



Lyon Software

CBISA Association

Rollup™

**Leader in Social Accountability Community Benefit
Reporting**

User Guide for Rollup Administrators

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May 2010

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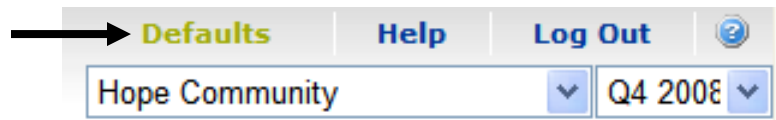
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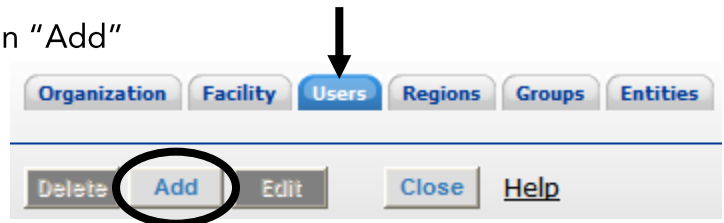
In CBISA Online Association Rollup™, there are two user permission levels: Rollup Administrator and Rollup Senior Manager. Rollup Administrator has the ability to request and receive snapshot requests, add/edit/delete some data records, and preview, print, and export reports. Rollup Senior Manager can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

A. Adding Additional Users

1. Choose Defaults

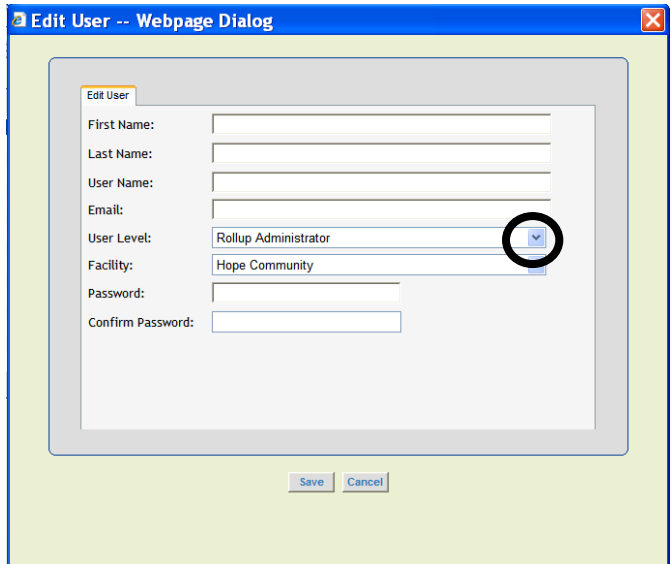


2. Choose "Users" and click on "Add"



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.

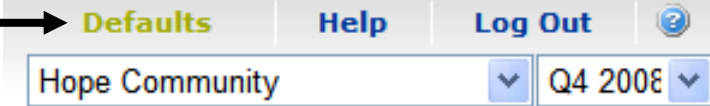
A note about User Names and Passwords: User names must be unique and may contain the letters A-Z, numbers 0-9, and the "underscore" _ character. Passwords may contain 6-15 characters, use the letters A-Z, numbers 0-9, and the "underscore" _ character.



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 reporting unit or 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™ reporting unit 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™ reporting unit or the CBISA Survey™ facility.

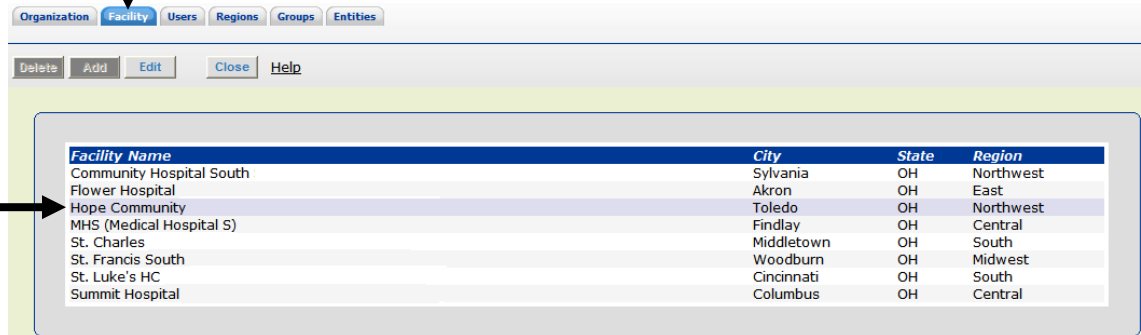
Please note: CBISA Survey™ is the free software tool available to hospitals which are not required to file a Form 990 "Return of Organization Exempt from Income Tax".

