

CBISA Association Rollup™

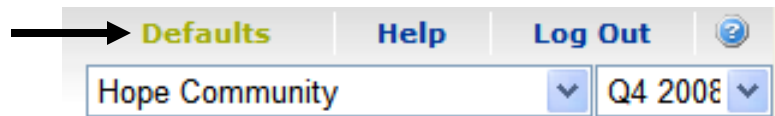
A Quick Start Guide

Leader in Social Accountability Community Benefit Reporting

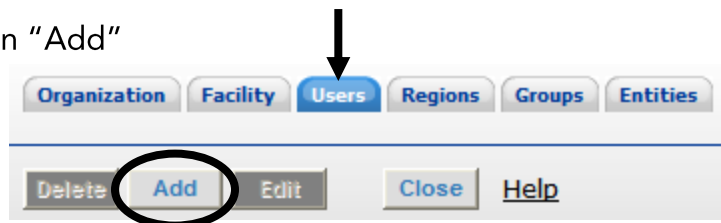
In CBISA Online Association Rollup™, there are two user permission levels: Rollup Administrator and Rollup Senior Manager. Rollup Administrator has the ability to request and receive snapshot requests, add/edit/delete some data records, and preview, print, and export reports. Rollup Senior Manager can view data for any active snapshot and preview, print, and export reports.

A. Adding Additional Users

1. Choose Defaults

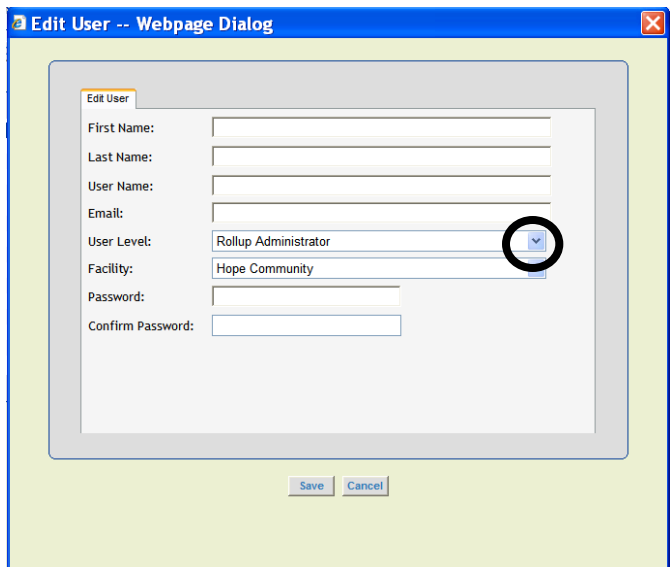


2. Choose "Users" and click on "Add"



3. Complete the user contact information, assign a unique user name, choose a user level from the dropdown, and create and confirm an initial password.





A note about User Names and Passwords: User names must be unique and may contain the letters A-Z, numbers 0-9, and the "underscore" _ character. Passwords may contain 6-15 characters, use the letters A-Z, numbers 0-9, and the "underscore" _ character.

