

CBISA

TM

A Quick Start Guide for the Hospital Coordinator

Leader in Social Accountability Community Benefit Reporting

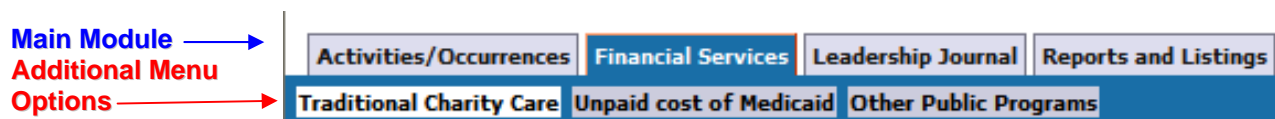
This *Quick Start* guide will give you the basic information you need to begin entering community benefit data. The guide will define the two user permission levels, describe how to navigate within the program, explain how to add data, outline the basic steps for previewing and printing reports, and show how to accept requests for data snapshots.

Permission Levels in CBISA Survey™


1. **State Administrator:** The State Administrator has the ability to access information for each facility attached to an Association, add/edit/delete users, turn on/off the Medicare reporting option for all facilities, add/edit/delete any data in any module for all facilities, and preview, print and export all available reports.
2. **Hospital Coordinator:** The Hospital Coordinator is responsible for the data entry into each of the three main modules within the CBISA Survey™ software, preview, print and export all available reports, and add/edit/delete other Hospital Coordinator users. The Hospital Coordinator has access to only one facility and answers the request for data snapshots from the Association.

Navigating within CBISA Survey™

1. **Choosing a Module:** With your mouse, click on one of the main module tabs to open it. Within the Financial Services module you will have additional menu options. Click on the menu option to open each new “page”.



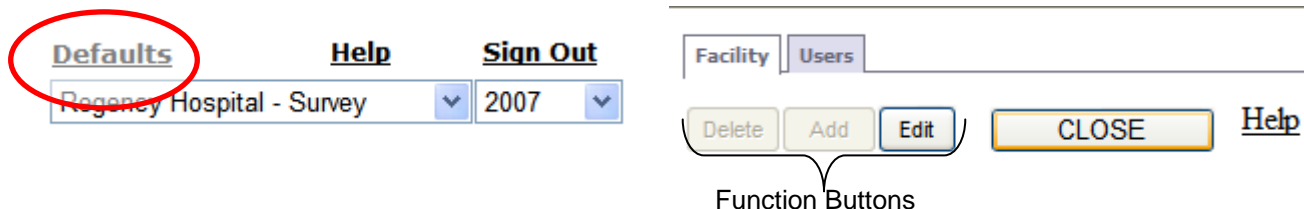
2. **Using the Control Panel Function Buttons:** The main data entry modules, Activities/Occurrences, Financial Services, and Leadership Journal, have the following buttons available: Add, Delete, Undo, and Save. Simply click on the corresponding button to perform the desired action. “Add” creates a new record; “Delete” completely deletes the highlighted record; “Undo” brings your record back to its last saved version; and “Save” accepts any new record or edits to an existing record.

3. **Minimizing and Maximizing the Control Panel:** Minimizing the Control Panel allows for an expanded view of the active page. To minimize the Control Panel, simply click on  the green triangle button located in the top left hand corner.

To maximize the Control Panel, click anywhere within the blue line on the far left side of your screen.

4. **Accessing the Default Pages:** To access the Facility Information screen or the Users Information page, click on “Defaults” located at the top right hand side of the screen. The Facility Information screen shows information, in “read only” format, which

has been entered by your State Administrator and gives you the ability to answer a request for a data snapshot. The Users Information page allows you to manage the users who have the ability to enter data. To add a new Hospital Coordinator, click on the function button “Add”. To edit an existing Coordinator, highlight the user name first, then click on the function button “Edit”. To delete a user, highlight the user name then click on the function button “Delete”.



5. Accessing the “Help” Screens: Each screen within the program has its own specific “Help” page. To access the “Help” page, click on the link at the top of each page (positioned between “Options” and “Sign Out”). The topic specific Help page will present in a dialog box. Choose the Red “X”



6. Choosing a Specific Record: Within the browse window of the control panel, you can choose (or highlight) a specific record by clicking on the record, or by using your Up and Down arrows on your keyboard.

7. Moving from field to field within a record: To access any field of a given record (regardless of the module), move your mouse and click within the field to enter data, or move from field to field with the “Tab” key.

