



Lyon Software

CBISA Survey™

Leader in Social Accountability Community Benefit Reporting

User Guide for Hospital Coordinators

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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, explain how to add data, outline the basic steps for previewing and printing reports, and show how to accept requests for data snapshots.

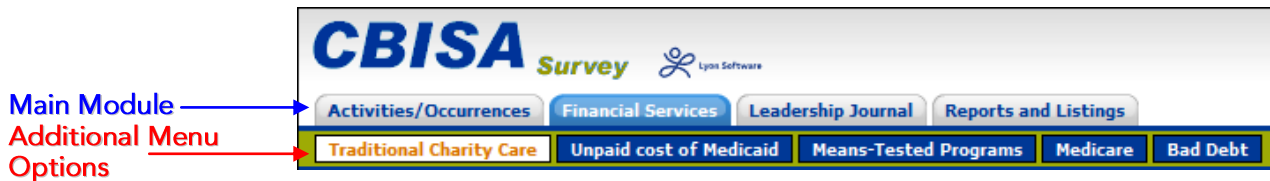
Please note: CBISA Survey™ is the free software tool available to hospitals which are not required to file a Form 990 "Return of Organization Exempt from Income Tax".

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”.



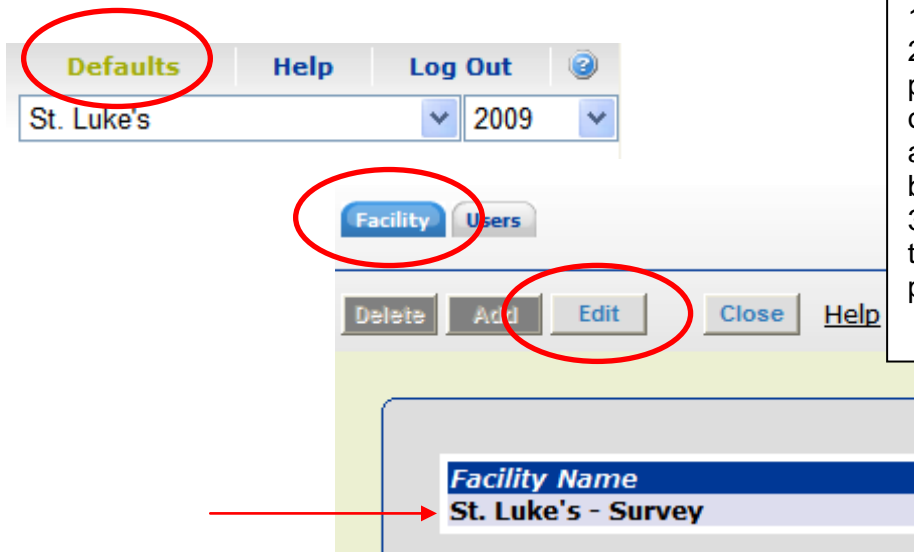
2. **Using the Control Panel Function Buttons:** The main data entry modules, Activities/Occurrences, Financial Services, and Leadership Journal, have the following buttons available: Add, Delete, Undo, and Save. Simply click on the corresponding button to perform the desired action. “Add” creates a new record; “Delete” permanently removes 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.



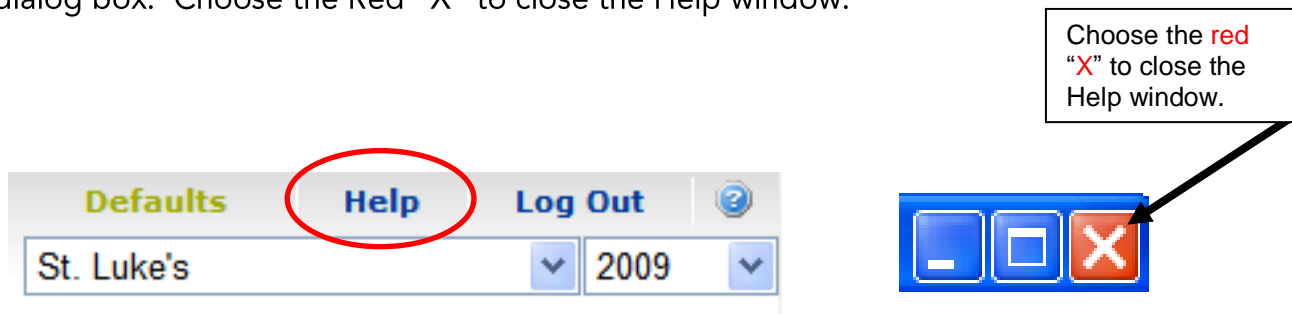
4. **Accessing the Default Pages:** To access the Facility Information screen or the Users Information page, click on “Defaults” located at the top right hand side of the screen. The Facility Information screen shows information, in “read only” format, which has been entered by your State Administrator and gives you the ability to answer a request for a data snapshot. The Users Information page allows you to manage the users who have the ability to enter data.