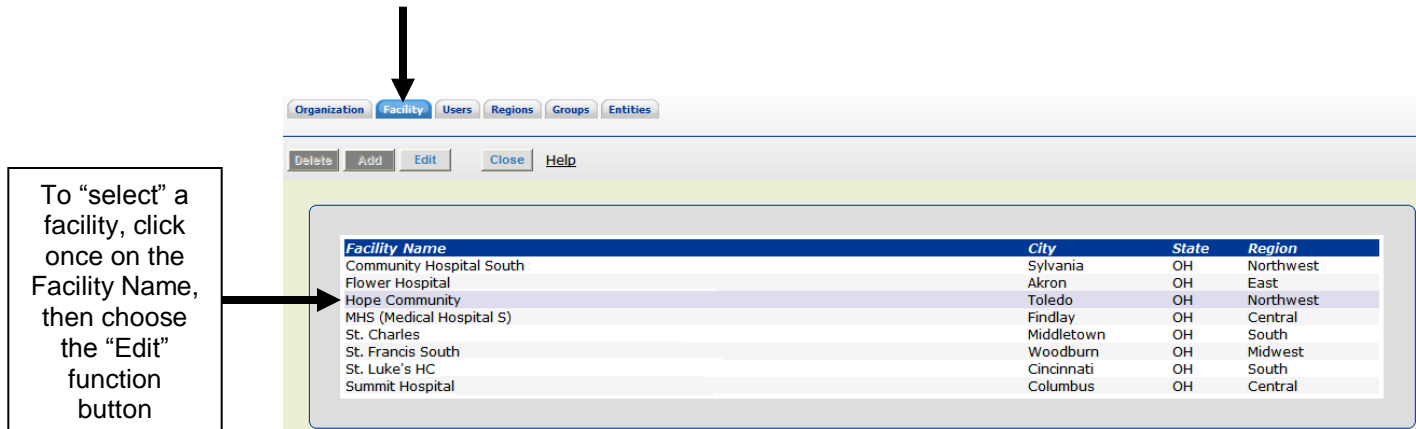


B. Requesting a quarterly snapshot from a CBISA Online™ facility

Snapshot is a new term relevant to CBISA Online Rollup™. A snapshot is an extraction of data for a particular facility for a specific reporting date range. The date range contains a fiscal quarter and a year, not a calendar quarter. A snapshot contains a copy of data that originated either in a CBISA Online™ facility or a CBISA Survey™

facility. Each subsequent snapshot is cumulative. For instance, Quarter 2 data includes all of Quarter 1 and Quarter 2; Quarter 3 includes all data from Quarters 1,2 and 3, etc. Updating data in a snapshot has no effect on the original data which continues to live in the CBISA Online™ facility or the CBISA Survey™ facility.

1. Choose Defaults  **Defaults** **Help** **Log Out** 
Hope Community  Q4 2008 
2. Open the Facilities tab and select a facility.



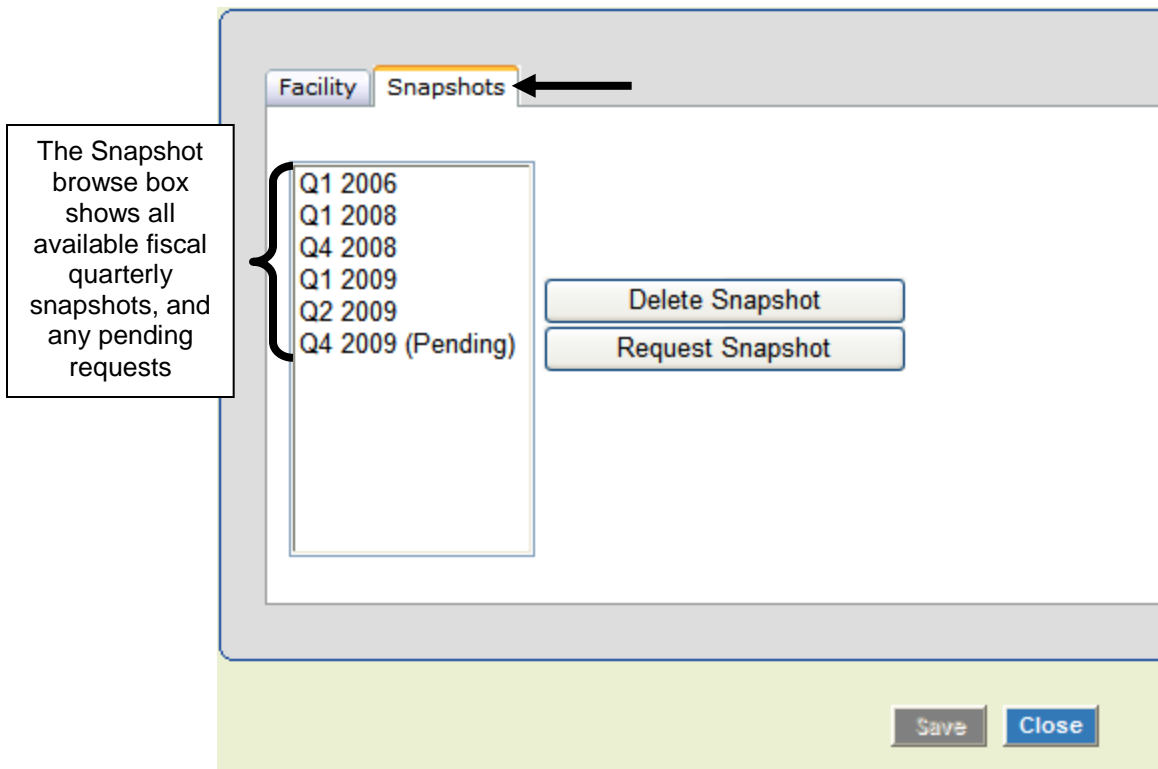
Organization **Facility** Users Regions Groups Entities

Deletes Add Edit Close Help

| Facility Name | City | State | Region |
|--------------------------|------------|-------|-----------|
| Community Hospital South | Sylvania | OH | Northwest |
| Flower Hospital | Akron | OH | East |
| Hope Community | Toledo | OH | Northwest |
| MHS (Medical Hospital S) | Findlay | OH | Central |
| St. Charles | Middletown | OH | South |
| St. Francis South | Woodburn | OH | Midwest |
| St. Luke's HC | Cincinnati | OH | South |
| Summit Hospital | Columbus | OH | Central |

