

Dear Agency Director,

WV Bureau of Medical Services (BMS) is announcing the implementation of the new WV Incident Management System (IMS) with a go-live date of Monday, July 2, 2018. The first step will be for you, as the agency director or your designee, to register to use the site at (insert Link). Here is a link (<http://dhhrimportal.wv.gov/Home/Help>) to the IMS user manual for instructions on how to register. You must register by **May 21, 2018** in the new IMS. We request that only the Directors or their designee registers now. Instructions for additional user registration will be forthcoming. Attached is a matrix explaining the four different roles in the new IMS. The director's role is indicated as level "A" and will have access to all available functionality.

Training on how to use the new system is also in the form of instructional videos and can be found on the state's Learning Management System (LMS) (<http://www.onlinelearning.wv.gov/student/home.html>). If you have not already enrolled in this system, instructions are attached.

Minimum browser requirements (obtain from OT)

If you require assistance registering with the LMS for instructional videos or the new WV Incident Management System (IMS), please contact the WV Office of Technology at:

Local to Charleston, WV: (304) 558-9966  
Toll Free: (877)- 558-9966  
E-mail: [ServiceDesk@wv.gov](mailto:ServiceDesk@wv.gov)

## Definitions

**APS or CPS** – Adult Protective Services or Child Protective Services

**Child Agency**- Agency sites/locations that operate under or are associated with the Parent Agency umbrella.

**CRM**- System utilized by state representatives such as BMS or BMS representatives (contractors).

**Completed**- Status of an incident indicating that a user has completed all possible actions on the incident.

**Director** – Provider agency executive director.

**Modification Request** to change information on an incident.

**No Incident Report**- Monthly report submitted by provider agencies when no incidents occurred within the calendar month.

**Operating Agency (OA)**–BMS contracted entity responsible for the monitoring of program incidents.

**IMS Portal** - Web-based system for Home Community Based Services (HCBS) providers to enter incidents.

**Parent Agency** – single umbrella agency or r agency with multiple sites or agency locations. (See Child Agency)

**Person**- Medicaid participant (member).

**Program Type** - HCBS programs (ADW, IDWW, TBIW and PC)

**Role**- The level of access as related to the function and system viewability (How to spell this?) granted to the user.

**User**- Person who accesses the IMS system with a unique user ID, password and is linked to an agency.

## Getting Started

### Agency Portal User Role Definitions:

**Agency Director:** Oversees, monitors and reports on multiple locations and multiple program types.

**Program Administrator/Admin:** Approves and monitors system access for one or more office locations.

**Program Supervisor:** Reports and monitors incidents entered by one or more case managers/service coordinators or nurses.

**Agency User:** Manages cases and enters incidents – only sees cases he or she entered.

Access to the portal is dependent upon your approved role. The higher level of your role, the more you will be able to see and do in the IMS. The Agency Director is in control of who accesses the IMS for the agency and assigns roles to agency staff that are approved to use the IMS. Below is a description of who might use these roles, his/her viewability, access and what he/she can do in the system.

IMS-Portal Role Type	Who is it?	What is the View and Access?	What functions can be performed based on Role Type
Agency Director	Executive Director, Agency director, etc. Or designee appointed by the Agency	<b>Note: Can view all programs provided by the agency:</b> All agency incidents Monthly No Incident Report Manage user page All portal reports All compliance notices Agency menu page	Add staff Approve roles Approve users Enter an incident Enter follow up APS or fraud report <b>APS referral</b> form creation Run agency reports
Program Administrator (Admin)	Director of the program for an agency	<b>Program admin. staff associated with one or more office locations, limited by Program Type (ADW, TBIW, IDDW, PC)</b> Agency incidents Monthly No Incident Report All portal reports All compliance reports Agency menu page	Approve users Enter an incident Enter follow up APS or fraud report <b>APS referral</b> form creation Run agency reports
Agency Supervisor	Typically, a site supervisor or office supervisor, that monitors Case Mangers, RN, Service Coordinators	<b>Only incidents, reports and data - associated with one office location, limited by Program Type (ADW, TBIW, IDDW, PC)</b>	Enters incidents Monitors incident compliance at site/program APS referral form creation
Agency User	Person entering incidents	<b>Only incidents the user entered, limited by Program Type (ADW, TBIW, IDDW, PC)</b> Only follow up related to an incident the user entered. Only compliance prompts related to incident the user entered.	Enter an incident Follow up, <b>APS referral form</b> creation or Medicaid fraud referral form creation,

**CRM Role:** As you work with your program operations managers you will hear the term CRM. CRM is the primary system housing the data you see on the IMS Portal. Only BMS or BMS representatives will have access in the CRM. CRM users will have access to all programs assigned to the representative, all incidents, all follow-up and program participants within all programs assigned to the representative.

**IMPORTANT NOTICE:** The idle timeout on the WV IMS system is 15 minutes. If you have unsaved edits and your login is idle for 15 minutes, you will be logged out and your edits will be lost. If you must leave the session, save your edits before stepping away.

