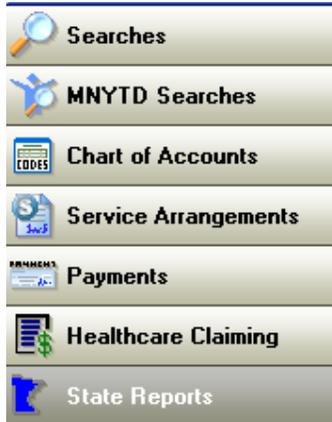


Fiscal Navigation Guide

Task Panel



The Task Panel is displayed on the left-hand side of the SSIS Worker/Fiscal application. This panel is used to categorize various tasks and provide quick access to commonly used tasks. The Task Panel may be hidden or viewed by selecting or deselecting it on the View menu, or using the Splitter Bar to expand or collapse the Task Panel. The user must have the XP Option Role assignment in order to select/deselect the Task Panel, and cannot use the Task Panel unless it is selected on the View menu.

Tasks available for the user to select from the Task Panel are split into different categories. When the user clicks on a category, the Task Panel expands to display different tasks related to that category.

Searches

- Business Organization Search
- Intake Search
- Licensed Provider (LNDX) Search
- Person Search
- Title IV-E Group Provider Search
- Workgroup Search

MNYTD Searches

- MNYTD Service Search
- MNYTD Survey Search
- MNYTD Survey Due Search

Chart of Accounts

- COA Element Search
- COA Code Search
- COA Maximum Search

Service Arrangements

- Service Arrangement Searches
- Service Agreement Search
- Service Arrangement Group Search
- Service Arrangement Reporting

Payments

- Payment Searches
- Payment Batch Search
- Payment Exclusion Search
- Payment Batch Edit Report
- Payment Reporting

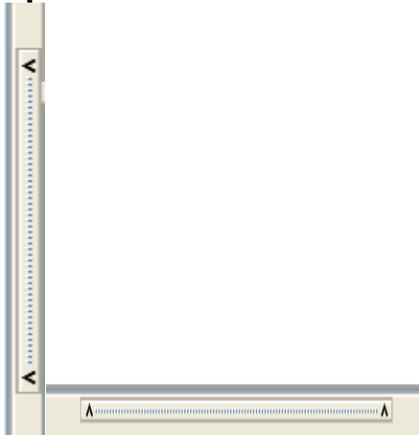
Healthcare Claiming

- Claim Batch Search
- Healthcare Claim Searches
- Healthcare Claim Reporting
- Healthcare Eligibility Reporting

State Reports

- CMHRS Report
- SEAGR Report
- TCM CSR Report
- Title IV-E Abstract Report

Splitter Bar



Splitter bars divide the SSIS Fiscal screen into these five different sections:

- Task panel
- Tree View/Data Clean panel
- Search panel
- Preview panel
- Detail panel

Click and drag the bar to expand the view or hide information not needed on the screen.

If you click on the line between the arrows, it expands or collapses the panel completely in the direction the arrows are pointing.

Toolbars

There are three toolbars available:

- Windows toolbar
- SSIS Application toolbar
- Tree View toolbar

Windows Toolbar

File View Searches/Logs Tools Window Help

The Windows toolbar provides general menu options on the SSIS main screen. For example:

- File - Logon/off, Change Password, Empty Data Cache
- View - Toolbar, change your view of SSIS (how items display on your screen)
- Searches/Logs - find all the Searches/Logs within the application
- Tools - General Reports, access other areas of SSIS (e.g., SSIS Admin)
- Windows - view and toggle between open windows
- Help - Social Services Manual

SSIS Application Toolbar



The SSIS Application toolbar is located under the Windows toolbar and displays icons for the most used features in SSIS:

- Log On – log onto SSIS
- Log Off – log off SSIS
- User Activity Log – displays the user's activity log, ability to search for another user's activity log
- User Reminders/Alerts – displays the user's reminders and alerts
- Service Arrangement Searches – displays service arrangement search
- Payment Searches – displays payment search
- Person Search – displays person search
- Business Organization Search – displays business organization search
- Workgroup Search – displays a user's caseload and options to search another's caseload
- Intake Search – displays intake search
- Contents – displays the SSIS Help file