To "select" a facility, click once on the Facility Name, then choose the "Edit" function button

3. Select the Snapshots tab from the Facility Information screens



Facility **Snapshots**

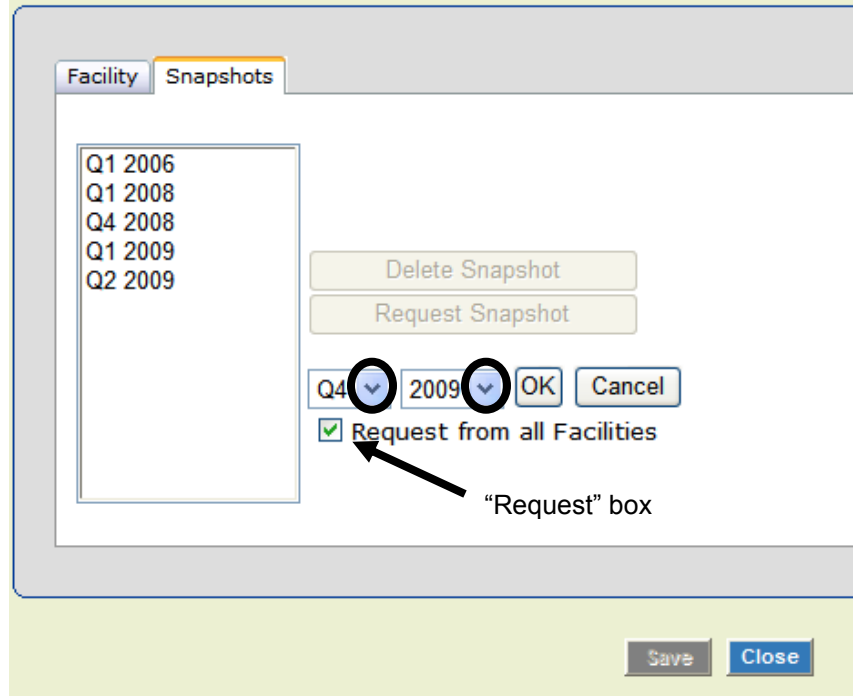
Q1 2006
 Q1 2008
 Q4 2008
 Q1 2009
 Q2 2009
 Q4 2009 (Pending)

Delete Snapshot
 Request Snapshot

Save Close

The Snapshot browse box shows all available fiscal quarterly snapshots, and any pending requests

4. To request a Snapshot, click on the “Request Snapshot” function button, choose the quarterly date from the dropdown lists, then click “OK” to initiate your snapshot request. NOTE: You may request the same quarterly snapshot from all the facilities in your association by checking the “request” box.

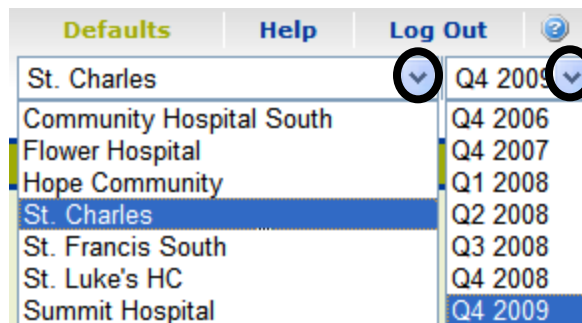


5. When a facility accepts the Rollup™ request, the snapshot will automatically be available in the facility dropdown list (with the corresponding quarterly snapshot selector) on the front page of any main module screen. Remember, quarters 2-4 are cumulative.

C. Setting the active snapshot

In order to view the data for different facilities, you must set the active snapshot to the desired facility and its corresponding quarterly date range.

1. From any main module screen, choose the facility from the active facility dropdown list.
2. Next, choose the date range from the quarterly snapshot selector dropdown list.



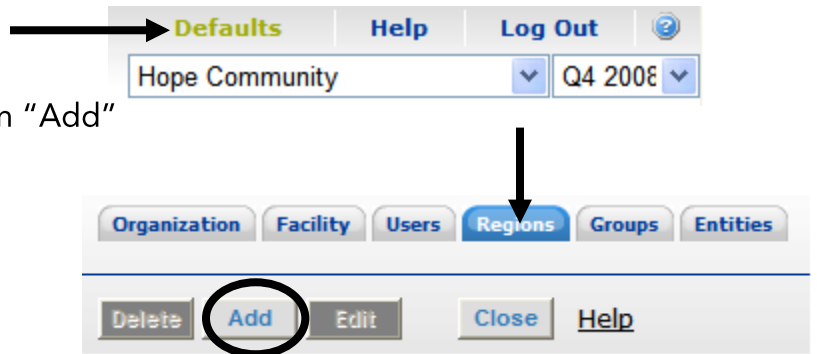
D. Editing active snapshot data

You may add/edit/delete some of the data for your current active snapshot. Any changes made in the Rollup™ program do not affect the permanent data for the facility.

