User Manual

AIDS Information Management System

Florida Department of Health
HIV/AIDS Section
Patient Care Program

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Section 1- Introduction

1.1   What is AIMS?

The AIDS Information Management System (AIMS 2.1) is a budget allocation and expenditures monitoring and reporting system that provides a method for the Florida Department of Health (DOH) HIV/AIDS program to collect and report expenditure data electronically to meet federal grant requirements.

Private providers and County Health Department(s) use AIMS to track funds and services funded by Ryan White Part B (Part B), Emerging Communities (EC), General Revenue, Patient Care Network (PCN), and Housing Opportunities for Persons with AIDS (HOPWA). Please refer to the Community Programs Administrative Guidelines[1] for further information on reporting requirements.

The purpose of this manual is to demonstrate system functions pertaining to Contractor, Contract Manager and Sub-Contractor users. For any questions about using AIMS, please call the Help Desk at 1-850-245-4744 and provide a detailed explanation about the issue.

1.2   Reporting Requirements

All HIV/AIDS Patient Care contracted providers and county health departments (CHDs) are required to adhere to reporting requirements as defined by the state and federal governments and any subsequent changes to these requirements enacted during the program year.

Monthly invoices for Part B, HOPWA[2] and Patient Care Network contracts are not to be processed for payment unless all reporting requirements have been met for the month. If a lead agency becomes aware that they will not be able to meet the reporting deadline, they must request an extension by emailing reporting program staff and giving the reason for the delay. Further information about reporting requirements can be found in the Community Programs Administrative Guidelines[1].

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[1] The Administrative Guidelines are available at the following link - http://www.floridahealth.gov/diseases-and-conditions/aids/patient-care/_documents/administrative-guidelines/Administrative_Guidelines_2017-2018_FINAL.pdf.
[2] Housing Opportunities for Persons with AIDS

1.3   General Notes and Instructions

1. Users will only be able to view/access contracts and information for their area.
2. Fields marked with a red asterisk (*) require data entry.
3. AIMS does not have grammar or spell check for open text fields.
4. For all boxes that require a check, or to use the drop-down lists, point the mouse at the box or arrow and click.
5. Data entered on all screens will need to be saved or submitted prior to moving to a new screen.
6. All reports can be printed and/or exported to PDF, Excel or Word files.
7. Users should update contact information by editing their profile when something changes.
8. Passwords must contain at least ten (10) characters, including an upper and lowercase letter, a number, and a special character. These rules are as per the DOH Information Security and Privacy Policy[3].
9. The User account will be locked after three failed password attempts. Password must be reset using the Forgot Password feature.

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[3] DOHP 50-10.2-19 (1)(B)(4)(b)(1) - http://www.floridahealth.gov/diseases-and-conditions/aids/patient-care/_documents/dohp-50-10-16-complete.pdf

Section 2- Access to AIMS

AIMS "New User" training is generally hosted on the second Tuesday of every month. After attending a training, a user may request an Access Authorization Request form from the AIMS Administrator at [AIMS20Support@flhealth.gov.](mailto:AIMS20Support@flhealth.gov) Once the form is completed and signed by their supervisor, it should be returned via email to the AIMS Administrator. The request will then be verified and processed by designated HIV/AIDS Section staff and a new User ID and a temporary password will be generated. The User will receive an email notification with the User ID (as shown below) and the password will be provided by the AIMS Administrator over the phone.

Dear John Doe,

Your UserID has been created at AIMS 2.0 Portal.

https://flhiv.doh.state.fl.us/AIMS2.0/Default.aspx

Your Username is : JohnD

You will receive your password from AIMS Administrator

If you have any question please contact Eunice Sawaya @ Eunice.Sawaya@flhealth.gov or (850) 901-6950

Regards,
AIMS Administrator
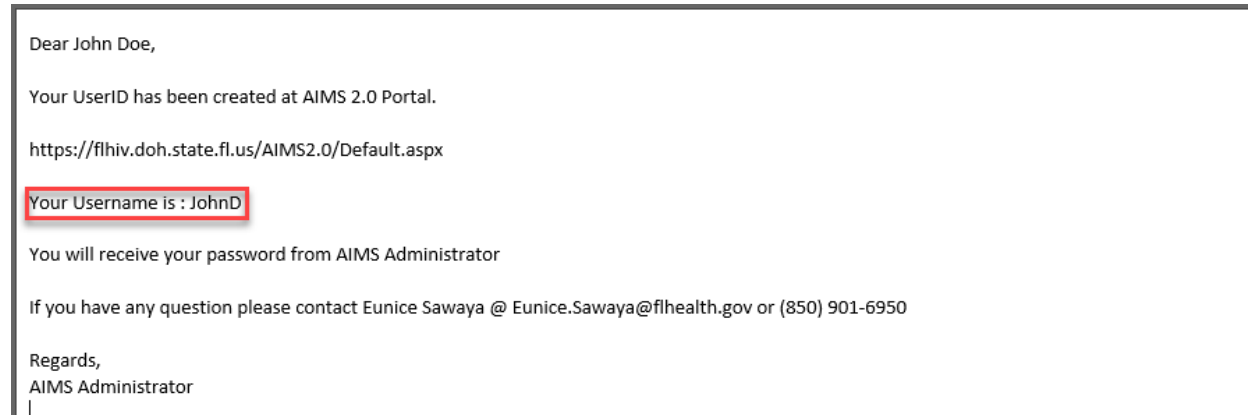
Additional assistance with the registration process is available by contacting the HIV Help Desk at 1-850-245-4744.

2.1 Logging into AIMS

Users can access the AIMS Application using the following link:
https://flhiv.doh.state.fl.us/aims2.0/. Below is the screenshot for AIMS login screen.

To log in to the system, follow the steps described below:
   a) For an existing User of the AIMS Application
      i.   Enter your **User ID** in the field provided.
      ii.   Enter your **Password** in the field provided.
      iii. Click the **Login Here** button.
      iv.   You will be logged into the AIMS Application and the application will redirect you
            to the Homepage.
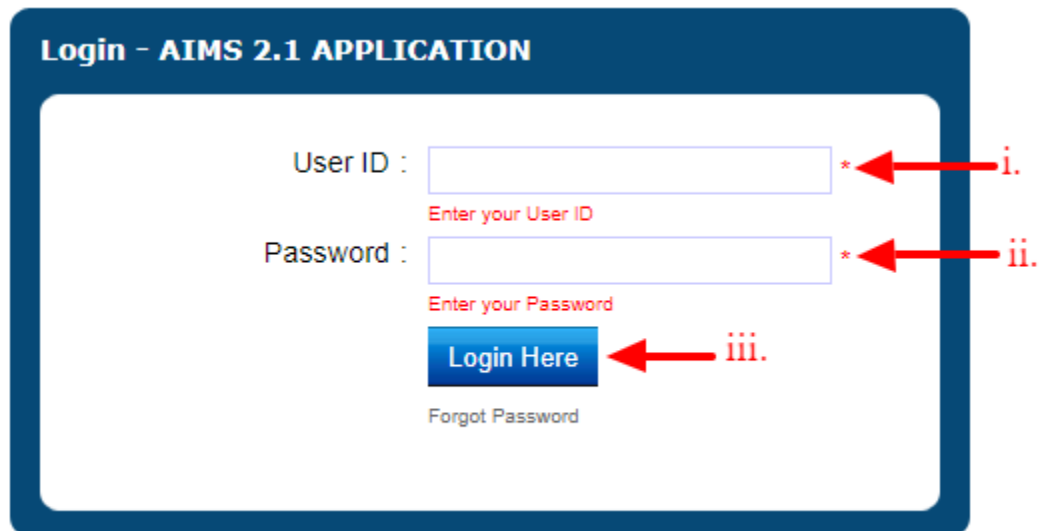
c) For a New User of the AIMS Application
    i. Enter your **User ID** in the field provided.
    ii. Enter your **Password** in the field (as provided by the AIMS Administrator).
    iii. Click the **Login Here** button.
    iv. You will be redirected to the **Change Password to Login** screen as shown below.

Change Password to Login

Existing Password	:	[ ]* ← i
New Password	:	[ ]* ← ii
Confirm Password	:	[ ]* ← iii

In case you forget your ID or password...

Security Question	:	[What is the name of your best friend from childhood? ▼] ← iv
Answer	:	[ ]* ← v

Note: Password must contain atleast 10 characters.
     Password must contain a upper case letter.
     Password must contain a lower case letter.
     Password must contain a number.
     Password must contain a special character.

[Relogin with New Password] ← vi

    v. To change the password, follow the below steps:
      1. Enter your **Existing Password** (as provided by the AIMS Administrator).
      2. Enter your **New Password**.
      3. Enter **Confirm Password** (same as New Password).
      4. Select a **Security Question** that is easy to remember and hard for others to figure out.
      5. Enter an **Answer** for the Security Question.
      6. Click **Re-login with New Password**.
      7. Follow steps as mentioned in 2.1(a).

Password requirements:
1. Password must contain at least 10 characters.
2. Password must contain an upper-case letter.
3. Password must contain a lower-case letter.
4. Password must contain a number.
5. Password must contain a special character.
6. Password cannot be any of your last 3 passwords.

2.1.1 Login Help

Click on the icon (located on the top right corner of the screen) for information on login functionality.

Clicking on this icon will redirect you to the screen displaying information on the User ID, Password, Login Here and Forgot Password functionality.

Login Page

- **User ID**
  Enter the User ID.

- **Password**
  Enter the Password.

- **Login Here**
  By clicking on this button, you can login to the portal.

  Three times entering of the wrong password your account will be locked.

  If role is not assigned or if the account is locked contact Administrator.

- **Forgot Password?**
  If you forgot your password you can click on this link.

2.1.2 Contact/Support Information

Click on the ⟳ icon in the top right corner of the login page.

The support and contact information will be displayed.

Support

Physical Addresses

Department of Health Feedback
4025 Esplanade Way
Floor: 03
Tallahassee, FL 32399-1733
Phone: (850) 922-7599
Fax: (850) 414-6719

Mailing Addresses
AIMS20Support@flhealth.gov
4052 Bald Cypress Way , Bin # A09
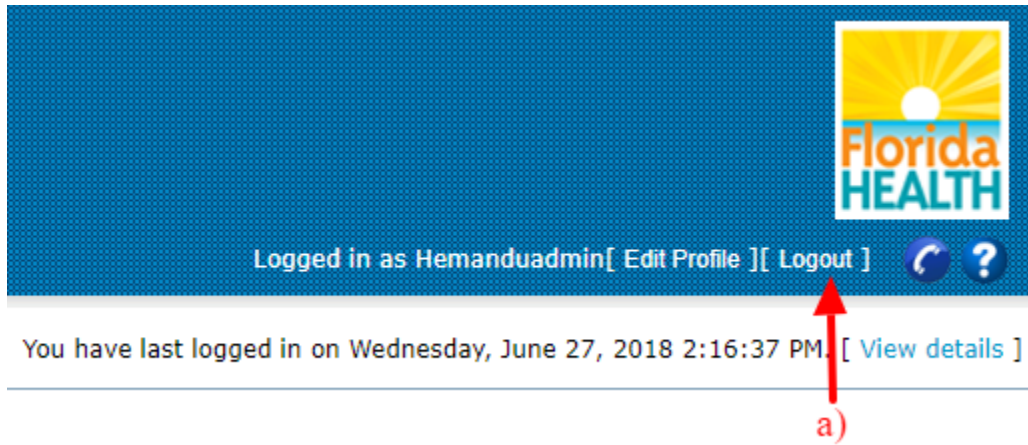Tallahassee , FL 32399 -1701

For any questions or comments please contact AIMS20Support@flhealth.gov.

2.2 Logout of AIMS

To log out of the AIMS Application, the user can click on the **Logout** tab located
- a) In the top right corner of the homepage, or
- b) In the bottom left section.

2.3 Forgot Password

The user can change their account password, if forgotten, by clicking on the **Forgot Password** link from the AIMS Login page.

    a) On the login page click on the **Forgot Password**. The User will be redirected to the Forgot Password Screen.

    b) On the Forgot Password screen enter all the required fields:
1. **Username** (User ID)
2. **Email Address**
3. **Password Recovery Question**
4. **Password Recovery Answer**
5. **CAPTCHA[4] code** as seen in the red box (this code is case-sensitive)
6. If the code in the red box is unreadable, click on the ⟳ to get a new code.

    c) Click the **Submit** button to complete the password request.

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[4] **C**ompletely **A**utomated **P**ublic **T**uring test to tell **C**omputers and **H**umans **A**part

e) The system will send out an email to the provided email address with a temporary code as shown below and on the same Forgot Password screen, the User will have the option to enter the Temporary Code and New Password.
1. **Enter the Temporary Code** as received in the email.
2. **Enter a New Password**.
3. **Enter the New Password again to Confirm**.
4. **Click Submit**

Dear JohnD,

Your Temporary code is **RsFr2Hh&Tv**

Please use this temporary code to change your password.

Please note that the temporary code expires in 15 minutes.

Regards,
AIMS Administrator
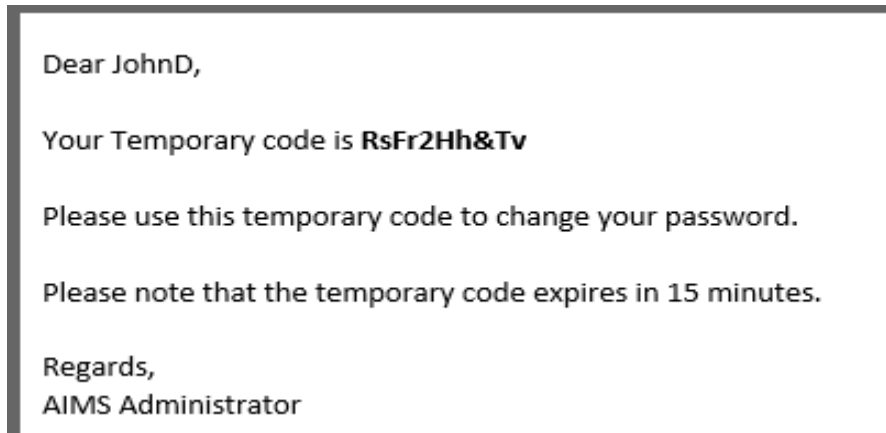
Forgot Password

Your temporary code has been sent to your email. Please check your email.

