

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Division of Aging and Adult Services

Aging Resource Management System

Region User

Version 5

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1. Introduction and Overview

Welcome to the Aging Resources Management System (ARMS). The ARMS system is accessible by all area agencies on aging, service providers, and any government entity with the need to access ARMS data and reports.

In order to streamline the information sharing between the Aging Resource Management System (ARMS) system and other Department of Health and Human Services (DHHS) division's systems, the ARMS system will interface with the *Common Name Data Service (CNDS)* system and obtain a single unified ID called the *"Person ID"* provided by CNDS to its clients. This unified ID is common to DHHS systems and will bring seamless information sharing and client verification to ARMS.

The following assumptions are made:

- Data provided by the client on the DAAS-101 Client Registration Form (CRF) is accurate
- There are NO data entry errors when searching for the client record in CNDS
- The user verified data keyed for search criteria is correct before searching CNDS
- The user verified information transferred from the CRF accurately before creating a new person in CNDS

1.1 What is ARMS?

The Aging Resource Management System (ARMS) is a client tracking system for demographic data and a reimbursement system that ties reimbursement to performance.

ARMS provide users with the convenience of on-line web access. The system includes functionality and features to facilitate data entry, reporting, and tracking of client information and service impacts over time. At any given time during the year, data is available to report service unit, program costs and income, and non-unit reimbursement.

1.2 ARMS Objectives

ARMS is designed with the following goals:

- To establish a statewide database for reporting client demographic data including eligibility
- To establish a statewide database for budgetary control, delivery of units of service and non-unit activities incorporating Older Americans Act regulations on matching, program income, and other requirements as needed and other funding sources
- To provide a linkage of databases to track services and costs to the client level
- To meet federal reporting requirements

1.3 Who uses ARMS?

The ARMS system is written for the use of the Division of Aging and Adult Services (DAAS) and its constituents. Those who will use ARMS include:

- Regional Area Agencies on Aging staff
- Aging Service Providers (non-profit, profit, public, minority)
- County Lead Agencies and other DHHS Personnel

Only authorized users can access the ARMS System using any Internet connection. An ARMS User ID and password are assigned. User roles require a different level of access to the features and functionality of ARMS. User access is managed by DAAS ARMS Administrators, which will assign each individual ARMS User a different role that is appropriate to the access level of User. User type functionality is shown in Table 1.

User Type	Functions Available
Region	Users assigned the "Region" role can perform all the Provider functions, with the addition of these administrative functions:
	Add / Modify Region Details
	Add / Update Region Budget
	Add / Update Region Expenditures
	Add / Update Provider Contract Segments
Provider	Users assigned a role in ARMS as " Provider " will be able to perform the following functions.
	Search for clients and review their information
	Add / Update a new client
	Add / Update a service to a client
	Add / Update monthly service totals for client
	Add / Update a site/route/worker code
	Modify provider agency information
	View / Print Provider specific reports
	Import Service Data
	Add / Update non-unit reimbursement data
	Add / Update consumer contributions/program income
	•
County	Users with "County" access can only View or Print County Reports for their County
Report	Those assigned "Report" access can only View or Print Reports
	Table 1 – User Functionality

This document presents text in different formats which communicate specific information about the system. These formats are described below in Table 2:

Format or Style	Description
Boldface text	Indicates an action to take in the system such as clicking a button or selecting a
	drop-down list box item or item on a menu.
Italics	Indicates text to enter into a field in ARMS.
<u>Hyperlinks</u>	A link to a web site or to another part of this User Guide. These are working links
	for those reading this document electronically.
Pipe Separated	Indicates the need to click on a series of links or menu items, which will appear
Text	in order as they are selected. Most commonly, they are used while navigating in
	ARMS.
Links	Drill-down links are usually found in columns. Clicking these opens additional
	detail screens specific to the data item displayed
\sim \sim \sim	ARMS screens are often quite long. This "tear away" line indicates that the actual
$\sim \sim \sim \sim$	display is too long to include in this document, and users will need to scroll down
tear away" line	to see the full list.

Table 2 – Document Conventions

List below are frequent navigation buttons that display based on screen selected. There are many buttons used throughout ARMS and

Previous	Click PREVIOUS to return to the previous screen
Finish	Click the FINISH when you have completed the screen to save data keyed
Cancel	Click CANCEL to end function without saving
Next	Click the Next button to advance to next screen
Update	Update will save the record
Search	Click to Search for specific criteria
Reset	Clear search criteria
Add Client	Click to Add Client to Provider Client List
[Add]	This Add can be found on the SRW Details screen to allow User to add names in drop down list to be added to the SRW. Select the name in list and click Add
Verify	Verify can be found on the Provider Client Site/Route/Worker Service Totals Screen. Click to Verify units keyed.
Generate Report	This button is found on the Reports screen. Click this button to generate reports based on criteria selected.
Create New Person	The Create New Person displays with CNDS Search and is used to create a new client in ARMS and CNDS.

Table 3 – Screen Navigation

2 Basic ARMS Functionality

2.1 ARMS System Availability and Connectivity

ARMS is designed to be available 24 hours a day including weekends. There will be times when ARMS may be down for maintenance or to run reimbursement reports. There may also be occasional times the server might be unavailable to users.

Connectivity for users is available from DHHS Customer Support Center Monday through Friday from 7:00 a.m. to 5:30 p.m. except State observed holidays.

For **Application/Support** e-mail the Division of Aging and Adult Services (DAAS) at <u>ARMS.Inquiry@dhhs.nc.gov</u>. To help with the troubleshooting process, provide exact details about the behavior, issues, or error messages received.

2.2 ARMS User Data Entry Requirements

ARMS data must be keyed in ARMS by 5:00 p.m. on or before the 11th of the each month to be reimbursed for the current report period. When the 11th falls on a holiday the due date is the next working day. If the 11th falls on a weekend, data is due the following Monday. The link to schedule <u>https://www2.ncdhhs.gov/aging/arms/arms-schedule.pdf</u>.

The processing of reimbursement reports and other financial documents will occur on the 12th calendar day of the month. When the 12th falls on a holiday the processing date is the next working day. If the 12th falls on a weekend, the processing date will be the following Monday. These reports along with previous months will be available at all times. Other reports, such as demographic, verification, waiting list, etc. are available **on demand**.

2.3 Starting ARMS

Follow these steps to begin using the ARMS system:

- 1. Launch your Internet browser. Internet Explorer is the **Preferred browser**.
- 2. Link to WIRM Portal to Access ARMS <u>https://wirm.dhhs.state.nc.us</u>

Helpful Hint: Users may want to change their Internet Options Browsing History Settings to **Every time I visit the webpage**. This will ensure an updated webpage will display when keying data and not pull from Cache.

Cache is a temporary place on your computer to keep a copy of web pages for faster retrieval on the second request. <u>Link for more information</u>

Users may get a Security Alert screen similar to this:



Figure 1 – Security Alert

Click Yes to continue.

NOTE: You must have pop-ups **<u>ENABLED</u>** in order for the menu structure to operate correctly.

- 1. To enable pop-ups in Internet Explorer, Click on the **Tools menu | Pop-up Blocker | Pop-up Blocker Settings**
- 2. Enter the ARMS website address in the text box under "Address of Web site to allow"
- 3. Click Add. This will be required for each PC used to access ARMS.



Figure 2 – Pop-Up Blocker Settings

Pop-up Blocker must be ENABLED to run reports

3. The Web Identity Role-based Management (WIRM) login page will display.

	Name :	
	Password :	
	Login	
If you s DHHS C	Name : Password : Login f you should encounter any WIRM Portal IT Issues please contact HHS Customer Support Center at 919-855-3200 opt. #2 or email DHHS.Customer.Support.Center@dhhs.nc.gov Business Hours: 7 a.m 5:30 p.m. Mon Fri. assword Resets and Security Requests should be directed to your Agency Security Officer.	
	Business Hours: 7 a.m 5:30 p	.m. Mon Fri.
Passwo	ord Resets and Security Requests sl Agency Security Offic	nould be directed to your cer.

Figure 3 – WIRM Portal Login Screen

4. Enter the assigned WIRM user Name and Password. (This name is typically the user's first and last name (Example – linda.owens). There will be some exceptions with common names (John Smith, Mary Smith) as these require using middle initials or some other combination. The password must be at least 8 alphanumeric characters. The password is case-sensitive and will expire every 90 days.

