

WV BMS INCIDENT MANAGEMENT SYSTEM (IMS)

Portal User Guide v2.5

Abstract

This guide provides instruction on basic functions of the WV IMS Portal. If you have procedure or regulatory questions, please contact your Program Operations Manager.

About the BMS Incident Management System – Portal

The BMS Incident Management System (IMS) Web Portal is designed for specific Medicaid Home and Community-Based Service (HCBS) providers to submit incident information regarding Medicaid recipients. The system will allow for incident reporting, follow-up, data tracking, and reports. Provider agency directors will be established as a Primary User for the agency and will assign agency staff with user profiles and access. Provider agency director or designee will be responsible for overall agency incident reporting and compliance with Medicaid policy. The Agency Director system role is responsible for also closing out users who are no longer with the provider agency.

The Agency Director will be responsible for reporting "no monthly incidents" when the agency has not reported any incident for the calendar month.

Note: The examples provided in this guide reflect views available to the highest security level in the system. Not all users will see the same screen content as some menu and button options are not available for the system role being used.

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Maintained By	WV Bureau of Medical Services			
Version Number	Modified By	Modifications Made	Date Modified	Status
2.3	MB-C	Added section titled "How to switch between multiple profiles"	10/11/18	FINAL
2.4	MB-C	Added section titled How to generate a "Resend Email Confirmation Code" email.	11/08/18	FINAL
2.5	MB-C	Updated Agency Director User Options \ No Monthly Incident Report submission to indicate it is a shared responsibility with Program Admins.	12/18/18	FINAL

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Definitions

APS or CPS – Adult Protective Services or Child Protective Services

Child Agency- Agency sites/locations that operate under or are associated with the Parent Agency umbrella.

CRM- System utilized by state representatives such as BMS or BMS representatives (contractors).

Completed- Status of an incident indicating that a user has completed all possible actions on the incident.

Director – Provider agency executive director.

Modification Request to change information on an incident.

No Incident Report- Monthly report submitted by provider agencies when no incidents occurred within the calendar month.

Operating Agency (OA)–BMS contracted entity responsible for the monitoring of program incidents.

IMS Portal - Web-based system for Home Community Based Services (HCBS) providers to enter incidents.

Parent Agency – single umbrella agency or an agency with multiple sites or agency locations. (See Child Agency)

Person- Medicaid participant (member).

Program Type - HCBS programs (ADW, IDWW, TBIW and PC)

Role- The level of access as related to the function and system view granted to the user.

User- Person who accesses the IMS system with a unique user ID, password and is linked to an agency.

Getting Started

System Role Definitions:

Agency Director: Oversees, monitors and reports on multiple locations and multiple program types.

Program Administrator/Admin: Approves and monitors system access for one or more office locations.

Program Supervisor: Reports and monitors incidents entered by one or more case managers/service coordinators or nurses.

Agency User: Manages cases and enters incidents – only sees cases he or she entered.

Access to the portal is dependent upon your approved system role. The higher level of your system role, the more you will be able to see and do in the IMS. The Agency Director is in control of who accesses the IMS for the agency and assigns system roles to agency staff that are approved to use the IMS. Below is a description of who might use these system roles, his/her viewability, access and what he/she can do in the system.

IMS-Portal System Role Type	Who is it?	What is the View and Access?	What functions can be performed based on system Role Type
Agency Director	Executive Director, Agency director, etc. Or designee appointed by the Agency	Note: Can view all programs provided by the agency: All agency incidents Monthly No Incident Report Manage user page All portal reports All compliance notices Agency menu page	Add staff Approve roles Approve users Enter an incident Enter follow up APS or fraud report* APS referral form creation* Run agency reports
Program Administrator (Admin)	Director of the program for an agency	Program admin. staff associated with one or more office locations, limited by Program Type (ADW, TBIW, IDDW, PC) Agency incidents Monthly No Incident Report All portal reports All compliance reports Agency menu page	Approve users Enter an incident Enter follow up APS or fraud report* APS referral form creation* Run agency reports
Agency Supervisor	Typically, a site supervisor or office supervisor, that monitors Case Mangers, RN, Service Coordinators	Only incidents, reports and data - associated with one office location, limited by Program Type (ADW, TBIW, IDDW, PC)	Enters incidents Monitors incident compliance at site/program APS referral form creation*
Agency User	Person entering incidents	Only incidents the user entered, limited by Program Type (ADW, TBIW, IDDW, PC) Only follow up related to an incident the user entered. Only compliance prompts related to incident the user entered.	Enter an incident Follow up APS referral form creation* Medicaid fraud referral form creation*

* Form creation does not submit the information to the appropriate organization or parties, but serves as a function to simplify completing the form. The information captured in IMS is entered onto the form for you and allows you to type in missing information, print and submit by following current procedures and methods.

CRM Role: As you work with your program operations managers you will hear the term CRM. CRM is the primary system housing the data you see on the IMS Portal. Only BMS or BMS representatives will have access in the CRM. CRM users will have access to all programs assigned to the representative, all incidents, all follow-up and program participants within all programs assigned to the representative.

Portal Access

To access the IMS website, use the following link: <https://dhhrimportal.wv.gov>

Register as a New Agency

Registration for a New Agency: A new provider agency will contact the Operating Agency (OA) to request registration. The OA for Aged and Disabled Waiver and the State Plan Personal Care (PC) Program is the WV Bureau of Senior Services (BoSS) and the OA for the IDD Waiver and the TBI Waiver is KEPRO. The OA with the respective program type will register the new agency in the IMS CRM.). Please check the IMS Contact Us page for program and technical support.

The Agency Director or any new users cannot register until the new provider agency has been registered in the IMS. Following the registration of the provider agency, the director can begin to register himself/herself in the system. Then, register his/her employees who will access the system. Directions for user registration are below.

Register as a New User

Select the link: <https://dhhrimportal.wv.gov>

Registration of a New User: The director (or designee) will be responsible for managing and approving new registrations of all users for their respective agency. The director (or their designee) will be responsible for immediately deactivating any user who leaves the provider agency.

1. Upon reaching the portal, you will need to **log in**. Simply click the **Log in link** on the ribbon at the top of the page.

DHHR BMS IMS Register **Log in** Contact Us Help

West Virginia Bureau for Medical Services

Incident Management System

Welcome to the West Virginia Bureau for Medical Services Incident Management System. This system enables authorized users to submit incident reports to the West Virginia Bureau for Medical Services.

This site is not compatible with mobile devices.

The development and implementation of the West Virginia Incident Management System (IMS) is supported by Take Me Home, West Virginia. Take Me Home, West Virginia is a Money Follows the Person Rebalancing Demonstration Grant (WV Department of Health and Human Resources Grant Number 1LICMS330830) from the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services.

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2. After clicking Log in, read the disclaimer, and click **I Agree** button to continue.

DHHR BMS IMS Register Log in Contact Us Help

Log In

This system is for authorized users only. Users of this system access protected, personally identifiable health data. As such, this system and its data are subject to the Privacy and Security Regulations within the Health Insurance Portability and Accountability Act of 1996. By accessing this system, all system users agree to protect the privacy and security of the data contained within as required by law. Access to information on this site is only allowed for necessary business reasons and is restricted to those persons with a valid user name and password. Users of this system must abide by the State of WV policies, procedures, and standards. All system use is subject to monitoring and recording by authorized personnel. Misuse may lead to disciplinary action and/or prosecution.

[I Agree](#) [Disagree](#)

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3. As a new user, you need to create a new account. Click on **Register as a new user**.

DHHR BMS IMS Register Log in Contact Us Help

Log In

Email *

Password *

[Log in](#)

[Register as a new user](#)

[Forgot your password?](#)

[Resend Email Confirmation Code](#)

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4. Fill out each field, noting that fields with an asterisk (*) are required. (see password rules below)
5. Select a system **Role** by checking the applicable roles in the box. (As defined by [System Role Definitions above](#)) ← Click here to jump to section in an electronic copy of this guide.

Note: When a role is selected, the Parent and Child Agency fields will appear.
6. Choose the **Parent Agency Name** and **Child Agency**.
7. When finished, click the blue button labeled **Submit**. After registering, you will receive a system generated email asking you to confirm your email address. You must confirm your email for the registration process to proceed. The system role completing your approval will receive an email informing of the new registration process. Once approved, you will receive a final email and be able to log in.

