Enter the following information:
 - **Assigned Location** – use the button to search and select a location
 - **Effective Date** – Enter the effective date of the Location
 - **Expiration Date** – Enter the expiration date of the Location
 - **Is this a primary location?**– Place checkmark in the checkbox to indicate
- Click the button – Clicking this button will save the information entered in the data entry screen and take you out of the record. The button is located in the bottom left-hand corner of the screen.

Make Assigned Location Primary

- Click the [System Setup](#) link in the Main Menu
- Click the [Staff](#) link to the right of the Main Menu


The Provider List screen will be displayed.

- Enter the search information. You can search by one or more of the following parameters:
 - Staff Name** – enter the staff name. You may enter the first few letters of the staff’s first or last name
 - Staff Type** – use the  drop-down menu to select staff type
 - Provider** – use the **lookup** button to search and select a provider
 - Active Staff Only**– the checkbox is checked by default to only display active Staff.
- Once you have entered the search information, click the **SEARCH** button.



A list of the staff members will be displayed.

- Click the [Assigned Locations](#) link to the right of the Staff Member information.



1 Staff Member

Name/User ID	Type	Affiliate	
Test Human Resources (test_HR)	Administrative	GENESEE COUNTY CMH	<div style="border: 1px solid red; padding: 2px; display: inline-block;">Click here to access Assigned Locations</div> Change View Credentials Enrollments Assigned Locations

The following screen will be displayed:

Click the [Make Primary](#) link to the right of the location

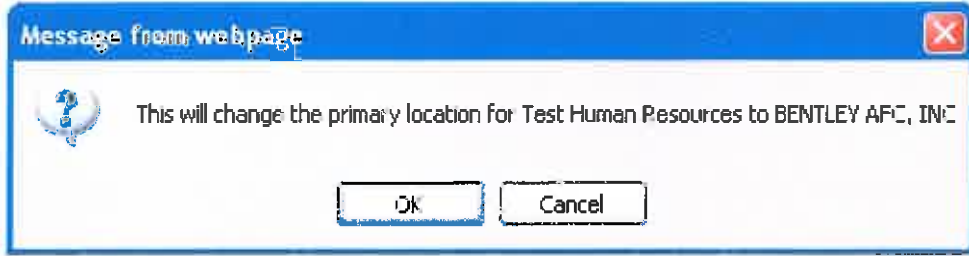


Staff Name	Staff ID
Test Human Resources	16309

2 Assigned Locations

Location	Effective Dates	Is Primary?	
BENTLEY AFC. INC	10/26/2010 -		<div style="border: 1px solid red; padding: 2px; display: inline-block;">Click here to make primary</div> Add Assigned Location Change View Make Primary

A message window will “pop-up”:



Click the button to make primary