NOTE: The screen below is what displays at the WIRM Portal Login, but the instructions are not the ones used for ARMS Users. ARMS Users should use the e-mail address in Figure 3 ONLY to have their existing WIRM Account unlocked or password reset.

If you should encounter any WIRM Portal IT Issues please contact DHHS Customer Support Center at 919-855-3200 opt. #2 or email DHHS.Customer.Support.Center@dhhs.nc.gov

Business Hours: 7 a.m. - 5:30 p.m. Mon. - Fri.

Password Resets and Security Requests should be directed to your Agency Security Officer.

Figure 4 - WIRM Portal Login Information

5. Click Login.

A user profile has been set up for authorized users. Functionality in ARMS is based on the user's unique profile. The profile includes identifying information about each user and the information a user can access. Users will see only that functionality which is assigned to one of the five access roles (described in Table 1).

You may change your password and other information at any time by using the **My Settings** link after you login.

duns THAT	web identity role managem	tal	
	My Applications	My Settings	Directory
An Arran Barra Barra Barra	Aging Resource Management System Aging Resource Management System to supp	port the automation requirement	s for Division Of Aging (Now Live)

Figure 5 – My Settings

If the **name is not found** a message will appear, check the assigned username and try again.

If the **password is incorrect** a message will appear, check the password and type it again.

WIRM users have three consecutive tries to login with their User Name and Password, after which they will be *locked out* of the WIRM portal. This helps prevent "hackers" from gaining system access.

If locked out of the WIRM Portal, users can call 919-855-3200, option 2 or e-mail <u>DHHS.Customer.Support.Center@dhhs.nc.gov</u>.

The following must be included in the e-mail.

- 1. ARMS User
- 2. Your Name or User ID (example: linda.owens or linda.m.owens)
- 3. Phone number

Users will be contacted by return e-mail or phone that password has been reset with the ARMS temporary password. If users are not familiar with the temporary password contact DAAS ARMS Staff.

NOTE: DAAS ARMS Staff cannot reset password

Some users have multiple applications in WIRM, all of which are visible by clicking the **My Applications** tab which appears beneath the WIRM logo. Therefore, **users should never share login name and password with other.**



Figure 6 — WIRM Portal "My Applications" Screen

- 6. Click the **thumbprint screen shot** or the **title text** to open ARMS to the home page.
- 7. The WIRM portal automatically logs users OFF the system after a period of inactivity. If the following screen appears simply login again to continue using ARMS.

	Manual Control of Cont					
	Password :					
	Login					
If you should encounter any WIRM Portal IT Issues please contact DHHS Customer Support Center at 919-855-3200 opt. #2 or email						
Y	our session has expired. Please login to o	continue				
	Business Hours: 7 a.m 5:30 p.m. Mon F	ri.				
Passw	ord Resets and Security Requests should be dir Agency Security Officer.	ected to your				

Figure 7 – Session Expired Screen

2.4 ARMS Recommended Internet Settings

Users should change their Internet Settings to load ARMS Web Pages each time they visit a particular page. Changing this option will allow users to see the current webpage each time they click on a link.

Follow the steps outline below with Internet Explorer open

- 1. Click Tools from the menu
- 2. Select Internet Options
- 3. Click Settings
- 4. Select Every time I visit the webpage
- 5. Click Ok



Figure 8 - ARMS Recommended Internet Settings for Internet Explorer

NOTE: This refers to Internet Explorer only. Check the browser you are using to ensure a new webpage is displayed in ARMS each time you access it.

Google Chrome - Clear Browsing data

- 1. Open Google Chrome, click three vertical dots on right.
- 2. Select Settings
- 3. Stroll down to bottom to click on Advanced
- 4. Select "Clear Browsing Data"

V -	🛙 🗙 🏂 Settings 🛛 🗙 🔪		0 – 0 ×
$\leftrightarrow \rightarrow \mathbf{C}$ \odot Chrome	chrome://settings		
≡ Settings	Q. Search settings		New tab Ctrl+T New window Ctrl+N New incognito window Ctrl+Shift+N
	Search engine		History
	Search engine used in the address bar	Google	Downloads Ctrl+J Bookmarks
	Manage search engines		Zoom - 100% + []
	Default browser		Print Ctrl+P Cast Ctrl+F
	Default browser Make Google Chrome the default browser	М	More tools
			Edit Cut Copy Paste
	On startup		Settings Help
	Open the New Tab page		Exit Ctrl+Shift+Q
	 Continue where you left off Open a specific page or set of pages 		
	Advanced		
-	Clear browsing data	Clear browsing data	×
	Clear history, cookles, cache, and more	Basic	Advanced
		Time range Last hour	·
		Browsing history Clears history and autocompletio	ons in the address bar.
		Cookies and other site data Signs you out of most sites.	
		Cached images and files Frees up less than 638 MB. Some visit.	e sites may load more slowly on your next
			CANCEL CLEAR DATA

2.5 Logging Out of ARMS

When finished using ARMS, always log out by clicking Logout in top right corner of screen. Logging out helps prevent unauthorized access to ARMS. The WIRM portal will automatically log users out of ARMS after a given period of inactivity. (See Figure 7).



2 Region User

The Region user role in ARMS provides utility for those who manage providers, agency information, budgets and client service data.

2.1 Navigating the Region Functions

The header section of the ARMS screen provides links to available functions. Click on any of the headings on this menu bar to open a separate area of Region user functions.

Arms.Reg	Arms.Region								
Home	Region Allocation	Region Budget	Provider Budgets	Providers	Clients	Export	Reports	Import ARMS/SIS	User Request Form
			Figure 6 – Regio	n User Na	vigation	Bar			

2.2 Initial Screen (Home)

Region users will see the following screen when they log into ARMS.



NOTE: Clicking either **Home** or **Region / County Allocations** from the menu bar will display this screen – Region Details.

2.3 Change Region Contact Information

The initial screen (for both **Home** and **Region / County Allocations**) is divided into two main sections. The top section contains the contact information for the Region User.

Region Details						
Region Code :	G					
Region Name :	PIEDMONT TRIAD REGIONAL COUNCIL					
Region Contact Name :	BLAIR BARTON-PERCIVAL					
Address :	2216 W MEADOWVIEW ROAD					
City :	GREENSBORO					
State :	NC					
Zip:	27407					
Work Phone :	(336) 294-4950 ext.					
Fax Number :	(336) 632-0457					
Email :	BBPERCIVAL@PTRC.ORG					
	Modify Cancel					

Figure 8 – Region User Contact Details

The user may update the Region Details by clicking on **Modify**. Click **Cancel** to return to the previous screen without saving.

	Update a Region		
Region Code :	G		
Region Name :	PIEDMONT TRIAD REGIONAL COUNCIL		
Update a Region Region Code : G Region Name : PIEDMONT TRIAD REGIONAL COUNCIL Region Contact Name : BLAIR BARTON-PERCIV/ Address : 2216 W MEADOWVIEW ROAD SUITE 201 GREENSBORC, NC Vork Phone : (336) 294 Gas Number : (336) 632 Greated User: RAMANA.REDDY Created User: RAMANA.REDDY Created User: LINDA.OWENS			
Address :	2216 W MEADOWVIEW ROAD		
	SUITE 201		
	GREENSBORC, NC 27407		
Work Phone :	(336) 294 -4950 ext.		
Fax Number :	(336) 632 -0457		
Email :	BBPERCIVAL@PTRC.ORG		
Created User:	RAMANA.REDDY		
Created Time:	6/27/2006 5:49:11 PM		
Last Updated User:	LINDA.OWENS		
Last Updated Time:	2/6/2013 10:50:54 AM		
	Update Cancel		

Figure 9 – Modify Region Contact Information

Changes can be made to any of the editable fields, then click **Update** to save. Click **Cancel** to return to the previous screen without saving.

NOTE: The Region Code cannot be changed by User.

2.4 Region Budget

Click on **Region Budget** on the navigation bar to view the regional budgets associated with the Region.