Enter Temporary Code	:	RsFr2Hh&Tv ← 1
Enter New Password	:	·········· ← 2
Confirm New Password	:	·········· ← 3

Note: Password must contain atleast 10 characters.
    Password must contain a upper case letter.
    Password must contain a lower case letter.
    Password must contain a number.
    Password must contain a special character.

Submit ← 4

f) The password will be updated successfully and the User can now log in to the AIMS system using the new password.

***Note*:**
1. The System will not allow the use of last 3 passwords when creating a new password.
2. The temporary code is valid for only 15 minutes.

2.4 Homepage

After a successful login, the user will be redirected to the AIMS Homepage as shown in the screen below.

The user can land on the homepage at any given time by clicking on the AIDS Information Management System tab located at the top left corner.

2.4.1 Navigation Bar

The Navigation bar on the left displays the various menu options available for a User depending on the privileges assigned to him/her. Privileges are assigned as per different User roles in the system.

AIMS 2.0

Provider Management
- View Providers
- Organization Profile

Contract Management
- View Contracts
- Messages

Data Submission
- Expenditure Data
- FTTY Demographic Data
- Revised Implementation Plan
- Final Implementation Plan

View Reports
- Contractor Reports
- Bureau Reports
- Report Manager
- ContractUnit Reports
- Sub-Contractor Reports

Logout

2.4.2 Messages

The Messages section will be displayed on the Homepage. This section displays messages sent by the AIMS Administrator and system generated messages. The messages are displayed in a tabular form as shown in the screen below.

Messages

☐	Date ⬍	End Date ⬍	Subject	Message	Message by	Actions
☐	05/22/18		Final Implementation Plan - 2018-2019 Baker CHD RW Consortia	Final Implementation Plan for the 2018-2019 Baker CHD RW Consortia is Submitted.	Admin	View
☐	05/22/18		Revised Implementation Plan - 2018-2019 Baker CHD RW Consortia	Revised Implementation Plan for the 2018-2019 Baker CHD RW Consortia is Submitted.	JohnD	View

b)   Delete Messages ⬅ b)   a)

a) To see more details about the message, click on the View link in the message row under the column Actions. Upon clicking the View link, a pop-up will appear with the detailed message.

View Sent Messages

Message Type : DashBoard
Subject   : Final Implementation Plan - 2018-2019 Baker CHD RW Consortia
Message Body : Final Implementation Plan for the 2018-2019 Baker CHD RW Consortia is Submitted.

Cancel
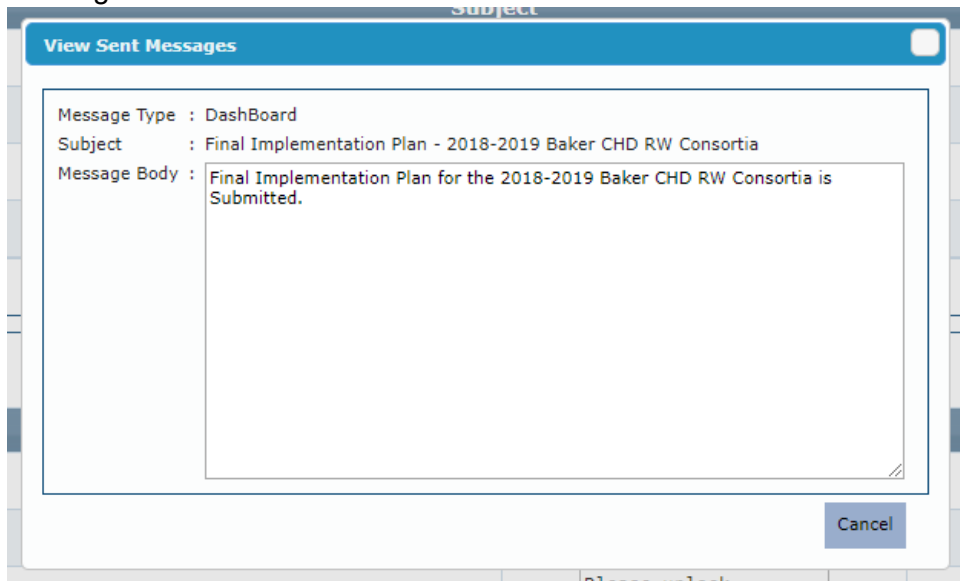
b) To delete old/unwanted messages, select the message using the checkbox and click the Delete Message button.

c) All high priority messages will have a yellow background color.

Messages

☐	Date ⬍	End Date ⬍	Subject	Message	Message by	Actions
☐	07/05/18		Complete the reports	The Reports submitted by your team needs to be updated.	Admin	View

Delete Messages

Users will receive messages for the following defined system actions:

1. Expenditure data submission.
2. Reminder message to submit expenditure data for a contract for the current month.
3. Budget planning for a contract.
4. FTTY[5] Demographic data submission for a contract.
5. Sub-Contractor data submission for a contract.
6. Final Implementation Plan submission for a contract.
7. Revised Implementation Plan for a contract.

2.4.3 Requests

The Requests section on the homepage displays the requests and reasons to unlock budget amendments and Contracts submitted by users and the status of these budget amendments.

Requests

Date ↕	Request to Unlock	Contract Name	Reason	Requested by	Status	Approved By	Actions
06/28/18	Budget Amendment	1516 Palm Beach CHD GR	Updates needed.	JohnD	Submitted		Enable Budget Planning?
06/28/18	Budget Amendment	MAY2018	Need to change the allocated amount.	JohnD	Submitted		Enable Budget Planning?
06/28/18	Budget Amendment	MAY2018	Unlock this Contract	JohnD	Approved	JaneD	

2.4.4 Edit Profile

Users can edit their profile by clicking on the Edit Profile link located on the top left section of the screen.
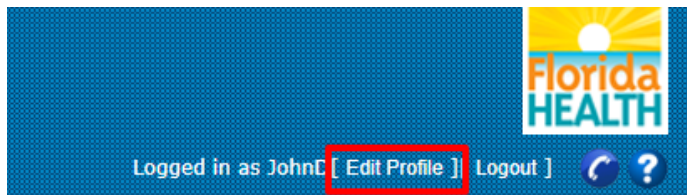
a) Clicking on the Edit Profile link will redirect you to the "Edit Profile" Screen.

b) You can update your First Name, Last Name, Middle name, Email Address, Phone Number and Phone Extension.
c) Click on the Save button to save all the changes.
d) Click on the Cancel button to cancel any changes and return to the Homepage.
e) Click on the Change My Password button to change the password. This functionality is explained in the next section.

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[5] First Time This Year

2.4.5 Change Password

Users can change their password for the AIMS system by using the Reset Password functionality. As described in the above section, Edit Profile (item e), a User can click on the Change My Password button to reset the existing password. Clicking on the Change My Password button will redirect the user to the Reset Password screen.

a) Change Password
1. Enter existing password.
2. Enter a new password.
3. Confirm the new password.
4. Click save to submit, the new password will be updated.

Reset Password

Fields with ***** *mark are mandatory*

a)
◉ Change Password ◯ Change Security and Answer

Existing Password	:	[ ] *	← 1
New Password	:	[ ] *	← 2
Confirm Password	:	[ ] *	← 3

Note: Password must contain atleast 10 characters.
   Password must contain a upper case letter.
   Password must contain a lower case letter.
   Password must contain a number.
   Password must contain a special character.

4
↓
[Submit] [Cancel]

Password requirements:
1. Password must contain at least 10 characters.
2. Password must contain an upper-case letter.
3. Password must contain a lower-case letter.
4. Password must contain a number.
5. Password must contain a special character.
6. Password cannot be last 3 passwords

b) Change Security and Answer
1. Select the Change Security and Answer radio button.
2. Select the Password Recovery Question from the drop-down list.
3. Enter the Password Recovery Answer.
4. Click Submit button to save the new security question and answer.

Reset Password

1

Fields with ***** *mark are mandatory*

◯ Change Password ◉ Change Security and Answer

Password Recovery Question	:	What is the name of your best friend from childhood? ▼	← 2
Password Recovery Answer	:	[ ] *	← 3

4
↓
[Submit] [Cancel]

2.4.6   Login Details

Users will be able to audit their login activities for any suspicious behavior with their account. To check the account activity, View the Details link located in the top right section of the screen.
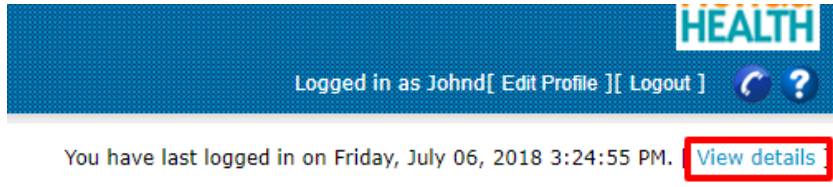
Clicking on this link, the user will be redirected to the View Details Screen. This screen will display detailed login activity including the Remote IP and Remote Host address, operating system, browser and date/time.

View Details

Remote IP	Remote Host	OS	Browser Details	Date Accessed
167.78.18.35	167.78.18.35	WinNT	Chrome	7/5/2018 11:02:16 AM
167.78.18.35	167.78.18.35	WinNT	Chrome	7/5/2018 10:26:12 AM
167.78.18.35	167.78.18.35	WinNT	Chrome	7/5/2018 10:03:41 AM
167.78.18.35	167.78.18.35	WinNT	Chrome	6/29/2018 11:29:31 AM
167.78.18.35	167.78.18.35	WinNT	Chrome	6/28/2018 3:28:24 PM
167.78.18.35	167.78.18.35	WinNT	Chrome	6/28/2018 2:29:25 PM
167.78.18.35	167.78.18.35	WinNT	Chrome	6/28/2018 1:32:03 PM
167.78.18.35	167.78.18.35	WinNT	Chrome	6/28/2018 1:23:11 PM
167.78.18.35	167.78.18.35	WinNT	Chrome	6/28/2018 1:20:39 PM
167.78.18.35	167.78.18.35	WinNT	Chrome	6/28/2018 10:28:08 AM

1 2 3

2.4.7   Additional Information on Homepage

a) Username – it is displayed on the screen as shown in the screenshot below in several places.
b) Current Date
c) Current login date and time
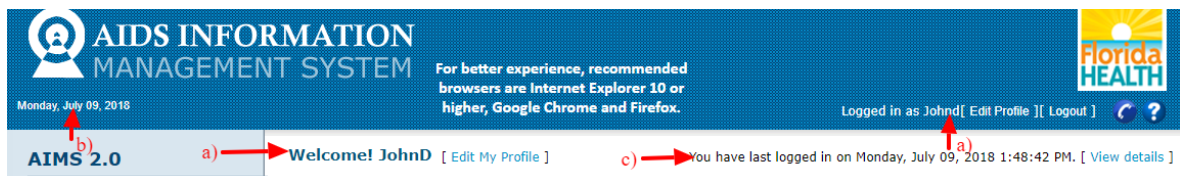
d) Useful links (at the bottom of the screen)
1. Email Advisory
2. Accessibility Information
3. Disclaimer
4. Privacy Statement
5. Copyright Statement
6. Software release version

Section 3- Provider Management

The **Provider Management** section captures the organization/agency contact information. This information should be updated as changes occur to ensure data submitted to federal and state stakeholders are accurate.

The provider management section has two sections:

1. **View Providers**
2. **Organization Profile**

3.1 View Providers

AIMS **Users** can view all providers they are assigned to in the system. Contract Managers, Contractors and Bureau Users will be able to access this feature.

To view providers,

a) Click on the **View Providers** link under Provider Management.
b) A list of all the providers for the logged in user will be displayed in a table.
c) View Detail
1. Click on the View link, to see the detailed information on any provider listed.

2. The user will be redirected to the View Organization screen displaying the Provider/Organization details.

d) Filters
1. User assigned to multiple providers from multiple areas will have the option to filter the organization list for a given area.
2. Click on the Select Area drop-down. The result set will display the organization for the selected area only.
3. The user can filter the Providers/Organization list by Organization type: Contract, Sub-contractor or Both.
4. Click on any option, the result set will display the organization with selected organization type only.

Provider Administration

e) Search
1. Type the organization name in the field provided.
2. Click on the search button
3. the list will display only the organization matching the searched name.

3.2   Organization Profile

Users can make changes to the Provider information by using the Organization Profile feature. Contract Manager, Contract, Bureau and Sub-Contractor users can access this feature.

Note: Sub-Contract user can only view the information and cannot make any changes.

a) Click on the Organization Profile link under Provider Management.

b) The system will redirect to the Organization Profile screen, with the first provider pre-selected.
c) Use the Select Provider drop-down to choose any other Provider from the available list.
d) To change any information, edit the appropriate fields.
e) Click the Save button to save the changes, the changes will be saved successfully.

Section 4- Contract Management

The Contract Management section captures contract details, service line items (service categories), budget planning, budget amendments, and subcontractor information. According to the Administrative Guidelines[6], all providers are required to capture contract and subcontractor information for reporting. Any changes made to the contract, such as increasing the amount or adding service categories to the contract, should be approved by the assigned contract manager and Community Programs representative. Once the changes are approved, submit a Help Desk ticket and be prepared to provide supporting documentation to verify the change (e.g., a copy of email approving the change or amended contract). Please see the Administrative Guidelines[6] for more details.

4.1 Contracts

AIMS contracts are initially created by Patient Care staff and will include the total contract amount and the service line items identified in the executed contract. The **View Contracts** tab allows the Contractor to view/edit the contract details, complete the budget planning and add subcontractors associated with the contract.

    a) Click on the View Contracts link under Contract Management section on the navigation bar.