DHHR BMS IMS Register Log in Contact Us Help

Register

Email * Confirm Email *

Password * Confirm password *

First Name *

Middle Name

Last Name *

Profiles

Role Agency Director Program Administrator Agency Supervisor * **#5**

Parent Agency **#6**

Child Agency **#6**

Program

+ Add Profile **#7**

Password Rules

Your password must consist of:

- a minimum of eight (8) characters
- a capital letter
- a lower-case letter
- a number
- a special character (like % or !)

Password Reset

To reset your password:

1. Click **Log in** on the WV IMS ribbon at the top of the screen.
2. Click **I Agree** on the terms of use page.
3. On the Log In screen, click the blue hyperlink **Forgot your password?**
4. Enter the email address used to log in.
5. Click **Email Link**

DHHR BMS IMS Register Log in Contact Us Help

Password Reset

Enter your email

Email

[Email Link](#)

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If completed successfully you will receive the following on-screen message:

DHHR BMS IMS Register Log in Contact Us Help

Password Reset

An email with information on resetting your password has been sent.

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You will receive an email containing a link that will allow you to reset your password.

6. Click the blue hyperlink provided in the email.

Reply Reply All Forward IM

Fri 6/15/2018 6:04 PM

DoNotReply@wv.gov

Password Reset -WV IMS

To

BMS IMS

This email has been sent because a password reset has been requested. If you requested the password reset, click the link below; otherwise, ignore this email.

<https://dhhrimportaltest.wv.gov/Account/ResetPassword?code=REJ6qUTBO%252fplotwC%252fhjEckqVq1YfBD56sCTID4fOmOMeGq14AhX2P3NGKw5%252b6vw7at%252bjh3XYBDUL3NiVwZYTUGr3icjiGtQF%252bqy4SUZcYsM2pSxOpGZXU9swPw8LDYExR2NoRoalntxhjV2sxpEHI%252f93zhY4bF5NQblCI6a%252bvWdnEj3WU0ix%252budfmQRZjStdYorfSkIm43ZTpaigCvUTTA%253d%253d>

IMS

7. Complete the empty fields of information. (see Password Rules above)
8. Click **Reset**

DHHR BMS IMS Register Log in Contact Us Help

Reset password

Reset your password

Email

Password

Confirm password

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If successful, you will receive an on-screen message indicating the password has been reset and providing a blue hyperlink to take you back to the login screen.

DHHR BMS IMS Register Log in Contact Us Help

Reset password confirmation

Your password has been reset. [Please click here to log in](#)

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If you receive errors, follow the on-screen instructions to correct any errors.

Logging In (Existing User)

1. **Open a browser and type in:** <https://dhhrimportal.wv.gov>
2. Click **Log in**
3. After clicking **Log in**, read and understand the Terms of Use
4. Click **I Agree**

DHHR BMS IMS Register Log in Contact Us Help

Log In

This system is for authorized users only. Users of this system access protected, personally identifiable health data. As such, this system and its data are subject to the Privacy and Security Regulations within the Health Insurance Portability and Accountability Act of 1996. By accessing this system, all system users agree to protect the privacy and security of the data contained within as required by law. Access to information on this site is only allowed for necessary business reasons and is restricted to those persons with a valid user name and password. Users of this system must abide by the State of WV policies, procedures, and standards. All system use is subject to monitoring and recording by authorized personnel. Misuse may lead to disciplinary action and/or prosecution.

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5. Enter your **Email** and **Password**
6. Click **Log in**

DHHR BMS IMS Register Log In Contact Us Help

Log In

Email * YourEmail@domain.com

Password *

Log in

[Register as a new user](#)

[Forgot your password?](#)

[Resend Email Confirmation Code](#)

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NOTE: If you have multiple User Profiles you will be directed to select the profile you wish to use by clicking the radio button, this screen will only display if you have more than one system user profile.

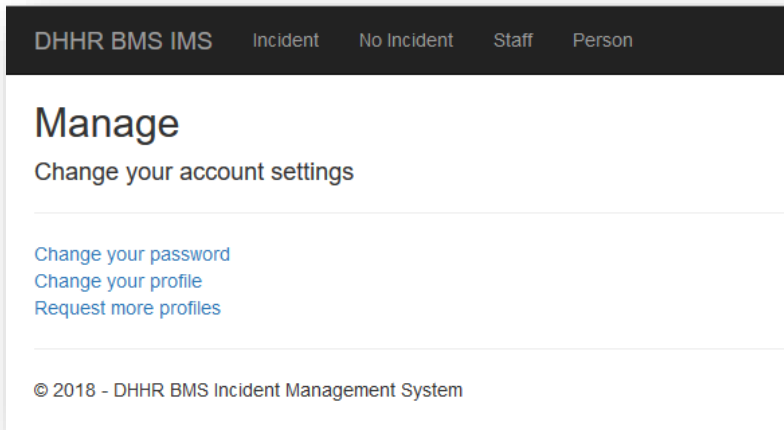
Requesting additional profiles

An existing user may request additional profiles in order to obtain a new role and/or program. The request will require approval by the agency director or the director's designee. Follow the steps below to request additional profiles.

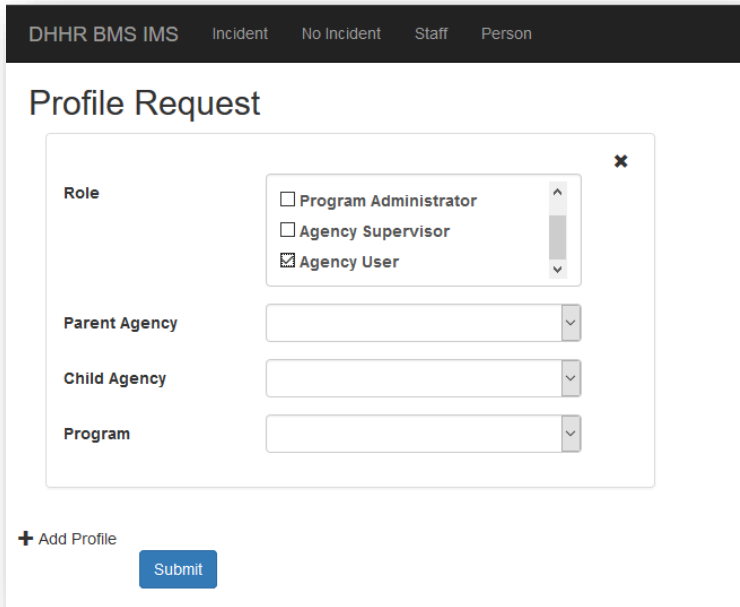
1. Log into the WVIMS Portal using your existing ID and password. (<https://dhhrimportal.wv.gov>)
2. In the black menu bar at the top of the screen, click on **your email address** to access options for your user acc

The options for your account will be presented:

- **Change your password** – Clicking this link will present you with a screen requesting your current password, new password and to confirm your password.
- **Change your profile** – Allows you to switch between profiles and perform tasks allowable by the associated roles.
- **Request more profiles** – Gives you the Profile Request form where you will be able to choose role, parent agency, child agency and program for the new/additional profile.



3. Click the “Request more profiles” link. The “Profile Request” form will be presented.



4. Make your profile selections and click **Submit**.

For Director role, BMS will receive an email requesting approval. Someone at BMS will verify and approve the profile. For all other roles approval will come from a designated user within your agency.

How to switch between multiple profiles

When you have multiple profiles, you will be presented with a selection upon each login.

Example:

User Profile Selection

<input checked="" type="radio"/>	Roles	Program Administrator
	Parent Agency	WVOT Parent
	Program	ADW-CMA

<input type="radio"/>	Roles	Program Administrator
	Parent Agency	WVOT Parent
	Program	ADW-PAA

1. Select the profile you wish to first use.
2. Click **Submit**.

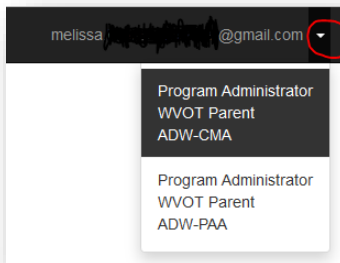
You will be presented with the **Main Menu**

To switch profiles,

1. Click the down arrow next to your email address, which appears on the menu bar at the top of the screen. A dropdown will appear and present your available profile options.

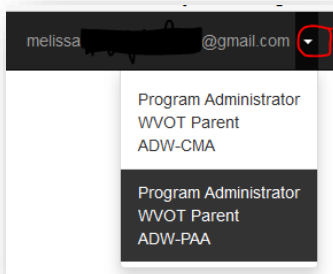
The profile shown with a black background and white text is the current profile. The profile(s) with a white background and black text are your available options.