Iome Region Alloc	ation Region Bud	dge Provider	Budgets	Providers	Clients	Report	s Impo	rt ARMS/
		Region De	tails					
Region Code : Region Name : Region Contact Name : Address : City : State : Zip : Work Phone : Fax Number : Emmail :		G PIEDMONT TRIA BLAIR BARTON-P 2216 W MEADOV GREENSBORO NC 27407 (336) 294-4950 (336) 632-0457 BBPERCIVAL@PT	D COG PERCIVAL WVIEW ROA ext. RC.ORG	Click [®] based the ap	to cre I on fu opropi	ate a unds riate f	new alloca fund s	budg ated t sourc
		Region Bud	gets					
Funding Source	Allocated Amount	Budget Amourt	Remainin	g Allocated /	Amount			
State AAA Admin Cost	\$27,776	\$18,999	\$8,777		D	etails Exp	enditures	
Planning And Admin	\$35,000	\$16,078	\$18,921		D	etails Exp	enditures	
Elder Abuse	\$19,089	\$17,180	\$1,908		D	etails Exp	enditures	
Ombudsman	\$276,534	\$264,180	\$12,353		D	etails Exp	<u>enditures</u>	
Add Region Budge	et 🧧							

Figure 10 – Region Budget Screen (Sample)

2.4.1 View / Modify Regional Budget Details and Expenditures

Details for each budget are available for viewing by clicking the **Details...** hyperlink. For example, details for the **State AAA Admin Cost** are:

Region Users may change any editable fields for the Approved Regional Budget on this screen. Click **Update** to save the changes or **Cancel** to return to the previous screen.

Funding Source	Allocated	l Amount	Budget A	mount	Remaining All	ocated Amount		
State AAA Admin Co	st \$27,776.0)0	\$27,629		\$146		<u>Details</u>	Expenditures
		- ·						
	Approved	Regional E	sudget					
Regi	on :	PIEDMONT T	RIAD COG					
Fund	ing Source :	State AAA A	dmin Cost	_				
Salar	es:	13000		Program	Income Allowance:	0		
Fring	e:	3592		Overmat	ch Received:	0		
Trav	els:	2777						
Adm	n Support Costs	: 700						
Equij	oment:	0						
Indir	ect:	10630						
Crea Crea Last Last	ed User: ed Time: Updated User: Updated Time: Upda	Kevin.Thomp 10/5/2006 1 Arms.Region 4/11/2007 2 te Cancel	oson 0:48:03 AM :43:56 PM					

Figure 11 – Sample Regional Budget Details

To view expenditure details, click the **Expenditures...** link:

Funding Source	Allocated Amount	Budget Amount	Remaining Allocated Amount		
State AAA Admin Cost	\$27,776.00	\$27,629	\$146	<u>Details</u>	Expenditures

R	egion Details		
Region Code : Region Name : Funding Source N Total Budget Amo Remaining Budget	G PIEDMON ame: Ombudsn punt: \$264,181 Amount:\$218,815	T TRIAD	COG
Reg	gion Expenditures		
Report Month	Expense Amount		
Jan	\$21,602.00	<u>Details</u>	-
Feb	\$23,764.00	<u>Details</u>	
	Total:\$45,366		
Cancel /	Add Region Expens	e	

Figure 12 – Sample Expenditure Details

From this screen Region Users view or edit monthly expenditures prior to reimbursement generation by clicking **Details**... Details for January are shown in this example:

Regio	nal Expenditure	г	
Region : Funding Source : Total Budget : Remaining Budget Amount: YTD Expense Amount: Report Month :	G-PIEDMONT TRIAD REGION Planning And Admin \$652,474 \$120,218 \$532,256	NAL COUN	Previous months are disabled and cannot be changed by Region User after reimbursement has been generated. If keyed in error, adjustments can be in the next reimbursement month
Salaries:	25949	Prog	ram Income Allowance: 0
Fringe:	7423	Over	rmatch Received: 0
Travels:	585		amounto koved must be XTD
Admin Support Costs:	8522	tota	als
Equipment:	0	Us	ers are required to key an YTD
Indirect:	13516	ent YT	D from a previous to allow the
Created User: Created Time: Last Updated User: Last Updated Time:	G.SUSAN.FERRIOLA 8/15/2012 1:42:38 PM G.SUSAN.FERRIOLA 8/15/2012 1:42:38 PM	ZG	A-060 to calculate mbursement
Į	date Cancel		

Figure 13 – Sample Regional Expenditures by Month

See <u>Appendix A</u> for additional information

Users may add new regional expenses by clicking the **Add Regional Expense** on the **Regional Expenditures** Details screen:

nding Source	Allocated Amount	Budget Amount	Remaining A	Allocated Amou	nt	
AAA Admin Cost	1min Cost \$27,776.00 \$2		\$146		Details	Expenditure:
			Oct Sep Cancel	\$2,400.00 \$100.00 Total:\$27,070 Add Region Expent	Details Details se	
Region	al Expenditure					
Region : Funding Source : Total Budget : Remaining Budget Amo YTD Expense Amount: Report Month : Salaries: Fringe: Travels:	G-PIEDMONT TRIAD CC State AAA Admin Cost \$27,629 \$27,070 Nov Dec Apr May Jun	Program meene Alle Oversetch Received	Click Expe availa are s	to add new nse. Note able month hown.	w Regio only is to ac	on Id
Admin Support Costs:			Click	Details to	edit an	l

Figure 14 – Add Regional Expenditure (from Details screen)

NOTE:

Region Users cannot change Regional Expenditures of a **Previous Month** after reimbursement has been generated for that particular month. Changes and/or updates should be included in the next month reimbursement period.

Name	Status	Туре	Category	FundingPercentage
Planning And Admin	Α	Region	Operation	79.11
Ombudsman	Α	Region	Operation	90.00
Elder Abuse	Α	Region	Operation	90.00
STATE AAA ADMIN COST	Α	REGION	OPERATION	100.00

Table 4 -Regional Expenditure and Reimbursement Percentages

2.5 Provider Budgets

2.5.1 Add Provider Budgets



The region code and name cannot be changed and is filled in based on user access. The user should select the Funding Source by clicking this symbol - . A drop down box will display with available funding sources. Available services will display based on the Funding Source selected from the drop down menu.

	Provider Budget		
Region :	G-PIEDMONT TRIAD COG		
Funding Source :			
County :	Our in Our in Our in Discussion Front		
Provider :	Family Caregiver [10]	•	
Service :	Disease Prevention/Health Promotion		
Net Unit Cost:	Senior Center Outreach Legal		
Net Service Cost:	Home Community Care Block Grant		
Total NSIP Dollars:			
Other Matching Resources:			In this example, Home and
Other Non Matching Resources:			Community Care Block
Projected People :			Grant was selected as the
Is Budgets Finalized :	O Yes O No		Funding Source.
	Update Cancel		
Figure 17 P	rovider Budget – Funding Source		When you click 🖾 on
	Provider Budget		Service, only services fied
Region :	G-PIEDMONT TRIAD COG		to funding source Home
Funding Source :	Home Community Care Block Grant		and Community Block
County :	Alamance		Grant can be selected.
Provider :	ADULT CENTER FOR ENRICHMENT(G010)	•	
Service :	ADULT DAY HEALTH(155)		
Net Unit Cost:			Note: Comisse are evailable
Net Service Cost:	HOME DELIVERED MEALS(020)		Note: Services are available
Total NSIP Dollars:			by Funding Service
Other Matching Resources:	HOME HEALTH SKILLED NORSING(001) HOME HEALTH THERAPY(082)		
Other Non Matching Resources:	HOME HEALTH MEDICAL SOCIAL SERVICES(083)		
Projected People :	HOUSING And HOME IMPROVEMENT(140)		
Is Budgets Finalized :	RESPITE, INSTITUTION(210)		
	Update Cancel		
Figure 18 –	Provider Budget - Service		

	Provider Budget	
Region :	G-PIEDMONT TRIAD COG	
Funding Source :		If no funding course
County :	Alamance 💌	If no funding source
Provider :	SERVICE PROVIDER(G100)	is selected, service
Service :	HOME DELIVERED MEALS-NSIP(021)	defaults to NSIP
Net Unit Cost:	HOME DELIVERED MEALS-NSIP(021) CONGREGATE NUTRITION-NSIP(181)	service codes 021
Net Service Cost:		and 181
Total USDA Dollars:		1
Other Matching Resources:		
Other Non Matching Resources		
Projected People :		
Is Budgets Finalized :	C Yes C No	
	Update Cancel	

Figure 19 - Provider Budget – NSIP



Figure 20 Provider Budget - Legal

	Provider Budget	
Region :	G-PIEDMONT TRIAD COG	
Funding Source :	Family Caregiver	
County :	Alamance 💌	
Provider :	SALUDA SENIOR CENTER(C045)	Select provider from
Service :		the list of all
Net Unit Cost:	SENIOR RESOURCES OF GUILFORD(G055)	available providers
Net Service Cost:	SENIOR SERVICES OF HOKE COUNTY(N048) SENIOR SERVICES, INC.(1083)	in ARMS. All
Total USDA Dollars:	SERVICE PROVIDER(G100)	providers are listed
Other Matching Resources:	SHARON UNITED METHODIST CHURCH(P039) SHEPHERD CENTER OF GREATER WS(1081)	because regions can
Other Non Matching Resources:	SOUTH IREDELL SENIOR CENTER(F047)	have contracts
Projected People :	ST LUKE MEDICAL ALERT(C031)	
Is Budgets Finalized :	C Yes C No	across regions, for
	Update Cancel	example, Lega

Figure 21 – Provider Budget - Provider

Users may add the provider budget information in editable fields and click **Update** to save or **Cancel** to return to the previous screen.