## Portal Access

To access the IMS website, use the following link: <https://dhhrimsportal.wv.gov>

### Register as a New Agency

**Registration for a New Agency:** A new provider agency will contact the Operating Agency (OA) to request registration. The OA for Aged and Disabled Waiver and the State Plan Personal Care (PC) Program is the WV Bureau of Senior Services (BoSS) and the OA for the IDD Waiver and the TBI Waiver is KEPRO. The OA with the respective program type will register the new agency in the IMS CRM.). Please check the IMS Contact Us page for program and technical support.

The Agency Director or any new users cannot register until the new provider agency has been registered in the IMS. Following the registration of the provider agency, the director can begin to register himself/herself in the system. Then, register his/her employees who will access the system. Directions for user registration are below.

### Register as a New User

Select the link: <https://dhhrimsportal.wv.gov>

**Registration of a New User:** The director (or designee) will be responsible for managing and approving new registrations of all users for their respective agency. The director (or their designee) will be responsible for immediately deactivating any user who leaves the provider agency.

1. Upon reaching the portal, you will need to log in. Simply click the **Log in link** on the ribbon at the top of the page.

DHHR BMS IMS Register Log in Contact Us Help

## West Virginia Bureau for Medical Services

### Incident Management System

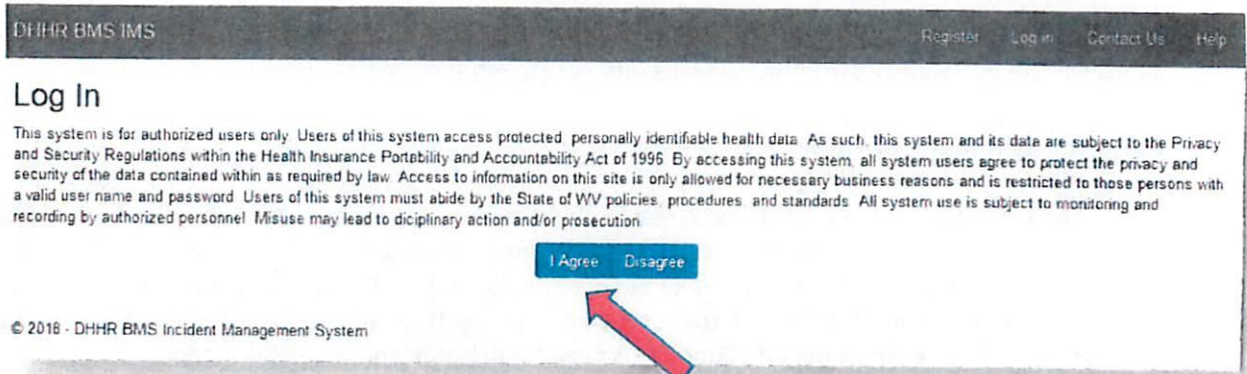
Welcome to the West Virginia Bureau for Medical Services Incident Management System. This system enables authorized users to submit incident reports to the West Virginia Bureau for Medical Services.

This site is not compatible with mobile devices.

The development and implementation of the West Virginia Incident Management System (IMS) is supported by Take Me Home - West Virginia. Take Me Home - West Virginia is a Money Follows the Person Rebalancing Demonstration Grant (WV Department of Health and Human Resources Grant Number 1LICMS330830) from the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services.

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2. After clicking Log in, read the disclaimer, and click I Agree button to continue.



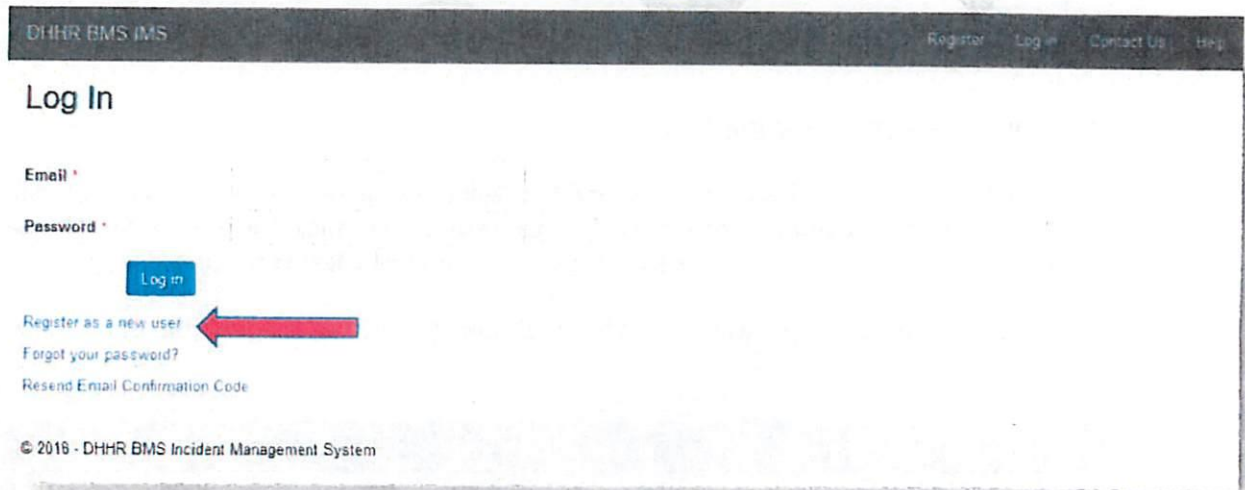
DHHR BMS IMS Register Log in Contact Us Help