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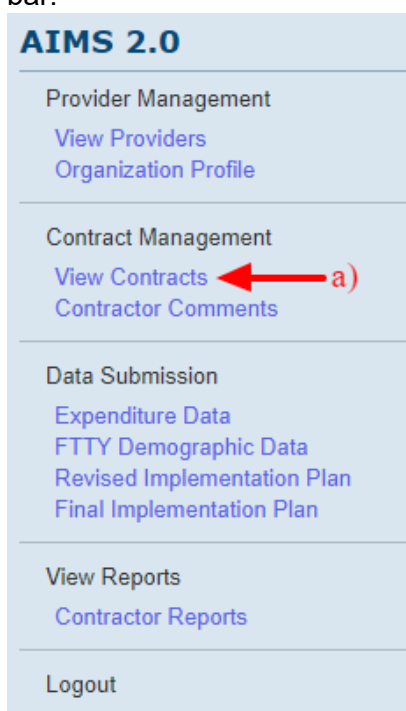
[6] The Administrative Guidelines are available at the following link - http://www.floridahealth.gov/diseases-and-conditions/aids/patient-care/_documents/administrative-guidelines/Administrative_Guidelines_2017-2018_FINAL.pdf

b) The screen will redirect to the View Contracts Screen, displaying all the available contracts for the logged in user.

View Contracts

Select Year : 2018-2019 ▾
Select Provider : All ▾
Select Program : All ▾
Contract Name : [   ] Search

Area ⬍	Contract Name ⬍	Organization Name ⬍	Program Name ⬍	Contract Status ⬍	Start Date ⬍	End Date ⬍	Actions
AREA 2B	CODLT-Y3	Big Bend Cares, Inc.	Patient Care-Consortia	Contract Executed	4/1/2018	3/31/2019	View | Budget Planning | Add/View Sub-Contractors | Sub-Contractor Allocation | Request to Unlock/Amendment
Headquarters	MAY2018	ABC Health	Patient Care-Consortia	Contract Executed	4/1/2018	3/31/2019	View | Budget Planning | Sub-Contractor Allocation | Request to Unlock/Amendment
Headquarters	ABC18	ABC Health	Patient Care-Consortia	Contract Executed	4/1/2018	3/31/2019	View | Budget Planning | Add/View Sub-Contractors | Sub-Contractor Allocation | Request to Unlock/Amendment
AREA 2B	CODMG-R2	Big Bend Cares, Inc.	HOPWA	Contract Executed	7/1/2018	6/30/2019	View | Budget Planning | Sub-Contractor Allocation | Request to Unlock/Amendment

1

c) The Contracts results can be filtered out by using the filter option:
   1. Select Year range from the dropdown list, the result set will be updated.
   2. Select Provider from the dropdown list, the result set will be updated.
   3. Select Program from the dropdown list, the result set will be updated.
   4. Enter Contract Name from the dropdown list and click Search to update the result set.

d) The User has access to the following functions under the Actions tab:
   1. View – To view contract details.
   2. Edit – To edit the Contract fiscal details.
   3. Amendments – To request changes to the Contract.
   4. Add Svc Lines – Add Service Categories to the Contract.
   5. Budget Planning – To allocate funds as part of budget planning for the contract.
   6. Add/View Sub-Contractors – To view and add existing and new Sub-Contractors for the contract. You can also allocate funds to Sub-Contracts from here.
   7. Sub-contractor Allocation – To allocate funds to sub-contractors from one location.
   8. Request to Unlock/Amendment – To adjust budget summary or service line item funding of the contract.
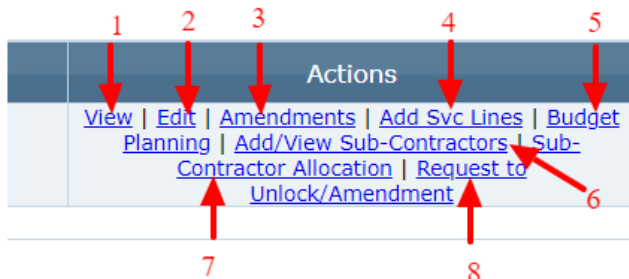
4.1.1 View Contract Details

Click on the **View** tab for a Contract, to view the following details for a Contract:

a) Contract details
b) Fiscal facts
c) Funding details

Actions
View	Add Svc Lines	Budget Planning	Add/View Sub-Contractors	Sub-Contractor Allocation	Request to Unlock/Amendment
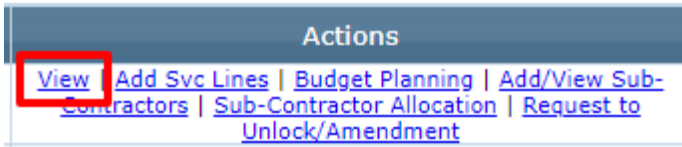
View Contract

Contract Details ← a)

Contract #	:	_12345			
Start Date	:	4/1/2018	End Date	:	3/31/2019
Amount	:	500	Advance Payments	:	
Clients Served	:	0	Method of Payment	:	
Orgnization Name	:	Big Bend Cares, Inc.	Program Name	:	Patient Care-Consortia
Contract Status	:	Contract Executed	Deliverables	:	

Fiscal Facts ← b)

Initial Year Funded	:		Fiscal Year	:
Provider End Date	:		Administrative Cost Allowed	:
Administrative Cost Percent	:		Administrative Cost Dollar	:
Periodic Increase	:		Periodic Increase Memo	:
Legislative Requirement	:		Law/Statutory Citation	:
Budget Entity	:		Appropriation Category Code	:
Recurring General Revenue	:		Recurring Trust Funds	:
Nonrecurring General Revenue	:		Recurring Trust Funds	:
Procurement Method	:		Business Case Completed Prior	:
Business Case Completed After	:			

Funding Details ← c)

VR	EO	OCA	Amount

Documents ← d)

Title	Name	Description	Uploaded By

4.1.2 Edit Contracts

The **Edit** Contracts section allows users to edit any information for a given contract. Clicking on the Edit link will redirect the user to the Contract Details Edit page. This option is only available to the Contract Manager Users. The Contract will be permanently locked once the Final Implementation Plan is approved by the Contract Manager.
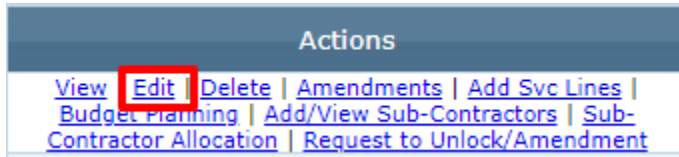
The Contract Details page displays the following sections:

a) Contract Summary

b) Fiscal Facts

c) Contract Documents
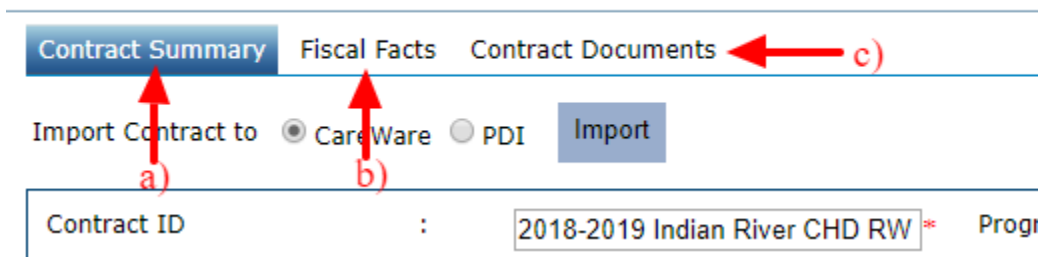
a) Contract Summary

1. The User can view the Contract Summary details of the selected contract.
2. Make changes to any enabled field and click "Save and Go to Fiscal Details" button.
3. The changes will be saved and the Fiscal Facts screen will be opened.

b) Fiscal Facts

1. Following the steps from the above section, the Fiscal Facts screen will be displayed.
2. The User can also view the fiscal details of the contract by clicking on the Fiscal Facts tab directly.
3. Funding details listed for the contract are displayed under the Funding details section.

Contract Details

Fields with * mark are mandatory **b)**

Contract Summary | **Fiscal Details** | Contract Documents

| Program Name | : | Patient Care-Consortia ▼ * | Program Description | : | Ryan White Part B funds for patient care and support services provided through lead agencies and contracted providers |

Field		Value	Field		Value
Contract Amount	:	1,150,000	Contract Amount Left	:	1,145,000
Other Cost Accumulator	:	Select OCA ▼	ORG Code	:	No Org Code ▼ *
Expansion Option	:	No EO ▼	Version	:	No Version ▼
Object Code	:	[ ] *	Budget Type	:	[▼] *

Field		Value	Field		Value
Fiscal Year	:	2018 *	Level 1	:	64
State Fund	:	No State Fund ▼	Fund Identifier	:	No Fund Identifier ▼
Budger Entity	:	No Budget Entity ▼ *	Internal Budget Indicator	:	No Internal Budget Indiactor ▼
Category Code	:	[ ] *	Amount	:	[ ] *
OCA Start Date	:	[ ] *	OCA End Date	:	[ ] *

Add

Fiscal details have been saved!

Funding Details ← 3

Program Name	OCA	ORG Code	EO	VR	Amount	Period	Actions
Patient Care-Consortia	PTC18	64361157113	PC	02	5,000.00	01/01/2018 to 01/01/2019	Edit | Delete

Go to Contract Documents **Cancel**

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4. Add new Funding:
   i. Enter all the required fields.
   ii. Click Add.
   iii. The newly added funding source will be displayed in the Funding Details section.

Contract Details   Fields with * mark are mandatory 4

Contract Summary | **Fiscal Details** | Contract Documents

Program Name	:	Patient Care-Consortia ▼ *	Program Description	:	Ryan White Part B funds for patient care and support services provided through lead agencies and contracted providers
Contract Amount	:	1,150,000	Contract Amount Left	:	1,145,000
Other Cost Accumulator	:	Select OCA ▼	ORG Code	:	No Org Code ▼ *
Expansion Option	:	No EO ▼	Version	:	No Version ▼
Object Code	:	*	Budget Type	:	▼ *

                                                                                              i

Fiscal Year	:	2018 *	Level 1	:	64
State Fund	:	No State Fund ▼	Fund Identifier	:	No Fund Identifier ▼
Budger Entity	:	No Budget Entity ▼ *	Internal Budget Indicator	:	No Internal Budget Indiactor ▼
Category Code	:	*	Amount	:	*
OCA Start Date	:	*	OCA End Date	:	*

                                                                                              i

                                                              ii ⟶ Add

                                                              Fiscal details have been saved!

Funding Details

Program Name	OCA	ORG Code	EO	VR	Amount	Period	Actions
iii ⟶ Patient Care-Consortia	PTC18	64361157113	PC	02	5,000.00	01/01/2018 to 01/01/2019	Edit | Delete

5. Edit Existing Funding:
   i. For any existing funding details, click on the Edit link for the same.
   ii. All the fields under the Fiscal Details section will be populated.
   iii. Edit the fields as needed.
   iv. Click the Update button to save changes.

Contract Summary | **Fiscal Details** | Contract Documents   5

Program Name	:	Patient Care-Consortia ▼ *	Program Description	:	Ryan White Part B funds for patient care and support services provided through lead agencies and contracted providers
Contract Amount	:	1,150,000	Contract Amount Left	:	1,145,000
Other Cost Accumulator	:	PTC18 ▼	ORG Code	:	64361157113 ▼ *
Expansion Option	:	PC ▼	Version	:	02 ▼
Object Code	:	12 *	Budget Type	:	Unfunded ▼ *

                                                                                              ii

Fiscal Year	:	2018 *	Level 1	:	64
State Fund	:	2 ▼	Fund Identifier	:	141001 ▼
Budger Entity	:	64200700 ▼ *	Internal Budget Indicator	:	11 ▼
Category Code	:	123 *	Amount	:	5000 *
OCA Start Date	:	1/1/2018 *	OCA End Date	:	1/1/2019 *

                                                                                              ii

                                                              iv ⟶ Update

Funding Details

Program Name	OCA	ORG Code	EO	VR	Amount	Period	Actions
Patient Care-Consortia	PTC18	64361157113	PC	02	5,000.00	01/01/2018 to 01/01/2019 i ⟶	Edit | Delete

6. Delete Funding Detail:
    i. Click on the delete button for any funding detail.
    ii. The system message will appear to confirm the deletion, select OK.
    iii. The funding detail will be deleted.

Funding Details

Program Name	OCA	ORG Code	EO	VR	Amount	Period	Actions
Patient Care-Consortia	PTC18	64361157113	PC	02	5,000.00	01/01/2018 to 01/01/2019	Edit | Delete

Go to Contract Documents   Cancel

Are you sure that you want to delete the record?

OK   Cancel

4.1.3 Budget Planning

The **Budget Planning** module allows the user to allocate the funds to different service categories, a contract will provide during the fiscal year. Each provider must record services that will be provided by the contractor or sub-contractor/service and allocate amounts totalling 100% that they plan to spend for each service category.

Under **Actions** click on the **Budget Planning** link to open the Contract Budget Planning section.

Actions

View | Budget Planning | Sub-Contractor Allocation |
Request to Unlock/Amendment

Contract Budget Planning

Contract	:	123456789
Annual Budget	:	100,000
Advances	:	5,000
Administrative Cost Limit	:	2,000

Please allocate all funds to service categories and sub contractors

- Hide Budget planning

Administrative Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Administrative Services	2000.00 ← a)	0	0

Direct and Support Care Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
1g Home Health Care	0 ← a)	0	0
1h Home & Community-based Health Services	0 ← a)	0	0
Medical Case Management	0 ← a)	0	0

Clinical Quality Management Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Planning and Development	0 ← a)	0	0

Inpatient/Managed Care Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor

Planning and Evaluation Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor

Advances			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor

Other Services (4BMOE)			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor

Requested Service Line Items (CHD GR Only)			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor

Total Amount: 2000.00

c)

b) → Save Submit Cancel

a) The User (Contractor) must enter the Amount Approved for each Service Category available for the contract.
b) Click the 'save' button to save the data.
c) Click the Submit button to submit the Budget Allocation Data.

***Note*:**

1. To Submit the Contract Budget Planning data, funds must be allocated to the assigned sub-contractor(s). Sub-contractors are only available for the following 3 Program Types – Patient Care-Consortia, Patient Care-EC and PTO-Base. For any other program type, Sub-contractors are not required and therefore, Contract Budget Planning data can be submitted directly.
2. **Only funded service categories as indicated in the contract agreement are activated for the contract.**
3. All budget planning and Subcontractor information should be entered into the system during the first month of the contract and is due no later than the 10th of the following month.

