COUNTY CMIPS II USER REQUEST FORM
ADD/MODIFY USER

USER INFORMATION

Action to be Taken ☐ Add ☐ Modify	User's Name: First Name Last Name ☐ Mr. ☐ Mrs. ☐ Ms.
Effective Date (*MM/DD/YYYY*)	Authorizing Manager's Name First Name Last Name

Authorizing Manager's Signature	Date

PORTAL

User ID	Worker Number	County	Location/District Office
User's Birthdate (MM/DD)	Report Access Level ☐ 0 = State Only ☐ 1 = County-Wide Access ☐ 2 = Limited - Caseload Only		

Assign Access Dates *(MM/DD/YYYY)*: Leave blank if no access is to be given

Web Portal	Start Date:	End Date:
Case Management	Start Date:	End Date:
Report Access	Start Date:	End Date:

Assign Portal Roles and Access Date *(MM/DD/YYYY)*: Leave blank if no access is to be given (Some Portal Roles are not for county use)

Query and Sampling Tool	Start Date:	End Date:
Data Retention	Start Date:	End Date:
Security Administrator	Start Date:	End Date:

CASE MANAGEMENT

Worker Number from Portal	Sensitivity Level (1-5)	Location	Primary Alternate Language
Secondary Alternate Language	Business Phone & Extension	Main Office Phone	
County Email Address		Fax Number	County Cellphone or Pager Number
User Role (See Instructions)		Application	Default Printer

Position

WORK QUEUES - Work Queue Administrator   ☐ Yes   ☐ No

Queue Name	Y/N	Queue Name	Y/N	Queue Name	Y/N
Timehseet Errors		Timesheet Eligibility Errors		Timesheets on Hold	
timesheets Over 70%		Payroll Supervisor		Payroll Pending Approval	
QA		QA Supervisor		Public authority	
ICT Coordinator		Homemaker Supervisor		County Contractor Coordinator	

REPORTING

Security Group	Types Of Reports	Y/N	Types Of Reports	Y/N
CORE	Case Maintenance		Payroll	
	Provider Management		Time and Attendance	
	QA/Fraud		Homemaker Reports	
SYSTEM ADMIN	System Performance		System Security	
	Date Download		Data Retention	
HEALTH BENEFITS MANAGER	Health Benefits Manager			

Security Officer/Administrator Signature	Date

INSTRUCTIONS ON FILLING OUT COUNTY CMIPS II USER REQUEST FORM
Add/Modify User

These instructions are to assist a requesting agency in completing the application. Please be sure to complete the form in its entirety. If you need assistance or have questions, please contact the CDSS CMIPS II Unit at (916) 651-1069.

USER INFORMATION

Action To Be Taken – Check appropriate box.

User's Name – Check appropriate box and then enter first and last name of User.

Effective Date (MM/DD/YYYY) – Enter effective date. Month and day must have two digits,
(e.g. 01/05/2012).

Authorizing Manager's Name – Enter first and last name of Authorizing Manager.

Authorizing Manager's Signature – Enter Authorizing Manager signature.

Date – Enter date Authorizing Manager signed form.

PORTAL

User ID – Enter a unique User ID. Standard format includes: First initial of first name (capital), up to 7 letters of last name (first letter capitalized), and 3-digit number (001-999) Omit hyphens, dashes, and apostrophes.

Worker Number – Enter user's worker number (4 Characters). It is very important for this number to be unique. All users must have one.

County – Make sure the appropriate county name displays.

Location/District Office – Enter a 2-digit number to identify the district office associated with user (only numbers are allowed). Enter 00 if user not associated with a specific district office.

User's Birthdate – Enter User's month and day of birth. (MM/DD)

Report Access Level – Check appropriate box for User's level of access to Report data. (0=State only, 1=User will have county-wide access, 2=User will have access to their caseload only.)

Assign Access Dates (MM/DD/YYYY): Leave blank if no access is to be given – Enter dates for each applicable area. If no specific end date is available, it is recommended that "2099" be used in End Date: fields.

Assign Portal Roles and Access Dates (MM/DD/YYYY): Leave blank if no access is to be given (Some Portal Roles are not for county use) – Enter dates for each applicable area. If no specific end date is available, it is recommended that "2099" be used in End Date: fields.