	Provider Budget			
Region :	G-PIEDMONT TRIAD COG			
Funding Source :	Home Community Care Block G	rant 💌		
County :	Alamance 💌			
Provider :	ADULT CENTER FOR ENRICHN	MENT(G01	0)	-
Service :	ADULT DAY HEALTH(155)			
Net Unit Cost:				
Net Service Cost:				
Total NSIP Dollars:				_ I
Other Matching Resources:		<u>SRWs</u>		Contributions
Other Non Matching Resources:			Reimbursements	Contributions
Projected People :				
Is Budgets Finalized :	C Yes C No	<u>SRWs</u>	Reimbursements	Contributions
	Update Cancel			

Figure 22 – Provider Budget Data Entry Screen

Net Unit Cost should **NOT** be keyed for Non-Unit Services. If a Net Unit Cost is keyed, Reimbursement will **NOT** calculate for Non-Unit Service Codes. See Service Chart for a list of Non-Unit Service Codes. **Hint:** If Reimbursement is displayed as shown in Figure 23, it is a Non-Unit Service Code. Therefore, **NO** Net Unit Cost for this Provider Budget should be keyed.

Instr	uctions for Data Entry in Figure 22
Net Unit Cost	Net Unit Cost is used in calculating actual expenses for unit-based expenses. Do not key for non-unit services. Refer to service code chart
Net Service Cost	The Net Service Cost is the actual budgeted amount of Federal/ State/Local. When keying the budgeted amount for a provider, key the GROSS amounts. The allocations given to each Region/Service are NET amounts. Regions add the respective LOCAL match to the NET to get the GROSS amount to be keyed into ARMS. This is based on Funding Source Reimbursement Percentages – See Table 5
Total NSIP Dollars	NSIP – Optional Entry for NSIP Only Service Codes
Other Matching Resources	Other matching resources received – Optional Entry
Other Non-Matching Resources	Other non-matching resources received – Optional Entry
Projected People	Number of people this provider expects to serve this year. This number is NOT used in calculating expenses, but used on several demographic reports.
Is Budget Finalized	Check Yes or No to show whether budget if finalized and/or verified. Note: This option was never implemented in ARMS.

Table 3 Provider Budget Data Entry Instructions

2.5.2 Viewing / Modifying Provider Budget Information

Home Region Allocation Region Budget Provider Budgets Providers Clients Reports Import ARMS/SIS

Click on **Provider Budgets** to view the complete list of Provider Budgets/Contract Segments for the Region: A linked index bar is available to help users find Providers by County order.

Region:	G-PIEDMONT	TRIAD COG						
Index on Cou	unty Name: 🚺 - <u>A</u> - <u>B</u> - <u>C</u> - <u>D</u> - <u>E</u> - <u>F</u> - <u>G</u> - <u>H</u>	<u></u>	<u>W - X - Y - Z</u>					
<u>County</u>	Provider	Service	<u>Service</u> Budget	Finalized			A	
Alamance	ALAMANCE CO MEALS ON WHEELS (G040)	CG-ASSISTANCE WITH ACCESS(820)	\$4,095.00	Yes	<u>Detail</u>	<u>SRWs</u>	<u>Reimbursements</u>	<u>Contributio</u>
Alamance	HOMECARE PROVIDERS(G009)	IN-HOME LEVEL 2 - PERSONAL CARE(042)	\$27,461.00	Yes	<u>Detail</u>	<u>SRWs</u>		Contributio
Alamance	HOMECARE PROVIDERS(G009)	IN-HOME LEVEL 3 - PERSONAL CARE(045)	\$97,169.00	Yes	<u>Detail</u>	<u>SRWs</u>		Contribution
Alamance	RANDOLPH CO SENIOR ADULTS(G005)	CARE MANAGEMENT(610)	\$15,000.00	Yes	<u>Detail</u>	<u>SRWs</u>	<u>Reimbursements</u>	Contribution
Alamance	FRIENDSHIP ADULT DAY SERVICES (G002)	ADULT DAY CARE(030)	\$88,237.00	Yes	<u>Detail</u>	<u>SRWs</u>		<u>Contributio</u>
Alamance	LEGAL AIDE OF NC-GREENSBORO(G020)	LEGAL SERVICES(130)	\$7,852.00	Yes	<u>Detail</u>	<u>SRWs</u>		Contribution
Alamance	ALAMANCE CO TRANSP AUTHORITY (G004)	TRANSPORTATION(250)	\$81,326.00	No	<u>Detail</u>	<u>SRWs</u>		Contribution
Alamance	HOMECARE PROVIDERS(G009)	IN-HOME LEVEL 1 - HOME MANAGEMENT(041)	\$13,111.00	Yes	<u>Detail</u>	<u>SRWs</u>		Contribution
Alamance	ALAMANCE ELDERCARE, INC(G003)	CARE MANAGEMENT(610)	\$55,628.00	Yes	Detail	<u>SRWs</u>	Reimbursements	Contribution

Figure 24 – Provider Budgets per Region

Simply click on any of the letters in the bar to index on County Name beginning with that letter. Click the heading link for additional sort order

Add Provider Budget				
Region:	G-PIEDMONT TRIAD CO	OG /		
ndex on County Name: [All] - A	- <u>B-C-D-E-F-G-H-I-J-K</u>	-L-M-N-Q-P-Q R-S-T-U-V-W	- <u>x - y z</u>	
County	Provider	Service	Service Budget	Finalized

Figure 25 - Additional Sort Orders

On the Provider Budgets screen the user have four links to choose from:

				The Details link will allow the user to update or modify and existing provider budget (contract)
<u>Detail</u>	<u>SRWs</u>		Contributions	
<u>Detail</u>		Reimbursements	Contributions	The SRWs link allow the user to add service totals
<u>Detail</u>	<u>SRWs</u>		Contributions	to SICW, create new routes, aud chemis to SICW
<u>Detail</u>	<u>SRWs</u>	Reimbursements	Contributions	Reimbursements link allow user to add non-unit
<u>Detail</u>	<u>SRWs</u>	Reimbursements	Contributions	reimbursements, update existing data
<u>Detail</u>	<u>SRWs</u>		Contributions	Contributions link allow the user to add Consumer
				Contribution, update existing data



(

2.5.3 View / Edit Provider Budget Details

Click on the **Detail** link to **View** or **Edit** Provider Budget details. Users can **Edit** only amounts in editable fields. Click **Update** to save or **Cancel** to return to the previous screen.

		Prov	ider Budg	et	
Region :		CENTRAL	INA COG		
Funding Source County : Provider : Service : Allocations :	: HOME CO Anson ANSON C CONGREC No fund County Anson	MMUNITY CARE BLO OUNTY COUNCIL ON GATE NUTRITION(18 ds available. No Allocated Amoun \$251,522	DCK GRANT I AGING(F005 0) more bud t Budgeted \$251,522) gets car Balance \$	n be created at this time.
Anson \$2 Net Unit Cost: Net Service Cost: Total NSIP Dollars: Other Matching Resources: Other Non Matching Resources Projected People : Is Budget Finalized : Created User: Created Time:		10.8639 83913 0 0 0 rces: 0 80 Yes EVELYN.PRESS 7/29/2016 6:33 EVELYN.PRESS	N C Y C C C C C C C C C C C C C C C C C	ote: If hange ear, YT alculat urrent eriod. ost in ne repo nits fro ne new	Net Unit Cost is d during the fiscal TD units will re- and display on reimbursement Changing the Net Un March, will prompt ort to re-calculate om July to March at Net Unit Cost.
Last Updated Ti	me:	8/3/2016 5:14	:13 PM ate Cance	el	

Figure 27 – Provider Budget Details

Reimbursement is made based on the funding source name and funding percentage.

