



WV BMS INCIDENT MANAGEMENT SYSTEM (IMS)

Portal User Guide v2.3

Abstract

This guide provides instruction on basic functions of the WV IMS Portal. If you have procedure or regulatory questions, please contact your Program Operations Manager.



About the BMS Incident Management System - Portal

The BMS Incident Management System (IMS) Web Portal is designed for specific Medicaid Home and Community-Based Service (HCBS) providers to submit incident information regarding Medicaid recipients. The system will allow for incident reporting, follow-up, data tracking, and reports. Provider agency directors will be established as a Primary User for the agency and will assign agency staff with user profiles and access. Provider agency director or designee will be responsible for overall agency incident reporting and compliance with Medicaid policy. The Agency Director system role is responsible for also closing out users who are no longer with the provider agency.

The Agency Director will be responsible for reporting "no monthly incidents" when the agency has not reported any incident for the calendar month.

Note: The examples provided in this guide reflect views available to the highest security level in the system. Not all users will see the same screen content as some menu and button options are not available for the system role being used.

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2.3	MB-C	Added section titled "How to switch between multiple profiles"	10/11/18	FINAL

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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 an agency with multiple sites or agency locations. (See Child Agency)

Person- Medicaid participant (member).

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

Role- The level of access as related to the function and system view 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

System 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 system role. The higher level of your system 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 system roles to agency staff that are approved to use the IMS. Below is a description of who might use these system roles, his/her viewability, access and what he/she can do in the system.

IMS-Portal System Role Type	Who is it?	What is the View and Access?	What functions can be performed based on system Role Type
Agency Director	Executive Director, Agency director, etc. Or designee appointed by the Agency	Note: Can view all programs provided by the agency: 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* APS referral form creation* Run agency reports
Program Administrator (Admin)	Director of the program for an agency	Program admin. staff associated with one or more office locations, limited by Program Type (ADW, TBIW, IDDW, PC) 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* APS referral form creation* Run agency reports
Agency Supervisor	Typically, a site supervisor or office supervisor, that monitors Case Mangers, RN, Service Coordinators	Only incidents, reports and data - associated with one office location, limited by Program Type (ADW, TBIW, IDDW, PC)	Enters incidents Monitors incident compliance at site/program APS referral form creation*
Agency User	Person entering incidents	Only incidents the user entered, limited by Program Type (ADW, TBIW, IDDW, PC) Only follow up related to an incident the user entered. Only compliance prompts related to incident the user entered.	Enter an incident Follow up APS referral form creation* Medicaid fraud referral form creation*

* Form creation does not submit the information to the appropriate organization or parties, but serves as a function to simplify completing the form. The information captured in IMS is entered onto the form for you and allows you to type in missing information, print and submit by following current procedures and methods.

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.

Portal Access

To access the IMS website, use the following link: <https://dhhrimportal.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://dhhrimportal.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.

[I Agree](#) [Disagree](#)

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

DHHR BMS IMS [Register](#) [Log in](#) [Contact Us](#) [Help](#)

Log In

Email *

Password *

[Log in](#)

[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 system **Role** by checking the applicable roles in the box. (As defined by [System Role Definitions above](#)) ← Click here to jump to section in an electronic copy of this guide.
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 system 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 has a dark header with the text 'DHHR BMS IMS' and navigation links for 'Register', 'Log in', 'Contact Us', and 'Help'. The main content area is titled 'Register' and contains several input fields: 'Email *', 'Confirm Email *', 'Password *', 'Confirm password *', 'First Name *', 'Middle Name', and 'Last Name *'. Below these fields is a section titled 'Profiles' which includes a 'Role' dropdown menu with three options: 'Agency Director', 'Program Administrator', and 'Agency Supervisor' (which is checked). There are also dropdown menus for 'Parent Agency', 'Child Agency', and 'Program'. At the bottom left of the form is a '+ Add Profile' link and a blue 'Submit' button. Three red arrows with numbers point to specific elements: arrow #5 points to the Role dropdown, arrow #6 points to the Parent Agency and Child Agency dropdowns, and arrow #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

To reset your password:

1. Click **Log in** on the WV IMS ribbon at the top of the screen.
2. Click **I Agree** on the terms of use page.
3. On the Log In screen, click the blue hyperlink **Forgot your password?**
4. Enter the email address used to log in.
5. Click **Email Link**

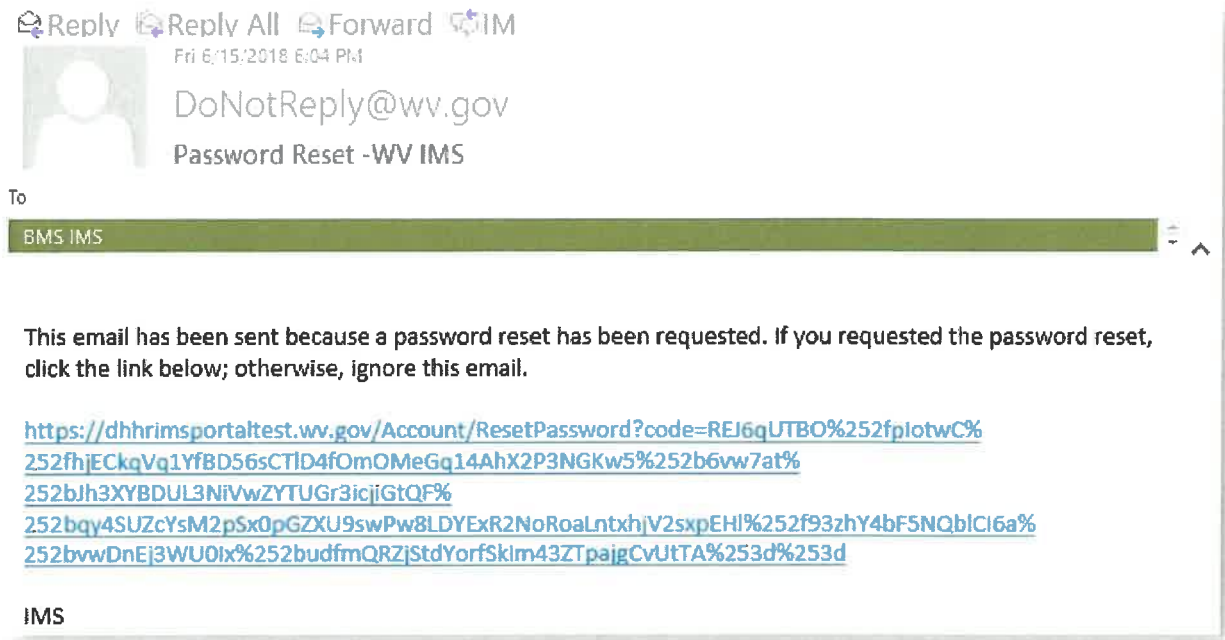
The screenshot shows the 'Password Reset' page in the DHHR BMS IMS system. At the top, there is a dark navigation bar with 'DHHR BMS IMS' on the left and 'Register', 'Log in', 'Contact Us', and 'Help' on the right. Below the navigation bar, the page title 'Password Reset' is displayed, followed by the instruction 'Enter your email'. There is a text input field labeled 'Email' containing the placeholder text 'YourEmail@domain.com'. Below the input field is a blue button labeled 'Email Link', which is circled in red. At the bottom of the page, there is a copyright notice: '© 2018 - DHHR BMS Incident Management System'.