1. Choose Defaults → 

2. Open the Facilities tab and select a facility.

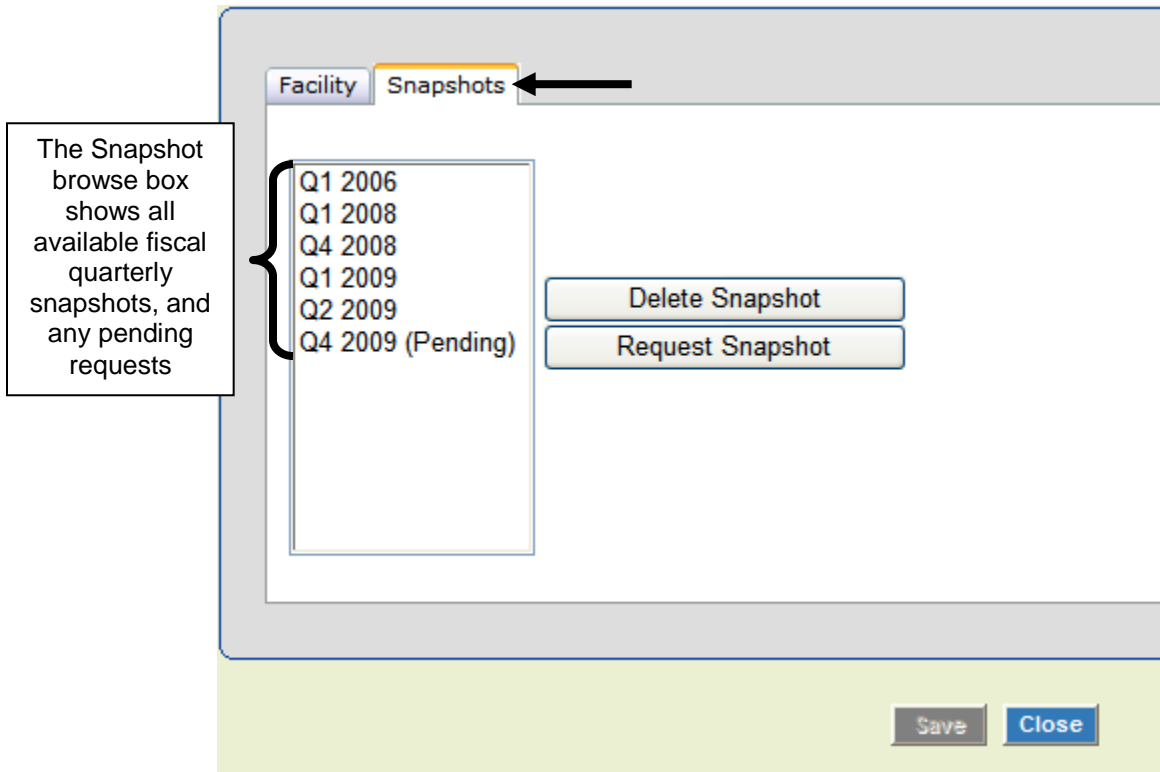
↓

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

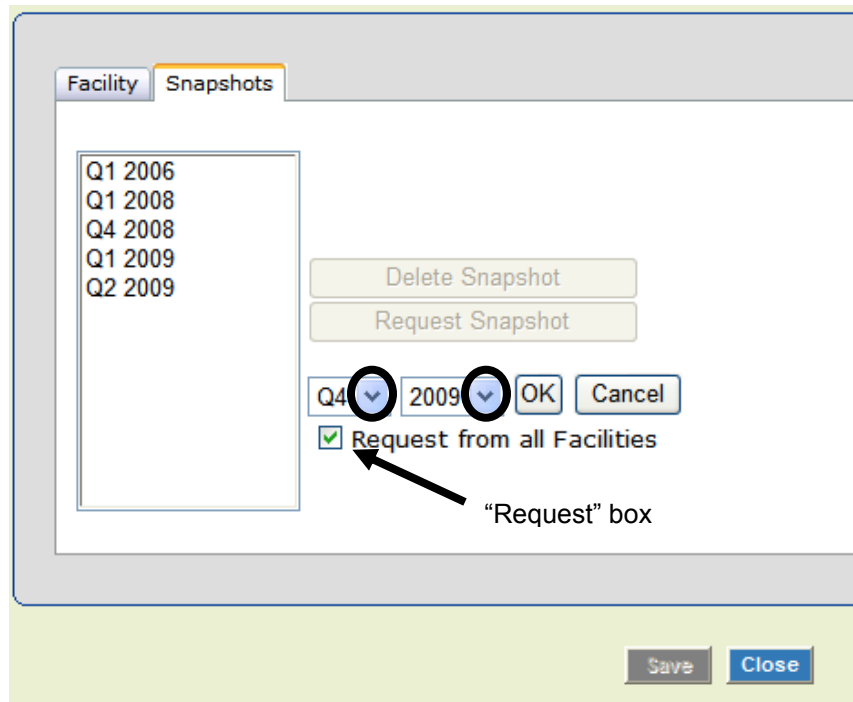


Facility Name	City	State	Region
Community Hospital South	Sylvania	OH	Northwest
Flower Hospital	Akron	OH	East
Hope Community	Toledo	OH	Northwest
MHS (Medical Hospital S)	Findlay	OH	Central
St. Charles	Middletown	OH	South
St. Francis South	Woodburn	OH	Midwest
St. Luke's HC	Cincinnati	OH	South
Summit Hospital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

3. Select the Snapshots tab from the Facility Information screens



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.

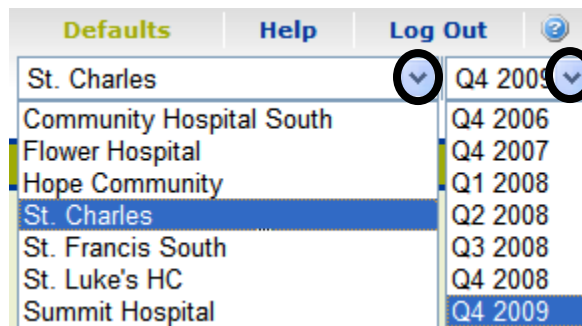


5. When a facility accepts the Rollup™ request, the snapshot will automatically be available in the facility dropdown list (with the corresponding quarterly snapshot selector) on the front page of any main module screen. Remember, quarters 2-4 are cumulative.

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.