Adding Data Records in CBISA Survey™

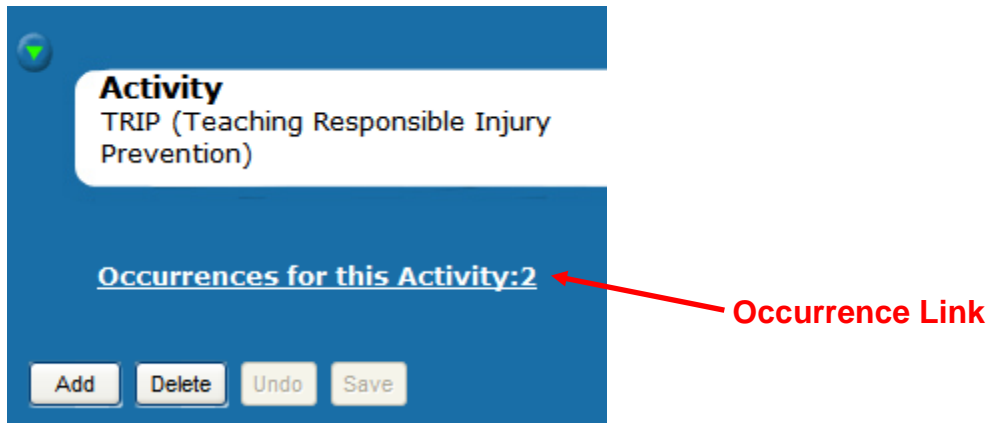
Your CBISA Survey™ program comes pre-loaded with approximately 125 standard Community Benefit activities. Each activity is named and attached to the correct category. In order to complete the information, simply type in a description and choose whether the program is for the poor or the broader community. Each pre-loaded record can be edited or deleted.

1. Adding Activity Records: While in the Activities/Occurrences module, click the function button Add, located on the control panel. Complete the available data fields. Save your data by clicking on the Save button.



2. Adding Occurrence Records: Add an Occurrence record to an Activity by first selecting the Activity (highlight it by clicking on it) and then clicking on the Occurrence

link. Click on Add and complete the data entry fields, as necessary. Click on “Save” to save your new Occurrence record.



3. **Adding Financial Service Records:** Click on the Financial Services module tab (second tab from the left). You can add records to three different menus, Traditional Charity Care, Unpaid Cost of Medicaid, and Other Public Programs, by clicking on the additional menu option tab. A fourth optional menu of Unpaid Cost of Medicare may be activated by the CBISA Online Rollup™ Administrator.

4. **Adding Leadership Journal Records:** Click on the Leadership Journal module tab (third tab from the left). Click on the function button “add” to begin a new record. Click on Save to accept your changes to the record.

6. **Editing Existing Data Records:** To edit any existing data record, regardless of the module (Activities/Occurrences, Financial Services, Leadership Journal), highlight the record in the browse box, make any necessary changes, then click on the “save” function button in the control panel.

7. **Deleting Existing Data Records:** To delete any existing data record, regardless of the module (Activities/Occurrences, Financial Services, Leadership Journal), highlight the record in the browse box then click on the “delete” function button in the control panel. You will always get a message “Are you sure you want to delete this row?” Click OK to delete the record or cancel. You can not delete an Activity record that has Occurrences attached to it. You must first delete the Occurrences, and then proceed with deleting the Activity.

Basic Steps for Previewing and Printing Reports in CBISA Survey™

1. **Accessing the Print Reports Module:** Click on the Reports & Listings module tab (fourth tab from the left) to open the Report module.

2. **Choosing a Report to Preview or Print:** The list of available reports appears in the browse box of the control panel. Highlight the report in the control panel browse box, click on the Preview button to see the report, then the printer icon, located in the report tool bar, if you wish to send the report to the printer.

3. **Printing Options:**

a. For every report, you can choose the date range of data to be included. The default date range is the current fiscal year; however, you can change the date by typing in the desired starting and ending dates, or by activating the calendar function by clicking within the Start Date or End Date fields.

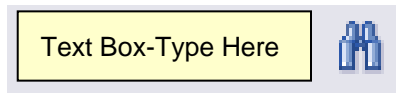
Date Range

Start Date **End Date**

b. Besides previewing and printing a report, you may also choose to export a report to another program. On the Report menu tool bar, choose the Export feature (circled below). You can export a report to Crystal Report Viewer, PDF, Excel, Word, or RTF (Rich Text Format).



c. You can search for a word and find each instance of it in the report by using the “find” feature. To access this feature, type in the word (or number) that you wish to find in the text box next to the binocular icon, then click on the binocular icon. Every instance of the word or number that is contained in the report will be highlighted in orange.