## Log In

This system is for authorized users only. Users of this system access protected, personally identifiable health data. As such, this system and its data are subject to the Privacy and Security Regulations within the Health Insurance Portability and Accountability Act of 1996. By accessing this system, all system users agree to protect the privacy and security of the data contained within as required by law. Access to information on this site is only allowed for necessary business reasons and is restricted to those persons with a valid user name and password. Users of this system must abide by the State of WV policies, procedures, and standards. All system use is subject to monitoring and recording by authorized personnel. Misuse may lead to disciplinary action and/or prosecution.

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3. As a new user, you need to create a new account. Click on Register as a new user.



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## Log In

Email \*

Password \*

[Register as a new user](#)

[Forgot your password?](#)

[Resend Email Confirmation Code](#)

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4. Fill out each field, noting that fields with an asterisk (\*) are required. (see password rules below)

5. Select a **Role** by checking the applicable roles in the box. (As defined by [Agency Portal User Role Definitions above](#)) ← Click here to jump to section.  
**Note:** When a role is selected, the Parent and Child Agency fields will appear.
6. Choose the **Parent Agency Name** and **Child Agency**.
7. When finished, click the blue button labeled **Submit**. After registering, you will receive a system generated email asking you to confirm your email address. You must confirm your email for the registration process to proceed. The role completing your approval will receive an email informing of the new registration process. Once approved, you will receive a final email and be able to log in.

The screenshot shows the 'Register' page of the DHHR BMS IMS system. The page includes a header with navigation links (Register, Login, Contact Us, Help) and a main form area. The form contains several input fields: Email, Confirm Email, Password, Confirm password, First Name, Middle Name, and Last Name. Below these fields is a 'Profiles' section with a 'Role' dropdown menu containing three options: Agency Director (unchecked), Program Administrator (unchecked), and Agency Supervisor (checked). Below the role selection are three more dropdown menus for 'Parent Agency', 'Child Agency', and 'Program'. At the bottom of the form is a blue 'Submit' button. Red arrows and numbers are overlaid on the image: #5 points to the Role dropdown, #6 points to the Parent Agency and Child Agency dropdowns, and #7 points to the Submit button.

### Password Rules

Your password must consist of:

- a minimum of six (6) characters
- a capital letter
- a lower-case letter
- a number
- a special character (like % or !)

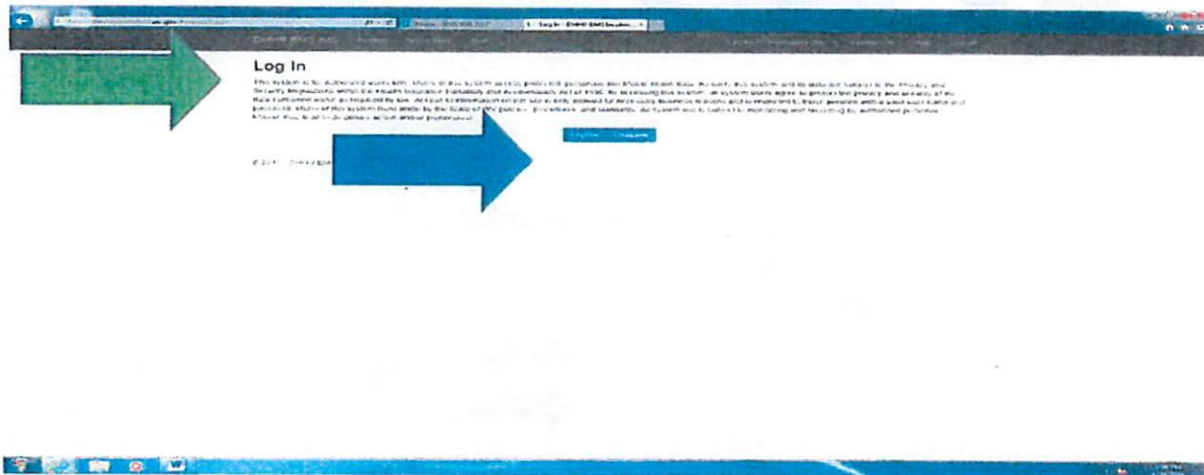
## Password Reset

This page is used to reset a user's password. An email with a link will be sent to the user's email address. The "email" field is formatted to [email@domain.com](mailto:email@domain.com)

## Logging In (Existing User)

Select the link: <https://dhhrmsportal.wv.gov>

1. Click on the system link and you will be promoted to **log in**. Simply click the **Log in** option from the ribbon at the top of the page (green arrow).
2. After clicking **Log in** read the disclaimer, and click **I Agree** to continue (blue arrow).



3. Fill out the **Email** and **Password** fields with the correct information and click **Log in** (orange arrow).
4. **NOTE:** If you have multiple User Profiles you will be directed to select the profile you wish to use by clicking the radio button, this screen will only display if you have more than one user role.