2. Select the desired profile by clicking the profile name.



To verify which profile is currently selected,

3. Click the down arrow next to your email address again.

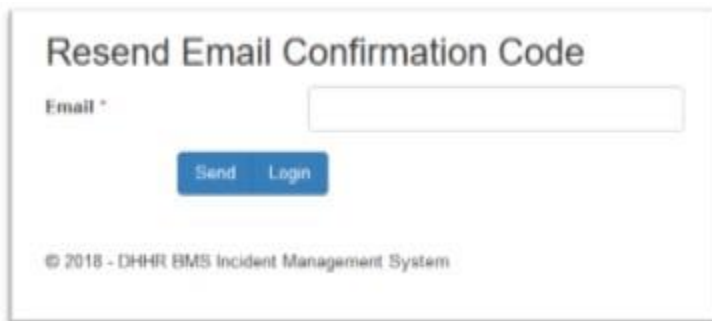


How to generate a “Resend Email Confirmation Code” email.

1. While logged OUT of the IMS Portal, click on the “Log in” link to get the login screen.
2. Click the blue link titled “Resend Email Confirmation Code”



3. Enter the email that requires confirmation in the “Email” field.
4. Click Send.



If the user does not receive an email after following the steps above, one of the system developers will need to confirm the email in the background so they may login.

Main Menu

The Main Menu is the first screen you will see upon logging in. There are many options for using this portal found on the Main Menu. Each option has a brief description underneath to notify you what it does.

- **DHHR BMS IMS** to the left on the ribbon will take you back to the Main Menu.
- **Incident** allows you to see all incidents for the programs in your login profile for your agency.
- **No Incident** allows the director (or designee) to see all “no incident” reports that have been submitted and provides a link at the top of the list to submit a new “no incident” report.
- **Staff** Provides a list of all staff registered to use IMS for your agency. You can click on the staff members name to see the details of their log in profile.

- By clicking the **User Email** on the ribbon will bring up options to change your password, change your profile and request more profiles.
- By clicking the **down arrow** to the right of the User Email you are presented with a list of profiles you are already registered for and can switch to a new profile without logging out.
- **Contact Us** on the ribbon provides both program and technical support information, which will allow you to contact different people for extra assistance with issues or questions you may have concerning specific areas or concepts.
- **Help** will provide you with Definitions of the screens and instructions for each field.
- **Log-Off** allows you to log off the system.

Note: Your agency computer should be set with a short time per guidelines

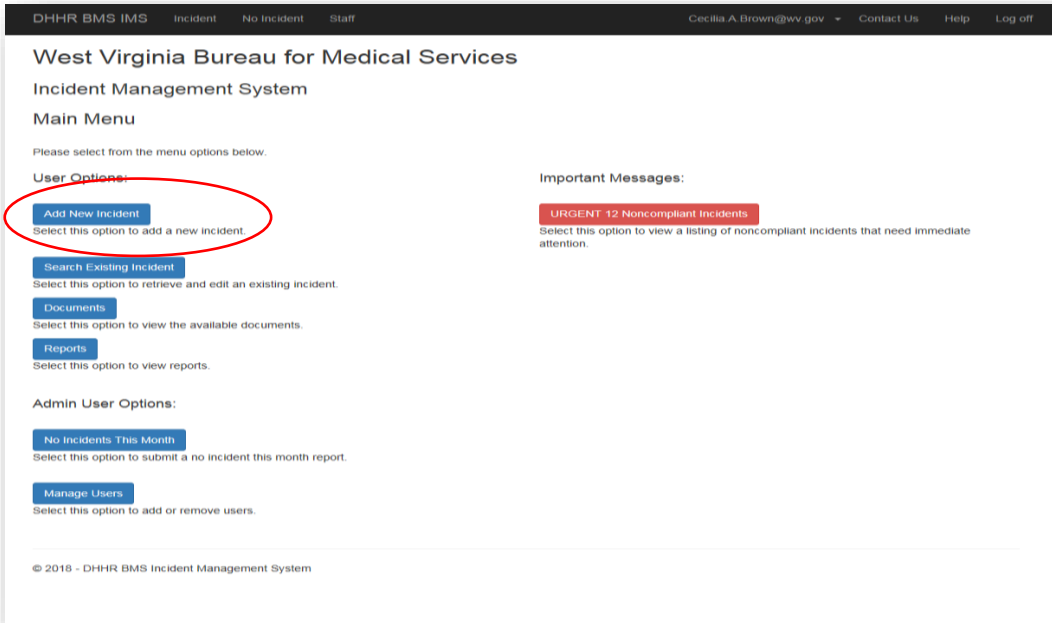
Main Menu options available to all users

These are the options to which all users have access.

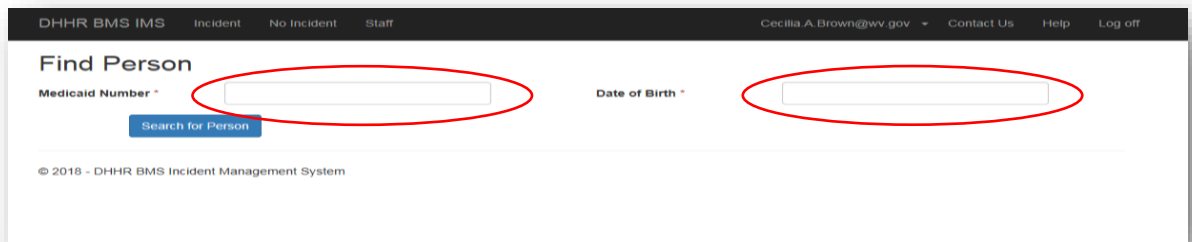
- Add a New Incident
- Edit an existing incident
 - Editing and adding follow-up to an unlocked incident
 - Request an incident modification for a locked incident
- Printing incidents and APS referral forms
- Running, exporting and printing reports (based on system user role)

Add New Incident

1. Select **Add New Incident** from the Main Menu. You will then be directed to the **Find Person** page.



2. Input the **Medicaid Number** for the desired person.
3. Input the **Date of Birth** for the desired person.



Note: These numbers must match exact.

4. Click **Search for Person** when the proper information has been entered.

Note: If a person cannot be found, double check the date of birth and the Medicaid number to ensure that you entered it correctly. If the person still is not present in IMS, please contact your program type Operating Agency. For participants who have been on the waiver program for fewer than seven (7) days, the person's information may not have been uploaded into the IMS.

Once the Person is found, the **Incident** page will populate with the **Person** and **Agency** information.

Note: All the required fields are marked with an asterisk (*). Most fields are dropdown lists and many lists are limited based on agency, program type, or system user role.

Staff Reported is the staff member who reported the incident. It may or may not be the user who is entering the incident into the system.

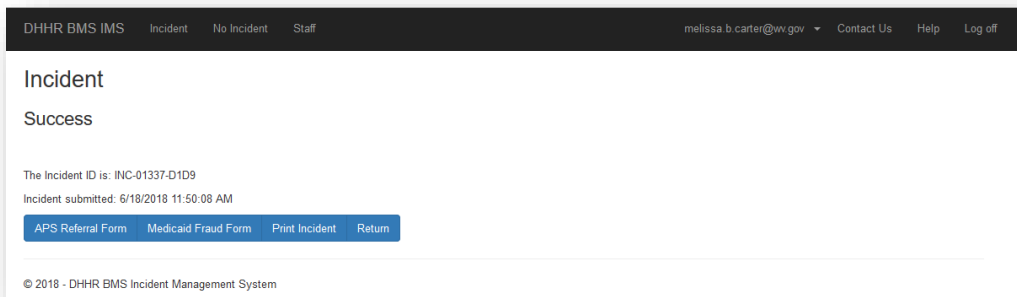
Other Entities Involved are non-staff who were involved in the incident.

APS (Adult Protective Services or CPS (Child Protective Services) Referral- An incident may be submitted without a name of the perpetrator. Answering yes for an APS or CPS referral will require entry of the date it was referred

Other Description additional information about the incident that doesn't fit in the fields provided under Description.