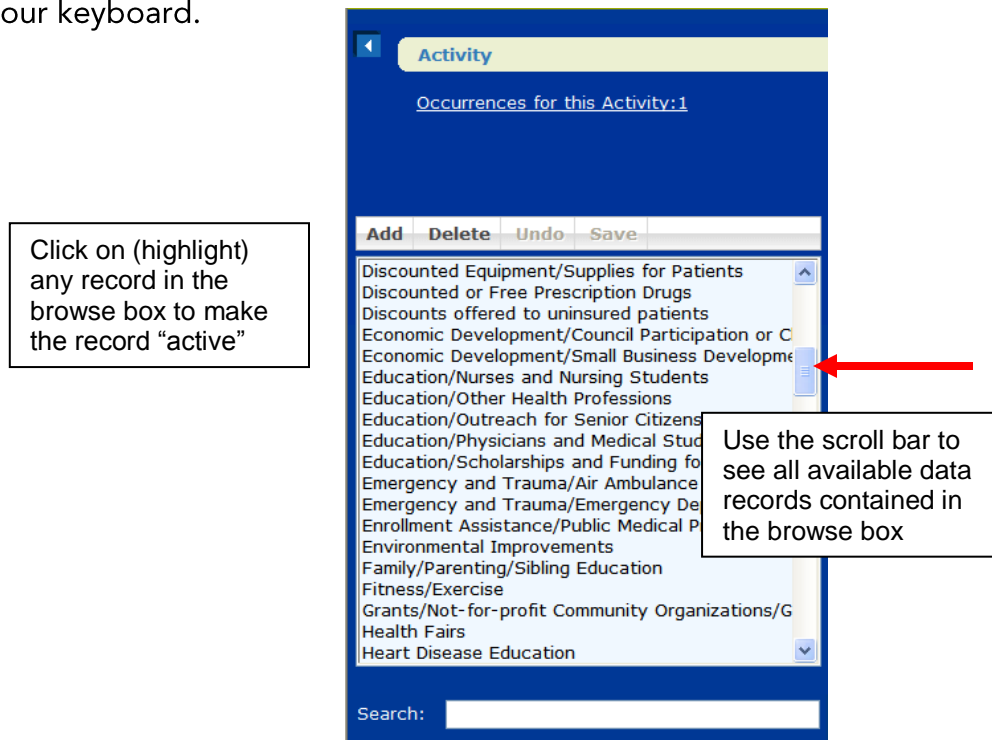
1. Choose **Defaults**
2. While on the Facility page, highlight (or click on) your facility to activate the function buttons
3. Click on **Edit** to open the facility information page



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 “Defaults” and “Log Out”). The topic specific Help page will present in a dialog box. Choose the Red “X” to close the Help window.