Tree View Toolbar



The Tree View toolbar displays when a selection is made either from the Task Panel or a search function from the SSIS Application toolbar. The buttons included on the toolbar are, from left to right:

- Back - moves to the previously selected node
- Forward - enabled only after the Back button is clicked
- Up - moves up one level in the Tree View
- Down – moves down one level in Tree View to the folders/nodes available
- Home – moves to top folder in the Tree View
- Add New – if enabled, creates a new record
- Save – saves entries and edits
- Cancel – cancels the last action
- Print – enabled when print is an Action menu item
- Refresh – refreshes current folder/node
- Delete – deletes the selected record from your agencies database
- Remove – removes the selected record
- Options – displays options to change the view of SSIS on your screen
- Action menu – displays the Action menu

Quick Add Buttons

Quick Add buttons display at the end of the Tree View toolbar based on your location and options in SSIS. Use these icons for quick access to add items such as a New Activity, New Service Arrangement or a New Payment.



- New Service Arrangement – creates a new service arrangement
- Create Duplicate of Service Arrangement – creates a duplicate service arrangement



- New Payment – creates a new payment
- Create Duplicate of Payment – creates a duplicate payment

Action Menu



The Action menu is available throughout SSIS. The Action menu displays tasks that can be completed depending on what is selected in the Tree View, Task Panel, or Results grid.

The Action menu is available from:

- The Lightning bolt button on the Tree View toolbar
- The Action button at the bottom of the open window
- Right-clicking on a node or folder in the Tree View
- Right-clicking on a tab
- Right-clicking in a grid

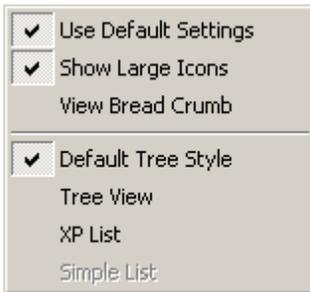
Lightening Bolt



Add New Toolbar



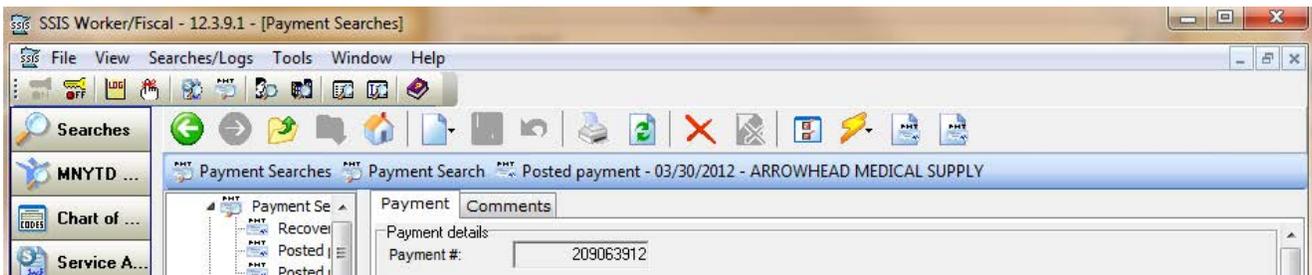
Breadcrumbs



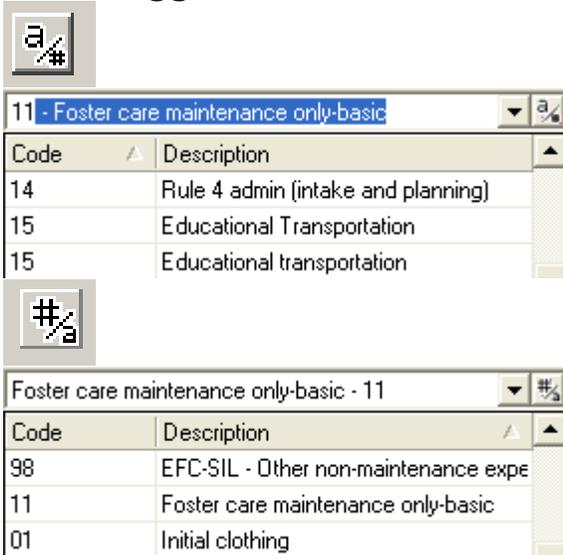
View Breadcrumb allows a user to use a trail for quick navigation. The Breadcrumb shows the trail you travelled to get to the screen you are currently on.