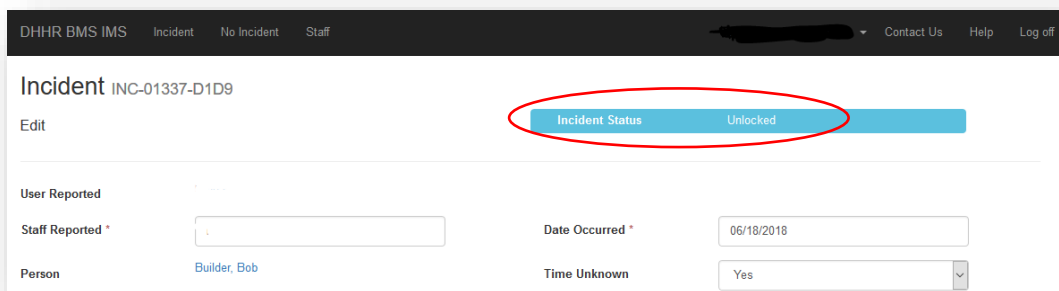
5. If completed without error, the **Create** button will take the user to an **Incident Success** page.

The **Incident Success** page will show the incident case number and the Medicaid Fraud Form button and the Adult Protective Services form. When you click the Medicaid Fraud form or the APS form, you can download or print the PDF form. At this time, there is not a form for CPS reports.



Additional post submission options:

- **APS Referral Form** – This form will open as a PDF file and fill in any information that is entered into IMS and provide the opportunity to have the remaining information typed in and the form printed. **THIS DOES NOT SUBMIT A REPORT TO APS! You must follow the normal procedure as defined.**
- **Medicaid Fraud Form** - This form will open as a PDF file and fill in any information that is entered into IMS and provide the opportunity to have the remaining information typed in and the form printed. **THIS DOES NOT SUBMIT A REPORT TO Medicaid Fraud Control Unit! You must follow the normal procedure as defined.**
- **Print Incident** – Prints a copy of the incident
- **Return** – Takes you back to the incident form you just submitted and displays the Incident Status.



Editing Existing Incidents – Unlocked

DHHR BMS IMS Incident No Incident Staff Cecilia A. Brown@wv.gov Contact Us Help Log off

West Virginia Bureau for Medical Services
Incident Management System

Main Menu

Please select from the menu options below.

User Options:

- Add New Incident**
Select this option to add a new incident.
- Search Existing Incident**
Select this option to retrieve and edit an existing incident.
- Documents**
Select this option to view the available documents.
- Reports**
Select this option to view reports.

Important Messages:

- URGENT 12 Noncompliant Incidents**
Select this option to view a listing of noncompliant incidents that need immediate attention.

1. Select the **Search Existing Incident** link from the Main Menu. You will then be directed to the **Incidents for My Agency** page. This page contains a table with the incident information.

DHHR BMS IMS Incident No Incident Staff Cecilia A. Brown@wv.gov Contact Us Help Log off

Incidents For My Program

Create New Incident

Show 10 entries Search:

Title	Person	User Reported	Staff Member Reported	Agency	Program	Incident Type	Incident Date	Created On	Date Learned	Status
INC-01273- X3N8	Builder, Bob	Brown, Cecilia A	Cecilia Brown	Happy Agency	ADW-PAA	Exploitation	2/2/2018 10:00:00 AM	2/2/2018	2/2/2018	Unlocked
INC-01271-J9T2	Smith, Jane	Hudson, Arlene Moore	Arlene Hudson	WVOT Parent 1	ADW-PAA	Abuse	11/22/2017	11/27/2017	11/24/2017	Locked
INC-01269-L3Z2	Quinn, Tess	Brown, Cecilia A	Cece Brown	Happy Agency	ADW-PAA	Critical	11/13/2017	11/13/2017	11/13/2017	Locked
INC-01286-Z1G7	Smith, Jane	McDonough, Teresa M	Teresa McDonough	WVOT Parent 1	ADW-PAA	Neglect	11/3/2017	11/6/2017	11/8/2017	Complete
INC-01268-T1X1	Finder, Stud	Brown, Cecilia A	Cecilia Brown	Happy Agency	ADW-PAA	Exploitation	11/6/2017 2:00:00 PM	11/6/2017	11/6/2017	Locked
INC-01262-V3C4	Builder, Bob	Brown, Cecilia A	Cecilia Brown	Happy Agency	ADW-PAA	Exploitation	10/16/2017 9:00:00 AM	10/16/2017	10/16/2017	Locked
INC-01281-B7Z2	Drillbit, David	Brown, Cecilia A	Arlene Hudson	Happy Agency	ADW-PAA	Critical	10/2/2018	10/2/2017	10/1/2017	Locked

The user has an option to **Create New Incident**, which is located above the table or find an existing incident that needs editing.

2. Click on the blue **incident case number** underneath the column labeled Title. When the incident is selected, the incident page is loaded. The user then will be allowed to change or update the information on any unlock incidents.

Note: Information that is shaded is not allowed to be changed. (Date Learned)

Incident Modification Request – Edit a Locked Incident

If additional information needs to be added or existing information corrected on a Locked Incident, an **Incident Modification Request must be submitted.**

1. From the “Main Menu”, click the **Search Existing Incident** option
The “Incidents for My Agency” page will open.
2. Use either the **Search** box, or incident list under the columned labeled **Title**. Select the locked incident that needs modification
3. Click on the **Incident Number**.
The Incident page will open.
4. Scroll down to Incident Modification Request section of the incident page.
5. Select **Create New**

You will be directed to the “Incident Modification Page” in which you will be required to describe the reason for the request.

6. Once documented, click the **Create** button.

The “Incident Modification Request Success” page will display.

NOTE: After 5 seconds your screen will be redirected to the incident

Modification Status will show as **Pending** after the request is successful submitted. Incident status will change to approved, when the Request has been reviewed and unlocked by the program type OA.

Modification Status	Created On
Pending	6/18/2018 12:25:02 PM

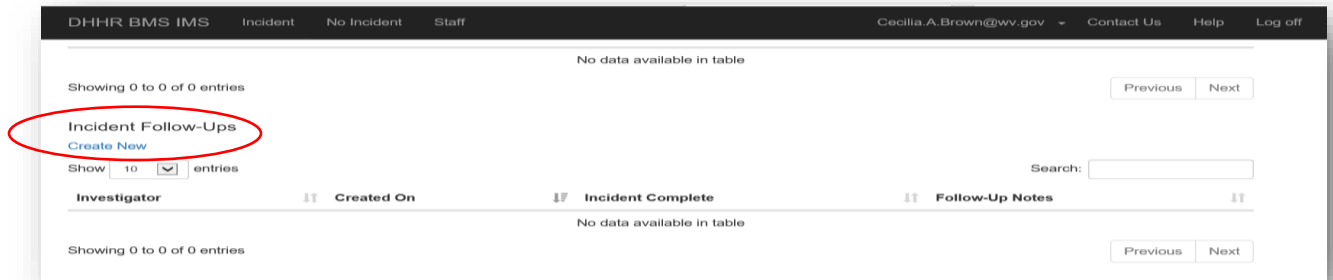
The user who submitted the **Incident Modification Request** will receive an email when the incident has been unlocked. The email informs that the incident is unlocked and provides a link to the IMS website so the user can log in and modify the report.

IMPORTANT: The incident will re-lock again after one business day (24 hours from the date & time unlocked) or when the incident is saved after being modified.