4.1.4 Add/View Sub-Contractors

Each provider must record the services that will be provided by the contractor and allocate 100% of the amounts they plan to spend on each service. The agency itself will need to be added as a subcontractor if the agency renders services in addition to a subcontractor.
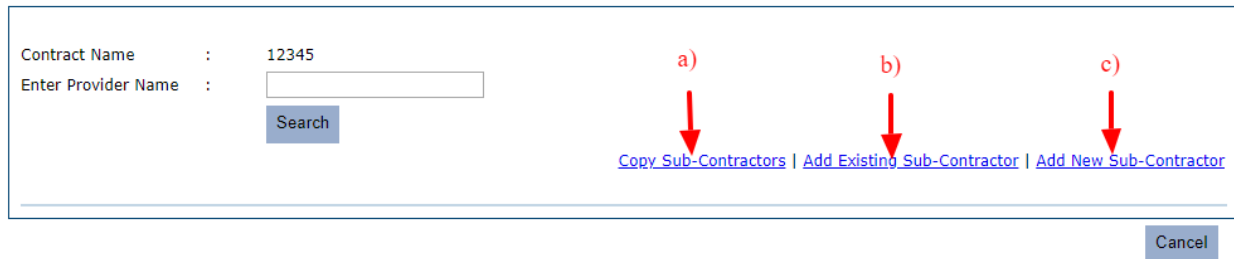
After the Budget planning process is completed, to add Sub-Contractors to the contract, under **Actions** click on the **Add/View Sub-Contractors** link to open the Provider Data section.
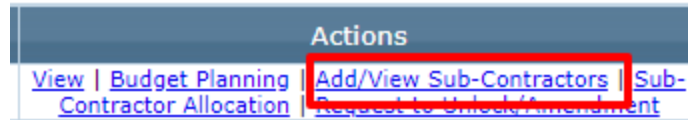
The system will redirect to the Provider Data screen. This screen will display any existing Sub-Contractors for the given contract and options to add new Sub-Contractors.
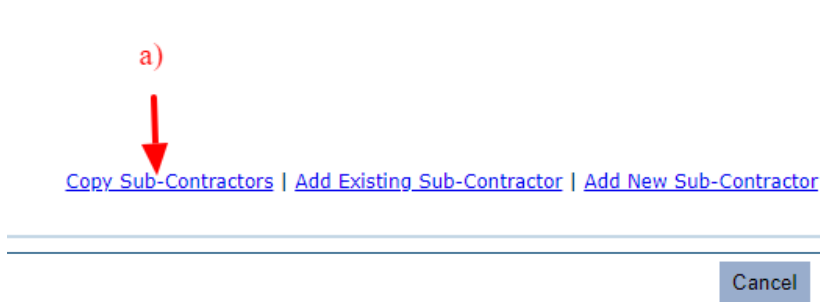

From this page, users can add subcontractors in three different ways:

    a) Copy Sub-Contractors
    b) Add Existing Sub-Contractor
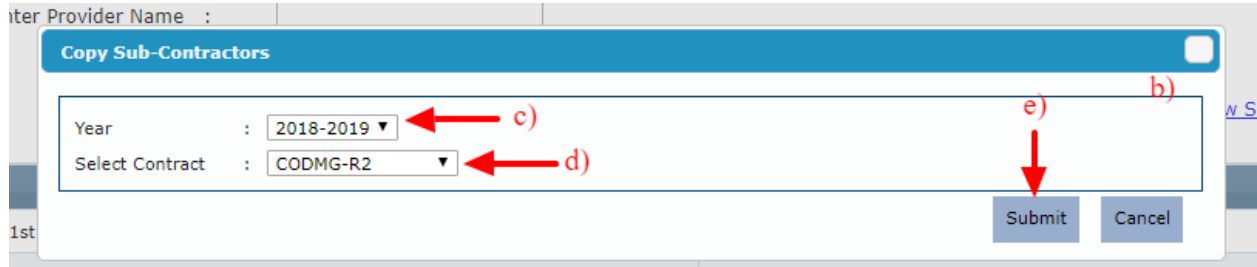   c) Add New Sub-Contractors

4.1.4.1   Copy Sub-Contractors

To add sub-contractors from previous contracts, this feature can be used.

    a) Click on the **Copy Sub-contractors link**.

b) A pop-up will be displayed to find the contract from which you want to copy the sub-contractors.
c) Select the year from the drop-down menu.
d) Select the Contract of interest from the drop-down menu.
e) Click on the submit button.

f) As per the selection, the system will display the sub-contractors for the chosen contract. The following information is displayed on the screen:
   i.   Current contract number
   ii.   Contract number from which the sub-contractors are being copied
   iii.   List of Sub-Contractors
   iv.   Any Sub-Contractor highlighted in red is already added to the current Contract.

Copy Sub-Contractors

Contract Name   :   12345 ← i.

Copy Sub Contracts From   :   CODLT 2017-18 AD18 Rebate ← ii.
Contract

*** Highlighted Organizations already Exists in Current Contract

Select	Organization Name	Contractor submits data for this Sub-Contractor?	Contractor submits Zero Expenditure for this Sub-Contractor?	Minority Provider	Faith-Based Organization	CBC/MAI Organization	Actions
☐	SE Center for Infectious Diseases	☐	☐	☐	☐	☐	Edit
☐	Mail-Meds Clinical Pharmacy	☐	☐	☐	☐	☐	Edit
☐	Big Bend Transit	☐	☐	☐	☐	☐	Edit
☐	Star Metro	☐	☐	☐	☐	☐	Edit
☐	Big Bend Cares	☐	☐	☐	☐	☐	Edit
☐	Costco	☐	☐	☐	☐	☐	Edit
☐	Coast Dental	☐	☐	☐	☐	☐	Edit

Save   Cancel

g) To select a sub-contractor, click on the checkbox under the Select column.

h) After selecting sub-contractors, click on the **Edit** link for each sub-contractor.
   i. The system will display the sub-contractor contact information details in a pop-up. Check the checkbox for **Sub Contractor Address Up to date**.
   ii. Click the **Update** button.

Note: User shall be able to verify if the sub-contractor address is up to date. This feature has been added to comply with HRSA reporting requirements.

i) Click the Save button to select the selected Sub-contractor. The option for a contractor to submit data for the sub-contractor has been added along with the options to select if the organization is a **Minority Provider**, **Faith-Based Organization** or **CBC/MAI Organization**.

Select	Organization Name	Contractor submits data for this Sub-Contractor?	Contractor submits Zero Expenditure for this Sub-Contractor?	Minority Provider	Faith-Based Organization	CBC/MAI Organization	Actions
☐ g)	SE Center for Infectious Diseases	☐	☐	☐	☐	☐	Edit
☑	TMH Family Residence Program	☐	☐	☐	☐	☐ h) →	Edit
☐	Ketchum, Wood & Burgert Pathology Assoc	☐	☐	☐	☐	☐	Edit
☑	Quest Diagnostics	☐	☐	☐	☐	☐	Edit
☐	Radiology Associates, P.A.	☐	☐	☐	☐	☐	Edit
☐	Labcorp	☐	☐	☐	☐	☐	Edit
☐	Tallahassee Primary Care	☐	☐	☐	☐	☐	Edit
☐	CVS Pharmacy	☐	☐	☐	☐	☐	Edit
☐	Eastwood Pharmacy	☐	☐	☐	☐	☐	Edit
☐	Mail-Meds Clinical Pharmacy	☐	☐	☐	☐	☐	Edit

1 2 3 4 5

Save Cancel — i)

j) The selected sub-contractors will now be added to the Contract.

View Sub-Contractors

|	
Contract Name :	12345
Enter Provider Name :	

Search

Copy Sub-Contractors | Add Existing Sub-Contractor | Add New Sub-Contractor

j)

Organization Name ⇕	Actions
21st Century Oncology	Add Svc Lines	Edit	Enable
SE Center for Infectious Diseases	Add Svc Lines	Edit	Disable
TMH Family Residence Program	Add Svc Lines	Edit	Disable
Quest Diagnostics	Add Svc Lines	Edit	Disable

Cancel

4.1.4.2   Adding an Existing Sub-contractor

To add existing sub-contractors from the system, this feature can be used.

a) Click on the **Add Existing Sub-contractors link**.

a)

Copy Sub-Contractors | Add Existing Sub-Contractor | Add New Sub-Contractor
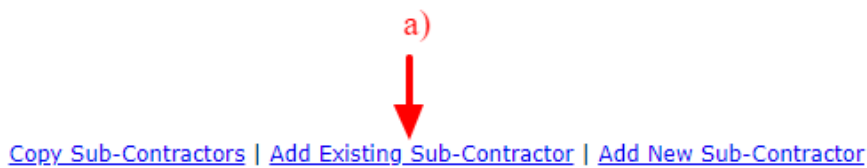
b) A pop-up will be displayed to add existing Sub-Contractors from the system.
c) Select the sub-contractor of choice from the Organization drop-down menu.
d) Click on the Save button to add the selected sub-contractor.

Add Existing Sub-Contractor

b)

Organization	c)	21st Century Oncology ▼	FEID# :	592485899 *
Website Url :			Address1 :	7451 Gladiolus Drive *
Address2 :			City :	Fort Myers *
State :	Florida ▼		Zipcode :	33908 *
Select CHD :	Select ▼ *		Area :	AREA 2B ▼ *

Contact Information

First Name :	Lammee *	Last Name :	Marone *
Phone Number :	239-689-8800 *	Phone Extension :	
Fax :	239-939-7733 *	Email Address :	f@f.com *

Contract :	12345		
Provide Direct Services :	Yes ▼	Minority Provider :	Select ▼ *
Faith-Based Organization :	Select ▼ *	CBC/MAI Organization :	Select ▼ *
Select Month :	January ▼	Method of Procurement :	Contract ▼
Allow Contractor to Submit Zero Expenditure :	Select ▼		

d) Save   Cancel

Note: All the fields marked with the red asterisk * must be updated even if the subcontractor already exists in AIMS. This is to avoid missing data necessary for annual reporting to the Health Resources and Services Administration (HRSA). Users will not be able to save changes if a required field is left blank. The fields named **Minority Provider, Faith-Based Organization** and **CBC/MAI Organization** must be updated every time the subcontractor is added or edited. This is to avoid missing data and ensure accuracy, as these statuses may change. Users will not be able to save data if the information is missing or null. The list of existing subcontractors is in alphabetical order.

4.1.4.3   Adding a New Sub-contractor

To add a new sub-contractor to the system, this feature can be used.

a) Click on the **Add New Sub-contractors link**.

b) A pop-up will be displayed to add new Sub-Contractors to the system.
c) Enter all the required fields for the sub-contractor
d) Click on the Save button to add the new sub-contractor to the system and to the selected contract.

4.1.4.4   Add Service Lines

Once sub-contractors have been added using one of the ways as explained in the sections 4.1.4.1, 4.1.4.2 and 4.1.4.3 on the **View Subcontractors** page, the **Add Svc Lines** option is available for each added sub-contractor. This feature can be used to add service lines to a sub-contractor and allocate appropriate funds to the same for each service line. There are two ways to allocate funds to sub-contractors for a given contract. This section explains the first way.

a) Click on the **Add Svc Lines** for the sub-contractor you may need to add service lines.

Organization Name ⇕	Actions
21st Century Oncology	a) ➡ Add Svc Lines	Edit	Enable
SE Center for Infectious Diseases	Add Svc Lines	Edit	Disable
TMH Family Residence Program	Add Svc Lines	Edit	Disable
Quest Diagnostics	Add Svc Lines	Edit	Disable
21st Century Oncology	Add Svc Lines	Edit	Disable

b) The system will be redirected to the Add Organization Category screen. This page will have the following options:
   i.   Checkbox for **Does Contractor submit data for this Sub-Contractor**. Click this checkbox if the Contractor can also submit data on the behalf of this sub-contractor.
   ii.   Service lines items – Select all service lines which are applicable to the selected sub-contractor.
   iii.   Amount Approved – for each selected service line item selected, enter the approved amount.

c) Click the Submit button to complete the process.

Note:

1. If the contractor decided to allow the sub-contractor to submit expenditure data, then they should work with the AIMS administrator to get sub-contractor users to get access to AIMS.
2. The approved amount cannot be greater than the remaining amount as mentioned for each service line.

4.1.4.5   Edit Provider Data

Once sub-contractors have been added using one of the ways as explained in the sections 4.1.4.1, 4.1.4.2 and 4.1.4.3 on the **View Subcontractors** page, you may edit the sub-contractor data by using the Edit feature available for each added sub-contractor.

a) To edit sub-contractor information, click on the **Edit** link for the sub-contractor of interest.

Organization Name ⬍	Actions
21st Century Oncology	Add Svc Lines	Edit ⟵ _____ a)
SE Center for Infectious Diseases	Add Svc Lines	Edit	Disable
TMH Family Residence Program	Add Svc Lines	Edit	Disable
Quest Diagnostics	Add Svc Lines	Edit	Disable
21st Century Oncology	Add Svc Lines	Edit	Disable

b) The system will pop-up the Edit Provider Data screen.
c) Update/edit any field as required.
d) Click Update to save the changes.

4.1.4.6 Disable/Enable Sub-contractor

For any added sub-contractor, you may disable or enable the same as required using this disable/enable the feature.

a) Disabling
   i. If a sub-contractor is enabled, Click on the **Disable** link for the sub-contractor of interest.

Organization Name ⇕	Actions
21st Century Oncology	Add Svc Lines | Edit | Disable ⬅— i.
SE Center for Infectious Diseases	Add Svc Lines | Edit | Enable
TMH Family Residence Program	Add Svc Lines | Edit | Disable
Quest Diagnostics	Add Svc Lines | Edit | Disable
21st Century Oncology	Add Svc Lines | Edit | Disable a)

   ii. The system will prompt a pop-up box requesting to provide a reason for disabling the sub-contractor.
   iii. Enter the reason.
   iv. Click the Disable button.

Enter Reason

Please enter reason to disable sub-contractor   ii.

Sub-Contractor no longer available. ⬅— iii.

iv ⟶ Disable   Cancel

   v. The sub-contractor will be disabled.

b) Enabling
   i. If a sub-contractor is disabled, Click on the **Enable** link for the sub-contractor of interest.

