



## **Division Guideline #29**

**Date: December 6, 2012**  
**Reviewed April 9, 2014**

**Title: Support Coordination Security and Set Up**

### **Application: DD Regional Offices and Community Providers**

All DD support coordinators (state and non-state) must be recorded in CIMOR HR and assigned to their caseload in Consumer Resources. Each support coordinator must also have a team name assigned in their employment record so that they can be grouped by regional office team and/or county.

#### Adding the Support Coordinator to CIMOR

1. State employees are added to CIMOR HR through an automatic update with SAMII HR. The employment record is automatically added with the employment type and position. The regional office designated HR person adds the team code to the employment record. If there are previous employment records that are no longer valid, these need to be closed by the respective facility.
2. Non-state support coordinators (county or not-for-profit) are added manually to CIMOR HR unless there is already an HR record in CIMOR (former state employee). In the event that a previous HR record exists, a new employment record is added under the applicable organization for the two scenarios listed below. Each support coordinator is to have only one active employment record unless they are actively employed by two agencies at the same time.
  - a. The non-state entity bills through CIMOR and has its own Episode of Care. In this instance, the HR record and/or employment record is added under the non-state entity and the employment record is with that entity only. An appropriate team code is added under the employment record. No employment record is needed under the regional office. Any expired employment records need to have a termination date and a status of "Inactive".
  - b. The SB40 does not use CIMOR for billing: These support coordinators need an employment record under the regional office. The appropriate team code is added under the employment record. If this person already has an HR record (previous regional office employment) then a new employment record is added to the existing HR record. Any expired employment records need to have a termination date and a status of "Inactive". These support coordinators need only security to the regional office they are working on behalf of. This may include multiple regions.
3. Non-state support coordinators need to be classified as a "practitioner" and be a member of the DD Case Manager Practitioner group.
4. Non-state support coordinators are to be entered as a resource on the Staff and Interested Parties page as a "DD Private Service Coordinator". The name of the county can go in the comments field.

## Security Roles for Non-State Support Coordinators

For ALL county and not-for-profit support coordinators:

- Non-state support coordinators need access to the regional office Episode of Care for information and to update demographic data. The security role needed is **DD Private TCM Provider Regional Office User**. The authority included in this role is:
  - Accounts Recv Facility View
  - Assessment Update/View
  - Benefit Eligibility View
  - Authorization View
  - Billing Schedule View
  - Claim View
  - Community Agency View
  - Consumer Banking View All
  - Consumer Group View
  - Consumer Public Health Condition View
  - Consumer Resource Update
  - Consumer Update
  - Consumer View
  - Contact Log View
  - Division MRDD
  - DMH Invoice Organization View
  - Encounter EOC View
  - Encounter My Org View
  - Encounter State Facility View
  - Encounter View
  - Episode of Care View
  - FI Timesheet View
  - HIPS Nursing Review View/Update
  - Human Resource View
  - ISL Budget View
  - Level of Care Determination Update
  - My Organization User
  - Organization Additional View
  - Report View
  - SCL Statement View
  - Screening Update/View
  - Search Master Diagnosis Codes
  - Training
  - DD Waiting List View
  - Waiver Assignment View
  - Waiver Request View

As new duties are defined, more security roles may be added to this list.

For community providers that use CIMOR for their billing system:

- For community providers that also bill through CIMOR, support coordinators will need additional authority under their TCM organization in CIMOR to log services and monitor claims. There are two security roles. The support coordinator may need one or both depending on job duties.

**DD TCM Provider Consumer and Services:**

- Assessment Update
- Benefit Eligibility View
- Claim Update
- Community Agency Update
- Consumer Group Update
- Consumer Public Health Condition Update
- Consumer Resource Update
- Consumer View/Update
- Contact Log Update
- Contract View
- Division MRDD
- Encounter State Facility Update
- Diagnosis Update
- Episode of Care Update
- Encounter EOC Update
- Encounter My Org Update
- Human Resource View
- Insurance Plan View
- Level of Care Determination Update
- Report View
- Screening Update
- Wait List DD View

**DD TCM Provider Financial:**

- Claim Update
- DMH Invoice Organization View
- Human Resource Update
- My Organization User
- Organization Additional View
- Report View
- Training
- Contact Update (request added 5/28/2010)

**Consumer Resource Assignment**

All active consumers must be assigned a support coordinator under Staff and Interested Parties. The support coordinator must have an employment record and team name. Non-state support coordinators are assigned the relationship type "DD Private Service Coordinator". Regional office employees are given the relationship type "DD Service Coordinator".

*This guideline will be reviewed and updated annually, as needed.*