View Breadcrumb is turned on/off using the View menu option, on the Windows Toolbar.

Breadcrumbs display under the Tree View Toolbar, above the search panel.



Code Toggle



The Code Toggle button is used to switch the display of field from Code – Description to Description – Code and vice versa. It can be found at the end of these fields:

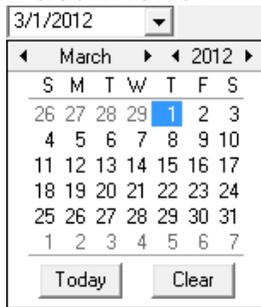
- Program
- Service
- County Sub-service
- HCPCS/Modifier
- Special Cost Code

When Code Toggle displays a/#, the code is sorted numerically. The type-ahead feature for this field looks for the number.

When Code Toggle displays #/a, the description is sorted alphabetically. The type-ahead feature for this field looks at the description.

The Date Picker is used throughout SSIS

Date Picker



when a date is entered. Click on the date in the calendar for the date to fill into the date field, or click the Today button to fill in today's date. Selecting Clear returns you to the date field.

To change the month and year:

- Use the calendar's arrow keys to move backward and forward in time or
- Click and hold the mouse button on the month on the banner to display a list of previous three and next three months

Month



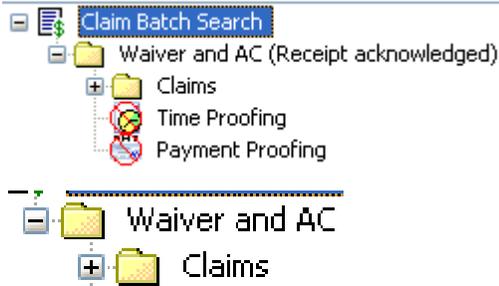
Drop-down Menu



Drop-down menus display throughout SSIS for the user to select information from the list. Click on the down arrow to display the selections available.

Only one item can be selected from a drop-down menu, with the exception of advanced searches where the advanced filter is available. See more information regarding advanced searches for details on the advanced filter option.

Folders vs. Nodes



Folder



Node



Field Indicators



The structure of the SSIS Tree View is based on general Windows functionality. The Tree View is composed of folders and nodes. Each folder/node represents a line in the tree. Indicators display to the left of the folder/node to expand or collapse the folder/node.

They are further defined as:

- Folders – displayed with a manila folder icon
- Nodes – displayed with an individual icon. These icons vary depending on the function being accessed

There are two types of Field Indicators -- Required and Warning. Field Indicators provide the user with a visual indication of whether information in a field is either required or needed. As information is entered, the field indicators no longer display. Positioning your mouse over the field indicator displays a flyover that provides more information regarding the indicator.

The Required Field Indicator displays as a red stop-sign shape with a white exclamation point. This marker indicates information must be entered into this field to save the record. As additional information is entered more fields can become mandatory or no longer be required.

The Warning Field Indicator displays as a yellow triangle with an exclamation point. The warning message is informational, alerting a user that it can become required based on the information entered.

Help Text



Help Text, underlined and in blue font color, is used throughout SSIS. Clicking on Help Text displays additional information.

Help Text can be field specific or related to data cleanup and proofing errors.



Radio Button



Radio buttons display throughout SSIS, allowing the user to select predefined options.

In most instances you can only select one predefined option.

Red Squiggly Line



A red squiggly line indicates entered information does not comply with business rules, e.g., a future date cannot be entered. Positioning your mouse over the red squiggly line displays a flyover that provides more information about the business rule.