Organization Name ⇕	Actions
21st Century Oncology	Add Svc Lines | Edit | Disable
SE Center for Infectious Diseases	Add Svc Lines | Edit | Enable ⬅— i.
TMH Family Residence Program	Add Svc Lines | Edit | Disable
Quest Diagnostics	Add Svc Lines | Edit | Disable
21st Century Oncology	Add Svc Lines | Edit | Disable b)

   ii. The system will prompt a pop-up box requesting to provide a reason for enabling the sub-contractor.
   iii. Enter the reason.

iv. Click the **Enable** button.

v. The sub-contractor will be enabled.

Note: Entering the reason for disabling in the textbox is mandatory as indicated by a red asterisk *.

4.1.5 Sub-contractor Allocation

There are two ways to allocate funds to a Sub-Contractor for each service line. The first option is explained in the section 4.1.4.4. This section explains the second option.

Note: To submit the budget planning, Contractors must allocate all the available funds to the added sub-contractors.

a) Under the **View Contracts** section, click **Sub-Contractor Allocation** link.
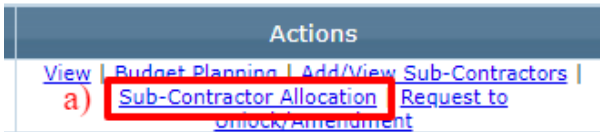
b) The system will be redirected to the Sub-Contractor allocation screen.
c) Allocate funds to each sub-contractor for each service lines as required.
d) Click the Save button to save data
e) Click the Submit button to submit data.

Note: Contractor must allocate all the funds to the sub-contractor, to successfully submit the data.

  f) If the contractor wants to submit data on behalf of the sub-contractor, enable the checkbox for the option **Contractor Submits Data for this Sub-Contractor** and click on the **Submit** button.

Sub-Contractor allocation for 12345

**Highlighted sub-contractor(s) are disabled

Does Contractor submit data for this Sub-Contractor?	Sub-Contractors	1a Ambulatory/O Medical (
☐	Amount	20000.00
☐	Expended To Date	0
☐	21st Century Oncology	20000.00
☐	SE Center for Infectious Diseases	0.00
☐	TMH Family Residence Program	0.00
☐	Quest Diagnostics	0.00
☐	21st Century Oncology	20000.00
f)	Balance	-20000.00

Note: This option allows the contractor to submit the data for the sub-contractor through the **Sub-contractor expenditure** section (*refer to section 5.1*).

4.1.6   Budget Amendments

This feature is used by Contractor to amend or update budget planning once submitted. Budget planning is locked after the initial budget plan has been submitted. The contractor can request to amend the budget again using the **Request to unlock Budget Amendments** feature. Once the request is approved by the Contract Manager or Patient Care Community Program staff, the **Add Amendment** option will be enabled to complete the budget planning updates.

All changes saved in the **Budget Amendment** will immediately be reflected on the **Contract Budget Planning** page. The amendment will allow users to move money from one existing line item to another.

4.1.6.1   Request to Unlock

To update budget planning for a contract:

a) Click on the **Request to Unlock/Amendment** link for the contract of interest.

b) The system will display a pop-up to create a request for the Budget Amendment.
c) Select the radio button for Budget Amendment.
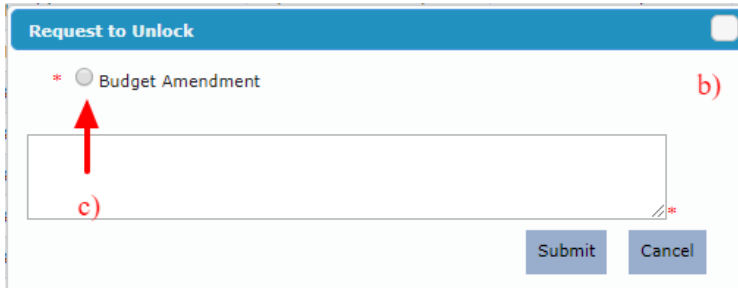
d) An additional option will appear **Are there any changes in Direct and Support Care Services**. Select Yes or No for the same. If Yes is selected, then the budget amendment request will be sent to Patient Care Community Programs staff to review and unlock. If No is selected, then the Contract Manager can review and unlock the budget amendment request.
e) Enter the reason for this request.
f) Click Submit.
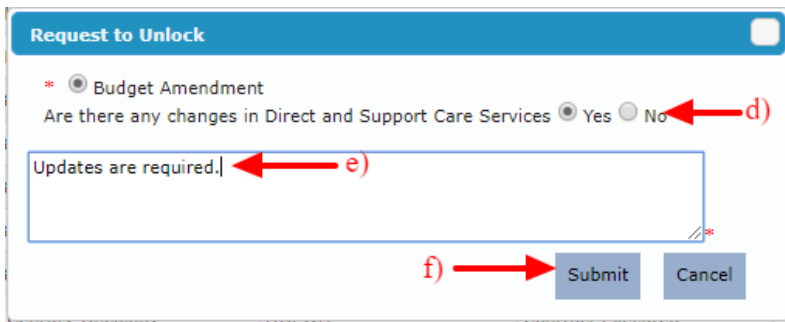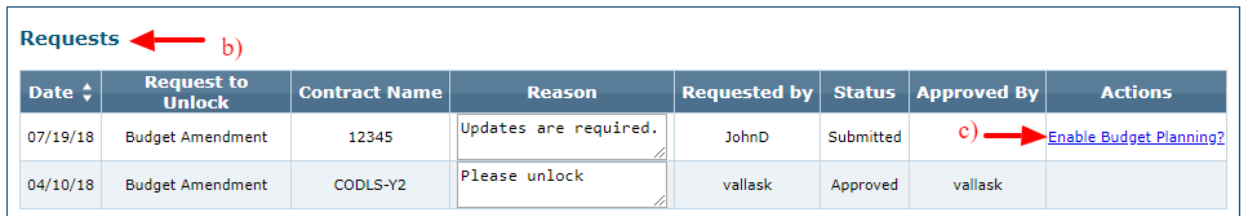
4.1.6.2 Request Approval

Requests to unlock the Budget, made in the previous section, will appear under the Requests section of AIMS dashboard page of the Contract Manager, Bureau User or Patient Care Community Program staff.

As a Contract Manager or Bureau user, this request must be approved to proceed with the amendment.

a) Go to the AIMS Dashboard screen.
b) Under the Request section, locate the requests made by the contractors to unlock/enable Budget planning.
c) Click on the Enable Budget Planning? Link.

d) The system will display with a confirmation message, click OK to close the same.

e) The request to unlock the Budget plan will be completed.

Note: Providers must get approval from their contract manager and/or Community Programs representative prior to completing the amendment in AIMS. Please refer to the Administrative Guidelines[7] for more details.

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[7] The Administrative Guidelines are available at the following link - http://www.floridahealth.gov/diseases-and-conditions/aids/patient-care/_documents/administrative-guidelines/Administrative_Guidelines_2017-2018_FINAL.pdf

4.1.6.4 Amendment

If the request to unlock budget amendment is approved, then **Add Amendment** option will become active on the **Budget Planning** section. A contractor will be able to start an amendment for the contract of interest.

    a) Click on the Budget Planning link under View Contracts section for the approved contract.
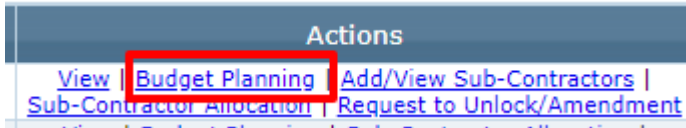
    b) The system will be redirected to the Contract Budget Planning screen. The Add Amendment link will be available for the contract at the bottom of the screen.

    c) To start the amendment process, click on the Add Amendment link.

Contract Budget Planning

Contract : 12345
Annual Budget : 100,000
Advances : 5,000
Administrative Cost Limit : 2,000

- Hide Budget planning

Administrative Services

Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Administrative Services	2000.00	0	2000.00

Direct and Support Care Services

Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
1a Ambulatory/Outpatient Medical Care	20000.00	0	20000.00
1g Home Health Care	20000.00	0	20000.00
1k Medical Nutrition Therapy	20000.00	0	20000.00
1l Medical Case Management (including Treatment Adherence)	20000.00	0	20000.00
2h Linguistic Services	15000.00	0	15000.00

Clinical Quality Management Services

Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Clinical Quality Management	1500.00	0	1500.00

Planning and Evaluation Services

Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Planning and Evaluation	1500.00	0	1500.00

c) → Add Amendment

    d) The options for Budget Amendment Details will appear below the actual submitted data.
    e) Make changes for each service line as required.
    f) Click Save to save the changes.
    g) Click submit to submit the Amendment.

Contract Budget Planning

Contract   :   12345
Annual Budget   :   100,000
Advances   :   5,000
Administrative Cost
Limit   :   2,000

- Hide Budget planning

Administrative Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Administrative Services	2000.00	0	2000.00

Direct and Support Care Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
1a Ambulatory/Outpatient Medical Care	20000.00	0	20000.00
1g Home Health Care	20000.00	0	20000.00

Clinical Quality Management Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Clinical Quality Management	1500.00	0	1500.00

Planning and Evaluation Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Planning and Evaluation	1500.00	0	1500.00

d)

Add Amendment

Budget Amendment Details

Advances   :   5,000

Administrative Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Administrative Services e) →	2000.00	0	2000.00

Direct and Support Care Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
1a Ambulatory/Outpatient Medical Care	20000.00	0	20000.00
1g Home Health Care	20000.00	0	20000.00

Clinical Quality Management Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Clinical Quality Management	1500.00	0	1500.00

Planning and Evaluation Services			
Category Name	Amount Approved	Expended to Date	Expended on Sub Contractor
Planning and Evaluation	1500.00	0	1500.00

g)

Total Amount: 100000.00

f) → Save   Submit   Cancel

Note: When moving funds from one-line item to another, the system will not allow users to enter an amount less than the Expended to Date amount or greater than contract amount.

The changes done on budget planning via amendment will reflect immediately on the **budget planning** page.

Section 5- Data Submission

Providers are required to submit monthly reports for their agency. These reports are used to fulfill the program's reporting requirements according to the grant and legislative awards. It is imperative that these reports be accurate and submitted on time. If a previously submitted report is inaccurate or incomplete, it is important that the report is updated and resubmitted. Please contact the assigned contract manager, and/or Community Program's representative for assistance as necessary.

The data submission module allows agencies to submit:

1. **Expenditure Data**.

2. **First Time This Year (FTTY) and Women, Infant, Children, and Youth (WICY) demographic data**.

3. **Revised Implementation Plan** (*Consortia & EC contracts only*)

4. **Final Implementation Plan** *(Consortia & EC contracts only)*

5.1   Expenditure Data as Sub-Contractor

The **Expenditure Data** section is used to document monthly expenditure data. Sub-Contractors are required to submit a monthly expenditure report that captures the following:

a) The number of clients served
b) The number of units of service provided
c) The amount (from funds) expended by service category, and
d) The amount they would like to put towards advance payments.

Service line items under the Administrative services category do not require the number of clients served or units of service provided.

A unit of service is defined in the Administrative Guidelines[8] by service category*.*

The Expenditure data submission is initiated with the Sub-contractor submitting the expenditure report for each month towards an assigned contract. A Contractor can approve or reject the expenditure data submitted by the sub-contractor.

Note: This functionality will be available for contracts starting from the year 2018.

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[8] The Administrative Guidelines are available at the following link - http://www.floridahealth.gov/diseases-and-conditions/aids/patient-care/_documents/administrative-guidelines/Administrative_Guidelines_2017-2018_FINAL.pdf

a) Under the **Data Submission** menu click **Expenditure Data** link.

b) The system will redirect you to the Sub-Contractor Expenditure Data screen. Select the search criteria for which Expenditure Data needs to be submitted
   i.   Select the year
   ii. Select Contract
   iii. Select Sub-Contractor
   iv. Select Month (the next month will appear if the expenditure data for the current month is submitted)
   v.   Click Submit button to open the report for the options selected.

c) The Expenditure Data report will be opened.

Expenditure Data for TLH-123

For Month: April
For Organization: 21st Century Oncology

Administrative Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Administrative Services	0	0	2000.00	0	0	2000.00

Direct and Support Care Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
1a Ambulatory/Outpatient Medical Care	0	0	2000.00	0	0	2000.00
1d Oral Health Care	0	0	28000.00	0	0	28000.00

Clinical Quality Management Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Clinical Quality Management	0	0	18000.00	0	0	18000.00

Inpatient/Managed Care Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Planning and Evaluation Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Planning and Evaluation	0	0	50000.00	0	0	50000.00

Other Services (4BMOE)

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Requested Service Line Items (CHD GR Only)

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Total Expended: 0   0

[Save] [Save & Submit] [Cancel]

d) Enter the values as per the expenditure made for each category.
e) For Administrative Services, only the total amount expended for the month is required.

Administrative Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Administrative Services	0	0	2000.00	0	0 — d)	2000.00

f) For all other categories, as applicable, you must enter the number of clients served, units of service and amount expended this month.

Direct and Support Care Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
1a Ambulatory/Outpatient Medical Care e) →	0	0	2000.00	0	0	2000.00
1d Oral Health Care	0	0	28000.00	0	0	28000.00

g) Click Save to save the data.
h) Click Save & Submit to Submit the data for the given month.

Other Services (4BMOE)						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Requested Service Line Items (CHD GR Only)						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Total Expended: 5300.00 5700.00

f) ⟶ Save Save & Submit Cancel

g)

Note*: The number of clients cannot be zero.*

5.2 Sub-Contractor Expenditure Data

As a Contractor or Contract Manager, the user can approve or reject the Expenditure report submitted by the Sub-Contractor for any month (as explained in section 5.1).

a) Under the **Data Submission** menu click the **Expenditure Data** link.

AIMS 2.0

Provider Management

View Providers
Organization Profile

Contract Management

View Contracts
Contractor Comments

Data Submission

Expenditure Data ⟵ a)
FTTY Demographic Data
Revised Implementation Plan
Final Implementation Plan

View Reports

Contractor Reports

Logout

b) The system will redirect you to the Expenditure Data screen with two options Expenditure Data and Sub-Contractor Expenditure Data. Click on the latter option.

Expenditure Data

Select Expenditure Data
- Expenditure Data
- Sub-Contractor Expenditure Data ← b)

c) On the Sub-Contractor Expenditure Data screen select the search criteria for which Expenditure Data needs to be reviewed
  i. Select the year
  ii. Select Contract
  iii. Select Sub-Contractor
  iv. Select Month
  v. Click the Submit button to open the report of the options selected.