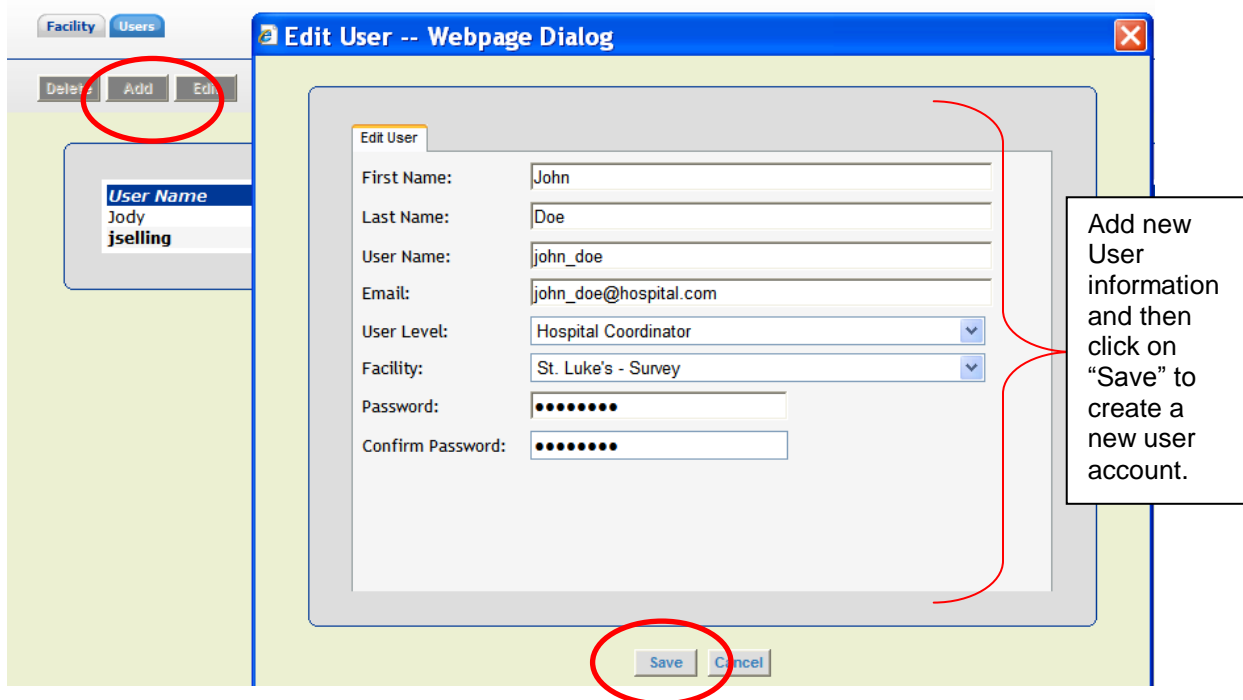
6. **Choosing a Specific Record:** Within the browse window of the control panel, you can choose (or highlight) a specific record by clicking on the record, or by using your Up and Down arrows on your keyboard.



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.

Adding/Editing User Accounts in CBISA Survey™

To add a second Hospital Coordinator (the State Administrator always adds the initial user), click on the function button "Add". To edit an existing Coordinator, highlight the user name first, then click on the function button "Edit". To delete a user, highlight the user name then click on the function button "Delete".



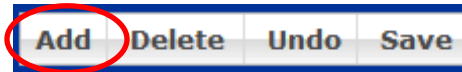
A Note about User Names and Passwords: User Names must be unique throughout an entire organization. User Names can contain up to 50 characters. Acceptable characters include the letters A through Z, numbers 0 through 9, and the character _ (the "underscore").

Passwords do NOT have to be unique; therefore, every user can be created with the same password. That user will then edit their own account and re-assign a password that they will remember and will remain private. Each user, regardless of user permission level, has access to their own user information. Passwords can be between 6 and 15 characters long. Acceptable characters include the letters A through Z, numbers 0 through 9, and the character _ (the "underscore").