Code	Name	Status	Туре	Category	FundingPercentage
00	NSIP	Α	REGION	SERVICE	100.00
01	HOME COMMUNITY CARE BLOCK GRANT	Α	COUNTY	SERVICE	90.00
02	LEGAL	Α	Region	Service	90.00
03	Senior Center Outreach	Α	Region	Service	75.00
04	Disease Prevention/Health Promotion	Α	Region	Service	90.00
07	Senior Center General Purpose Fund	Α	Region	Service	75.00
08	Family Caregiver	Α	Region	Service	100.00

Table 5 - Funding Sources and Reimbursement Percentage

2.5.4 View / Edit Provider Budget SRWs

NOTE: Identical functionality for this feature is available for Provider users.

Click on the **SRWs** link to view Site/Route/Workers (SRW) Details (See Figure 24). The following screen appears:

Provider: FRI	ENDSHIP ADULT DA	Y SERV	ICES(GOO2)		
Region: PIED	MONT TRIAD COG					
County: Alam	hance					
Service: ADU	LT DAY CARE					
SRWCode	Description					
100	ADULT DAY CARE	<u>Details</u>	Service To	otals		
Add	Provider Site/Rout	e/Work(er	I	Provider Budgets	Cancel

Figure 28 – Site/Route/Workers Details

All the Site/Route/Workers associated with this Provider will appear, therefore, the list may be long. Click on **Provider Budgets** or **Cancel** to return to the previous screen.

Click on the **Add Provider Site/Route/Worker** button (see <u>Figure 29</u>) to add a new SRW for this provider.

Ad	d Provider Site/Route/Worker	
Provider Code : Agency Name : Region : County : Service :	G002 FRIENDSHIP ADULT DAY SERVICES PIEDMONT TRIAD COG Alamance ADULT DAY CARE(030)	Enter a 3-digit number and a description
Site/Route/Worker Code		
Description :	Add Cancel	

Figure 29 – Add Site/Route/Worker

Users may add the information in the two editable fields. Click **Add** to save or **Cancel** to return to the previous screen.

The **SRW Details** screen provides two additional links for more information. Click on **Details** to view the clients assigned to this route and a list of Clients that can be assigned this SRW. Select the name from the list, click **Add** and then click **Update** to Save. Click **Cancel** to return to previous screen.

		Prov	ider S	ite/Route,	/Woi	rke	r Inforr	nation		
	Provider Code	:	G002							
	Agency Name	:	FRJEND	SHIP ADULT D	AY SE	ER VI	CES			
	Region :		G							
	County :		Alaman	се						
	Service :		ADULT	DAY CARE(03	0)					
	Site/Route/W	orker Code :	100							
	Description :		ADUL1	I DAY CARE						
	CreateUser:		Ramana.Reddy							
	CreateTime:		9/19/2006 4:55:43 PM							
	ModifyUser:		Ramana	Reddy						
	ModifyTime:		9/19/2006 4:55:43 PM							
	Clients :		SSN4	Name	Sex	D	ate Of Birth	Client Status		
			1111	BEAM JOHN	м		3/1932	A	[Remove]	<u>Details</u>
			1111	BYRD KAY	F	¢.	.933	A	[Remove]	<u>Details</u>
			1111	CARR KLA RA	м		l/1937	A	[Remove]	<u>Details</u>
			1111	SMITH JO	м	τ.,	23	А	[Remove]	Details
Note: Cl Add butte	lick the In after		1111	SMITH JOYCE	F	e	/1913	A	[Remove]	<u>Details</u>
selecting	a clien:		1111	WOOD JAYNE	F	ł,	/1932	A	[Remove]	<u>Details</u>
Add to SI	RW.		ALDR	IDGE-4444-F-	0))	1927	-			
			Add1							
				Update	Car	ncel				
					_					

Figure 30 – SRW Additional Details

To view details for a client, click the Details link to view the SRW Service Totals an individual client.

			Pro	vider S	ite/Rou	ite/Wor	'ker Ser	vice Tot	tals							
Provide Service	r: FRIENI : ADULT	DSHIP AD F DAY CA	ULT DAY SER RE(030) [Mai	VICES(GO ximum mo	02) nthly units	:0]				Re	egion - Col te/Route/'	unty: 0 Worker:1	6 - Alamano LOO - ADUL	:e T DAY CAI	RE	
SSN4	Name	Status	Date Of Birth	Jul	Aug	wg Sep Oct Nov Dec Jan Feb Mar Apr May Jun Total						Total				
1111	BEAM JOHN	A	12/23/1933	20	23											43
							43									
			Ve	rify Up	date	Provider	Budgets	Can	cel							

Figure 31—Service Details (from Site/Route/Worker)

Users can add or edit the monthly totals for the client on Provider Site/Route/Worker Service Totals screen in any month. Click one of the four buttons to:

- Verify to recalculate the Totals.
- **Update** to save the changes
- Provider Budgets to return to the Provider Budgets screen without saving
- Cancel to return to the previous screen without saving

Users can click **[Remove]** *permanently remove* a client from a provider S/R/W list only if the client **does not** have Service Totals. The user will have to make the client Inactive if they do not want to add additional service totals amounts.

2.5.5 View / Edit Provider Budget Reimbursements

	Provider Non-U	nit Reimbu rs em	nents		
Region : Provider:	PIEDMONT TRIAD COO ALAMANCE ELDERCAR	3 E, INC(G003)	County : Service:	Alamance CARE MANAGEMENT(610)	
Report Month	Admin Direct Cost	Admin Indirect Co	ost Program Cost	Total Non Unit Reimbursement	
Jul	\$2,182.00	\$0.00	\$2,680.00	\$4,862.00	<u>Detail</u>
Aug	\$2,182.00	\$0.00	\$5,352.00	\$7,534.00	<u>Detail</u>
Cancel	Add Non Unit Reim	bursement	Provider Budget	s	

Click the **Reimbursements** link to add, edit or view Provider Non-Unit Reimbursements data.

Figure 32 – View / Edit Provider Budget Reimbursements

Click Add Non Unit Reimbursement to add a monthly non-unit reimbursement record.

Choose the correct month from the drop-down and complete the editable fields. Click **Add** to save the information or **Cancel** to exit without saving.

NOTE: Only whole numbers should be entered in the monetary fields. But, if the User key amounts with decimal the system will automatically round up or down.

Keying examples:

\$99.**49** = \$99 00

\$99.**50** = \$100.00)

To view the existing non-unit reimbursement information for any month, click the appropriate **Detail** link.

Amounts can be keyed into the Administrative Direct Cost, Administrative Direct Cost and/or Program Cost fields. *Each line is a separate cost.*

When complete, click **Update** to save or click **Cancel** to return to the previous screen.

Region : Provider: Report Ma Jul	Provider Nor PIEDMONT TRIA NC COOPERATIV Jonth Admin Dir \$400.00	n-Unit Reimbursemen D COG /E EXT ALAMANCE(G013) rect Cost Admin Indirect \$0.00	ts County : Ala Service: Co Cost Program \$600.00	amance S-COUNSELING, TF Cost Total Non \$1,000.00	RAINING, SUPPO Unit Reimburs	DRT(830) sement <u>Det</u> a	ail	Edit or View current recor] d
	Click Ad Provider N	Click Detail to d Non Unit Re on-Unit Reimburseme	o update imburse	existing	record. add a ne rovider Non	EW MO	nth nbursemer	nts	
Region : County : Provider: Service : Report Mo Administra Administra Program C Created U Created T Last Upda Last Upda Cancel	onth : ative Direct Cost: ative Indirect Cost Cost: Jser: Jser: ited User: ated User: ated Time:	PIEDMONT TRIAD COG Alamance NC COOPERATIVE EXT ALA CG-COUNSELING, TRAINING Jul \$400 \$5400 \$600 Arms.Region 5/29/2007 11:38:28 AM Arms.Region 6/5/2007 11:07:48 AM	MANCE(G013) , SUPPORT(830)	County : County : Provider: Service : Administrative I Administrative I Administrative : Program Cost: Cancel Ac	Direct Cost: O Indirect Cost: O Id F	amance C COOPERATI S-COUNSELIN Aug ep bet ep bet eb lar lar lay un	IVE EXT ALAM G, TRAINING,	AANCE(G013) SUPPORT(830) Select month, key data, Click Add to save	

Figure 33 – Add / Edit Non-Unit Reimbursement

2.5.6 View / Edit Provider Budget Contributions

Click **Contributions** to add, edit or view Provider Consumer Contribution/Program Income. Click the **Add Consumer Contribution** button to **Add** a new month. Click **Detail** to edit or view a current month.