If completed successfully you will receive the following on-screen message:

The screenshot shows the 'Password Reset' page in the DHHR BMS IMS system after a successful password reset. At the top, there is a dark navigation bar with 'DHHR BMS IMS' on the left and 'Register', 'Log in', 'Contact Us', and 'Help' on the right. Below the navigation bar, the page title 'Password Reset' is displayed, followed by the message 'An email with information on resetting your password has been sent.' At the bottom of the page, there is a copyright notice: '© 2018 - DHHR BMS Incident Management System'.

You will receive an email containing a link that will allow you to reset your password.

6. Click the blue hyperlink provided in the email.



7. Complete the empty fields of information. (see Password Rules above)
8. Click **Reset**



If successful, you will receive an on-screen message indicating the password has been reset and providing a blue hyperlink to take you back to the login screen.

Reset password confirmation

Your password has been reset. Please [click here to log in](#)

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If you receive errors, follow the on-screen instructions to correct any errors.

Logging In (Existing User)

1. **Open a browser and type in:** <https://dhhrimportal.wv.gov>
2. **Click Log in**
3. **After clicking Log in, read and understand the Terms of Use**
4. **Click I Agree**

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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5. **Enter your Email and Password**
6. **Click Log in**

DHHR BMS IMS Register Log In Contact Us Help

Log In

Email * YourEmail@domain.com

Password * *****

Log in

[Register as a new user](#)

[Forgot your password?](#)

[Resend Email Confirmation Code](#)

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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 system user profile.

[Requesting additional profiles](#)

An existing user may request additional profiles in order to obtain a new role and/or program. The request will require approval by the agency director or the director's designee. Follow the steps below to request additional profiles.

1. Log into the WVIMS Portal using your existing ID and password. (<https://dhhrimsportal.wv.gov>)
2. In the black menu bar at the top of the screen, click on **your email address** to access options for your user acc

The options for your account will be presented:

- **Change your password** – Clicking this link will present you with a screen requesting your current password, new password and to confirm your password.
- **Change your profile** – Allows you to switch between profiles and perform tasks allowable by the associated roles.
- **Request more profiles** – Gives you the Profile Request form where you will be able to choose role, parent agency, child agency and program for the new/additional profile.

DHHR BMS IMS

Incident

No Incident

Staff

Person

Manage

Change your account settings

[Change your password](#)

[Change your profile](#)

[Request more profiles](#)

© 2018 - DHHR BMS Incident Management System

3. Click the "Request more profiles" link. The "Profile Request" form will be presented.

Profile Request

✕

Role	<input type="checkbox"/> Program Administrator	^
	<input type="checkbox"/> Agency Supervisor	
	<input checked="" type="checkbox"/> Agency User	v
Parent Agency		v
Child Agency		v
Program		v

+ Add Profile

4. Make your profile selections and click **Submit**.

For Director role, BMS will receive an email requesting approval. Someone at BMS will verify and approve the profile. For all other roles approval will come from a designated user within your agency.

How to switch between multiple profiles

When you have multiple profiles, you will be presented with a selection upon each login.

Example:

User Profile Selection

⊕	Roles	Program Administrator	⊖	Roles	Program Administrator
	Parent Agency	WVOT Parent		Parent Agency	WVOT Parent
	Program	ADW-CMA		Program	ADW-PAA
Submit					

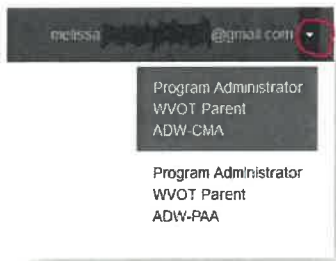
1. Select the profile you wish to first use.
 2. Click **Submit**.
- You will be presented with the **Main Menu**

To switch profiles,

1. Click the down arrow next to your email address, which appears on the menu bar at the top of the screen. A dropdown will appear and present your available profile options.

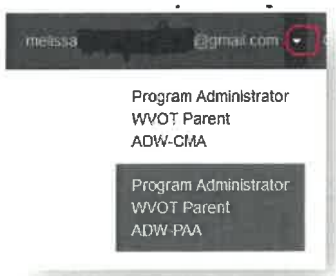
The profile shown with a black background and white text is the current profile. The profile(s) with a white background and black text are your available options.

2. Select the desired profile by clicking the profile name.



To verify which profile is currently selected,

3. Click the down arrow next to your email address again.



Main Menu

The Main Menu is the first screen you will see upon logging in. There are many options for using this portal found on the Main Menu. Each option has a brief description underneath to notify you what it does.

- **DHHR BMS IMS** to the left on the ribbon will take you back to the Main Menu.
- **Incident** allows you to see all incidents for the programs in your login profile for your agency.
- **No Incident** allows the director (or designee) to see all “no incident” reports that have been submitted and provides a link at the top of the list to submit a new “no incident” report.
- **Staff** Provides a list of all staff registered to use IMS for your agency. You can click on the staff members name to see the details of their log in profile.
- By clicking the **User Email** on the ribbon will bring up options to change your password, change your profile and request more profiles.
- By clicking the **down arrow** to the right of the User Email you are presented with a list of profiles you are already registered for and can switch to a new profile without logging out.
- **Contact Us** on the ribbon provides both program and technical support information, which will allow you to contact different people for extra assistance with issues or questions you may have concerning specific areas or concepts.
- **Help** will provide you with Definitions of the screens and instructions for each field.
- **Log-Off** allows you to log off the system.