Sub-Contractor Expenditure Data c)

Year	:	2018-2019 ▼ ← i.
Select Contract	:	TLH-123 ▼ ← ii.
Select Sub-Contractor	:	21st Century Oncology ▼ ← iii.
Select Month	:	June ▼ ← iv.

v → Submit   Cancel

d) The system will be redirected to the Expenditure data submitted by the sub-contractor.
e) Contractor user may Approve or reject the same.
f) If rejected, the Sub-Contractor will be notified and should resubmit the expenditure report for the same month again.

Expenditure Data for TLH-123

For Month: June
For Organization: 21st Century Oncology

d)

Administrative Services						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Administrative Services	0	0	2000.00	100.00	300.00	1700.00

Direct and Support Care Services						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
1a Ambulatory/Outpatient Medical Care	10	1	2000.00	200.00	700.00	1300.00
1d Oral Health Care	1	1	28000.00	4000.00	9000.00	19000.00

Clinical Quality Management Services						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Clinical Quality Management	0	0	18000.00	500.00	500.00	17500.00

Inpatient/Managed Care Services						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Planning and Evaluation Services						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Planning and Evaluation	0	0	50000.00	500.00	500.00	49500.00

Other Services (4BMOE)						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Requested Service Line Items (CHD GR Only)						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Total Expended: 5300.00 11000.00

[Approve] [Reject] [Cancel]

e) e)

g) If Approved, the sub-contractor will be notified about the same.

5.3   Expenditure Data as Contractor

The **Expenditure Data** section is used to document monthly expenditure data. Contractors are required to submit a monthly expenditure report that captures the following:

a) The number of clients served
b) The number of units of service provided
c) The amount (from funds) expended by service category, and
d) The amount they would like to put towards advance payments.

Service line items under the Administrative services category do not require the number of clients served or units of service provided.

If a Contract requires Sub-Contractor, the contractor will receive the expenditure report from the sub-contractor and as a Contractor, you may approve or reject the expenditure report.

If a Contractor is acting as a Sub-contractor or the contractor does not require a sub-contractor, then the Contractor is required to complete the expenditure report and submit the same.

A unit of service is defined in the Administrative Guidelines[9] by service category.

a) Under the **Data Submission** menu click **Expenditure Data** link.

---

[9] The Administrative Guidelines are available at the following link - http://www.floridahealth.gov/diseases-and-conditions/aids/patient-care/_documents/administrative-guidelines/Administrative_Guidelines_2017-2018_FINAL.pdf

b) The system will redirect you to the Expenditure Data screen with two options Expenditure Data and Sub-Contractor Expenditure Data.
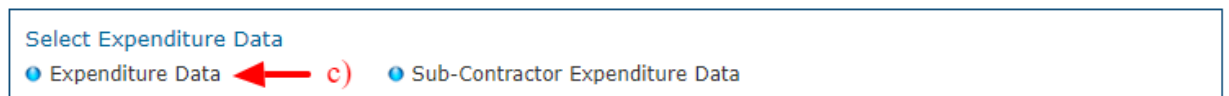
c) Click on the **Expenditure Data** link, the system will redirect to the Submit Expenditure Data screen.

d) On the Submit Expenditure Data screen select the search criteria for which Expenditure Data needs to be submitted
   i. Select the year
   ii. Select the Contract
   iii. Select the Month (the next month will appear if the expenditure data for the current month is submitted)
   iv. Click Submit button to open the report of the options selected.

Submit Expenditure Data d)

Year	:	2018-2019 ▾ ← i.
Select Contract	:	CODMG-R2 ▾ ← ii.
Select Month	:	July ▾ ← iii.

iv. → Submit   Cancel

e) The system will redirect you to the Expenditure data report for the selected contract and the month. The below screenshot displays the system assuming the sub-contractor expenditure data was submitted and approved.

Expenditure Data for TLH-123

For Month : June

Administrative Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Administrative Services	0	0	2000.00	100.00	300.00	1700.00

Direct and Support Care Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
1a Ambulatory/Outpatient Medical Care	10	1	2000.00	200.00	700.00	1300.00
1d Oral Health Care	1	1	28000.00	4000.00	9000.00	19000.00

Clinical Quality Management Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Clinical Quality Management	0	0	18000.00	500.00	500.00	17500.00

Inpatient/Managed Care Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Planning and Evaluation Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Planning and Evaluation	0	0	50000.00	500.00	500.00	49500.00

Advances

Other Services (4BMOE)

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Requested Service Line Items (CHD GR Only)

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

n)

Total Expended: 5300.00   11000.00
Total Advance Reimburse Expended: 0   0

m) → Save   Save & Submit   Cancel

f) Click Save to save the data.
g) Click Save & Submit to save and submit the data.

h) Expenditure data will be submitted and the Contract Manager will be notified.

Note: If the admin enables the contract manager to submit the expenditure data on behalf of the contractor, then the expenditure data submitted by the contractor will be approved.

5.3.1 View Missing Sub-Contractor Submission

If the Sub-Contractor has not submitted their expenditure data for the month, the Contractor will not be able to view the data and will not be able to submit the report. To view the Sub-Contractor actions for the month, follow the steps below.

   a) As a Contactor, open the Expenditure report for any contract.
   b) If the contract is missing sub-contractor data submission for the same, the View Missing Sub-Contactor Submission link will be activated.

Expenditure Data for TLH-123

For Month : April

b)

Expenditure data can only be submitted once all the sub-contractors have submitted their data and approved by contractor (View Missing Sub-Contractor Submissions).

Administrative Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left
Administrative Services	0	0	2000.00	0	0	2000.00

Direct and Support Care Services

   c) Click on the link, the system will display a pop-up.
   d) The pop-up will display the Sub-contractors and the status of the expenditure data for the current month.

5.3.2 Zero Expenditure Submission

A Contractor or Contract manager can submit zero expenditures data for sub-contractors, if expenditure data is not submitted for a month by the sub-contractor and if the sub-contractor has zero expenditures.

   a) If the expenditure data is not submitted by the sub-contractor, the Expenditure data screen will have the View Missing Sub-contractor Submission link activated.
   b) All categories will contain zero values.
   c) Click on the link, the system will display a pop-up.
   d) The pop-up will display the status of the expenditure data by each sub-contractor for the given contract.
   e) Click on the Check-box to Submit the Data on the behalf of the Sub-Contractor, if not submitted. If the sub-contractor has saved the data but not submitted, the data will be submitted.
   f) Click the submit button.

Submission Details

Note:
*If the Status of the Organization is Data Not Saved then Zero Expenditure will be submitted
*If the Status of the Organization Saved then Saved Expenditure will be submitted

Organization Name	Status	Submit Expenditure for this month
21st Century Oncology	Data is only saved	☐ e)

f) → Submit   Cancel

d)

g) The Save and Save & Submit for the expenditure data for the same contract will be activated now.

h) Click on Save & Submit button to submit the expenditure report.

Other Services (4BMOE)						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Requested Service Line Items (CHD GR Only)						
Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date	Balance Left

Total Expended: 0.00   11000.00
Total Advance Reimburse Expended: 0   0

h) → Save Save & Submit Cancel

i) This will store zero expenditures for sub-contractors for that month

After all the sub-contractors have submitted their data, the contract manager is ready to submit expenditure data for that month.

5.4 FTTY Demographic Data

Providers are required to submit a monthly demographic report, also known as the FTTY (First Time This Year) report. It captures basic demographic data on clients seen for the first time in the fiscal year.

The following data are required for this report:

1. **Unduplicated client**
   a) Each client must only be counted once each fiscal year. For example, if Rachel Doe is seen in April of FY 2017-18, she will not be counted again when she returns in June for a follow-up visit. She will be counted as a FTTY client when she returns for a visit during FY 2018-19.
   b) The FTTY unduplicated client count will decrease as the fiscal year progresses because clients are typically seen within the first few months of the year. It is not unusual to have no FTTY clients during some of the latter months of the fiscal year.
2. **WICY data**
   The State is required to report information on Ryan White expenditures for Women, Infant, Children and Youth (WICY). Previously, this data was collected at the end of the fiscal year but is now collected monthly. WICY populations are defined as follows:
   a) Women: 25+ years old
   b) Infant: 0-35 months old (0-2 years old)
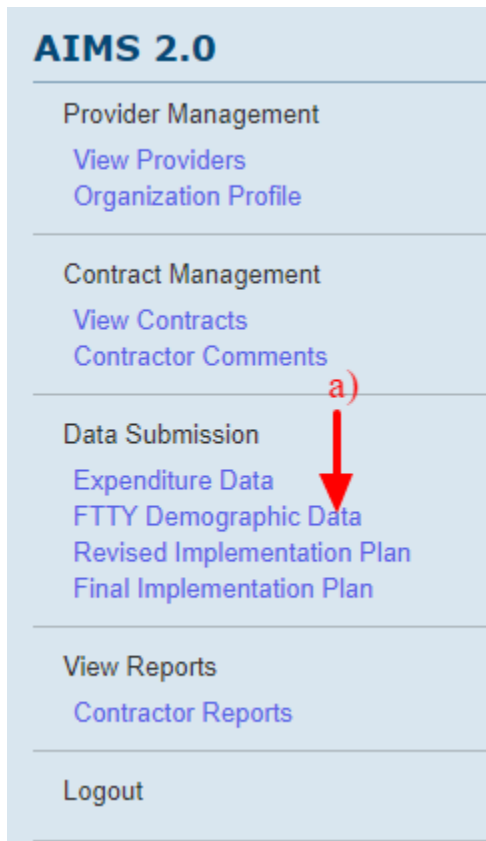   c) Children: 36 months -11 years old
   d) Youth: 12-24 years old
3. **Ethnicity and Race**
   a) Ethnicity and Race are two distinct categories and the unduplicated count should be divided among the groups available.

To view the FTTY Demographics Data, follow the below steps.

a) Under the **Data Submission** menu click the **FTTY Demographic Data** link.

b) The system will redirect you to the Submit FTTY Demographic Data screen with the following search criteria:
   i.   Year
   ii.   Select Contract
   iii.   Select Month
   iv.   Click Submit button to open the report of the options selected.

c) The system will redirect you to the FTTY Demographic Data for the selected contract.
d) Enter the total number of unduplicated clients.
e) Enter the totals for each section/sub-section for the remaining 3 categories and its sub-categories.
f) Click Save to save the data.
g) Click Save & Submit to submit the data.

FTTY Demographic Data for TLH-123   c)

For Month : April

Get Data From CAREWare

TOTAL		
Description	**Total**	**Year to Date**
Unduplicated clients d) →	0	0

WICY		
Description	**Total**	**Year to Date**
Women (Ages 25 and Up) e)	0	0
Infant (Age 0-2)	0	0
Children (Ages 3-11)	0	0
Youth (Ages 12-24)	0	0
Non-WICY (Male Ages 25 and Up)	0	0

ETHNICITY		
Description	**Total**	**Year to Date**
Hispanic	0	0
Non-Hispanic	0	0

RACE		
Description	**Total**	**Year to Date**
White	0	0
Black	0	0
Asian	0	0
Other	0	0

f) → Save   Save & Submit ← Cancel   g)

If the provider for the contract is available in the CAREWare database, the button "Get Data from CAREWare" will be visible. Clicking on the button will get the data from CAREWare and automatically fills in the report.

Note: The total of 3 categories/sub-categories cannot be greater the total unduplicated number.

5.5 Revised Implementation Plan

The State submits an implementation plan each year as part of the Ryan White Part B grant submission (Consortia & EC Contracts only). It provides an estimate of the number of clients, units of service and the amount of funding the program will spend by line item. Once the grant is awarded and providers have had a chance to plan the services they will provide, data from this section is submitted as the **Revised Implementation Plan** to reflect the services the field intends to render for the year. Implementation Plans are required for Ryan White Part B-funded providers only.

Once the fiscal year ends, the State is required to report on the services rendered throughout the fiscal year. This data is captured in the Final Implementation Plan. HRSA also requires that grantees provide information on the accomplishments, challenges and changes the agency experienced throughout the fiscal year. This is collected through the Progress Report narrative.

The following reports are available under the Annual **Revised Data Submission section**:

1. **Annual Progress Data**
2. **Revised Implementation Plan**

Providers estimate the number of clients and units of service the agency will provide in the new fiscal year. The **Revised Implementation Plan** will become inaccessible after the submission deadline has passed.

To access these reports, follow the steps below:

a) Under the **Data Submission** menu click **Revised Implementation Plan** link.

b) The system will redirect you to Annual Revised Data Submission screen with Annual Progress Data section selected.

Annual Revised Data Submission

c) The user will get the following options to choose from:
i.   Year
ii.   Select Contract
iii.   Period
iv.   First Name
v.   Last Name
vi.   Phone Number
vii.   Phone Extension

Annual Revised Data Submission

d) Click Save to save the selection.
e) Click Continue to save and submit the selection.

f) The system will be redirected to the Revised Implementation Plan section.
g) Enter the Number of Unduplicated Clients to be Served.
h) Enter the Units of service to be Provided fields for all the categories.
i) Click Save to save the data
j) Click Save & Submit to submit the data.

Implementation Plan   ***Please Turn Off Pop Up Blocker***

Annual Progress Data | Revised Implementation Plan ← f)

Revised Implemetaion Plan   g)   h)

Direct and Support Care Services

Category Name	Units of Description	# of Unduplicated Clients To Be Served	Units of Service To Be Provided	Approved Budget
1a Ambulatory/Outpatient Medical Care	Ambulatory/Outpatient Medical Care 1 visit/1 FTE,	10	10	2000.00
1d Oral Health Care	Oral Health Care 1 visit	10	10	28000.00

Back | Save | Save & Submit | Cancel

i)   j)

k) The system will display a message for successful submission.