Figure 34 – Add Provider Contributions / Program Income



Figure 35 - Edit / View Provider Contributions / Program Income

Click **Detail** to edit or view existing record. Click **Add** to save or **Cancel** to return to the previous screen without saving. Click **Provider Budgets** to return to the budget list.

Note: Enter deduction amount on the second line ONLY if the agency is reporting costs to collect cost sharing.

3 Providers

To view list Provider Agencies, click on the **Providers** link on the navigation bar. A list of provider agencies will display.

Users can list all **Providers** by selecting the **All** link or User may narrow the list by clicking on the letter links on the index bar across the top to sort by **Agency Name**. Additional sorting can be done by clicking on the column headings. For example, to sort by City, click the column heading <u>City</u>.

Home	Region Allocation Region Budget Provide	r Budge	ets Providers Clients Re	ports Import /	ARMS/SI	s
	.					
Index	on Agency Name: [All] - <u>A</u> - <u>B</u> - <u>C</u> - <u>D</u> - <u>E</u> - <u>F</u> - <u>G</u> - <u>H</u> - <u>I</u> -	<u>] - K - L</u> -	<u>M - N - O - P - Q - R - S - T - U - V</u>	- <u>W</u> - <u>X</u> - <u>Y</u> - <u>Z</u>		
Code	Agency	<u>Status</u>	<u>Address</u>	<u>City</u>		▲
G002	FRIENDSHIP ADULT DAY SERVICES	A	1946 Martin Street	BURLINGTON	Details	Clients
G003	ALAMANCE ELDERCARE, INC	Α	2732 Anne Elizabeth Drive	BURLINGTON	Details	Clients
G004	ALAMANCE COUNTY TRANSPORTATION AUTHORITY	A	PO BOX 2746	BURLINGTON	Details	Clients
G005	RANDOLPH CO SENIOR ADULTS	Α	133 W WAINMAN AVENUE	ASHEBORO	Details	Clients
G007	LIFE CENTER OF DAVIDSON	Α	601 W. Center Street	LEXINGTON	Details	Clients
G008	HOME HEALTH RANDOLPH HOSPITAL	Α	PO BOX 1048	ASHEBORO	Details	Clients
G009	HOMECARE PROVIDERS	Α	PO BOX 205	BURLINGTON	Details	Clients
G010	ADULT CENTER FOR ENRICHMENT	A	122 N ELM STREET	GREENSBORO	Details	Clients
G012	NC COOPERATIVE EXT RANDOLPH	A	2222-A S FAYETTEVILLE ST	ASHEBORO	Details	Clients
G013	NC COOPERATIVE EXT ALAMANCE	Α	209 N GRAHAM-HOPEDALE RD	BURLINGTON	Details	Clients
G014	UNITED WAY OF RANDOLPH COUNTY	Α	PO BOX 2822	ASHEBORO	Details	Clients
G015	NC COOPERATIVE EXT MONTGOMERY	Α	203 W MAIN ST	TROY	Details	Clients
G018	CASWELL COUNTY	A	PO BOX 1405	YANCEYVILLE	Details	Clients
G020	LEGAL AIDE OF NC-GREENSBORO	Α	PO BOX 3467	GREENSBORO	Details	Clients

Figure 36 – Providers Associated with a Region

Provider codes consist of the Region code and a three digit numeric number. Provider Agency Codes are assigned by the DAAS ARMS Staff and will not change. Once a **Provider Code** is setup in ARMS it will never be assigned to another Provider Agency.

Status = A indicates that the Provider Agency is Active for the current fiscal year.

The **Details...** link will allow the user to edit or view Provider Agency information.

The Clients... link will allow the user to Add, Edit, or View Clients assigned to a Provider Agency.

3.1.1 Edit / View Provider Details

Click on Details... to edit / view Provider Agency information in the editable fields. Provider Code or Registration Date cannot be changed. The user can edit or modify any of the editable fields on this form. When complete, click **Update** to save or **Cancel** to return to the previous screen.

Provider Code :	G002		
Agency Name :	FRIENDSHIP ADULT DAY SERVICES		
RegistrationDate:	9/3/1998		
Address :	1946 Martin Street	With Nutriti	on Congregate and
		Nutrition-Ho	ome Delivered
	BURLINGTON NC 27216	- checked, the	user should
Work Phone :	(336) 222 -7797 evt	- Complete this	s portion of the
Eav Number	(336) 222 7798	Flovider Age	ency information Point
Web Dago :	(000) (111) (1100		
-Contact Persons -		<u> </u>	
Name: Kathryn	Porter Title: EXEC DIRECTO	Facility Type	Number Of Facilities
Name: [Namiji		Restaurant	0
Ernail : friend39@	gbellsouth.net	Senior Center	3
Name:	Title:	All Others	1
Email :		Public or Low Rent Ho	using 4
-Type Of Agency		Religious	0
Profit	Type Services Provided Once keyed	this Operating School	0
III Public	Supportive section of the	e form	2
Minority	Nutrition-Congregate Users	Congregate - Number	r Of Days Serving
Mon Droft	Mutrition-Home Delivered	07 06 @5 04	03 02 01 00
MINOPPION		© Yes	ne(1) Mear Per Day
Update Canc	el	CNO	
		-Home Delivered Meals	s - Number Of Days Delivering
		07 06 @5 04	03 02 01 00
		C Yes	One(1) Meal Per Day
		@ No	
		Unders Oceand	

Figure 37 – View / Modify Provider by Region

3.1.2 View Clients for Region Providers

To view the list of Clients associated with a Providers, click on **Clients...** and the full client list for that Provider will appear:

Clier	nt List							
Provide Agency	er Code : y Name :				GOO2 FRIENDSHIP ADU	JLT DAY SERVICES		
Index o	on Last Name: 🚺	AII] - A - B - C	- <u>D</u> - <u>B</u>	E-E-G-H-I-	<u>] - K - L - M - N -</u>	Q - P - Q - R - S - I -	<u>U - V - M</u>	(-X-Y-2
SSN4	Last Name	First Name	Sex	Date Of Birth	Client Status	Registration Date	Status	
1111	BEAM	JUDY '	F	12/23/1930	A	7/17/2002	A	Details
1111	BYRD	RUBY	F	4/10/1930	A	2/23/2005	A	Details
1111	CARR	CLONTZ	м	8/11/1930	A	4/6/2005	A	Details
1111	CAYNOR	ASHMORE	м	9/27/1930	A	7/17/2002	A	Details

Figure 38 – Client List for a Provider in a Region

To see the details for a particular Client, click the **Details**.... link to open the Clients Detail screen, which allows the Region User to perform all the same functions as described in the <u>Provider User Manual</u>, Sections 4-7.

Region Users may also add a new Client by clicking on Add Client .

To return to the list of Providers click on either the **Providers** link on the navigation bar or the **Providers** Button.

Appendix

Appendix A - Regional Expenditures Change

Regional Expenditures are to be keyed as YTD Expenses. Any corrections to **Prior Months** must be made in **Current Month**. Once reimbursements are generated for Current Month, changes to Regional Expenditures will be locked for the Current Month. Changes to Regional Expenditures must be sent ARMS Staff to key corrections if errors are found before reimbursement payments are made.

Regional	Expenditure		Fields are disabled and cannot be
Region : Funding Source : Total Budget : Remaining Budget Amount YTD Expense Amount: Report Month : Salaries: Fringe: Travels: Admin Support Costs: Equipment: Indirect: Created User: Last Updated Time: Last Updated Time:	STATE AAA ADMIN COST \$45,423 t: \$35,703 \$9,720 Aug 4743 1257 0 0 0 3720 9/11/2008 3:01:52 PM 9/11/2008 3:01:52 PM	Program Income Allowance: 0 Overmatch Received: 0	Fields are disabled and cannot be changed after Reimbursement has been generated on the designated day for the current month. If these amounts are wrong, corrections to the YTD Expenditures must be keyed in the next report month. Changes for the current month can be made up until Reimbursement is generated. Therefore, if you key on the November 1 and find on November 5 that you made an error you can correct that error because Reimbursement won't be
Update	Cancel		generated until later that month.