Note: Your agency computer should be set with a short time per guidelines

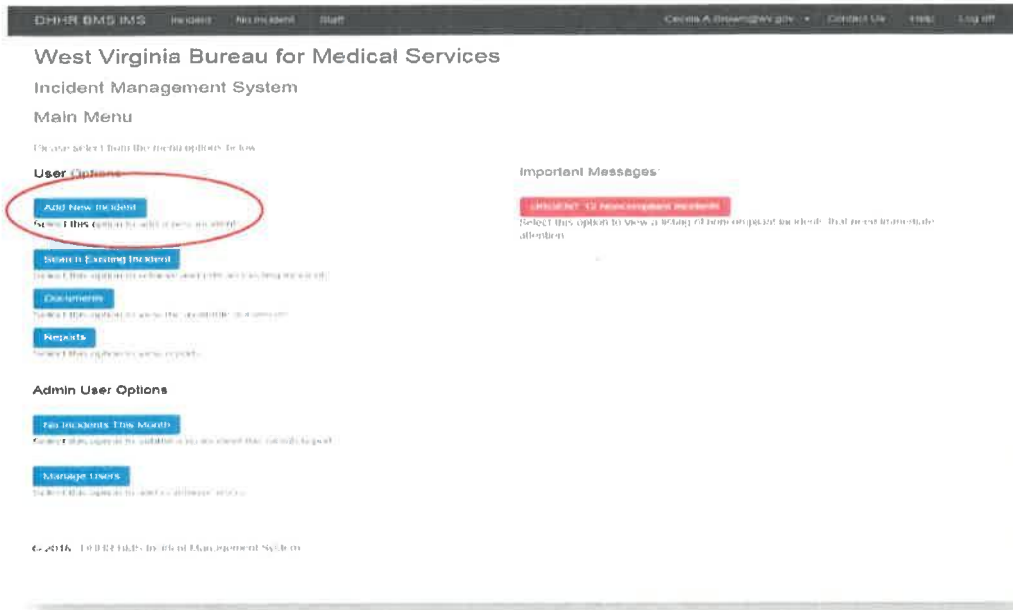
Main Menu options available to all users

These are the options to which all users have access.

- Add a New Incident
- Edit an existing incident
 - Editing and adding follow-up to an unlocked incident
 - Request an incident modification for a locked incident
- Printing incidents and APS referral forms
- Running, exporting and printing reports (based on system user role)

Add New Incident

1. Select **Add New Incident** from the Main Menu. You will then be directed to the **Find Person** page.



2. Input the **Medicaid Number** for the desired person.
3. Input the **Date of Birth** for the desired person.



Note: These numbers must match exact.

4. Click **Search for Person** when the proper information has been entered.

Note: If a person cannot be found, double check the date of birth and the Medicaid number to ensure that you entered it correctly. If the person still is not present in IMS, please contact your program type Operating Agency. For participants who have been on the waiver program for fewer than seven (7) days, the person's information may not have been uploaded into the IMS.

Once the Person is found, the **Incident** page will populate with the **Person** and **Agency** information.

Note: All the required fields are marked with an asterisk (*). Most fields are dropdown lists and many lists are limited based on agency, program type, or system user role.

DHHR BMS IMS Incident No Incident Staff Ceclia A. Brown@wv.gov Contact Us Help Log off

Incident

Create
All information in this section is required before you can save the incident.

Staff Reported	Date Occurred
Person Builder, Bob	Time occurred AM PM
Agency Happy Agency	Time Unknown No
Program	Date Learned
Type	Take Me Home Participant No
Incident Setting	Sub-Type
Description	County of Incident

Staff Reported is the staff member who reported the incident. It may or may not be the user who is entering the incident into the system.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

Legal Representative	Legal Rep Phone
APS/CPS Referral No	Date Sent to APS/CPS
Alleged Perpetrator	Other Entities Involved
Direct Care Staff Involved	
Involved Agencies	
123 Provider A Special Touch In Home Care ABC Provider ABCD Agency ABODE Health Care Services Inc - Alum Creek ABODE Health Care Services Inc - MasterParent ABODE Health Care Services Inc - Winfield Advantage Home Care LLC ADV Agency 1 Agency Test	<input type="button" value=">>"/> <input type="button" value="<<"/>
Other Description	

Other Entities Involved are non-staff who were involved in the incident.

APS (Adult Protective Services or CPS (Child Protective Services) Referral- An incident may be submitted without a name of the perpetrator. Answering yes for an APS or CPS referral will require entry of the date it was referred

Other Description additional information about the incident that doesn't fit in the fields provided under Description.

5. If completed without error, the **Create** button will take the user to an **Incident Success** page.

The **Incident Success** page will show the incident case number and the Medicaid Fraud Form button and the Adult Protective Services form. When you click the Medicaid Fraud form or the APS form, you can download or print the PDF form. At this time, there is not a form for CPS reports.

The screenshot shows a web interface for the Incident Management System. At the top, there is a navigation bar with links for 'Incident', 'No Incident', and 'Staff'. The main content area displays 'Incident Success' and provides the incident ID 'INC-01337-D1D9' and the submission time '6/19/2018 11:50:08 AM'. Below this information, there are four buttons: 'APS Referral Form', 'Medicaid Fraud Form', 'Print Incident', and 'Return'. The footer of the page reads '© 2018 - DHHR BMS Incident Management System'.

Additional post submission options:

- **APS Referral Form** – This form will open as a PDF file and fill in any information that is entered into IMS and provide the opportunity to have the remaining information typed in and the form printed. ***THIS DOES NOT SUBMIT A REPORT TO APS! You must follow the normal procedure as defined.***
- **Medicaid Fraud Form** - This form will open as a PDF file and fill in any information that is entered into IMS and provide the opportunity to have the remaining information typed in and the form printed. ***THIS DOES NOT SUBMIT A REPORT TO Medicaid Fraud Control Unit! You must follow the normal procedure as defined.***
- **Print Incident** – Prints a copy of the incident
- **Return** – Takes you back to the incident form you just submitted and displays the Incident Status.

DHHR BMS IMS Incident No Incident Staff ██████████ Contact Us Help Log off

Incident INC-01337-D1D9

Edit **Incident Status** Unlocked

User Reported

Staff Reported *	Date Occurred	06/18/2018
Person Builder Bob	Time Unknown	Yes ▼

Editing Existing Incidents – Unlocked

West Virginia Bureau for Medical Services
 Incident Management System
 Main Menu

Please select from the menu options below.

User Options:

- [Add New Incident](#)
Select this option to create a new incident.
- [Search Existing Incident](#)
Select this option to retrieve an existing incident.
- [Documents](#)
Select this option to view the available documents.
- [Reports](#)
Select this option to view reports.

Important Messages:

1 INCIDENT 12 Noncompliant Incidents
 Select this option to view a listing of noncompliant incidents that need immediate attention.

1. Select the **Search Existing Incident** link from the Main Menu. You will then be directed to the **Incidents for My Agency** page. This page contains a table with the incident information.