[Incident Follow-Up \(Unlocked Incidents\)](#)

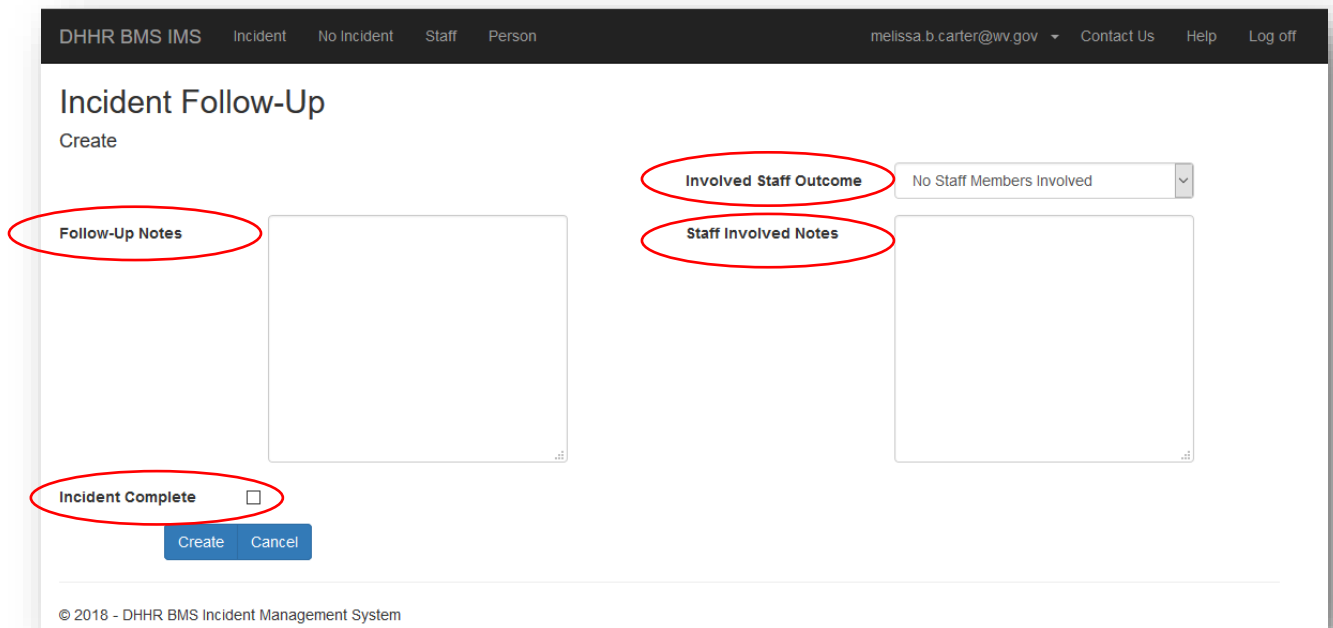
Follow-ups can be completed on unlocked incidents only. The **Create Follow** up option will not appear if the incident is locked or completed, nor can follow-ups be created for Simple type incidents.

1. Search and open an incident.
2. Scroll down the incident screen to the **Incident Follow-Ups** section.
3. Select **Create New**.



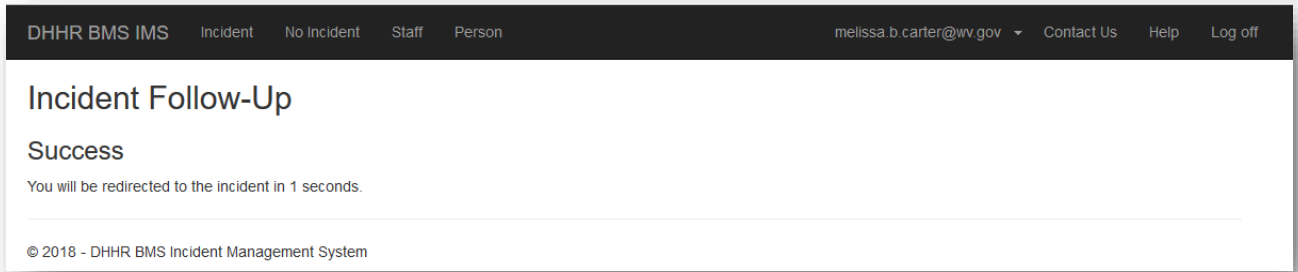
You will be directed to the Incident Follow up page

4. Enter information in the **Follow-up Notes**, **Staff Involved Notes** and **Involved Staff Outcomes** (if applicable.)



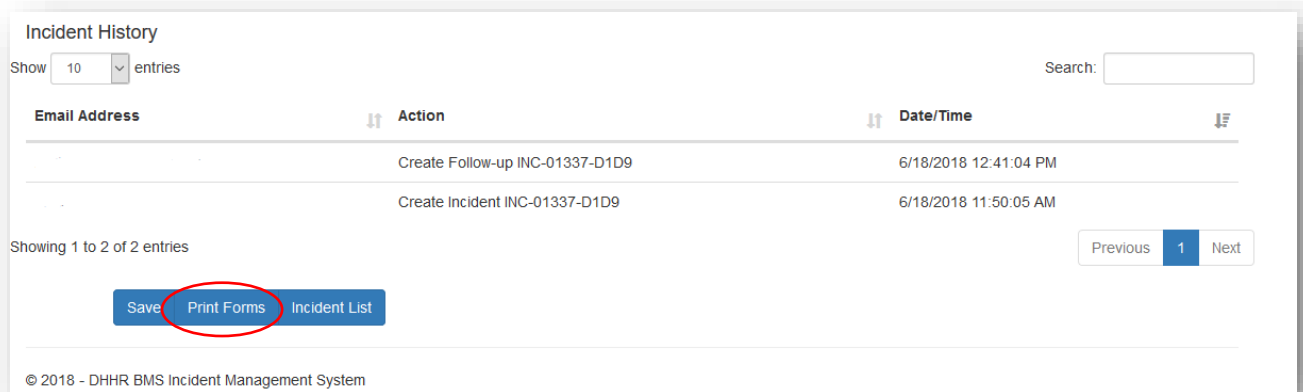
5. After information is entered, select the **Incident Complete** checkbox.
6. Click the blue **Create** button, you will be directed to the Incident Follow –Up Success Page

NOTE: After 5 seconds your screen will be redirected to the incident



How to Access Printable Forms

1. Access your “Incidents for My Agency” page, select the Incident to be printed by clicking the incident number.
2. Scroll down to the bottom of the screen and click the blue button **Print Forms**



3. You will be directed to the **Incident Success Page** where you will select the option that corresponds with your printing needs.

Printing Options include:

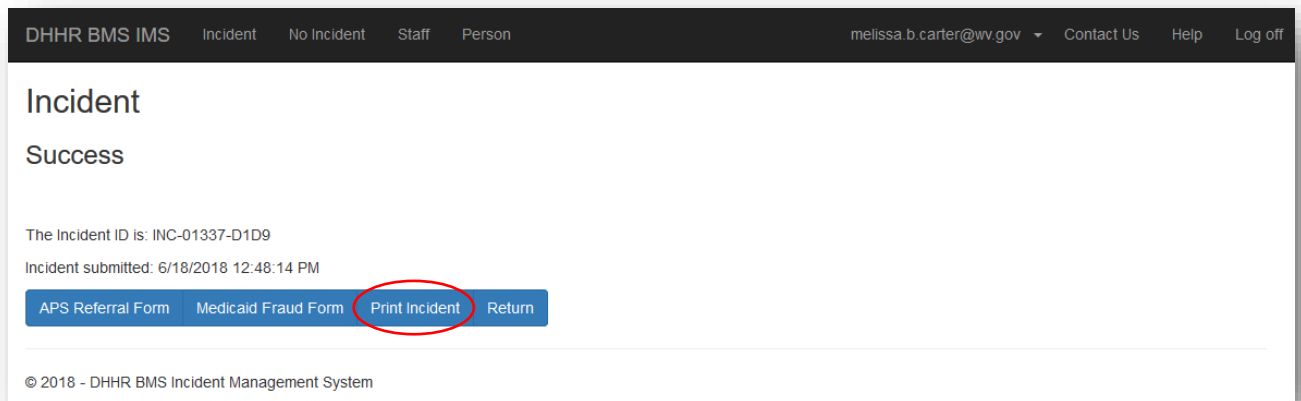
- APS Referral Form
- Medicaid Fraud Form
- Printable Incident Form

The Return button will direct you back to the Incident.

Note: Please note, the page may look different, depending upon the operating/printing system, follow your printer system steps to print the needed document.

Printing an Incident

1. From the **Incident Success Page**, click the **Print Incident** button.
2. You will then be prompted to either Open, Save, or Cancel. Click **Open**. A PDF form will then open.
3. From here, you can view, save, print, and e-mail the Incident report.



Printing a Medicaid Fraud Referral or Adult Protective Services Form

1. From the **Incident Success Page**, click the **Medicaid Fraud Form** or the **APS Referral Form** button.
2. You will then be prompted to either Open, Save, or Cancel. Click **Open**. A PDF form will then open, auto filled with the information that was entered into the IMS system.
3. Additional information may be typed on the form.
4. From here, you can view, save, print, and e-mail the Referral Forms.

Note: If you choose not to save the form, you can always bring it back up by repeating steps 1 and 2 on this page. However, your original changes to the form will not be saved. If you require an electronic copy of the completed form choose “Save As” and save a copy to your machine.

