CBISA Survey™

Leader in Social Accountability Community Benefit Reporting

User Guide for State Administrators

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This *User 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, demonstrate how to set defaults, explain how to add data, outline the basic steps for previewing and printing reports, and show how to accept requests for data snapshots.

> ***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".*

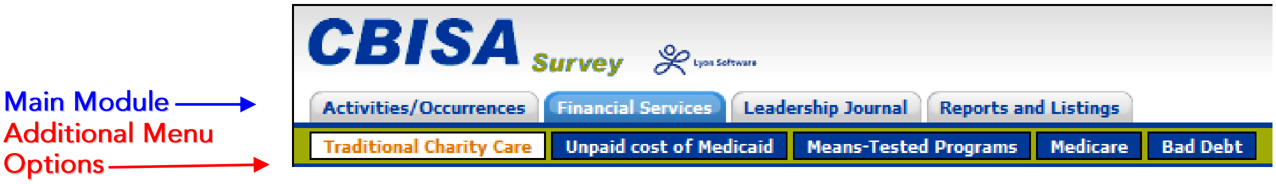
Permission Levels in CBISA Survey™

1. **State Administrator:** The State Administrator has the ability to access information for each facility attached to an Association, add/edit/delete users, 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™

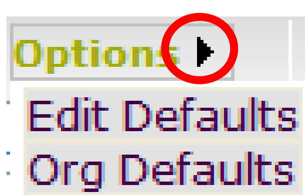
1. **Choosing a Module:** With your mouse, click on one of the main module tabs to open it. Within the Financial Services module you will have additional menu options. Click on the menu option to open each new "page".



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.

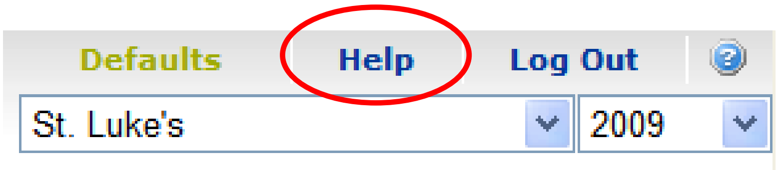
3. **Minimizing and Maximizing the Control Panel:** Minimizing the Control Panel allows for an expanded view of the active page. To minimize the Control Panel, simply click on the icon located in the top left hand corner. To maximize the Control Panel, click the icon again.

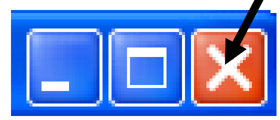
4. **Accessing the Default Pages:** To open the organization and facility default pages, move your mouse to the "Options" button located at the top right hand side of the screen. The Options menu will expand to give you the additional menu choices of Edit Defaults and Org (Organization) Defaults. Click on the specific menu choice to access the desired page.



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.

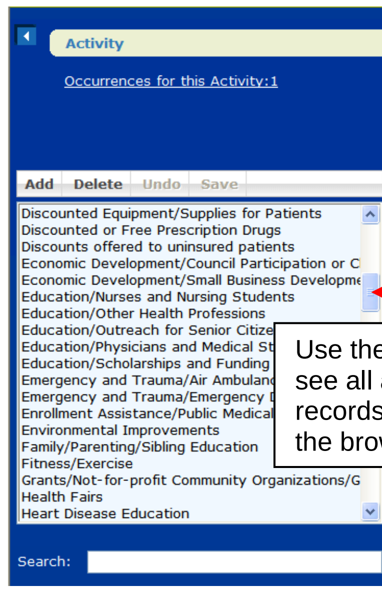
Choose the red "X" to close the Help window.





6. **Choosing a Specific Record:** Within the browse box 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.