Incidents For My Program

[Create New Incident](#)

Show 10 entries

Title	Person	User Reported	Staff Member Reported	Agency	Program	Incident Type	Incident Date	Created On	Date Learned	Status
INC-01273-X308	Builer, Bob	Brown, Cecilia A	Cecilia Brown	Happy Agency	ADW-PAA	Exploitation	2/2/2018 10:00:00 AM	2/2/2018	2/2/2018	Unlocked
INC-01271-J072	Smith, Jane	Hudson, Arlene Moore	Arlene Hudson	WV01 Parent 1	ADW-PAA	Abuse	11/22/2017	11/27/2017	11/24/2017	Locked
INC-01200-L322	Quinn, Tess	Brown, Cecilia A	Cece Brown	Happy Agency	ADW-PAA	Critical	11/13/2017	11/13/2017	11/13/2017	Locked
INC-01206-Z107	Smith, Jane	McDonough, Teresa M	Teresa McDonough	WV01 Parent 1	ADW-PAA	Neglect	11/9/2017	11/9/2017	11/9/2017	Complete
INC-01288-T1X1	Findor, Stud	Brown, Cecilia A	Cecilia Brown	Happy Agency	ADW-PAA	Exploitation	11/9/2017 2:00:00 PM	11/9/2017	11/9/2017	Locked
INC-01202-V304	Builer, Bob	Brown, Cecilia A	Cecilia Brown	Happy Agency	ADW-PAA	Exploitation	10/16/2017 9:00:00 AM	10/16/2017	10/16/2017	Locked
INC-01261-B7Z2	Drillbit, David	Brown, Cecilia A	Arlene Hudson	Happy Agency	ADW-PAA	Critical	10/2/2016	10/2/2017	10/1/2017	Locked

2. The user has an option to **Create New Incident**, which is located above the table or find an existing incident that needs editing.
3. Click on the blue incident case number underneath the column labeled Title. When the incident is selected, the incident page is loaded. The user then will be allowed to change or update the information on any unlock incidents.

DFHR BMS IMS Incident No Incident Staff Cecilia A.Brown@gov. Contact Us Help Log off

Incident INC 01273-X3QB

Edit Incident Status Unlocked

User Reported	Brown Cecilia A	Date Occurred	07/29/2018
Staff Reported	Cecilia Brown	Time occurred	11:00 AM PM
Person	Builder Bob	Time Unknown	Yes
Agency	Happy Agency	Date Learned	2/2/2018
Program	ADW/PA	Take Me Home Participant	Yes
Type	Exploitation	Sub-Type	Financial
Incident Setting	Home	County of Incident	Marion

Description
 Mr. Builder reported to the RN that Welder Werker, PA had allegedly stolen his debit card. He reported unusual charges for locations out of the county he did not visit. Total of \$300 that member did not authorize. Mr. Builder stated that no one else had been into his home and his card was now missing. He said he kept it in his sock drawer. Reported to APS and the police.

Note: Information that is shaded is not allowed to be changed. (Date Learned)

Incident Modification Request – Edit a Locked Incident

If additional information needs to be added or existing information corrected on a Locked Incident, an **Incident Modification Request must be submitted.**

1. From the “Main Menu”, click the **Search Existing Incident** option
 The “Incidents for My Agency” page will open.
2. Use either the **Search** box, or incident list under the column labeled **Title**. Select the locked incident that needs modification
3. Click on the **Incident Number**.
 The Incident page will open.
4. Scroll down to Incident Modification Request section of the incident page.
5. Select **Create New**

DFHR BMS IMS Incident No Incident Staff melissa.b.carter@gov. Contact Us Help Log off

Incident Modification Requests

[Create New](#)

Show 10 entries Search

Modification Status	Created On
No data available in table	

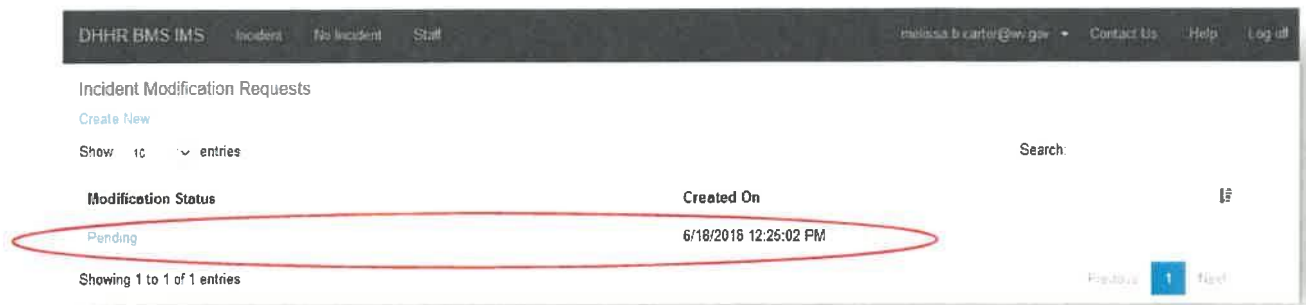
You will be directed to the “Incident Modification Page” in which you will be required to describe the reason for the request.

- Once documented, click the **Create** button.
 The “Incident Modification Request Success” page will display.



NOTE: After 5 seconds your screen will be redirected to the incident

Modification Status will show as **Pending** after the request is successful submitted. Incident status will change to approved, when the Request has been reviewed and unlocked by the program type OA.



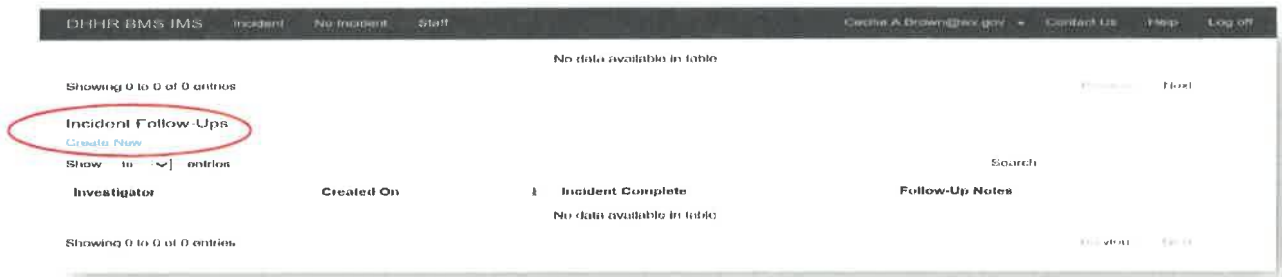
The user who submitted the **Incident Modification Request** will receive an email when the incident has been unlocked. The email informs that the incident is unlocked and provides a link to the IMS website so the user can log in and modify the report.

IMPORTANT: The incident will re-lock again after one business day (24 hours from the date & time unlocked) or when the incident is saved after being modified.