Documents

1. From the Main Menu Page, (Screen Shot here), selected the Blue Documents button

The screenshot shows the 'Main Menu' of the Incident Management System. Under 'User Options', there are four buttons: 'Add New Incident', 'Search Existing Incident', 'Documents' (circled in red), and 'Reports'. Under 'Admin User Options', there is one button: 'No Incidents This Month'. On the right side, under 'Important Messages', there are two messages: 'URGENT 73 Noncompliant Incidents' and 'WARNING 2 Near Noncompliant Incidents'.

2. You will be directed to the **Documents** page
3. The Documents page shows the different documents available for printing or viewing, which include blank forms and guides for the portal.

The available documents include:

- Blank forms for
 - Abuse, Neglect & Financial Exploitation Referral
 - APS Mandatory Reporting
 - Medicaid Fraud Referral
- Manuals
 - WV IMS Portal User Guide

How to Change the Person's Address

Changes in the person's address originate with CareConnection®. If it has been identified that a person's address is incorrect, please contact the Case Manager, Resource Consultant, Service Coordinator, or PC RN to update the person's address in the CareConnection® system. Please note that the person's address may be sourced from outside DHHR and an update could be pending.

Reports

The system has seven (7) available reports. Viewing of reports is based on the user's system role and access. An **Agency User** may not see all reports but an **Agency Director** will see all reports. Each report has a different function and yields different data results for monitoring of your agency's incident management system compliance.

Reports include:

- Non-Compliant Incident Report
- Near Non-Compliant Incident Report
- Compliance Follow-up Report
- User Access Report
- APS-CPS Referral Report
- Agency Non-Compliant Report
- Incidents by Agency Report

Note: Report availability is based on user profile. You may only see some of these reports.

To run/view a report

1. Click on the report name. This will open the selection criteria specific for that report.
2. Choose the dates by clicking on the calendar picker icon beside the date field (for those with a date range) or by typing in a date (M/D/YYYY).
3. Make selections from the dropdowns available (Agency, incident types and program types, e).
4. Then, click on "**View Report**" to the top right of the screen. The report will appear.

Report Types (Definition and Screen Shot)

Noncompliant Incident Report: Incidents that are considered noncompliant with Medicaid policy. Incidents submitted in the IMS beyond the one business day policy requirement for incident reporting.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

Non-Compliant Incident Report

Start Date: 2/1/2017 End Date: 9/1/2017 View Report

Agency: Happy Agency Program Type: ADW-PAA

Incident Type: Abuse, Critical, Exploitation, Ne Incident Number Contains: NULL

Member Name Contains: NULL

14 1 of 1 100% Find Next

Noncompliant Incident Report

Noncompliant Incident Listing For 2/1/2017 to 9/1/2017 Run Time: 9/11/2017 10:42 AM
Date Learned > 1 Business Day from Date Submitted User: Cecilia Brown

# of Business Days	Incident Number	Person Name	Agency	Program Type	Incident Date	Date Learned	Date Submitted	Incident Type
Total Incidents That Meet Selected Criteria: 0								
Total Non-Compliant Incidents: 0								
Total Compliant Incidents: 1								
Total Incidents: 1								
Programs Selected: ADW-PAA								
Agencies Selected: Happy Agency								

Near Noncompliant Incident Report: This report allows an agency to review all incidents that are 9 to 14 days from the date the agency learned of the incident (follow-up is due within 14 days). This is one of the most important reports for an agency to run, as it helps monitor incident compliance.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

Near Non-Compliant Incident Report

Start Date: 3/1/2017 End Date: 7/1/2017 View Report

Agency: All Agencies Program Type: All Programs

14 1 of 1 100% Find Next

Near Noncompliant Incident Report

Noncompliant Incident Listing For 3/1/2017 to 7/1/2017 Run Time: 7/7/2017 11:22 AM
9-14 Days From Date Learned with No Follow-up User: Cecilia Brown

# of Days	Incident Number	Person Name	Agency Name	Program Name	Incident Date	Date Learned	Date Reported
Total Incidents That Meet Selected Criteria: 0							
Total Near Non-Compliant Incidents: 0							
Total Incidents: 0							
Programs Selected: All Programs							
Agencies Selected: All Agencies							

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Compliance Follow-Up Report: An agency will enter a range of dates (from and to) for the report, choose all or only select incident types and program types. The report will show a list of incidents and the total number of incidents that were out of compliance for the 14-day incident follow-up. This report is another critical report to monitor incident compliance.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

Compliance Follow-up Report

Start Date: 2/1/2017 End Date: 9/1/2017 View Report

Agency: Happy Agency Program Type: ADW-PAA

Incident Type: Abuse, Critical, Exploitation, Neglect

1 of 1 100% Find | Next

Compliance Follow-Up 14 Day

Compliance Follow-Up Not Created within 14 Days of Date Learned Run Time: 9/11/2017 10:40 AM
User: Cecilia Brown

# of Days	Follow-up Exists	Incident Number	Person Name	Agency Name	Program Name	Incident Type	Incident Date	Date Learned	Date Reported
Total Incidents That Meet Selected Criteria: 0									
Total Incidents Not Followed-up Within 14 Days: 0									
Total Incidents: 1									
Programs Selected: ADW-PAA									
Agencies Selected: Happy Agency									
Incident Types: Abuse, Critical, Exploitation, Neglect									

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Agency Noncompliant Report: This report shows if the agency did not submit any incidents for the month and had not submitted a Monthly No Incident Report. This allows the director to monitor across agency sites and programs to ensure either incidents were entered or Monthly No Incident Report was entered.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

Agency Non-Compliant Report

Month: May Year: 2018 View Report

Agency: Happy Agency, WVOT Child Agency Program Type: ADW-CMA, ADW-PAA, IDDW, IDDW-

1 of 1 Find | Next

Agency Non-Compliant Report

Agency Listing for May 2018 No Incidents and Missing No-Incident record Run Time: 6/18/2018 2:35 PM
User: Carter, Melissa

Agency	Program Name
Total Non-Compliant Agencies That Meet Selected Criteria: 0	
Total Non-Compliant Agencies: 0	
Programs Selected: ADW-CMA, ADW-PAA, IDDW, IDDW-SC, Personal Care (PCS), TBIW-CM	
Agencies Selected: Happy Agency, WVOT Child Agency, WVOT Parent 1	

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User Access Report: This report allows the agency to monitor system users by month/year and logged-in status.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

User Access Report

Month: July Year: 2018
 Logged In Status: No Login Agency: 123 Provider, ABC Provider, All Care
 Program Type: ADW-CMA, ADW-PAA, IDDW, TBIW-

1 of 2 ? Find | Next

User Access Report

User Access Listing for July 2018 Run Time: 6/18/2018 2:37 PM
 User: Carter, Melissa

User Name	Last System Access Date	Parent Agency	Child Agency	Program Name
arlene.m.hudson@wv.gov	No Login	WVOT Parent		ADW-CMA
arlene.m.hudson@wv.gov	No Login	WVOT Parent		ADW-PAA
arlene.m.hudson@wv.gov	No Login	WVOT Parent		IDDW
arlene.m.hudson@wv.gov	No Login	WVOT Parent 1		ADW-PAA
armohu@aol.com	No Login	WVOT Parent 1	WVOT Child Agency	ADW-CMA
Barbara.Q.Recknagel@wv.gov	No Login	WVOT Parent 1		IDDW
BarbR103@aol.com	No Login	WVOT Parent 1	WVOT Child Agency	TBIW-CM

APS-CPS Referral Report: This report shows the incident date learned, date reported in the IMS, and the date referred to APS or CPS. This allows the agency to monitor compliance with protective service reporting, within program policy and WV state code. (Report to WV Centralized Intake immediately and paper copy within 48 hours to applicable county DHHR office as per WV State Code).