Adding Data Records in CBISA Survey™

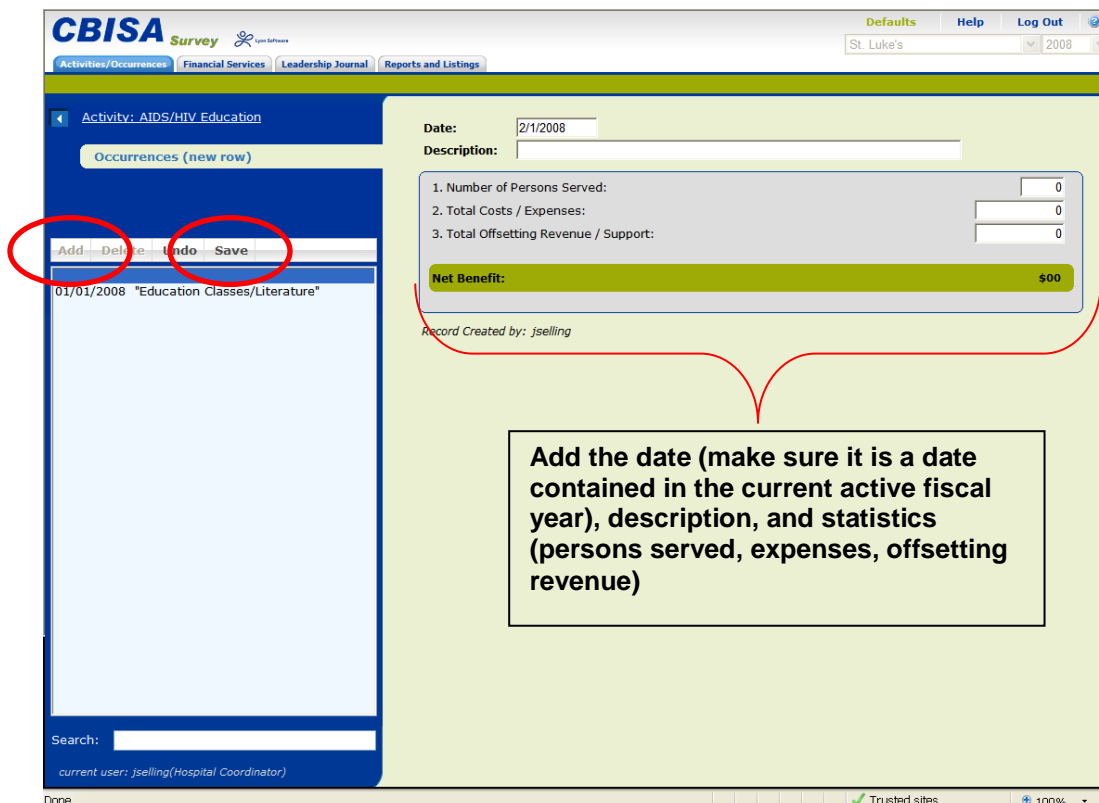
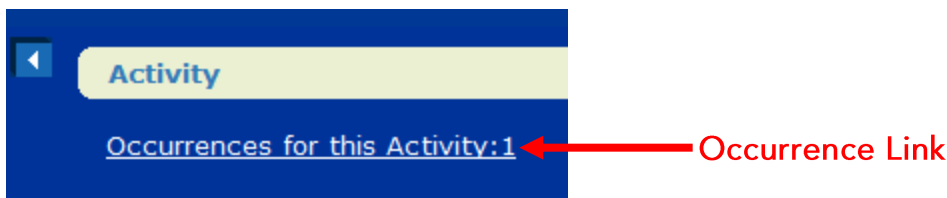
Your CBISA Survey™ program comes pre-loaded with approximately 125 standard Community Benefit activities. Each activity is named and attached to the recommended category. In order to complete the information, simply type in a description and choose whether the program is for those living in poverty or for the broader community. Each pre-loaded record can be edited or deleted.

1. **Adding Activity Records:** 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.

Active Fiscal Year

Financial/Traditional Charity Care

Date: 6/30/2008

Description: Second Quarter Charity Care

Persons Served: 250

Total community benefit expense

1. Estimated cost from cost accounting: 253,714

2. Other revenues: 0

3. Net community benefit expense (line 1 minus line 2): \$253,714

Add the date (make sure it is a date contained in the current active fiscal year), description, and statistics

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.

Leadership Journal Narrative

Date: 12/31/2008

*** Be sure to NOT enter any Protected Health Information (PHI) in this screen -- that includes patient or community member names.**

David Lang, Finance Manager, St. Lukes, nominated Joseph Brown, Staff Nurse for the 2008 Volunteer of the Year Award presented to the employee who has made a significant contribution to the community. Joseph's many activities include: Health Care instructor for local Boy Scout Troop #21, teaching CPR to the scouts and their leaders, acting as Camp Nurse for the Camp Navajo Boy Scout Camp during their annual one week encampment, volunteering as school nurse for the Swanton Public School System along with assisting and organizing fundraisers for the Pediatric Department. David will be the guest of honor at the hospital's Employee Recognition Reception held in June.