Incident Follow-Up (Unlocked Incidents)

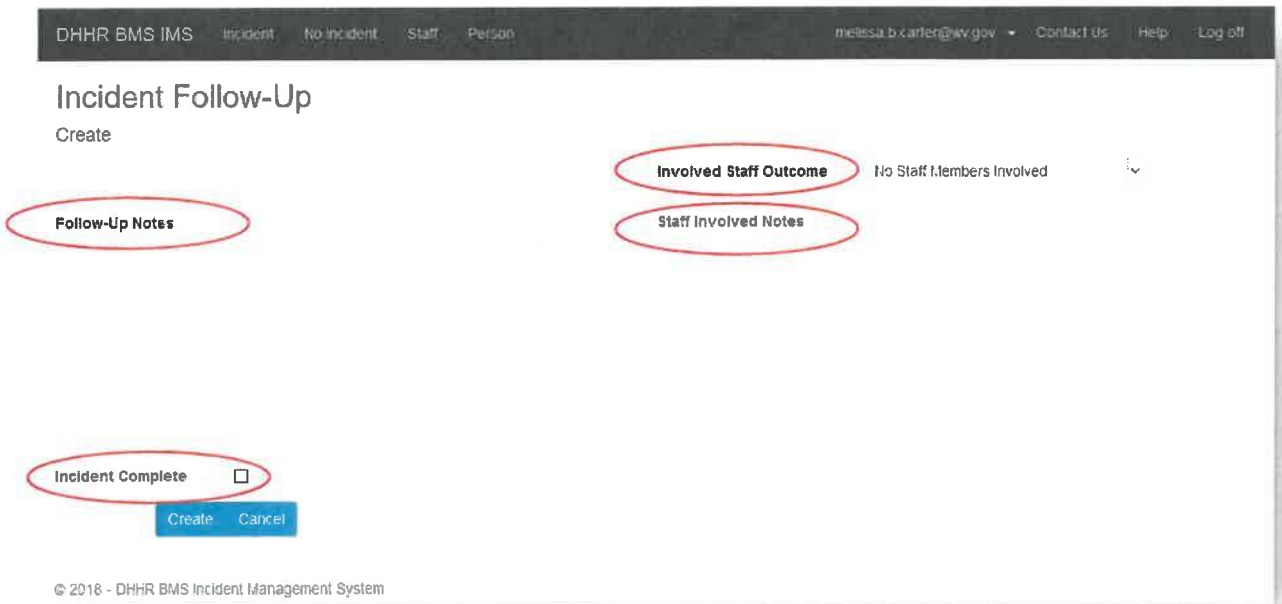
Follow-ups can be completed on unlocked incidents only. The **Create Follow up** option will not appear if the incident is locked or completed, nor can follow-ups be created for Simple type incidents.

1. Search and open an incident.
2. Scroll down the incident screen to the **Incident Follow-Ups** section.
3. Select **Create New**.



You will be directed to the Incident Follow up page

4. Enter information in the **Follow-up Notes**, **Staff Involved Notes** and **Involved Staff Outcomes** (if applicable.)



5. After information is entered, select the **Incident Complete** checkbox.
6. Click the blue **Create** button, you will be directed to the Incident Follow –Up Success Page

NOTE: After 5 seconds your screen will be redirected to the incident



How to Access Printable Forms

1. Access your “Incidents for My Agency” page, select the Incident to be printed by clicking the incident number.
2. Scroll down to the bottom of the screen and click the blue button **Print Forms**



3. You will be directed to the **Incident Success Page** where you will select the option that corresponds with your printing needs.

Printing Options include:

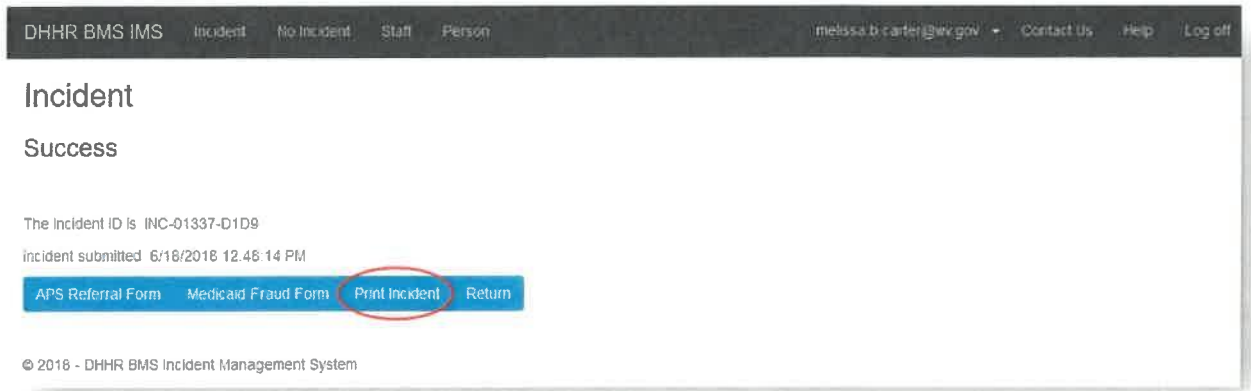
- APS Referral Form
- Medicaid Fraud Form
- Printable Incident Form

The Return button will direct you back to the Incident.

Note: Please note, the page may look different, depending upon the operating/printing system, follow your printer system steps to print the needed document.

Printing an Incident

1. From the **Incident Success Page**, click the **Print Incident** button.
2. You will then be prompted to either **Open**, **Save**, or **Cancel**. Click **Open**. A PDF form will then open.
3. From here, you can view, save, print, and e-mail the Incident report.



Printing a Medicaid Fraud Referral or Adult Protective Services Form

1. From the **Incident Success Page**, click the **Medicaid Fraud Form** or the **APS Referral Form** button.
2. You will then be prompted to either **Open**, **Save**, or **Cancel**. Click **Open**. A PDF form will then open, auto filled with the information that was entered into the IMS system.
3. Additional information may be typed on the form.
4. From here, you can view, save, print, and e-mail the Referral Forms.

Note: If you choose not to save the form, you can always bring it back up by repeating steps 1 and 2 on this page. However, your original changes to the form will not be saved. If you require an electronic copy of the completed form choose "Save As" and save a copy to your machine.

Documents

1. From the Main Menu Page, (Screen Shot here), selected the Blue Documents button

The screenshot shows the main menu of the Incident Management System. At the top, there is a navigation bar with 'DHHR BMS IMS' and user information. Below this, the page title is 'West Virginia Bureau for Medical Services Incident Management System'. The 'Main Menu' section contains several options: 'Add New Incident', 'Search Existing Incident', 'Documents' (circled in red), and 'Reports'. To the right, there are 'Important Messages' including 'URGENT 73 Noncompliant Incidents' and 'WARNING 2 Week Noncompliant Incidents'. At the bottom, there is an 'Admin User Options' section with 'No Incidents This Month'.

2. You will be directed to the **Documents** page
3. The **Documents** page shows the different documents available for printing or viewing, which include blank forms and guides for the portal.

