# Case Management Information System (CMIS) 6.3.1 - New Features

## New Features

<table>
<thead>
<tr>
<th>New Features</th>
<th>Description/Process</th>
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<tbody>
<tr>
<td><strong>CMIS Log-In and Time Out Revisions</strong></td>
<td>Revisions have been in regards to the following for CMIS users:</td>
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<td></td>
<td>• <strong>Access:</strong> If a user attempts to log-in and has 9 failed attempts (using the same Login Name), the system will lock the account automatically. The user will need to contact the appropriate Site Administrator to unlock the account.</td>
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<td>• <strong>System Time Out:</strong> CMIS will now time out after 60 minutes of inactivity or no navigation between screens. (The time is being revised)</td>
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<td><strong>CMIS Support</strong></td>
<td>CMIS will begin displaying contact information for the Network level support for general users. Site Administrators will have the CCNC Support number displayed within their workspaces.</td>
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<td><strong>Notification Settings</strong></td>
<td>Users have the ability to customize the Notifications they receive, by selecting the available options within My Profile Screen, Add/Edit User Screen or within the Notification Tab. However, the Security notifications are pre-set and may not be edited by the user.</td>
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<tr>
<td></td>
<td><em>See Resource Guide for:</em></td>
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<tr>
<td></td>
<td>• <a href="#">User Workspace –Administration- My Profile</a></td>
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<tr>
<td></td>
<td>• <a href="#">User Workspace- Notification Tab</a></td>
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<td>Please note that with this enhancement release, all available options will be selected. Users are encouraged to edit their Profiles to customize to their desired setting.</td>
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<td><strong>Task Calendar on User Workspace</strong></td>
<td>The User Workspace Tasks (the “To Do” List) may now be viewed as a calendar view. This is a read only format. (Tasks must be edited from the appropriate workspace, rather than the calendar.) The calendar can viewed as daily, weekly or monthly. It will mirror the filter task options on the Task Tab.</td>
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<tr>
<td></td>
<td><em>See Resource Guide for:</em></td>
</tr>
<tr>
<td></td>
<td>• <a href="#">User Workspace- Task Calendar</a></td>
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</table>
| **User Briefcase** | A User “Briefcase” is now available on the Search Tab of the User Workspace. The Briefcase allows the user to easily access and view most recently-searched patients or other patients who the user identifies in pre-selected folders. The Briefcase folders include both system-generated and user-customized folders.  

*See Resource Guide for*
  - *User Workspace- Search and Briefcase* |
| **My Task Tab (User) Revisions** | The following revisions have been made to My Task Tab:  
  - Activity Section has been removed.  
  - Additional options for Interventions, Tasks and Task With have been included.  
  - Multiple tasks may be selected with one comment associated.  

*See Resource Guide for*
  - *User Workspace-My Task Tab* |
| **Patient Demographic Tab Revisions** | The following revisions have been made to the Patient Demographic Tab:  
  - Patient Phone Numbers  
  - Patient Addresses  
  - Contacts Information  
  - Call Center Support- Last Call Date added.  

*See Resource Guide for*
  - *Patient Workspace- Demographics Tab* |
| **Patient Document Revisions** | The Patient Document tool has been revised to allow users the ability to upload multiple documents as well as fax directly from the workspace.  

*See Resource Guide for*
  - *Patient Workspace- Demographics Tab* |
| **Patient Task Tab Revisions** | The following revisions have been made within the Patient Task Tab:  
- Multiple tasks may be documented and associated w/one comment.  
- Filter “By Assigned To” (User Assigned to task) has been added as an option.  
- Spell check feature has been republished.  
- Update all Case Statuses (Primary, OB and CC4C) from Task Tab.  
- TC Task Discharge Date revision was made to allow users to distinguish 30 day re-admits from other hospitalizations. |
| **Chronic Pain Initiative (CPI) Management Referral Form** | The Chronic Pain Initiative Management tools have been added to CMIS as part of the initiative. The following are available:  
- CPI Form is available for External Users to complete in Messaging. (Form will be sent directly to the Network’s Chronic Pain Coordinator.)  
- CPI Notifications will get sent to CPI Coordinator.  
- Chronic Pain Program has been added as Patient Program.  
- Chronic Pain Folder has been added in Patient Documents.  

See Resource Guide for  
- **Patient Workspace-Task Tab** |
| **LHD Updates** | The following revisions have been made within the LHD tools:  
- OB Risk Screening Form (RSF):  
  - There is now only one RSF available rather than an Initial and Follow Up.  
  - Historical Icons are available within the tool.  
  - Printable View is available. |
## Reports

Users may find it beneficial to export reports into PDF or Excel to print, if the Print Icon within the Menu Option does not work on the computer.

### Case Load

Case Load Report has been revised to include Last Completed Task, Last Attempted Task and Next Pending Task within the Sub-report.

*See Resource Guide for*
- *User Workspace -Report-Case Load*

### Case Load Activity Summary

Case Load Activity Summary has been revised and re-published. It now consists of three (3) separate reports:
- Case Load Activity Summary (CCNC)
- Case Load Activity Summary (OB)
- Case Load Activity Summary (CC4C)

The report for the primary (CCNC) users is located under Case Load, while the OB and CC4C are available under their respective report folders.

*See Resource Guide for*
- *User Workspace -Reports-Case Load Activity Summary-CCNC*
- *User Workspace -Reports-Case Load Activity Summary-OB*
- *User Workspace -Reports-Case Load Activity Summary-CC4C*

### CM Standards Report

A user level option is now available for general users (who do not supervise a team) to view their own CM Standards Report.

*See Resource Guide for:*
- User Workspace- Report- CM Standards

### Task Activity Reports

Task Activity Reports have been added for both OB and CC4C Programs. Users may find these reports under the respective program folders.

*See Resource Guide for:*
- User Workspace- Report- Task Activity Summary
| Administration | Transferring Case Loads (OB and CC4C) | Network Site Administrators have the ability to transfer caseloads for OB and CC4C users in addition to CCNC users.  
*See Resource Guide for:*  
•  *User Workspace-Administration-Transfer Case Load*

| Reconciling Duplicate Patient Records | Network Site Administrators now have the ability to query their Networks for duplicate patient records and resolve duplicates. This feature will allow Networks to perform internal audits as desired.  
*See Resource Guide For:*  
•  *User Workspace-Administration-Resolve Duplicates*

| Revised Documents | The following documents have been revised within the Resources Dropdown:  
•  Definitions: Interventions and Tasks  
•  CMIS Trainers and How to Add Patients*

| Manage Referral Contacts | This feature will allow Network Site Administrators to identify which users will receive the incoming referral forms. (Examples include designating who receives CPI and Aetna referrals.) Additional options will be added in the future.  
*See Resource Guide for:*  
•  *User Workspace-Administration-Manage Referral Contacts*

| Dynamic Custom Forms | CMIS offers Networks to create custom forms for their users. The forms are similar to Survey Monkey questionnaires. Reports can be obtained from the results for analysis. Networks will identify which users have the access to customize the forms.  
*See Resource Guide for:*  
•  *User Workspace-Administration-Custom Forms* |