Click on (highlight) any record in the browse box to make the record "active"

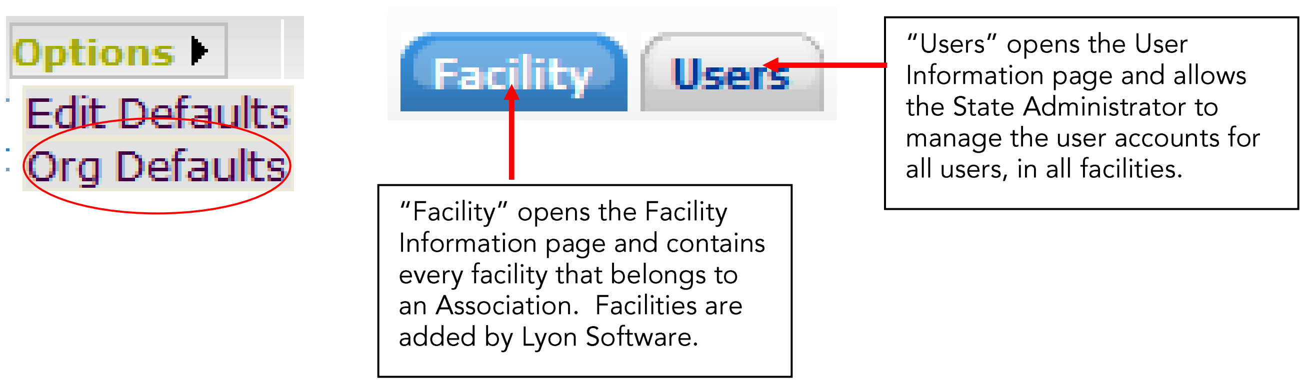


Use the scroll bar to see all available data records contained in the browse box

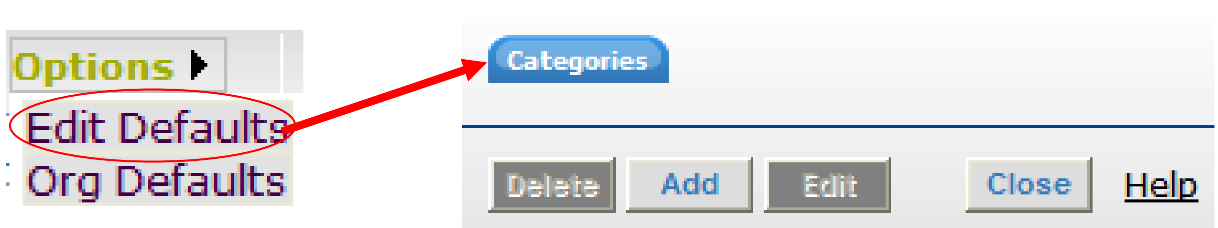
7. **Moving from field to field within a record:** To access any field of a given record (regardless of the module), move your mouse and click within the field to enter data, or move from field to field with the "Tab" key.

Setting Defaults in CBISA Survey™

1. **Setting Organizational Defaults:** Org Defaults contain the screens which house facility information and manage users. On the Facility Information pages, the State Administrator may enter facility contact and financial information. The Hospital Coordinator accesses the Facility Information page to answer requests for data snapshots.



2. **Editing Facility Defaults:** The facility default page allows you to make any necessary edits to the Categories, which are pre-populated with the standard categories as outlined in the *Guide for Planning and Reporting Community Benefit*. Any change made to a category in one facility copies over to ALL facilities within an Association.