Message

Revised Implementation Plan Submitted Successfully

Ok
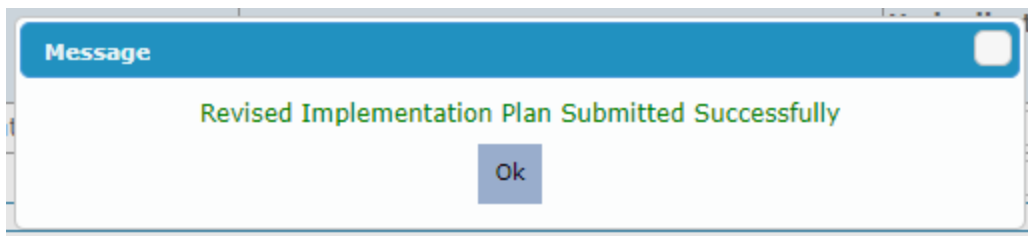
Note: The user must turn off pop up blocker to be able to view these screens.

5.6   Final Implementation Plan

The **Final Implementation Plan** reflects the number of clients served, unduplicated clients served, units of service provided, and the amount expended by line item at the end of the fiscal year. The plan is submitted to HRSA approximately 45 days after the end of the fiscal year (*Consortia & EC contracts only*).

The **Final Implementation Plan** auto-populates the number of clients served and units of service provided during the fiscal year, based on data submitted in the monthly Expenditure Reports. If these numbers are incorrect, corrections can only be made via the Expenditure Data page. The provider will need to identify the expenditure report(s) with the error and resubmit the correct amount expended, the number of clients served that month and/or units of service provided. For the unduplicated client count, providers will enter the number of unduplicated clients served by line item. This field is the only field available for editing. Providers should reference their primary data source (e.g., CAREWare) for this client count.

At the end of the Ryan White fiscal year, the agency will need to review and approve the **Final Implementation Plan**. It is imperative data is accurate. Data is updated as **Expenditure Reports** are submitted. It is advisable to review the report frequently throughout the year to catch errors early.

To access these reports, follow the steps below:

a) Under the **Data Submission** menu click **Final Implementation Plan** link.

b) The system will redirect you to the Annual Final Data Submission screen with Annual Progress Data section selected.

c) The user will get the following options to choose from:
    i.   Year
    ii.   Select Contract
    iii.   Period
    iv.   First Name
    v.   Last Name
    vi.   Phone Number
    vii.   Phone Extension

Annual Revised Data Submission

c)

| Annual Progress Data | Revised Implementation Plan |

Year	:	2018-2019 ▼ i.
Select Contract	:	TLH-123 ▼ ii.
Period	:	Annual ▼ iii.
First Name	:	John iv.
Last Name	:	Doe v
Phone Number	:	vi.
Phone Extension	:	vii.

e)

d) ⟶ Save   Continue   Cancel

d) Click Save to save the selection.
e) Click Continue to save and submit the selection.
f) The system will be redirected to the Final Implementation Plan section.
g) Enter the Number of Unduplicated Clients for all the categories.
h) Click Save to save the data.

Implementation Plan

| Annual Progess Data | Final Implementation Plan | Progress Report |

Final Implementation Plan

f)

g)

Direct and Support Care Services

Category Name	Units of Description	# Of Clients Served	# of Unduplicated Clients	Units of Service Provided	Total Expenditures
1a Ambulatory/Outpatient Medical Care	Ambulatory/Outpatient Medical Care 1 visit/1 FTE,	12	5	51	700.00
1d Oral Health Care	Oral Health Care 1 visit	2	2	21	9000.00

Clinical Quality Management Services

Category Name	Units of Description	# Of Clients Served	# of Unduplicated Clients	Units of Service Provided	Total Expenditures
Clinical Quality Management	Encompasses capacity building, clinical quality mar	0	0	0	500.00

Inpatient/Managed Care Services

Category Name	Units of Description	# Of Clients Served	# of Unduplicated Clients	Units of Service Provided	Total Expenditures

Planning and Evaluation Services

Category Name	Units of Description	# Of Clients Served	# of Unduplicated Clients	Units of Service Provided	Total Expenditures
Planning and Evaluation	Encompasses: program evaluation, needs assessn	0	0	0	500.00

Advances

Other Services (4BMOE)

Category Name	Units of Description	# Of Clients Served	# of Unduplicated Clients	Units of Service Provided	Total Expenditures

Requested Service Line Items (CHD GR Only)

Category Name	Units of Description	# Of Clients Served	# of Unduplicated Clients	Units of Service Provided	Total Expenditures

h) [Back] [Save] [Cancel]

i) The **Progress Report** becomes available for editing after the **Final Implementation Plan** has been submitted at the end of the Ryan White fiscal year. It is a narrative of the provider's accomplishments and challenges in meeting established goals and objectives. It also includes any technical assistance needs identified during the fiscal year. The responses should be concise and *fully* answered.

j) Clicking on Save from the point h) above (if all the month's expenditure report has been submitted) the system will be redirected to the Progress report.

k) Fill in all the questions from 1 to 4.

l) Click save to save the data

m) Click Save & Continue to save the data.

Note: It is advisable to write out responses in a Word or similar program first, then copy and paste text into the fields to ensure grammar and spelling are correct.

Section 6 – View Reports

AIMS provides several reports for different user types. All the reports are available under the View Reports section on the Navigation Bar. The following reports are available for each User:

Reports	User Types			
	Contract Manager	Contractor	Sub-Contractor	Bureau
Contractor Reports	Yes	Yes[10]		Yes
Report Manager	Yes			Yes
Bureau Reports				Yes
Contract Unit Reports				Yes
Sub-Contractor Reports			Yes	

Note: The system allows the Users to print, view and export all the available reports.

6.1   Contractor Reports

The Contract Manager, Contractor and Bureau users can access contractor Reports.

    a) Click on the Contract Reports link under the View Report section on the navigation bar.

---
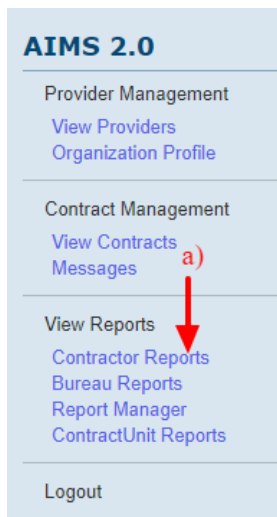
[10] Only if a contractor is also a Contract Manager.

b) The system will redirect the user to the list of the AIMS Contractor Reports Available:
1. Expenditure/Invoice
2. FTTY Demographic
3. Providers/Subcontractor Data by Contract
4. Progress Report
5. Revised Implementation Plan Report
6. Final Implementation Plan Report

AIMS Contractor Reports
(b
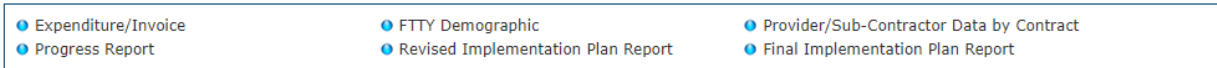
ⓘ Expenditure/Invoice	ⓘ FTTY Demographic	ⓘ Provider/Sub-Contractor Data by Contract
ⓘ Progress Report	ⓘ Revised Implementation Plan Report	ⓘ Final Implementation Plan Report

c) To open a report, select the report of interest and click on the same. For example, Expenditure/Invoice.

AIMS Contractor Reports
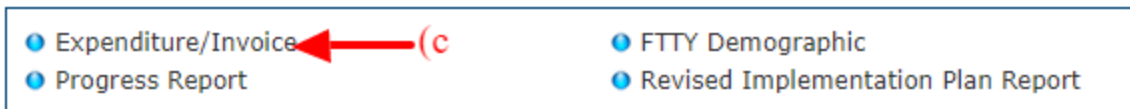
ⓘ Expenditure/Invoice ◄—(c   ⓘ FTTY Demographic
ⓘ Progress Report   ⓘ Revised Implementation Plan Report

d) The system will redirect the user to the report filter criteria.
1. Select Area from the dropdown list
2. Select Contract from the dropdown list
3. Select a month from the dropdown list
4. Click the Print Report button

Expenditure Report
d)

Select Area   : ALL ▼ ◄— 1   4
Select Contract   : CODMB-R2 ▼ ◄— 2
Select Month   : July ▼ ◄— 3

Print Report   Cancel

e) The system will redirect to the Report

f) This report can be printed out or exported by following the steps explained in sections 6.5 and 6.7.

6.2   Report manager

The Report Manager section allows the Contract Manager and Bureau User to View, Approve, Un-Approve and Reject any Reports submitted.

a) Click on the Report Manager link under the View Report section on the Navigation Bar.

b) The system will redirect to the Report manager screen.

Report	Contract Name	Month/Quarter	Status	☐	Action
Expenditure	2017-2018 Miami CHD GR	April	Submited	☐	View
Expenditure	2017-2018 Volusia CHD GR	April	Submited	☐	View
Expenditure	2017-2018 Martin CHD GR	April	Submited	☐	View
Expenditure	2017-2018 Palm Beach CHD GR	April	Submited	☐	View
Expenditure	2017-2018 Bay CHD GR	April	Submited	☐	View
Expenditure	2017-2018 Hernando CHD GR	April	Submited	☐	View
Expenditure	2017-2018 Marion CHD GR	April	Submited	☐	View
FttyDemographics	2017-2018 Broward CHD GR	January	Submited	☐	View
FttyDemographics	2017-2018 Broward CHD GR	October	Submited	☐	View
FttyDemographics	2017-2018 Broward CHD GR	November	Submited	☐	View

1 2

c) The reports are listed in the table on the Report Manager screen.

6.2.1 Report Filters

The user can filter to the specific reports on different criteria provided:

a) Program – Select the dropdown menu to choose an available program.
b) Area – Select the dropdown menu to choose an available Area.
c) Contract – Select the dropdown menu to choose an available Contract.
d) Status – Select the dropdown menu to choose an available Report Status. By default, "Submitted" status is selected.
e) Report Type – Select the dropdown menu to choose an available Report Type. Following report types are available:
   1. Expenditure Data
   2. FTTY Demographic
   3. Annual Progress Report
   4. Revised Implementation Plan Report
   5. Final Implementation Plan Report

Report Manager

Select Program	:	Patient Care-CHD GR ▼	← a)
Select Area	:	ALL ▼	← b)
Select Contract	:	ALL ▼	← c)
Select Status	:	Submitted ▼	← d)
Select Report	:	ALL ▼	← e)

The result set will dynamically update with a filter selection.

6.2.2 Report Actions

For any available report, the user can View, Approve, Reject or Un-Approve the report.

a) To view a report, click on the View link available in the Action column for the given report.

Report ⬍	Contract Name ⬍	Month/Quarter ⬍	Status	☐	Action
AnnualProgressReport	ABC	Annual-2010	Submited	☐	View ← a)
AnnualProgressReport	2017-2018 St. Lucie CHD RW Consortia	Annual-2017	Submited	☐	View
AnnualProgressReport	2017-2018 Martin CHD RW Consortia	Annual-2017	Submited	☐	View
AnnualProgressReport	2017-2018 Indian River CHD RW Consortia	Annual-2017	Submited	☐	View
AnnualProgressReport	2018-2019 Indian River CHD RW Consortia	Annual-2018	Submited	☐	View
AnnualProgressReport	2018-2019 Baker CHD RW Consortia	Annual-2018	Submited	☐	View
Expenditure	CODLP-Y2	Final	Submited	☐	View
Expenditure	2017-2018 Monroe CHD RW Consortia	Final	Submited	☐	View
Expenditure	2017-2018 Volusia CHD RW Consortia	March	Submited	☐	View
Expenditure	2017-2018 Flagler CHD RW Consortia	Final	Submited	☐	View

1 2 3 4 5 6 7 8 9 10

b) All report types (except Expenditure report) will be opened in a new tab with a standard report format.
c) This report can be printed out or exported by following the steps explained in sections 6.5 and 6.7.

d) Viewing the Expenditure report, the system will be redirected to the Expenditure Data report.

Expenditure Data for 2017-2018 Volusia CHD RW Consortia d)

For Month : March

Administrative Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date
Administrative Services	0	0	126797.00	8196.82	114379.83

Direct and Support Care Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date
1a Ambulatory/Outpatient Medical Care	45	63	133930.00	7896.55	104233.39
1c AIDS Pharmaceutical Assistance (local)	12	37	64698.00	3172.86	34643.60
1d Oral Health Care	21	27	209426.00	15185.18	183599.16
1f Health Insurance Premium/Cost Sharing	120	296	517248.00	56028.61	363626.75
1j Mental Health Services	1	1	4000.00	31.00	1277.97
1k Medical Nutrition Therapy	0	0	3000.00	0.00	0.00
1l Medical Case Management (including Treatment Adherence)	101	192	276179.00	26681.11	264123.90
2a Case Management (non-medical)	88	144	118841.00	11678.80	112553.75
2c Emergency Financial Assistance	2	4	48475.00	5506.75	38577.16
2d Food Bank/Home Delivered Meals	48	48	35090.00	34996.50	34996.50
2h Linguistic Services	1	1	719.00	110.00	220.00
2i Medical Transportation Services	12	37	1625.00	0.00	1350.00
2k Psychosocial Support Services	0	0	0.00	0.00	0.00

Clinical Quality Management Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date
Clinical Quality Management	0	0	84531.00	4422.63	75091.05

Inpatient/Managed Care Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date

Planning and Evaluation Services

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date
Planning and Evaluation	0	0	42266.00	2948.42	36916.24

Advances

Other Services (4BMOE)

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date

Requested Service Line Items (CHD GR Only)

Category Name	# Of Clients Served	Units of Service	Approved Budget	Expended this Month	Expended to date

Total Expended:	176855.23	1365589.30
Total Advance Reimburse Expended:	0.00	0.00

Any report submitted can be processed by the three actions, Approve, Reject and Un-Approve:

a) Select one or multiple reports by clicking the checkbox.
b) Approve – click this button to approve the expenditure data.
c) Reject – click this button to reject the expenditure data submitted. This action will allow the contractor to resubmit expenditure data.
d) Un-Approve – click this button to un-approve already approved expenditure data.

Note: If the contractor has a contract manager role then the data submission is auto-approved.