The available documents include:

- Blank forms for
 - Abuse, Neglect & Financial Exploitation Referral
 - APS Mandatory Reporting
 - Medicaid Fraud Referral
- Manuals
 - WV IMS Portal User Guide

How to Change the Person's Address

Changes in the person's address originate with CareConnection®. If it has been identified that a person's address is incorrect, please contact the Case Manager, Resource Consultant, Service Coordinator, or PC RN to update the person's address in the CareConnection® system. Please note that the person's address may be sourced from outside DHHR and an update could be pending.

Reports

The system has seven (7) available reports. Viewing of reports is based on the user's system role and access. An **Agency User** may not see all reports but an **Agency Director** will see all reports. Each report has a different function and yields different data results for monitoring of your agency's incident management system compliance.

Reports include:

- Non-Compliant Incident Report
- Near Non-Compliant Incident Report
- Compliance Follow-up Report
- User Access Report
- APS-CPS Referral Report
- Agency Non-Compliant Report
- Incidents by Agency Report

Note: Report availability is based on user profile. You may only see some of these reports.

To run/view a report

1. Click on the report name. This will open the selection criteria specific for that report.
2. Choose the dates by clicking on the calendar picker icon beside the date field (for those with a date range) or by typing in a date (M/D/YYYY).
3. Make selections from the dropdowns available (Agency, incident types and program types, e).
4. Then, click on "**View Report**" to the top right of the screen. The report will appear.

Report Types (Definition and Screen Shot)

Noncompliant Incident Report: Incidents that are considered noncompliant with Medicaid policy. Incidents submitted in the IMS beyond the one business day policy requirement for incident reporting.

Non-Compliant Incident Report

Start Date: 2/1/2017 End Date: 9/1/2017
 Agency: Happy Agency Program Type: ADW-FAA
 Incident Type: ... Incident Number Range: ...
 Member Agency Contains: ... MISL

Noncompliant Incident Report
Noncompliant Incident Listing For 2/1/2017 to 9/1/2017
 Date Learned > 1 Business Day from Date Submitted

Run Time: 9/11/2017 10:42 AM
 User: Cecilia Brown

# of Business Days	Incident Number	Person Name	Agency	Program Type	Incident Date	Date Learned	Date Submitted	Incident Type
Total Incidents That Meet Selected Criteria: 0								
Total Non-Compliant Incidents: 0								
Total Compliant Incidents: 1								
Total Incidents: 1								
Programs Selected: ADW-FAA								
Agencies Selected: Happy Agency								

Near Noncompliant Incident Report: This report allows an agency to review all incidents that are 9 to 14 days from the date the agency learned of the incident (follow-up is due within 14 days). This is one of the most important reports for an agency to run, as it helps monitor incident compliance.

Near Non-Compliant Incident Report

Start Date: 3/1/2017 End Date: 7/1/2017
 Agency: All Agencies Program Type: All Programs

Near Noncompliant Incident Report
Near Noncompliant Incident Listing For 3/1/2017 to 7/1/2017
 9-14 Days From Date Learned with No Follow-up

Run Time: 9/11/2017 10:42 AM
 User: Cecilia Brown

# of Business Days	Incident Number	Person Name	Agency Name	Program Name	Incident Date	Date Learned	Date Reported
Total Incidents That Meet Selected Criteria: 0							
Total Near Non-Compliant Incidents: 0							
Total Incidents: 0							
Programs Selected: All Programs							
Agencies Selected: All Agencies							

WARNING: This document may contain U.S. Government information and/or personally identifiable information (PII) and is restricted to authorized official use only. All system users, whether DHHR employees or contractors, are expected to be aware of and abide by all applicable federal and state laws, as well as Executive Branch and DHHR policies, procedures, and guidelines relating to the use and release of U.S. Government information and PII. Any misuse or unauthorized disclosure may result in both civil and criminal penalties.

Compliance Follow-Up Report: An agency will enter a range of dates (from and to) for the report, choose all or only select incident types and program types. The report will show a list of incidents and the total number of incidents that were out of compliance for the 14-day incident follow-up. This report is another critical report to monitor incident compliance.

DHHR BMS IMS Incident No Incident Staff Cecilia A. Brown@wv.gov Contact Us Help Log off

Compliance Follow-up Report

Start Date: 5/1/2017 End Date: 9/17/2017 View Report
 Agency: Happy Agency Program Type: ADW-PAA
 Incident Type: Abuse Critical Exploitation Neglect

Compliance Follow-Up 14 Day

Compliance Follow-Up Not Created within 14 Days of Date Learned

Run Time: 9/11/2017 10:40 AM
 User: Cecilia Brown

# of Days	Follow-up Exists	Incident Number	Person Name	Agency Name	Program Name	Incident Type	Incident Date	Date Learned	Date Reported
Total Incidents That Meet Selected Criteria: 0									
Total Incidents Not Followed-up Within 14 Days: 0									
Total Incidents: 1									
Programs Selected: ADW-PAA									
Agencies Selected: Happy Agency									
Incident Types: Abuse Critical Exploitation Neglect									

WARNING! This document may contain U.S. Government information and or personally identifiable information (PII), and is restricted for authorized official use only. All system users, whether DHHR employees or contractors, are expected to be aware of and abide by all applicable federal and state laws, as well as Executive Branch and DHHR policies, procedures, and guidelines related to the use and release of U.S. Government information and PII.

Agency Noncompliant Report: This report shows if the agency did not submit any incidents for the month and had not submitted a Monthly No Incident Report. This allows the director to monitor across agency sites and programs to ensure either incidents were entered or Monthly No Incident Report was entered.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

Agency Non-Compliant Report

Month: May Year: 2018 View Report
 Agency: Happy Agency, WVOT Child Agency Program Type: ADW-CHA, ADW-PAA, IDDW, IDDW-SC

Agency Non-Compliant Report

Agency Listing for May 2018

No Incidents and Missing No-Incident record

Run Time: 6/18/2018 2:35 PM
 User: Carter, Melissa

Agency: Program Name:

Total Non-Compliant Agencies That Meet Selected Criteria: 0

Total Non-Compliant Agencies: 0

Programs Selected: ADW-CHA, ADW-PAA, IDDW, IDDW-SC, Personal Care (PCS), TBW-CM

Agencies Selected: Happy Agency, WVOT Child Agency, WVOT Parent 1

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User Access Report: This report allows the agency to monitor system users by month/year and logged-in status.