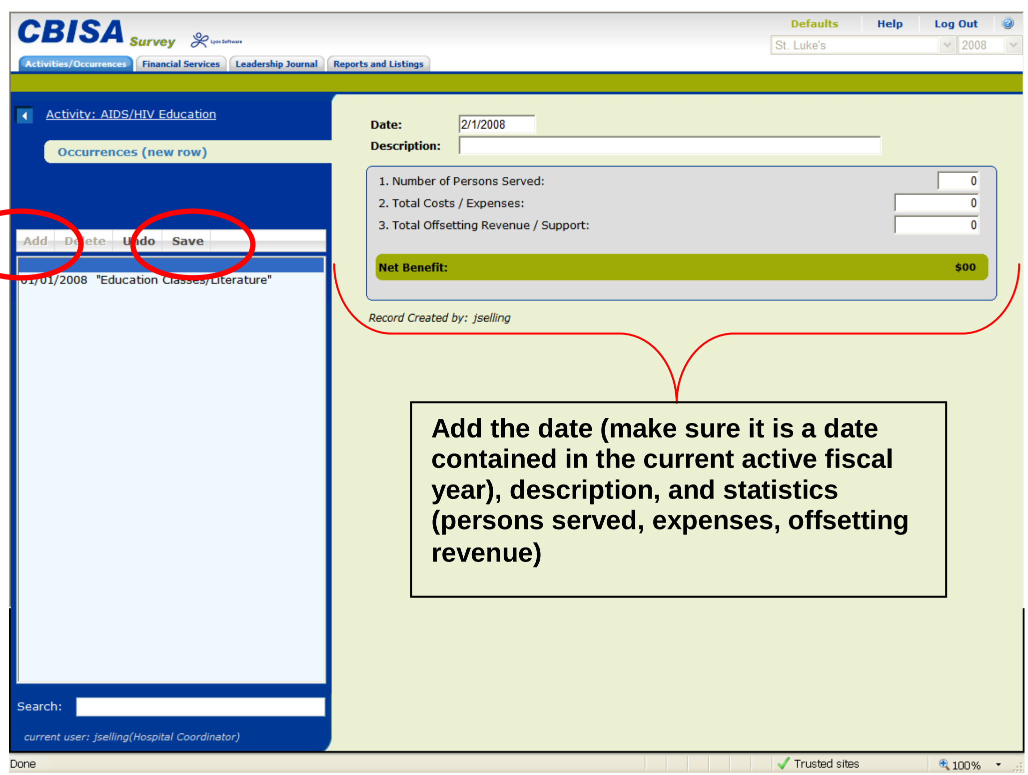
Adding Data Records in CBISA Survey™

1. **Adding Activity Records:** The Hospital Coordinator will have the main responsibility of adding data records that will be included in the snapshot. However, as the State Administrator, you may need to make slight revisions/additions/deletions to the data after it has been requested and received from a member hospital.

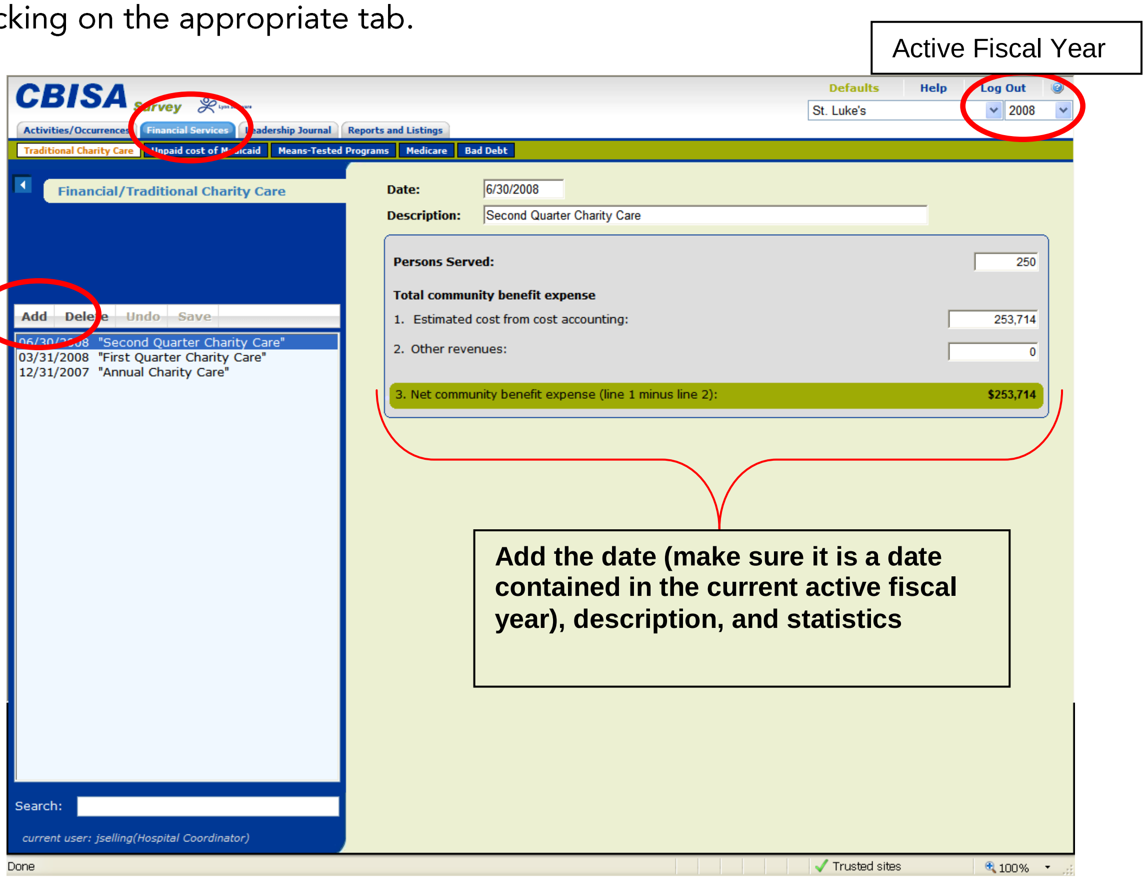
While in the Activities/Occurrences module, click the function button Add, located on the control panel.