6.3   Bureau Reports

Bureau users can access Bureau Reports.

    a) Click on the Bureau Reports link under the View Report section on the navigation bar.
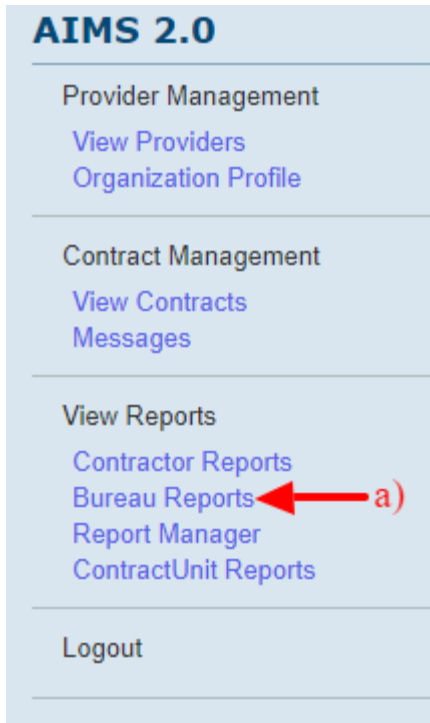
    b) The system will redirect the user to the list of the AIMS Bureau Reports Available:

       1. Expenditure/Invoice

       2. FTTY Demographic

       3. Contract Organization Data

       4. Providers/Sub-Contractor Data

       5. Allocation

       6. Progress Report

AIMS Bureau Reports   b)

Expenditure/Invoice	FTTY Demographic	Contract Organization Data
Provider/Sub-Contractor Data	Allocation	Progress Report

    c) To open a report, select the report of interest and click on the same. For example, Expenditure/Invoice.

AIMS Bureau Reports

Expenditure/Invoice c)	FTTY Demographic
Provider/Sub-Contractor Data	Allocation

d) The system will redirect the user to the report filter criteria.
1. Select Area from the dropdown list
2. Select Contract from the dropdown list
3. Select a month from the dropdown list
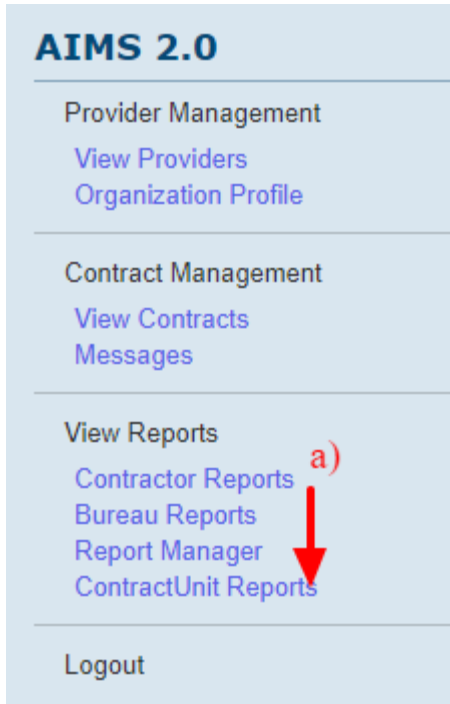4. Click the Print Report button

e) The system will redirect to the Report

f) This report can be printed out or exported by following the steps explained in sections 6.5 and 6.7.

6.4 Contract Unit Reports

Bureau users can access Contract Unit Reports.

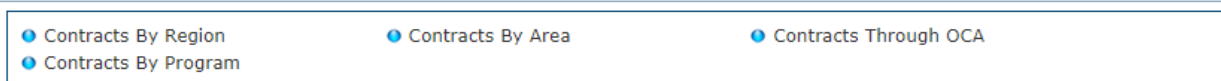a) Click on the Contract Unit Reports link under the View Report section on the navigation bar.

b) The system will redirect the user to the list of the AIMS Contract Unit Reports Available:

1. Contracts By Region

2. Contracts By Area

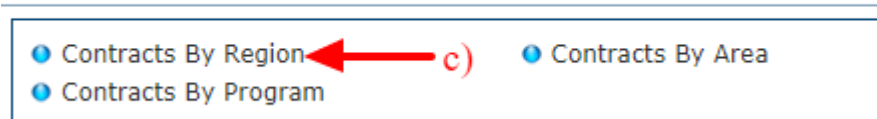3. Contracts Through OCA

4. Contracts By Program

c) To open a report, select the report of interest and click on the same. For example, Contracts By Region.

d) The system will redirect the user to the report section.
1. Select a region for which the report is required.
2. Click Search.
3. The updated report will be displayed.
4. Save Report – the report can be saved (Excel, PDF or Word format) using the save icon.

ContractList By Region Report

d)

Select Region   :   Escambia County Health Dept. (1)   ▼   1

4

2 ——► Search   Cancel

◄◄ ◄ 1   of 2 ? ► ►◄   ◄‖   [   ] Find | Next 🖫 ▾ ⟳

Contract List By Region Name : Escambia County Health Dept. (1)

Contract	Org Name	Program Name	Start Date	End Date	Amount	Clients Served
ABC	AIDS Healthcare Foundation	Patient Care-Consortia	1/1/2013 12:00:00 AM	12/31/2013 12:00:00 AM	249960.00	25000
TEST	State of Florida Department of Corrections	Prevention	7/1/2012 12:00:00 AM	6/30/2013 12:00:00 AM	100000.00	270
cod	AIDS Healthcare Foundation	Prevention	1/1/2013 12:00:00 AM	12/31/2013 12:00:00 AM	249960.00	0
CODGZ	State of Florida Department of Corrections	Prevention	1/1/2013 12:00:00 AM	12/31/2013 12:00:00 AM	80000.00	0
CODHA	The University of South Florida Board of Trustees	Prevention	1/1/2013 12:00:00 AM	12/31/2013 12:00:00 AM	100000.00	0
CODHB	Drug Abuse	Prevention	1/1/2013 12:00:00 AM	12/31/2013 12:00:00 AM	200000.00	0

e) All reports except Contract Through OCA contains Region, Area and Program selection drop-down option respectively.

ContractList By Region Report

Select Region   :   Escambia County Health Dept. (1)   ▼ ◄—— e)

Search   Cancel

ContractList By Area Report

Select Area   :   ALL   ▼ ◄—— e)

Search   Cancel

ContractList By Program Report

Select Program   :   Patient Care-Consortia ▼ ◄—— e)

Search   Cancel

6.5   Sub-Contractor Reports
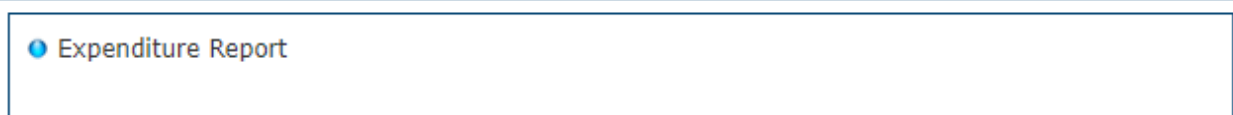
Sub-Contract users can access Sub-contractor Reports.

a) Click on the Sub-Contract Reports link under the View Report section on the navigation bar.

b) The system will redirect the user to the list of the AIMS Sub-Contractor Reports Available:
   1. Expenditure Report

c) To open the report, click on the report.

d) The system will redirect the user to the report filter criteria.
1. Select Year from the dropdown list
2. Select Area from the dropdown list
3. Select Contract from the dropdown list
4. Select Sub-Contractor from the dropdown list
5. Select a month from the dropdown list
6. Click the Print Report button

Sub-Contractor Expenditure Report

Select Year	:	2018-2019 ▼	← 1
Select Area	:	ALL ▼	← 2
Select Contract	:	No Contract ▼	← 3
Select Sub-Contractor	:	No Sub-Contractors ▼	← 4
Select Month	:	▼	← 5

6 ↓

Print Report   Cancel

e) The system will redirect to the Report

f) This report can be printed out or exported by following the steps explained in sections 6.5 and 6.7

6.6   Print Report

All reports generated can be printed by following the below steps:

    a) Print Reports
       1. Click on the Print icon.
       2. The system will display the Print to PDF options in a pop-up.
       3. Select the options as required
       4. Click export button
       5. The report will be downloaded on your computer and ready for printing.
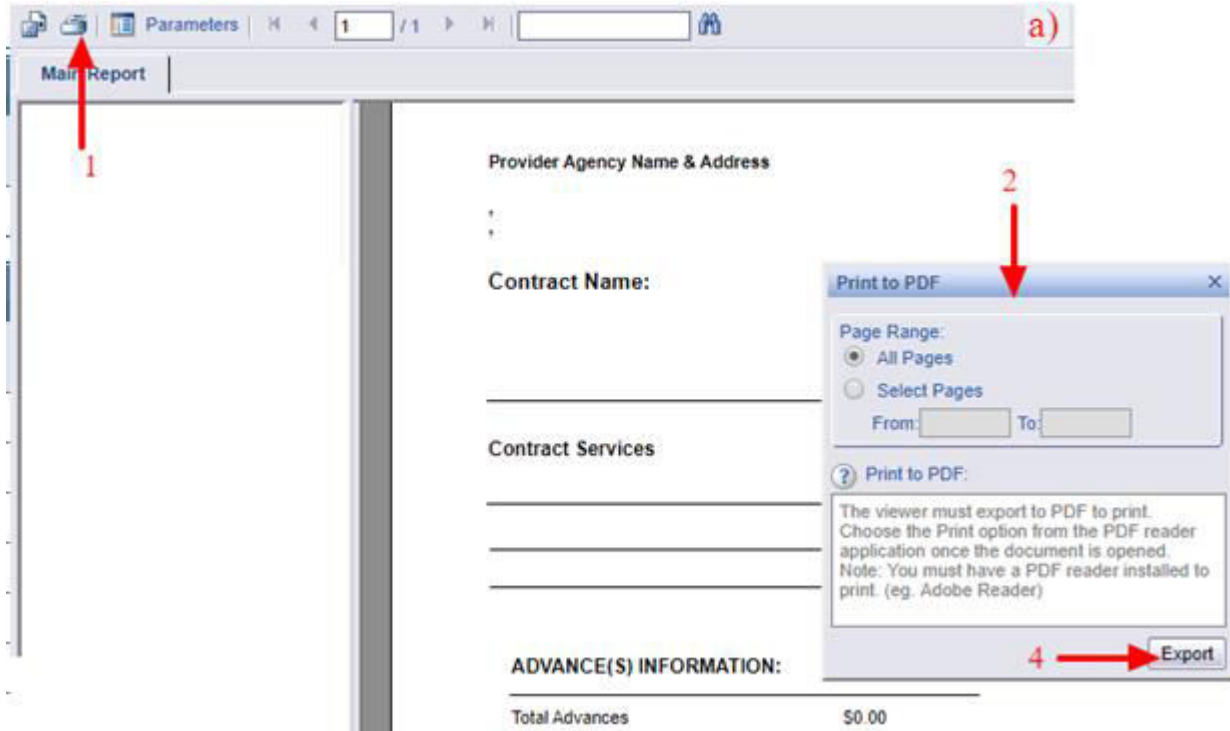
6.7 Exporting Report

All reports generated can be exported by following the below steps:
  a) Export Reports
     1. Click on the Export icon.
     2. The system will display the Export options in a pop-up.
     3. Select the options as required
     4. Click Export button
     5. The report will be downloaded on your computer.
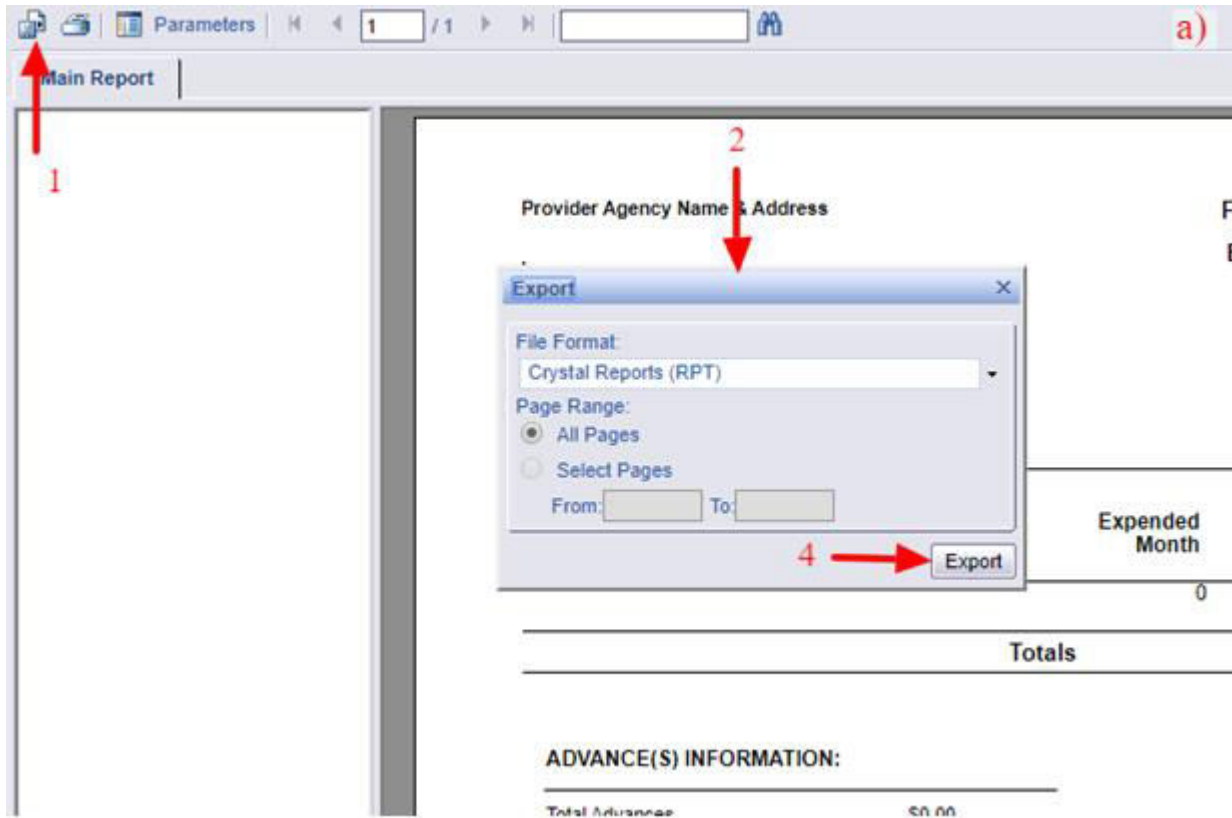
Note: the report can be exported in different file formats: PDF, Excel, Word, RTF and XML.