DHHR BMS IMS incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

User Access Report

Month: Year: [View Report](#)

Logged In Status: Agency: Program Type:

1 of 27 | Next

User Access Report

User Access Listing for July 2018 Run Time: 6/18/2018 2:37 PM
User: Carter, Melissa

User Name	Last System Access Date	Parent Agency	Child Agency	Program Name
arlene.m.hudson@wv.gov	No Login	WVOT Parent		ADW-CMA
arlene.m.hudson@wv.gov	No Login	WVOT Parent		ADW-PAA
arlene.m.hudson@wv.gov	No Login	WVOT Parent		IDDW
arlene.m.hudson@wv.gov	No Login	WVOT Parent 1		ADW-PAA
armohu@aol.com	No Login	WVOT Parent 1	WVOT Child Agency	ADW-CMA
Barbara.Q.Recknagel@wv.gov	No Login	WVOT Parent 1		IDDW
BarbR103@aol.com	No Login	WVOT Parent 1	WVOT Child Agency	TBIW-CM

APS-CPS Referral Report: This report shows the incident date learned, date reported in the IMS, and the date referred to APS or CPS. This allows the agency to monitor compliance with protective service reporting, within program policy and WV state code. (Report to WV Centralized Intake immediately and paper copy within 48 hours to applicable county DHHR office as per WV State Code).

DHHR BMS IMS incident No Incident Staff Melissa.A.Brown@wv.gov Contact Us Help Log off

APS-CPS Referral Report

Agency: Program Type:

APS/CPS Noncompliance

Run Time: 7/20/17 11:18 AM
User: Corbin Brown

Incident Date	Agency Learned Date	Date Reported	Date Diff	Incident ID	APS/CPS Referral Date	Member Name	Agency	Program	Incident Type
2/1/2017	2/6/2017	2/15/2017	4	96-01213-0008	02/10/2017	Elise Jenity	WVOT Parent	ADW-CMA	Neglect
2/14/2017	2/23/2017	2/27/2017	4	96-01220-0209	02/27/2017	Elough Jerriss	WVOT Parent	ADW-CMA	Exploitation
2/21/2017	2/24/2017	2/27/2017	3	96-01220-0801	02/27/2017	Glenn Toss	WVOT Parent	ADW-PAA	Abuse
2/21/2017	2/24/2017	2/27/2017	15	96-01224-1119	No Date Entered	Glenn Toss	WVOT Parent	ADW-PAA	Neglect
3/3/2017	3/15/2017	3/18/2017	3	96-01220-0801	03/13/2017	Glenn Toss	WVOT Parent	ADW-PAA	Neglect

Total Non-Compliant Incidents That Meet Selected Criteria: 5
Total Compliant: 0
Total Non-Compliance: 5

Incidents by Agency Report: This report allows the agency to see the incidents reported by a specific agency or all agencies (Parent & Child agencies). Also, the agency can run a specific incident type report by choosing types for one or all agencies (example: Critical incidents from March 1, 2017, to June 30, 2017, for Happy Agency, the Case Management Agency).

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

Incidents by Agency Report

Start Date: 2/2/2017 End Date: 2/7/2017 View Report

Agency: All Agencies Program Type: All Programs Incident Type: All Incident Types Incident Sub-Type: All Incident Sub-Types

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Incidents by Agency Report

Incident Listing for 2/2/2017 to 7/7/2017 Run Time: 7/7/2017 11:18 AM User: Cecilia Brown

Incident Number	Agency Name	Program Name	Member Name	Incident Date	Date Learned	Date Reported	Incident Type	Incident Sub-Type
INC-01211-8782	WVOT Parent 1	ADW-FAA	O'ough, James	2/6/2017	2/19/2017	2/19/2017	Critical	Accident/Injury, Requiring First Aid
INC-01212-8201	WVOT Parent 1	ADW-FAA	Quinn, Tess	2/19/2017	2/19/2017	2/19/2017	Abuse	Physical
INC-01217-8281	Happy Agency	ADW-CMA	Quinn, Tess	2/24/2017	2/27/2017	2/27/2017	Abuse	Emotional
INC-01218-8777	Happy Agency	ADW-CMA	Quinn, Tess	2/24/2017	2/27/2017	2/27/2017	Abuse	Emotional
INC-01220-8229	WVOT Parent 1	ADW-CMA	O'ough, James	2/14/2017	2/27/2017	2/27/2017	Exploitation	Financial
INC-01221-8788	Happy Agency	ADW-FAA	Smith, Jane	2/27/2017	2/27/2017	2/27/2017	Critical	Other
INC-01222-8281	WVOT Parent 1	ADW-FAA	Quinn, Tess	2/21/2017	2/24/2017	2/27/2017	Abuse	Physical

Exporting and Printing a Report

To export a file (report), click on the **Save** button at the top of the report, a drop down menu will appear with seven (7) options, select the option the correspond with your needs and system (computer) function and the report will be imported into the selected export options/programs.

Print: Click on the printer icon to the right of the Save file icon above.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@wv.gov Contact Us Help Log off

Compliance Followup Report

Start Date: 1/1/2017 End Date: 1/1/2017 View Report

Agency: All Agencies Program Type: All Programs Incident Type: All Incident Types Incident Sub-Type: All Incident Sub-Types

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Compliance Follow-Up 14 Day

Compliance Follow-Up Not Created within 14 Days of Date Learned Run Time: 7/7/2017 11:23 AM User: Cecilia Brown

# of Days	Follow-up Expiry	Incident Number	Person Name	Agency Name	Program Name	Incident Type	Incident Date	Date Learned	Date Reported
123	N/A	INC-01228-8288	Quinn, Tess	WVOT Parent 1	ADW-PAA	Exploitation	3/5/2017	3/5/2017	3/5/2017
74	N/A	INC-01238-8284	Parks, Alex	WVOT Parent 1	ADW-PAA	Bergle	4/21/2017	4/24/2017	4/24/2017
74	N/A	INC-01238-8770	Carlinville, Craig	WVOT Parent 1	ADW-PAA	Sergio	4/20/2017	4/24/2017	4/24/2017
74	N/A	INC-01245-8828	Fischer, Brad	WVOT Parent 1	ADW-PAA	Exploitation	4/21/2017	4/24/2017	4/24/2017

Total Incidents That Meet Selected Criteria: 4
 Total Incidents Not Followed-up Within 14 Days: 4
 Total Incidents: 8
 Programs Selected: All Programs

Example of a Report that was imported into Excel.

3 - Compliance Followup 14 Calendar Days (Read-Only) - Excel

Run Time 7/7/2017 11:23 AM

User Cecelia Brown

Compliance Follow-Up 14 Day

Compliance Follow-Up Not Created within 14 Days of Date Learned

# of Days	Follow-up Exists	Incident Number	Person Name	Agency Name	Program Name	Incident Type	Incident Date	Date Learned	Date Reported
123	No	INC-01228-162M8	Quinn Tess	WVOT Parent 1	ADW-PAA	Expiration	3/6/2017	3/6/2017	3/6/2017
74	No	INC-01235-N5G28	Parks Alice	WVOT Parent 1	ADW-PAA	Simple	4/21/2017	4/24/2017	4/24/2017
74	No	INC-01238-86Y0	Contractor Craig	WVOT Parent 1	ADW-PAA	Simple	4/20/2017	4/24/2017	4/24/2017
74	No	INC-01245-89G38	Kinder Stud	WVOT Parent 1	ADW-PAA	Expiration	4/21/2017	4/24/2017	4/24/2017

Total Incidents That Meet Selected Criteria: 4

Important Messages

The Main Menu will display different types of **Important Messages** that need to be addressed. There is a color code for the messages:

- **Red messages** are urgent, and need to be handled promptly.
- **Orange messages** are not urgent, but will need attention.
- **Blue messages** (not shown) are incidents that the user requested to be unlocked, approved, and need resubmitted.