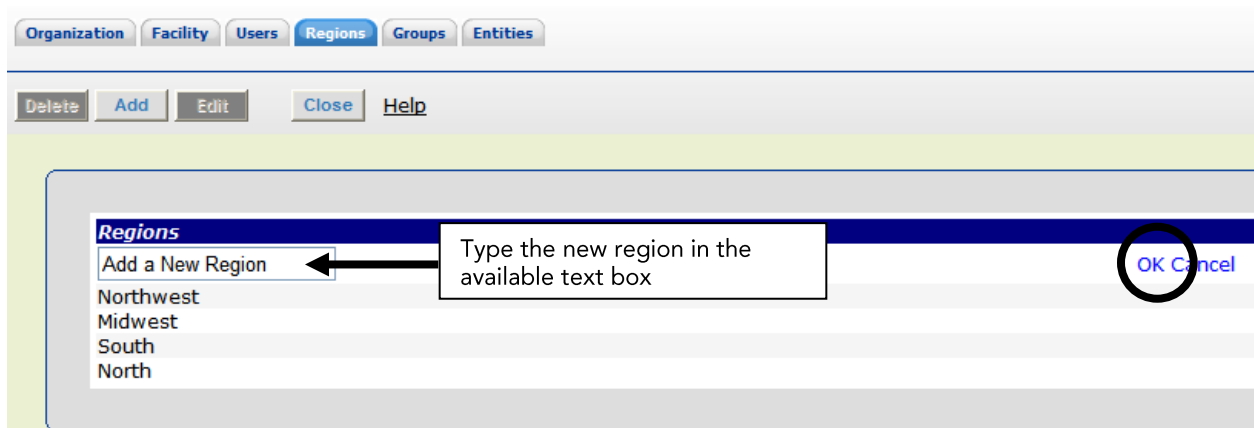
E. Creating Regions/Groups/Entities

In order to group different facilities in your association together for reporting purposes, you have the ability to create regions, groups, and entities. Regions (a geographical location), and groups (user defined), entities (a type of facility), are created in "Defaults" then attached to specific facilities on each facility information page. The process of creating and assigning is outlined below.

1. Choose Defaults
2. Choose "Regions" then "Add"



3. Enter a new region, and then click "OK" to add



4. Repeat steps 2 and 3 for Groups and Entities until all of your grouping options have been added.

5. To assign a facility to a specific region, group, or entity, select the facility (see Section B 1 & 2 above), and then choose the options from the available dropdown list or check boxes.

The screenshot shows a web form for facility configuration. The form has two tabs: "Facility" (selected) and "Snapshots". The "Facility" tab contains the following fields:

- Facility Name: Hope Community
- Fax Number: (empty)
- E-Mail Address: (empty)
- City: Toledo
- Region: Northwest (dropdown menu)
- Entity: Critical Access (CAH) (dropdown menu)
- Groups: A list of checkboxes with "Rural" and "Small" checked, and "Suburban" unchecked.

Annotations on the form include:

- A callout box on the left: "To 'check' a box, simply click with your left mouse button. Pick as many options as apply."
- A callout box pointing to the Region and Entity dropdowns: "Click on the down arrow to open the dropdown list to view options. Pick only one."
- A callout box pointing to the scroll bar of the Groups list: "Use the scroll bar to view all check box options"

At the bottom of the form are "Save" and "Cancel" buttons.

6. "Save" your changes and repeat for all facilities.

G. Previewing and Printing Reports

1. Select the main module of Reports & Listings
2. From Menu I or Menu II, choose the report you would like to preview/print from the browse box
3. Select the quarterly snapshot data range.
4. Select your grouping option: **Single Facility, Group, Region, Entity, or Organization.**
5. Click on Preview to view the report, then on the printer icon to send the report to the printer.

Rollup Snapshot

Year: 2009 Quarter: Q4

Open in new window

Preview

Report Orientation

Portrait

Report Grouping Information

Select Grouping Option

- Select Grouping Option
- Single Facility
- Group
- Region
- Entity
- Organization

Quarterly Snapshot Dates

Portrait reports contain standard statistics. Landscape reports contain expanded statistics.

Select your Grouping Option from the dropdown list

Report Task Bar

Printer Icon: Sends a report to a printer

Export Icon: Sends a report to another application