Complete the available data fields. Save your data by clicking on the "save" function button.

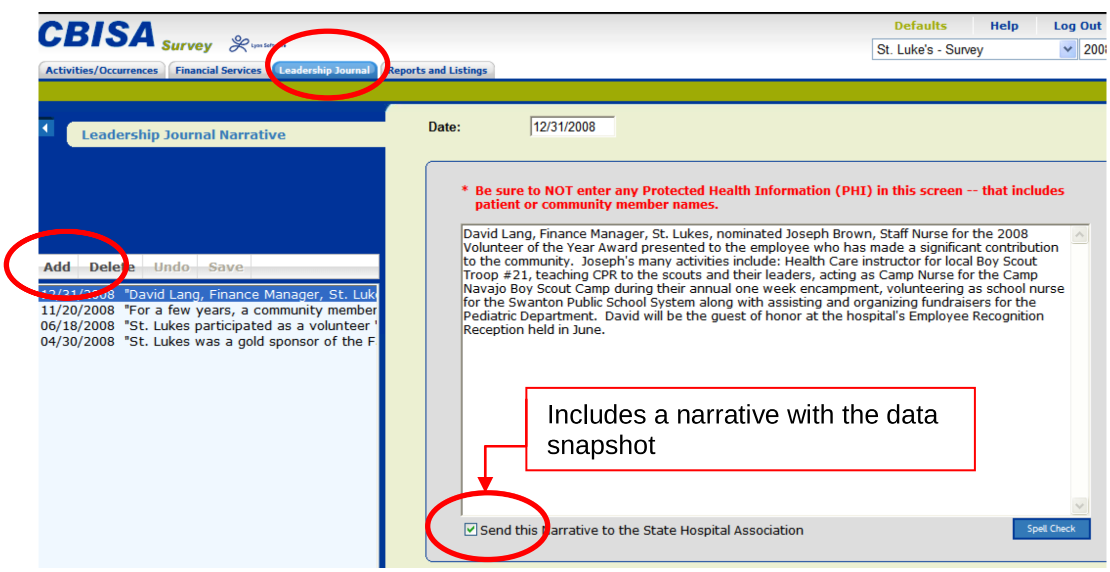
2. **Adding Occurrence Records:** Add an Occurrence record to an Activity by first selecting the Activity (highlight it by clicking on it) and then clicking on the Occurrence link. Click on Add and complete the data entry fields, as necessary. Click on "Save" to save your new Occurrence record.



3. **Adding Financial Service Records:** Click on the Financial Services module tab (the second tab from the left). You can add records to five different sub-menus, Traditional Charity Care, Unpaid Cost of Medicaid, and Means-Tested Programs, Medicare, Bad Debt, by clicking on the appropriate tab.



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.