Includes a narrative with the data snapshot

Send this Narrative to the State Hospital Association

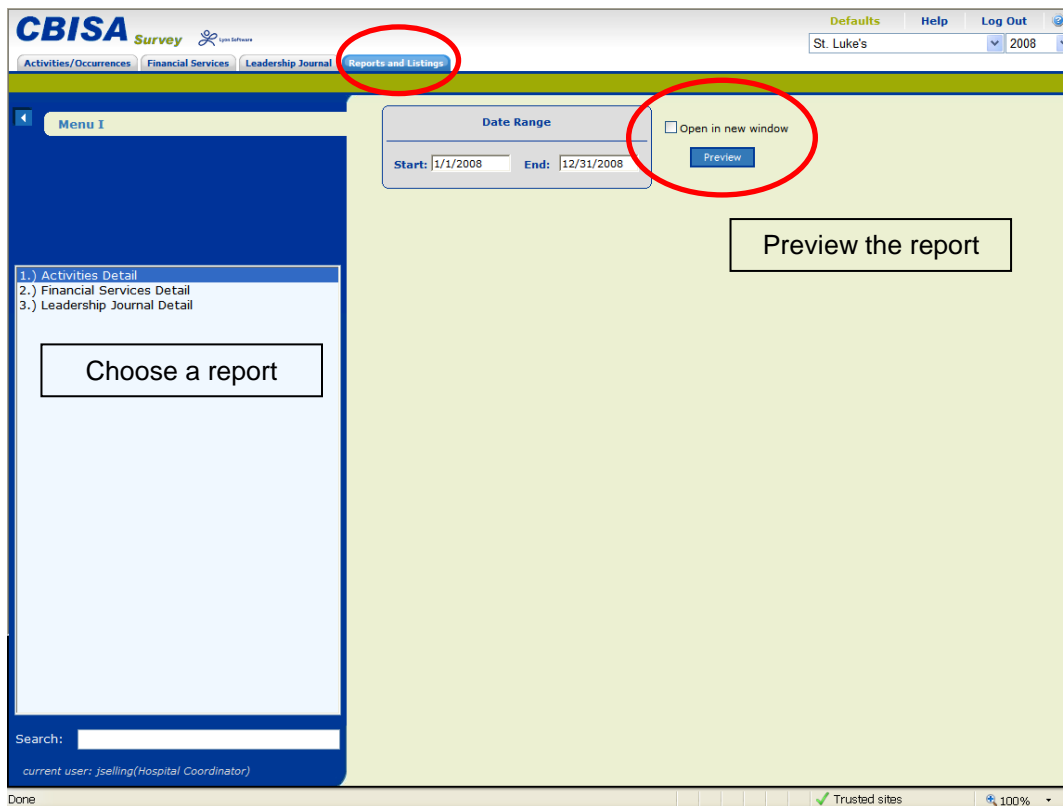
5. **Editing Existing Data Records:** To edit any existing data record, regardless of the module (Activities/Occurrences, Financial Services, Leadership Journal), highlight the record in the browse box, make any necessary changes, then click on the "save" function button in the control panel.

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™

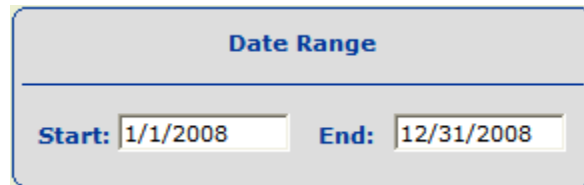
1. **Accessing the Print Reports Module:** Click on the Reports & Listings module tab (fourth tab from the left) to open the Report module.

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.

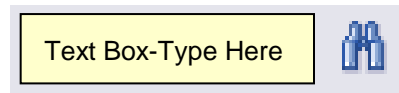


The image shows a dialog box titled "Date Range". It contains two input fields: "Start:" with the value "1/1/2008" and "End:" with the value "12/31/2008".

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.



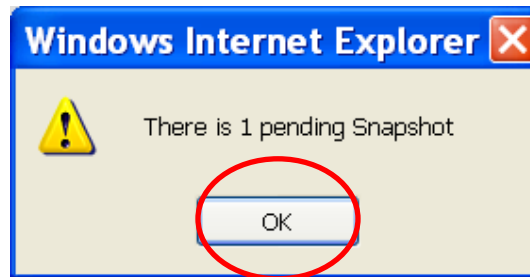
The image shows a text box with the placeholder text "Text Box-Type Here" and a binocular icon to its right.