Figure 39

With the keying of YTD Expenditures for Regional Expenses, corrections to a previous month must be corrected in the Current Month. If no expenditures are reported for a current month the User are encouraged to re-key the Previous Month in the Current Month for the ZGA-060 to calculate correctly. In the example below no Current Month expenditures for August were keyed; therefore, the report had nothing to calculate.



Figure 40

Below are the YTD for July and the ZGA-060 report for Report Month July.

Regior	nal Expenditure		
Region :	COMMIS		
Funding Source :	Planning And Admin		
Total Budget :	\$154,194		
Remaining Budget Amou	nt: \$145,903		
YTD Expense Amount:	\$8,291		
Report Month :	Jul		
Salaries:	3502	Program Income Allowance:	0
Fringe:	1857	Overmatch Received:	0
Travels:	0		
Admin Support Costs:	1319		
Equipment:	0		
Indirect:	1613		
Created User:			
Created Time: Last Undated User:	8/13/2008 12:25:58 PM		
ast Updated Time:	8/13/2008 12:25:58 PM		

Figure 41

MONTH PRINT	REPORTING:Jul DATE: 10/28/2	У 2008 008	NORTH CAROLINA DIVISION OF AGING AND ADULT SERVICES ZGAD60 - Planning And Admin FINANCIAL REPORT (AAA) REGION						
	EXPENDITURES:		APPROVED BUDGET	CURRENT MONTH	CUMULATIVE YEAR TO DATE	BUDGET BALANCE	PERCENT EARNED		
	SALARIES		72,075	3,502	3,502	68,573	5		
	FRINGE		15,117	1,857	1,857	13,260	12		
	TRAVEL		10,000	0	0	10,000	0		
	ADMINITRATI	JE SUPPORT COSTS	23,803	1,319	1,319	22,484	6		
	EQUIPMENT		0	0	0	0	0		
	INDIRECT		33,199	1,613	1,613	31,586	5		
	TOTAL COST		154,194	8,291	8,291	145,903	5		
	LESS P	ROGRAM INCOME	0	0	0	0	0		
	0	VERMATCH	0	0	0	0	0		
	NET COST		154,194	8,291	8,291	145,903	5		

Figure 42

In Figure 40, the ZGA-060 report did not calculate because no YTD expenditures were keyed in the current report month. The ZGA-060 calculated corrected in Figure 42 for report month July. For the report to calculate correctly, the user can re-key the previous as shown in Figure 43.

	Regio	n Details	Regio	nal Expenditure	
Region Code : Region Name : Funding Source N Total Budget Am Remaining Budge	lame : ount :	Planning And Admin \$154,194	Regon : Funding Source : Total Budget : Remaining Budget Amou YTD Expense Amount: Report Month : Salaries: Fringe:	Planning And Admin \$154,194 nt: \$145,903 \$8,291 Aug [3502 [1857]	Program Income Allowance Overmatch Received:
ternaming beage	Region I	Expenditures	Travels:	0	
Report Month	YTD Exp	enses	Equipment:	0	
Jul	\$8,291	Details	Created User:	LINDA.OWENS	
Aug	\$8,291	Details	Created Time: Last Updated User:	10/28/2008 11:56:55 AM LINDA.OWENS 10/28/2008 11:56:55 AM	
Cancel	Add Regio	on Expense	Line operation in the	tate Cancel	



Keying the same YTD Expenditures in Current Month (August) as was in Previous Month (July) will allow the ZGA-060 to perform the calculations correctly. The report is setup to subtract the previous month YTD from the Current Month YTD as shown in Figure 44. Therefore, if the user decides not to key Current Month expenditures, the User are encouraged to key the Previous Month YTD expenditures as the Current Month YTD Expenditures, which is actually the YTD expenditures being reported in ARMS.

In comparing the ZGA-060 for July (Figure 42) and August (Figure 44) you will note that in July expenditures show up on the Current Month, but in August, the Current Month expenditures are zero.

MONTH REPORTING: August 2008 PRINT DATE: 10/28/2008	NORTH CAROLINA DIVISION OF AGING AND ADULT SERVICES ZGA060 - Planning And Admin FINANCIAL REPORT (AAA) REGION					
EXPENDITURES:	APPROVED BUDGET	CURRENT MONTH	CUMULATIVE YEAR TO DATE	BUDGET BALANCE	PERCENT EARNED	
SALARIES	72,075	0	3,502	65,071	10	
FRINGE	15,117	0	1,857	11,403	25	
TRAVEL	10,000	0	0	10,000	0	
ADMINITRATIVE SUPPORT COSTS	23,803	0	1,319	21,165	11	
EQUIPMENT	0	0	0	0	0	
INDIRECT	33,199	0	1,613	29,973	10	
TOTAL COST	154,194	0	8,291	137,612	5	
LESS PROGRAM INCOME	0	0	0	0	0	
OVERMATCH	0	0	0	0	0	
NET COST	154,194	0	8,291	137,612	5	

-				
-	n	ı ır	Δ.	<u>4</u> 4
	S	u	C	

Appendix B – Access to ARMS - User Request Form

Access to ARMS is **ONLY** granted to Agencies that have contracted to key client and service data for reimbursement in ARMS in the current Fiscal Year. Therefore, if access is given to a User and there is no provider budget in the current fiscal year or the Provider Agency is not **Active**, the User will get a server error.



Regional Staff should check the **Directory** in the WIRM Portal to see if the User has an existing WIRM Account. If the new User is not found after a Search, select **Add New Use**r on the form for the User Type. When prompted for the WIRM Name, type New. *Note: To search the Directory, it must be selected before selecting the ARMS application.*

the web ide	RM entity role ma	portal nagement	_	_	_	Logout Disclaimer
	My	Applications	My Setting	15	Directory	
First Name :			E	mail Address :		
Last Name : owens		County : Wake				
Division :		Telephone Number :				
			Search			
Name	First Name	Last Name	Division	Email Address		Telephone Number
Brenda.Owens	Brenda	Owens	DSS	Brenda.Owens@	Incmail.net	877-361-5437
Joe.Owens	Joe	Owens	DIRM	Joe.Owens@ncr	mail.net	
Linda.Owens	Linda	Owens	DAAS	Linda.Owens@d	ihhs.nc.gov	919-855-3449
Martha.Owens	Martha	Owens	DSS	Martha.Owens@	Incmail.net	877-361-5437

There are several ways to search the directory, as illustrated above. In this illustration a search was performed on last name "*Owens*" and County "*Wake*."

ARMS User Request Link to Form

The ARMS User Request Form is available to Users with Region Administrator rights to ARMS. Click link on menu bar to access the form.

Home Region Allocation Region Budget Provider Budgets Providers Clients Export Reports Import ARMS/SIS User Request Form

Arms Region

DAAS: ARMS User Access Request Form

	in the WIRM Account field above.
New 🛟 💿 Update	User 💿 Change User 💿 Remove/Deactivate User
\ w	IRM Account Name *
Fo	r Update User. Change User and Remove/Deactivate User requests. please provide WIRM account na
	C Key existing WIRM Name
Irst Name	
Middle Initial *	
ast Name *	
mail *	3
aency *	
	1
Position Title *	
Phone Number *	
nna) ann-nana	
Street Address *	
Street Address * City *	
Street Address * City *	
Street Address * City *	
Street Address * City * State *	Select State from list
Street Address * City * State * - Select - ~	Select State from list
Street Address * City * State * - Select - ~ Zip Code *	Select State from list
Street Address * City * State * - Select - ~ Zip Code *	Select State from list
Street Address * City * State * - Select - ~ Zip Code *	Select State from list
Street Address * City * State * - Select - ~ Zip Code * County *	Select State from list
Street Address * City * State * - Select - ~ Zip Code * County * - Select - ~	Select State from list
Street Address * City * State * Select - ~ Zip Code * County * Select - ~	Select State from list
Street Address * City * State * Select - ~ Zip Code * County * Select - ~ ARMS User Role *	Select State from list
Street Address * City * State * Select - ~ Zip Code * County * Select - ~ ARMS User Role * Region Administrator/User	Select State from list When ARMS User Role is chosen a selection
Street Address * City * State * Select - ~ Zip Code * County * Select - ~ ARMS User Role * Region Administrator/User Provider Administrator/User	Select State from list When ARMS User Role is chosen a selection list will display

County *



ARMS will not allow more than one **User Role** per WIRM Account. The different types of User Roles are explained in <u>Section 1.3 - Who Uses ARMS</u>.