Director User Options

The Director role has several responsibilities that others do not have, such as the “No Monthly Incidents” report.

No Monthly Incidents

IMPORTANT NOTE: To maintain incident reporting compliance, Medicaid policy requires the agency to enter “No Monthly Incidents” for every month that your agency does not enter an incident in the IMS. If multiple programs have no incidents, each must have a separate report submitted.

1. From the Main Menu, click on **No Incidents This Month**.



2. Click the **Create No Incident Record** link to create a new **No Incident Report**.

Note: No Incidents are sorted by the agency name, then by the year and month to show the most recent No Monthly Incidents.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

No Incidents

Create No Incident Record

Show 11 entries

Agency	Program	Year	Month	User
Happy Agency		2017	August	Bradshaw-Carter, Melissa
Happy Agency		2017	July	Recknagel, Barbara Q
Happy Agency		2017	June	Brown, Cecilia A
Happy Agency	Personal Care (PCS) dhhrmspmo@wv.gov	2017	April	Bradshaw-Carter, Melissa
Happy Agency	TBIW-CM dhhrmspmo@wv.gov	2017	April	Bradshaw-Carter, Melissa
Happy Agency	ADW-CMA dhhrmspmo@wv.gov	2017	April	Bradshaw-Carter, Melissa

3. Select the name of the agency, the month the agency had no incidents, year and program. Then, click **Save**.

DHHR BMS IMS Incident No Incident Staff melissa.b.carter@wv.gov Contact Us Help Log off

No Incident

Agency * Happy Agency Program * Personal Care (PCS) dhhrmspmo@wv.gov

Month * July Year * 2018

Save No Incident List

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The incident report is submitted for the month. Incidents reports for the prior month must be submitted the first of the following month.

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No Incident

Success

You will be redirected to the no incident list in 1 seconds

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Manage Users

Note: This function and screen will be available based on system user role. Not all users will have access to this function.

1. From the Main Menu Page, select **Manage Users**.

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No Incidents This Month
Select this option to submit a no incident this month report

Manage Users
Select this option to add or remove users

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2. A page with the list of current users will then generate.
3. To access the desired record, locate the desired user and **click on the e-mail address** to open the **Details** for the user.

DHHR BMS IMS Incident No Incident Staff Cecelia A. Brown@wv.gov Contact Us Help Log off

Manage Users

Show 10 of 10 entries

Email	Full Name	Approved	Approved Viewable Profiles
af041851z@gmail.com	Tinker Bell	No	0/1
am.hudson72@yahoo.com	Arlene Hudson	No	0/1
arlene.m.hudson@wv.gov	Arlene Hudson	Yes	3/3
armohu1872@gmail.com	Arlene Hudson	No	0/1
brocknagol@kapro.com	Barbara Rocknagol	Yes	5/6
Cecelia.A.Brown@wv.gov	Cecelia Ann Brown	Yes	3/3
Heather.D.Smith@wv.gov	Heather Smith	Yes	1/1
leaver.M.Miller@wv.gov	leaver Michael Miller	Yes	1/1
jack.turner@wv.gov	Jack Turner	No	0/1
james.j.terris@wv.gov	James Terris	Yes	1/1

Showing 1 to 10 of 10 entries

Previous 1 2 3 Next

4. Click **Edit**, to edit user information.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@gwy.gov Contact Us Help Log off

Details

User

Email	a041051z@gmail.com
Approved	No
Confirmed Email	Yes
Full Name	Holl Tinker
Related Staff Name	

Profiles

Parent Agency	ABCD Agency
Roles	Agency Director
Approved	No

[Edit](#) [Manage Users](#)

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Note: Shaded fields are "Read Only" and cannot be changed.

DHHR BMS IMS Incident No Incident Staff Cecilia.A.Brown@gwy.gov Contact Us Help Log off

Edit

User

Email	a041051z@gmail.com
First Name	Tinker
Middle Name	
Last Name	Holl
Approved	<input type="checkbox"/>

Profiles

Parent Agency	ABCD Agency
Roles	Agency Director
Approve	<input type="checkbox"/>

[Submit](#)

- System roles are changed by adding or removing the checkmark in the **Approve** checkbox. Once finished, click **Submit** to save changes. **Note:** If all profile boxes are unchecked, the user's profile will be considered unapproved and will deny them access to the system.
- Upon saving, you will be redirected to the **Details** page. Click the **Manage Users** button to return to the list of users.
- Note:** Different users will have different visible profiles displayed depending entirely on the system roles that they have been approved for. Example: the person could be approved as a Program Administrator and an Agency Supervisor.

Note: Different Users will have different visible Profiles display dependent entirely upon the roles they have been approved to hold. As is the case for this sample user, he is approved to be both an Administrator and an Agency Supervisor.

Details

User:

Email	1544111@wvhs.org
Approved	Yes
Confirmed Email	Yes
Full Name	Mike Lutz
Related Staff Name	Mike Lutz

Profiles

Roles	Administrator	Parent Agency	WVHHS
Approved	Yes	Child Agency	WVHHS
		Program	ALL
		Roles	Agency Supervisor
		Approved	Yes

Edit
Manage Users
5

Troubleshooting

Incorrect profile selection during registration – How to fix

How to approve the user's login only to allow request for a corrected profile.

If a user requests a profile and makes an incorrect selection, the agency director may approve only the user's login allowing the user to request a corrected profile.

1. Agency director (or designee) must login to WV IMS.
2. Click "Manage Users" and locate the email of the user
3. Click the email address to open the user's record
4. Click "Edit"
5. Check the box appearing below the user's last name.
6. Do not approve the profile that was submitted incorrectly.
7. Click "Submit"

DHHR BMS IMS		Incident	No Incident	Staff	Person
<h1>Edit</h1>					
User					
Email *	a041651z@gmail.com				
First Name *	Tinker				
Middle Name					
Last Name *	Bell				
Approved	<input checked="" type="checkbox"/> Step #5				
<h2>Profiles</h2>					
Parent Agency	ABCD Agency				
Roles	Agency Director				
Approve	<input type="checkbox"/> Step #6 Do not check box / Approve				
<input type="button" value="Submit"/>					

The user will then be able to log into IMS using the email and password previously setup. Upon login the user will be presented with the option to select a profile.