Accepting a Request for Data Snapshot in CBISA Survey™

In order for your information to be included in CBISA Association Rollup™ reports, the Association must request a “snapshot”, or picture, of your data. The Association generates a request for your data, and when you answer the request, your data is automatically and immediately sent and available to your Association.

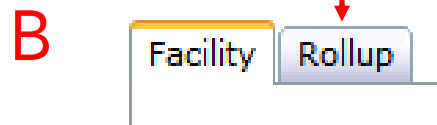
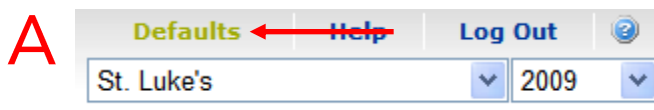
1. **Receiving the Request.** The Hospital Coordinator is the only user permission level that can receive and answer a request for the data snapshot. After the Association generates the request, whenever the Hospital Coordinator logs into CBISA Survey™, they will see the request, or “nag”.

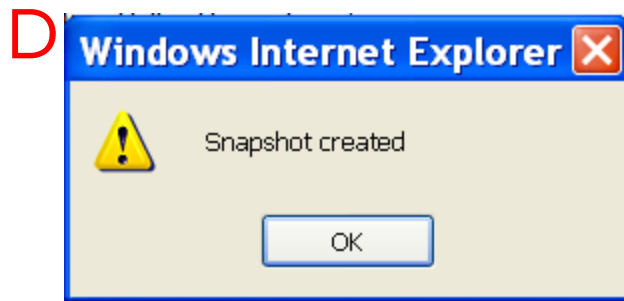
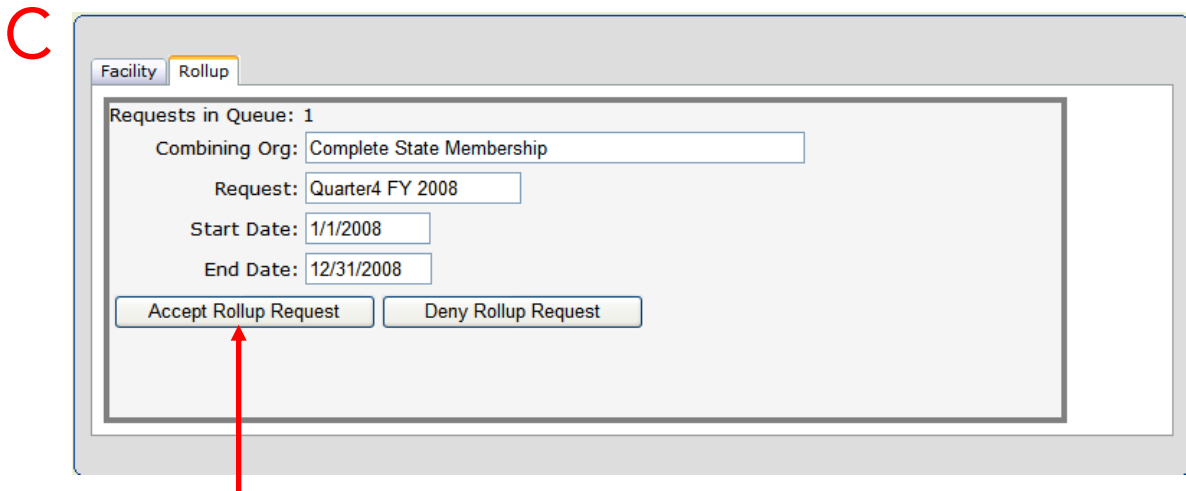
Simply choose “OK” and continue working.



2. **Answering the Request.** When you have completed your data entry and are ready to answer the request for a snapshot (which includes Activities/Occurrences, Financial Service, and tagged Leadership narratives for the requested fiscal time period), follow the steps as outlined below.

- a. Choose Defaults to open up your Facility information screen.
- b. Edit your Facility, and click on the “Rollup” tab.
- c. Click on “Accept Rollup Request”.
- d. Close, and then receive the “Snapshot Created” notification





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).