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

APS-CPS Referral Report

Start Date: 2/1/2017 End Date: 7/1/2017
 Agency: All Agencies Program Type: All Programs
 Incident Type: All Incident Types

1 of 1 ? Find | Next

APS/CPS Noncompliance

Incident Listing Abuse, Neglect, or Exploitation Incidents Where APS/CPS referral Date > 2 Days from Date Learned Run Time: 7/7/2017 11:14 AM
 User: Cecilia Brown

Incident Date	Agency Learned Date	Date Reported	Date Diff	Incident ID	APS/CPS Referral Date	Member Name	Agency	Program	Incident Type
2/1/2017	2/6/2017	2/10/2017	4	INC-01215-5906	02/10/2017	Doe, Jimmy	WVOT Parent 1	ADW-CMA	Neglect
2/14/2017	2/23/2017	2/27/2017	4	INC-01220-19220	02/27/2017	Dough, James	WVOT Parent 1	ADW-CMA	Exploitation
2/21/2017	2/24/2017	2/27/2017	3	INC-01222-K0P3	02/27/2017	Quinn, Tess	WVOT Parent 1	ADW-PAA	Abuse
2/21/2017	2/24/2017	2/27/2017	133	INC-01224-Y1T9	No Date Entered	Smith, Jane	WVOT Parent 1	ADW-PAA	Neglect
3/3/2017	3/10/2017	3/13/2017	3	INC-01230-F9Z1	03/13/2017	Quinn, Tess	WVOT Parent 1	ADW-PAA	Neglect

Total Non-Compliant Incidents That Meet Selected Criteria: 5
 Total Compliant: 10
 Total Non-Compliant: 5

Incidents by Agency Report: This report allows the agency to see the incidents reported by a specific agency or all agencies (Parent & Child agencies). Also, the agency can run a specific incident type report by choosing types for one or all agencies (example: Critical incidents from March 1, 2017, to June 30, 2017, for Happy Agency, the Case Management Agency).

DHHR BMS IMS Incident No Incident Staff Cecelia A. Brown@wv.gov Contact Us Help Log off

Incidents by Agency Report

Start Date: 2/2/2017 End Date: 7/7/2017 View Report

Agency: All Agencies Program Type: All Programs

Incident Type: All Incident Types Incident Sub Type: All Incident Sub Types

Incident Number Contains: NULL

100%

Incidents by Agency Report

Incident Listing For 2/2/2017 to 7/7/2017 Run Time: 7/7/2017 11:18 AM User: Cecelia Brown

Incident Number	Agency Name	Program Name	Member Name	Incident Date	Date Learned	Date Reported	Incident Type	Incident Sub-Type
INC-01211-X7B2	WVOT Parent 1	ADW-PAA	Dough, James	2/9/2017	2/10/2017	2/10/2017	Critical	Accident/Injury Requiring First Aid
INC-01212-X2Q1	WVOT Parent 1	ADW-PAA	Quinn, Tess	2/10/2017	2/10/2017	2/10/2017	Abuse	Physical
INC-01217-X3Z1	Happy Agency	ADW-CMA	Quinn, Tess	2/24/2017	2/27/2017	2/27/2017	Abuse	Emotional
INC-01218-X7P7	Happy Agency	ADW-CMA	Quinn, Tess	2/24/2017	2/27/2017	2/27/2017	Abuse	Emotional
INC-01220-P2Z9	WVOT Parent 1	ADW-CMA	Dough, James	2/14/2017	2/23/2017	2/27/2017	Exploitation	Financial
INC-01221-P3R1	Happy Agency	ADW-PAA	Smith, Jane	2/27/2017	2/27/2017	2/27/2017	Critical	Other
INC-01222-K6P1	WVOT Parent 1	ADW-PAA	Quinn, Tess	2/21/2017	2/24/2017	2/27/2017	Abuse	Physical

Exporting and Printing a Report

To export a file (report), click on the **Save** button at the top of the report, a drop down menu will appear with seven (7) options, select the option the correspond with your needs and system (computer) function and the report will be imported into the selected export options/programs.

Print: Click on the **printer icon** to the right of the Save file icon above.

DHHR BMS IMS Incident No Incident Staff Cecelia A. Brown@wv.gov Contact Us Help Log off

Compliance Followup Report

Start Date: 1/1/2017 End Date: 7/7/2017 View Report

Agency: All Agencies Program Type: All Programs

Incident Type: All Incident Types

100%

Compliance Follow-Up 14 Day

Compliance Follow-Up Not Created within 14 Days of Date Learned Run Time: 7/7/2017 11:23 AM User: Cecelia Brown

# of Days	Follow-up Exists	Incident Number	Person Name	Agency Name	Program Name	Incident Type	Incident Date	Date Learned	Date Reported
123	No	INC-01226-N2M8	Quinn, Tess	WVOT Parent 1	ADW-PAA	Exploitation	3/6/2017	3/6/2017	3/6/2017
74	No	INC-01235-NSQ4	Parks, Alice	WVOT Parent 1	ADW-PAA	Simple	4/21/2017	4/24/2017	4/24/2017
74	No	INC-01238-S6YD	Contractor, Craig	WVOT Parent 1	ADW-PAA	Simple	4/20/2017	4/24/2017	4/24/2017
74	No	INC-01245-B9G9	Finder, Stud	WVOT Parent 1	ADW-PAA	Exploitation	4/21/2017	4/24/2017	4/24/2017

Total Incidents That Meet Selected Criteria: 4
Total Incidents Not Followed-up Within 14 Days: 4
Total Incidents: 9
Programs Selected: All Programs

Example of a Report that was imported into Excel.

3- Compliance Followup 14 Calendar Days (Read-Only) - Excel

Home Insert Page Layout Formulas Data Review View Tell me what you want to do

Calibri 11 A A Wrap Text General Conditional Formatting Cell Styles Insert Delete Format AutoSum Fill Sort & Find & Filter Select

Clipboard Font Alignment Number Styles Cells Editing

Compliance Follow-Up 14 Day

Run Time: 7/7/2017 11:23 AM

Compliance Follow-Up Not Created within 14 Days of Date Learned

User: Cecilia Brown

# of Days	Follow-up Exists	Incident Number	Person Name	Agency Name	Program Name	Incident Type	Incident Date	Date Learned	Date Reported
123	No	INC-01226-N2M8	Quinn, Tess	WVOT Parent 1	ADW-PAA	Exploitation	3/6/2017	3/6/2017	3/6/2017
74	No	INC-01235-N5Q4	Parks, Alice	WVOT Parent 1	ADW-PAA	Simple	4/21/2017	4/24/2017	4/24/2017
74	No	INC-01238-S6Y0	Contractor, Craig	WVOT Parent 1	ADW-PAA	Simple	4/20/2017	4/24/2017	4/24/2017
74	No	INC-01245-B9G9	Finder, Stud	WVOT Parent 1	ADW-PAA	Exploitation	4/21/2017	4/24/2017	4/24/2017

Total Incidents That Meet Selected Criteria: 4

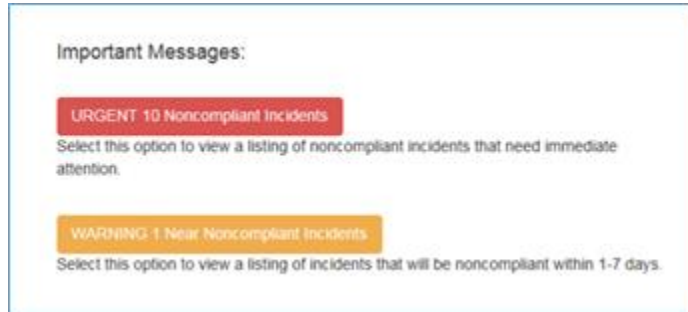
3- Compliance Followup 14 Calen

Ready

Important Messages

The Main Menu will display different types of **Important Messages** that need to be addressed. There is a color code for the messages:

- **Red messages** are urgent, and need to be handled promptly.
- **Orange messages** are not urgent, but will need attention.
- **Blue messages** (not shown) are incidents that the user requested to be unlocked, approved, and need resubmitted.



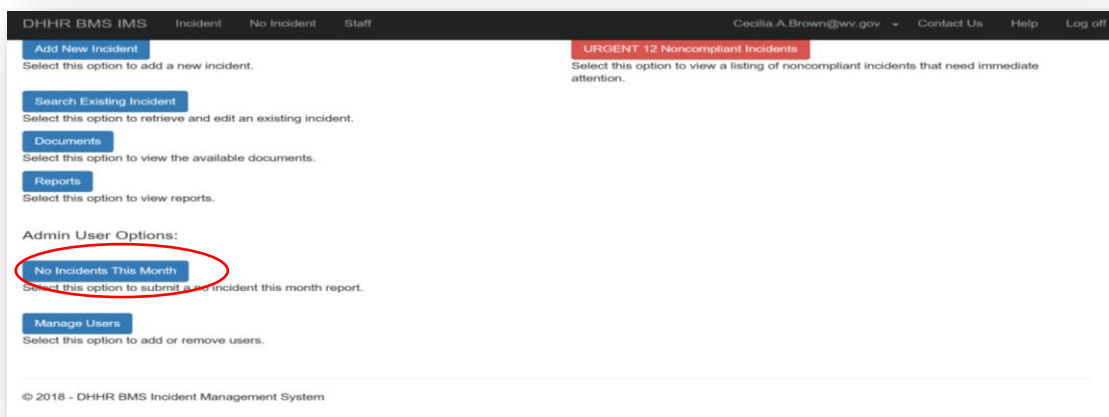
Director User Options

The Director role has several responsibilities that others do not have, such as the “No Monthly Incidents” report. The Program Admins can also perform this function.