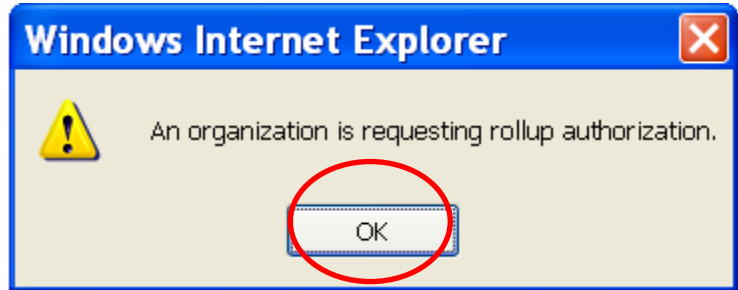


Accepting a Request for Data Snapshot in CBISA Survey™

In order for your information to be included in CBISA Association Rollup™ reports, the Association must request a “snapshot”, or picture, of your data. The Association generates a request for your data, and when you answer the request, your data is automatically and immediately sent and available to your Association.

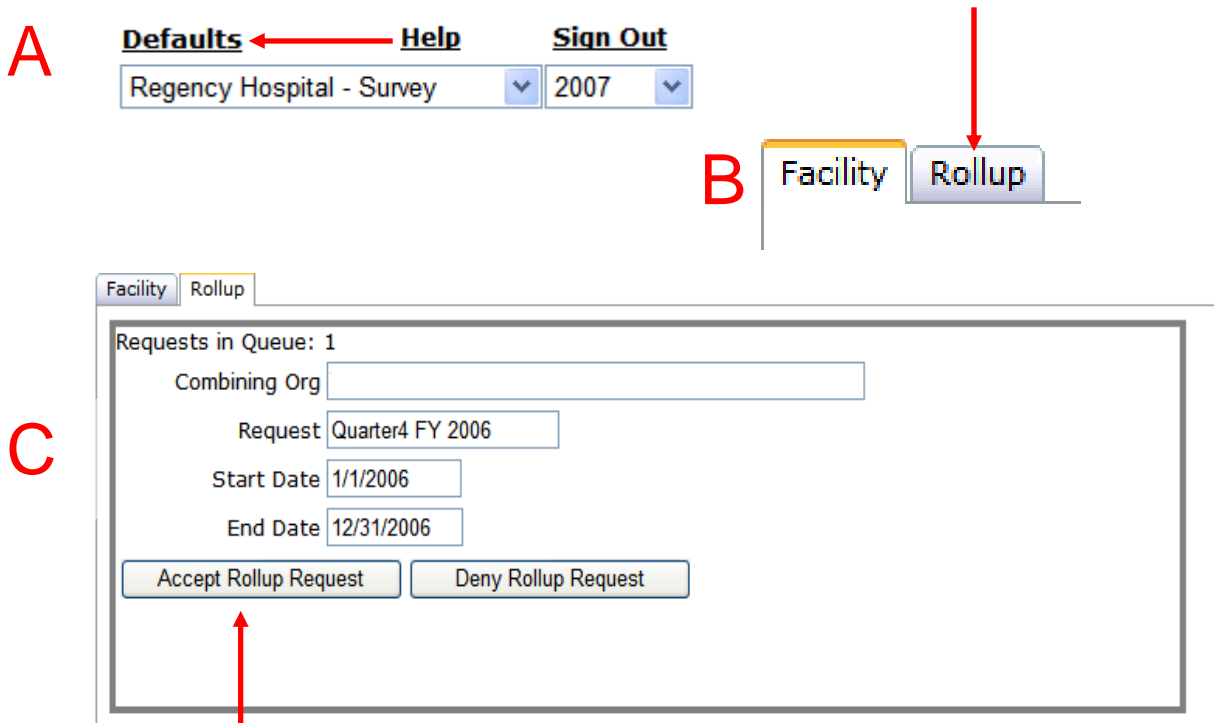
1. **Receiving the Request.** The Hospital Coordinator is the only user permission level that can receive and answer a request for the data snapshot. After the Association generates the request, the first time a Hospital Coordinator logs into CBISA Survey™, they will see the notice, or “nag”.

Simply choose “OK” and continue working.



2. **Answering the Request.** When you have completed your data entry and are ready to answer the request for a snapshot of your data, follow the steps as outlined below.

- a. Choose Defaults to open up your Facility information screen.
- b. Edit your Facility, and click on the “Rollup” tab.
- c. Click on “Accept Rollup Request”.



Additional Resources:

www.lyonsoftware.com On our website you can find information about recent changes and upgrades to the software, and upcoming training sessions. We also provide links to CHA (Community Benefit “What Counts” and 990 template) and VHA websites.

A Guide for Planning and Reporting Community Benefit is a comprehensive guide to developing and implementing a sustainable and effective community benefit reporting program. The *Guide* may be ordered from CHA. (See our website for ordering information).