CASE MANAGEMENT

Worker Number from Portal – Defaults to 99. Enter User's worker number. Must be same worker number from Portal setup. It is very important for this number to be unique. All users must have one.

Sensitivity Level (1-5) – Applies to Case Notes: Values = 1-5 (e.g. level 1 can only view/create a note at a level 1; level 3 can view/create 3, 2, 1, etc.)

Location – Pertains to level of cases User is allowed to access/update (e.g. county vs. district office). Enter appropriate organizational level.

Primary Alternate Language – Optional: Enter primary alternate language to which User is associated. This is used for case assignment purposes.

Secondary Alternate Language – Enter secondary alternate language to which User is associated. This is used for case assignment purposes.

Business Phone No & Extension – Enter business telephone number and extension of User.

Main Office Phone – Enter main office telephone number of User.

County Email Address – Enter county email address of User.
(e.g. for.example@saccounty.gov)

Fax Number – Enter Fax machine telephone number of User.

County Cellphone or Pager Number – Enter county cellphone or pager number of User.

Application – Defaults to "NewWrkrApp." Determines appropriate My Workspace (home page) screen. Options are: DefaultAPP (common to most staff); CTYSYSADMN (County Security Administrators); PAApp (PA staff with PA-specific roles).

Default Printer – Enter User's default CMIPS II Printer. rXXpsY (XX=Co. #, Y=Printer #)

Position – Enter assigned position. (Security Admin: Navigate to appropriate Organizational Unit to locate position).

User Role – Defaults to "NewUserRole" Enter User's role (see listing of user roles). If setting up a new Security Administrator, role selected must be a County Security Admin.

CMIPS II CASE MANAGEMENT USER ROLES

#	User Role	Includes Business Functions
1	ReferralIntake	Create referrals/applications/cases; maintain person information, create person/case notes.
2	CaseManagement	Create referrals/applications/cases; determine program eligibility; conduct needs assessment; conduct reassessment/renew case; perform leave/terminate/deny/withdraw/rescind a termination or denial; generate replacement/supplemental timesheets; perform County Contractor/ Homemaker activities; create person/case notes; generate forms; ability to assign a worker on upon receipt of an ICT case; perform quality assurance activities; perform state hearing activities; view payroll (timesheet, special transaction, overpayment, collection, warrant, payment correction) information; view provider information; create unannounced home visit information.
3	CaseManagement WithApproval	This role offers the same functionality as CaseManagement except this role requires Supervisor Approval.
4	CaseManagement Supervisor	This role offers the same functionality as CaseManagement except this role can also perform Supervisor Approval.
5	Timesheet	Create person/case notes; receive/process timesheet; generate replacement/ supplemental timesheet; view case management information; view provider information; view unannounced home visit information; create payment corrections; view payroll (timesheet, special transaction, overpayment, collection, warrant, payment correction) information.
6	Homemaker	Create and view person/case notes; view case management information; enter/view homemaker timesheets.
7	CDSSView **(CDSS Only)**	This role offers view access to screens including case, payroll (timesheet, warrant, special transaction, overpayment, collection, and payment correction), home visit, case/person notes.
8	CDSSFiscal **(CDSS Only)**	This role offers the same functionality as *CDSSView* except this role can also update rate information (county contractor, public authority, county wage rates).
9	WPCS	View case information; view/modify payroll (timesheet, warrant, special transaction, overpayment, collection, and payment correction); ability to approve special transactions; assign/modify provider information.
10	PublicAuthority	This role offers a limited view of information such as case home, authorization summary, case providers, and payment search.