No Monthly Incidents (Agency Director or Program Admin Responsibility)

IMPORTANT NOTE: To maintain incident reporting compliance, Medicaid policy requires the agency to enter “No Monthly Incidents” for every month that your agency does not enter an incident in the IMS. If multiple programs have no incidents, each must have a separate report submitted.

1. From the Main Menu, click on **No Incidents This Month**.



2. Click the **Create No Incident Record** link to create a new **No Incident Report**.

Note: No Incidents are sorted by the agency name, then by the year and month to show the most recent No Monthly Incidents.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

No Incidents

[Create No Incident Record](#)

Show 10 entries Search:

Agency	Program	Year	Month	User
Happy Agency		2017	August	Bradshaw-Carter, Melissa
Happy Agency		2017	July	Recknagel, Barbara Q.
Happy Agency		2017	June	Brown, Cecilia A
Happy Agency	Personal Care (PCS) dhhrmispmo@wv.gov	2017	April	Bradshaw-Carter, Melissa
Happy Agency	TBIW-CM dhhrmispmo@wv.gov	2017	April	Bradshaw-Carter, Melissa
Happy Agency	ADW-CMA dhhrmispmo@wv.gov	2017	April	Bradshaw-Carter, Melissa

3. Select the name of the agency, the month the agency had no incidents, year and program. Then, click **Save**.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

No Incident

Agency *

Program *

Month *

Year *

[Save](#) [No Incident List](#)

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The incident report is submitted for the month. Incidents reports for the prior month must be submitted the first of the following month.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

No Incident

Success

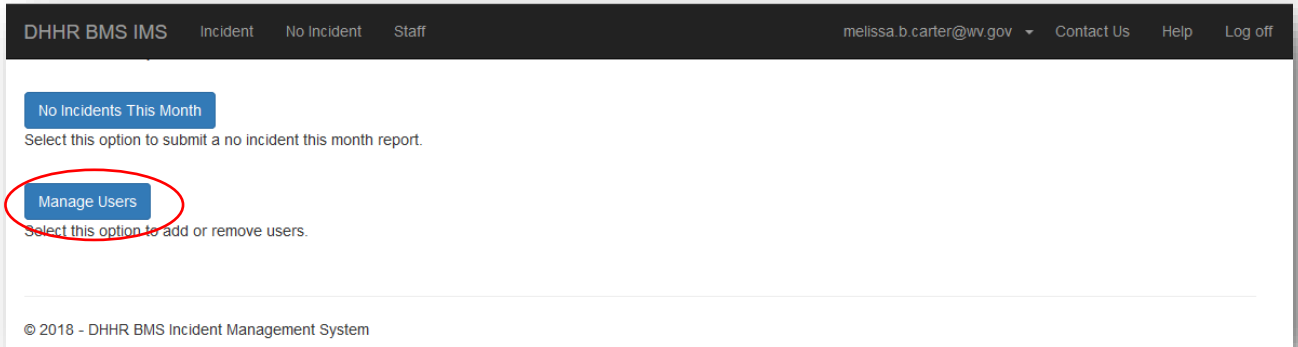
You will be redirected to the no incident list in 1 seconds.

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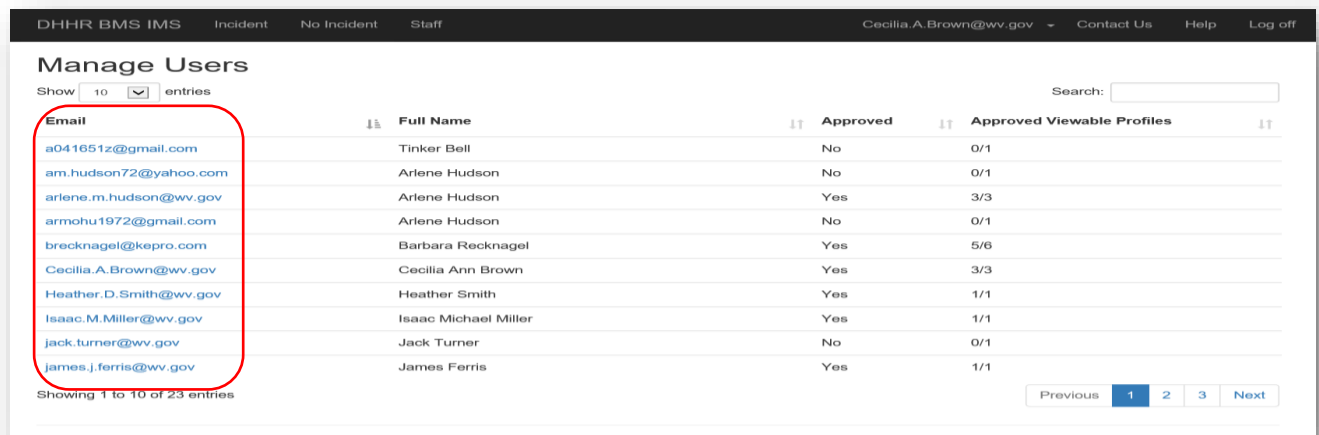
Manage Users

Note: This function and screen will be available based on system user role. Not all users will have access to this function.

1. From the Main Menu Page, select **Manage Users**.



2. A page with the list of current users will then generate.
3. To access the desired record, locate the desired user and **click on the e-mail address** to open the Details for the user.



4. Click **Edit**, to edit user information.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

Details

User

Email	a041651z@gmail.com
Approved	No
Confirmed Email	Yes
Full Name	Bell, Tinker
Related Staff Name	

Profiles

Parent Agency	ABCD Agency
Roles	Agency Director
Approved	No

[Edit](#) [Manage Users](#)

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Note: Shaded fields are "Read Only" and cannot be changed.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

Edit

User

Email * a041651z@gmail.com

First Name * Tinker

Middle Name

Last Name * Bell

Approved

Profiles

Parent Agency	ABCD Agency
Roles	Agency Director
Approve	<input type="checkbox"/>

[Submit](#)

- System roles are changed by adding or removing the checkmark in the **Approve** checkbox. Once finished, click **Submit** to save changes. **Note:** If all profile boxes are unchecked, the user's profile will be considered unapproved and will deny them access to the system.
- Upon saving, you will be redirected to the **Details** page. Click the **Manage Users** button to return to the list of users.
- Note:** Different users will have different visible profiles displayed depending entirely on the system roles that they have been approved for. Example: the person could be approved as a Program Administrator and an Agency Supervisor.

Note: Different Users will have different visible Profiles display dependent entirely upon the roles they have been approved to hold. As is the case for this sample user, he is approved to be both an Administrator and an Agency Supervisor.

Details
User

Email	Isaac.M.Miller@wv.gov
Approved	Yes
Confirmed Email	Yes
Full Name	Miller, Isaac Michael
Related Staff Name	Miller, Isaac

Profiles

Roles	Administrator
Approved	Yes

Parent Agency	WVOT Parent 1
Child Agency	WVOT Child Agency
Program	ADW-PAA
Roles	Agency Supervisor
Approved	Yes

Edit Manage Users

5

Troubleshooting

Incorrect profile selection during registration – How to fix

How to approve the user's login only to allow request for a corrected profile.

If a user requests a profile and makes an incorrect selection, the agency director may approve only the user's login allowing the user to request a corrected profile.

1. Agency director (or designee) must login to WV IMS.
2. Click "Manage Users" and locate the email of the user
3. Click the email address to open the user's record
4. Click "Edit"
5. Check the box appearing below the user's last name.
6. Do not approve the profile that was submitted incorrectly.
7. Click "Submit"

DHHR BMS IMS Incident No Incident Staff Person

Edit

User

Email * a041651z@gmail.com

First Name * Tinker

Middle Name

Last Name * Bell

Approved Step #5

Profiles

Parent Agency	ABCD Agency
Roles	Agency Director
Approve	<input type="checkbox"/> Step #6 Do not check box / Approve

Submit

The user will then be able to log into IMS using the email and password previously setup. Upon login the user will be presented with the option to select a profile.