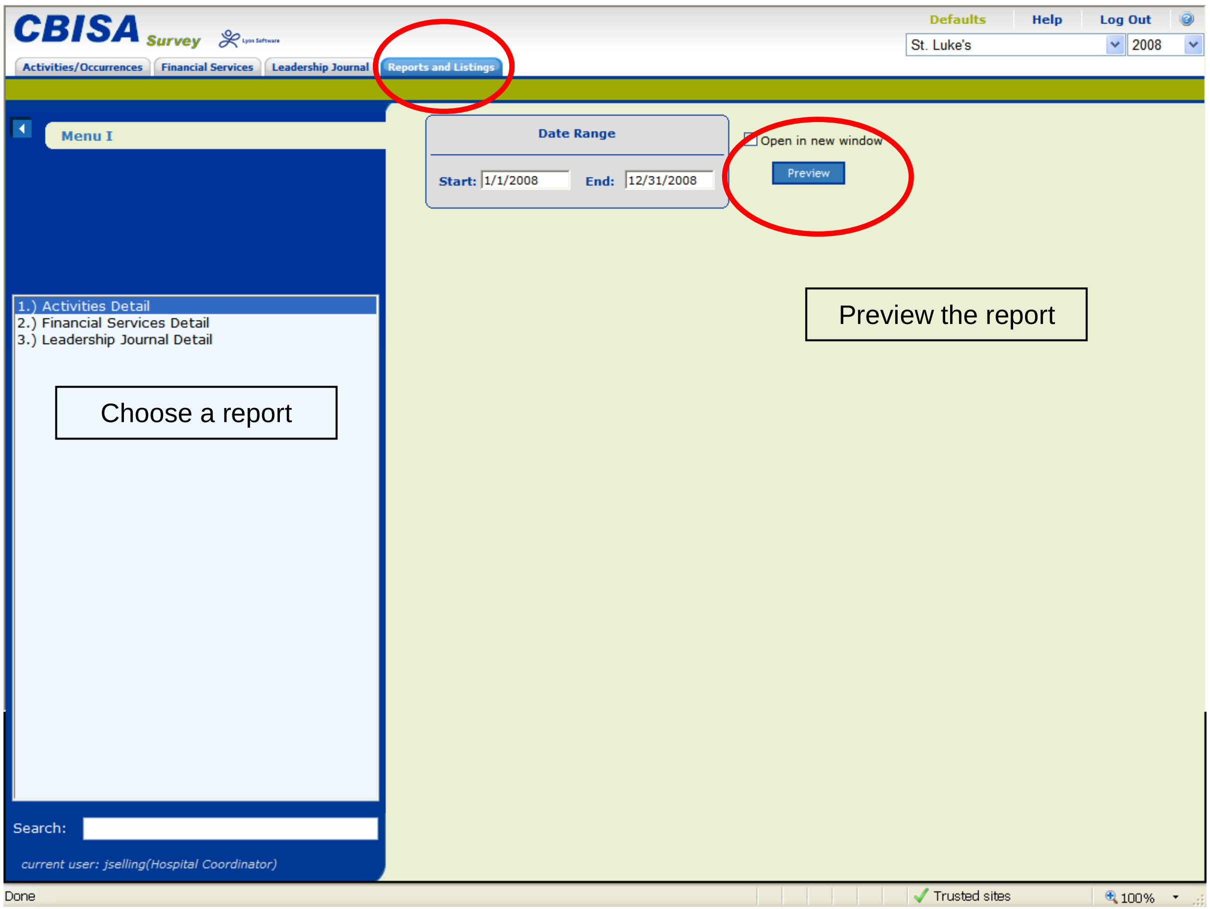
5. **Editing Existing Data Records:** To edit any existing data record, regardless of the module (Activities/Occurrences, Financial Services, Leadership Journal), highlight the record in the browse box, make any necessary changes, then click on the “save” function button in the control panel.

6. **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 cannot 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™

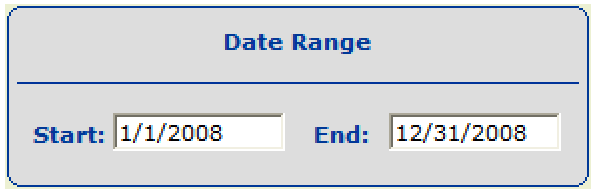
1. **Accessing the Print Reports Module:** Click on the Reports & Listings module tab (fourth tab from the left) to open the Report module.

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.

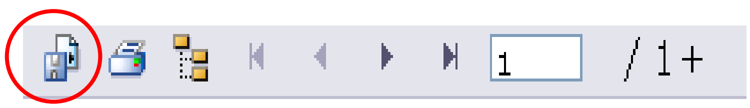


3. Printing Options:

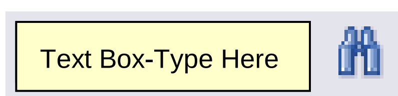
a. For every report, you can choose the date range of data to be included. The default date range is the current fiscal year; however, you can change the date by typing in the desired starting and ending dates, or by activating the calendar function by clicking within the Start Date or End Date fields.



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.



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).

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