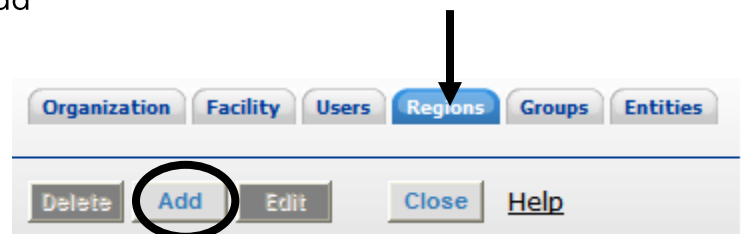
E. Creating Regions/Groups/Entities

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.

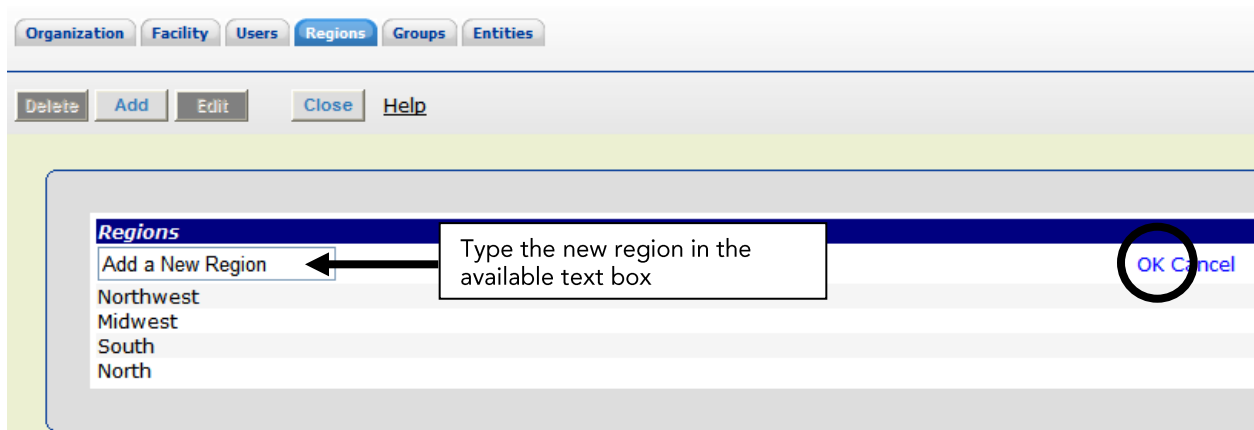
1. Choose Defaults



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.

- 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-based form for configuring a facility. The form has two tabs: "Facility" (selected) and "Snapshots". The fields are as follows:

- Facility Name: Hope Community
- Fax Number: (empty)
- E-Mail Address: (empty)
- City: Toledo
- Region: Northwest
- Entity: Critical Access (CAH)
- Groups: Rural, Suburban, Small
- Lyon Account: 0

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

Three callout boxes provide instructions:

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

- "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, Organization, or Continuous Facilities (available only in Menu I).**
5. Click on Preview to view the report, then on the printer icon to send the report to the printer.