11	CasemgmtProv Mgmt	This role offers a combination of the *CaseManagement* and *Provider Management* roles.
12	CaseMgmtWith ApprovalProvMgmt	This role offers a combination of the *CaseManagementWithApproval* and *ProviderManagement* roles.
13	CaseMgmtPayroll	This role offers a combination of the *CaseManagement* and *Payroll* roles.
14	CaseMgmtWith ApprovalPayroll	This role offers a combination of the *CaseManagementWithApproval* and *Payroll* roles.
15	CaseMgmtPayroll Approver	This role offers a combination of the C*aseManagement* and *Payroll* roles except this role can also approve payments submitted by other users.
16	CasemgmtWith ApprovalPayroll Approver	This role offers a combination of the *CaseManagementWithApproval* and *Payroll* roles except this role can also approve payments submitted by other users.
17	ProviderMgmt Payroll	This role offers a combination of the *ProviderManagement* and *Payroll* roles.
18	ProviderMgmt PayrollApprover	This role offers the same functionality as *ProviderMgmtPayroll* but this role can also approve payments submitted by other users.
19	CaseMgmtProv MgmtPayroll	This role is a combination of the *CaseManagement*, *ProviderManagement*, and P*ayroll* roles.
20	CaseMgmtWith ApprovalProvMgmt Payroll	This role is a combination of the *CaseManagementWithApproval*, *ProviderManagemen*t, and *Payroll* roles.
21	CaseMgmtProv MgmtPayroll Approver	This role offers the same functionality as *CaseMgmtProvMgmtPayroll* except this role can also approve payments submitted by other users.
22	CaseMgmtwith AprovalProvMgmt PayrollApprover	This role offers the same functionality as *CaseMgmtWith ApprovalProvMgmtPayroll* except this role can also approve payments submitted by other users.
23	CrossCounty Payroll	This role offers the same functionality as *PayrollMgmt* and *ProviderMgmt* role except this role can key a payment on a case after it has transferred to another county. ***Note:*** If a county cannot assign this to a user as their primary role, they can temporarily assign or contact current county to process the action for them.
24	PayrollMgmt	This role offers the same functionality as *Payroll* except this role can also approve payments submitted by other users.

25	ProgramMgmt	This role offers view and modify access to most areas of Case Management. The only exception is that it does not offer "Cross County Payroll" functionality. It is recommended that this role be assigned to a limited amount of users as it is considered to be a "super user" role.
26	ProviderMgmt	Create person/case notes; view case management information; view payroll information (timesheet, warrant, special transaction, overpayment, collection, payment correction); view unannounced home visit information; assign providers; modify all provider information including benefits; generate forms.
27	Payroll	Create person/case notes; view case management information; view/modify payroll information (timesheet, warrant, special transaction, overpayment, collection, payment correction); view unannounced home visit information; view provider information.
28	CDSSModify **(CDSS Only)**	This role offers the same functionality as *CDSSFiscal* except this role can also modify unannounced home visit information, view payment corrections, and process special transactions for missed buyout.
29	CDSSProgram Mgmt (CDSS Only)	This role offers the same functionality as CaseMgmtSupervisor, ProviderMgmt, and CDSSFiscal except this role can also process special transactions for missed buyout.
30	CountyView Only	This role offers view access to case management, payroll, and provider information.
31	PAProviderEnroll (new)	This role offers the same functionality as the *PublicAuthority* role but this role can also enroll providers.
32	PAProviderEnroll Benefits(new)	This role offers the same functionality as the *PublicAuthority* role but this role can also enroll providers and manage provider benefits.
33	PABenefits(new)	This role offers the same functionality as the PublicAuthority role but this role can also enroll providers and manage provider benefits.

	CMIPS II CASE MANAGEMENT SECURITY	
#	**User Role**	**Includes Business Functions**
1	CountySecurity Admin	Add/assign/modify/close user access to Case Management. Note: This user role must be assigned to any user being added as a Security Officer/Administrator in CMIPS II. With this role, the Security Officer/Administrator has the full functionality needed to manage user setup in Case Management.

WORK QUEUES – Work Queue Administrator (Yes/No)

Enter Y if User is a Work Queue Admin. User must also have County Security Admin role. Only CMIPS II Help Desk can assign a user to this. Contact CMIPS II Help Desk; inform them which queues User will administer.

Queue Name – Enter Y for yes or N for no for each applicable Queue Name User will have access to. If no access is to be granted leave blank.

REPORTING

Enter Y next to the security group(s) to which this User needs access. The Security Group is a "folder" and under each folder the listed types of reports are available. A user can be given access to multiple groups. Contact the CMIPS II Help Desk to request that this user be added/modified in the Reporting area.

Security Officer/Administrator Signature – Enter Security Officer/Administrator's Signature.

Date – Enter date Security Officer/Administrator signed form.