Region Administrator/User can only be assigned to one Region





Provider User Role

Provider Administrator/User can be assigned multiple Providers across Regions. For example: Provider C005 can also have access to G003, J017, etc.



County Report User



Report User



Message to Requester

User Type * 🛛 Add New User 🔿 Update	User O Change User O Remove/Deactivate User
User Type	Selection Criteria
Add New User	User does NOT have access to ARMS and User NOT FOUND WIRM Directory
Update User	Add ARMS attributes to a WIRM Account or Add additional attributes to an existing ARMS User. (Include the WIRM Name found in WIRM Directory)
Change User	Change/Replace ONLY ARMS attributes for existing ARMS User with new attributes (Include the WIRM Name found in WIRM Directory)
Remove/Deactivate User	REMOVE ARMS User Access Only (Include the WIRM Name found in WIRM Directory)

ARMS User Request Selection Criteria

Three e-mails are generated when form is submitted:

1. The AAA ARMS Coordinator will receive an e-mail similar to the one illustrated below. This e-mail alerts the ARMS Coordinator that the request has been received by DAAS Staff.

Your ARMS User Access request has been submitted for processing within the next 2 business days. If you did not submit a request please notify this office immediately. ARMS Job ID: 4977 Submission Date & Time: Friday, September 30, 2016 - 9:14 am _____ User Type: Change User WIRM Account Name: swarna, reddy _____ -----First Name: Swama Middle Initial: D Last Name: Reddy Email: swarna.reddy@dhhs.nc.gov Agency: DAAS Position Title: Data Specialist Phone Number: 919-855-3442 Office Address: 693 Palmer Drive, Raleigh, NC 27699-2101 County: Wake (092) _____ ARMS User Role Provider Administrator/User - choose Provider(s) below Region Needed: Provider(s) Needed: - F001 Legal Services of Southern Piedmont - G040 Alamance Co Meals On Wheels - K095 Legal Aid of NC-Region K - M065 Legal Aid of NC-Fayetteville - P026 Legal Aid of NC-Wilmington County/Counties Needed: Director/Coordinator's Name: Linda Owens Director/Coordinator's Email: linda.owens@dhhs.nc.gov Thank you, Division of Aging and Adult Services (ARMS Application)

Confirmation E-mail

2. The person ARMS Access is being requested for will receive a similar e-mail as illustrated below. This e-mail alerts the User that the request has been made and the AAA ARMS Coordinator will let them know they have been granted access to ARMS and provide the User with the temporary password.

From: webmaster.ncgov@its.nc.gov [mailto:webmaster.ncgov@its.nc.gov] On Behalf Of ARMS
Inquiry Sent: Friday, September 30, 2016 9:14 AM
To: Reddy, Swarna < <u>swarna.reddy@dhhs.nc.gov</u> >
Subject: ARMS 4977: Swarna Reddy
You are receiving this communication to inform you that your request for ARMS access has been submitted and is being processed. Once your access has been established, you will be contacted by your regional AAA ARMS Coordinator for guidance in logging in and technical assistance.
ARMS Job ID: 4977 Submission Date & Time: Friday, September 30, 2016 - 9:14 am
User Type: Change User WIRM Account Name: swarna,reddy
First Name: Swarna Middle Initial: D Last Name: Reddy Email: swarna.reddy@dhhs.nc.gov Agency: DAAS Position Title: Data Specialist Phone Number: 919-855-3442 Office Address: 693 Palmer Drive, Raleigh, NC 27699-2101
ARMS User Role: Provider Administrator/User – choose Provider(s) below
Region Needed:
Provider(s) Needed: - F001 Legal Services of Southern Piedmont - G040 Alamance Co Meals On Wheels - K095 Legal Aid of NC-Region K - M065 Legal Aid of NC-Fayetteville - P026 Legal Aid of NC-Wilmington
County/Counties Needed:
Director/Coordinator's Name: Linda Owens Director/Coordinator's Email: linda.owens@dhhs.nc.gov

Change User Request

3. The third e-mail is sent to DAAS Staff. The information in this e-mail is used to create, change, update and or remove the User Account.

ARMS Job ID: 4977 Submission Date & Time: Friday, September 30, 2016 - 9:14 am
User Type: Change User WIRM Account Name: swarna,reddy
First Name: Swarna Middle Initial: D Last Name: Reddy Email: <u>swarna.reddy@dhhs.nc.gov</u> Agency: DAAS Position Title: Data Specialist Phone Number: 919-855-3442 Office Address: 693 Palmer Drive, Raleigh, NC 27699-2101 County: Wake (092)
ARMS User Role: Provider Administrator/User – choose Provider(s) below
Region:
Provider(s): - F001 Legal Services of Southern Piedmont - G040 Alamance Co Meals On Wheels - K095 Legal Aid of NC-Region K - M065 Legal Aid of NC-Fayetteville - P026 Legal Aid of NC-Wilmington
County/Counties:
Director/Coordinator's Name: Linda Owens Director/Coordinator's Email: linda.owens@dhhs.nc.gov

E-mail Sent to DAAS Staff

Appendix C - Consumer Directed Services ARMS Requirements

With GT Financial Services serving as fiscal intermediary for Consumer Directed Services (CDS) some unique challenges arose with reporting. A new procedure for compiling clients and reimbursements in ARMS was created to reduce duplication of effort and increase fiscal transparency and ease of reporting

There are four main types of data entry in ARMS for Consumer Directed Services (CDS) Provider Agencies

- 1. Client information
 - Client demographics
 - Assessment information
- 2. Units for services received
- 3. Non-unit based reimbursement requests
- 4. Consumer contributions

CDS Reporting Procedures

Duties will be split between GT Financial and Local Agency

The illustration below displays the local agency, Yancey County Committee on Aging (D060), home screen when they login in to ARMS. The local agency (D060) is given access to their agency as well and access to GT Financial (D160).

Code	Provider	Status	Address	City			
D060	YANCEY CO COMMITTEE ON AGING	А	PO BOX 546	BURNSVILLE	Details	Clients	Services
D160	GT FINANCIAL SERVICES-YANCEY	Α	113 N MONROE ST	STURGIS	Details	Clients	Services

Local Agency Home Screen

GT Financial will have a unique provider code for each county it serves. The home screen for GT Financial is illustrated below. ARMS Provider User Access is given to person(s) identified by GT Financial to access each agency with one login.

Index o	índex on Agency Name: [<u>All] - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U - V - W - X - Y - Z</u>								
<u>Code</u>	Agency A	<u>Status</u>	<u>Address</u>	<u>City</u>					
D150	GT FINANCIAL SERVICES-ALLEGHANY	Α	113 N MONROE STREET	STURGIS	Details	Clients	Services		
Q107	GT FINANCIAL SERVICES-BEAUFORT	Α	215 BROADUS ST	STURGIS	Details	Clients	Services		
F112	GT FINANCIAL SERVICES-CABARRUS	Α	215 BROADUS	STURGIS	Details	Clients	Services		
F155	GT FINANCIAL SERVICES-LINCOLN	Α	113 N MONROE ST	STURGIS	Details	Clients	Services		
Q175	GT FINANCIAL SERVICES-MARTIN	Α	215 BROADUS ST	STURGIS	Details	Clients	Services		
F160	GT FINANCIAL SERVICES-MECKLENBURG	Α	113 N MONROE ST	STURGIS	Details	Clients	Services		
D160	GT FINANCIAL SERVICES-YANCEY	Α	113 N MONROE ST	STURGIS	Details	Clients	Services		
M180	GT FINANCIAL-CUMBERLAND	Α	215 BROADUS ST	STURGIS	Details	Clients	Services		

GT Financial Services Home Screen

A budget for CDS services 501 and 503 will be created in ARMS under GT Financial Provider Code. In ARMS, GT Financial can key units of services for these two service codes and report any contributions. These budgets are set up in ARMS by the Area Agency on Aging (Region) for the county by service.

Provider Budgets										
Provider :		GT FINANCIAL SERVICES-YANCEY(D160)	T FINANCIAL SERVICES-YANCEY(D160)							
Region	County	Service	Service Budget							
HIGH COUNTRY COG	Yancey	CDC-PERSONAL ATTENDANT(501)	\$4,580.00	<u>SRWs</u>	Contributions					
HIGH COUNTRY COG	Yancey	CDC-FINANCIAL MANAGEMENT SERVICES(503)	\$976.00	<u>SRWs</u>	Contributions					
Cancel Provider	Cancel Providers									

GT Financial Budgets

GT Financial cannot change budgets in ARMS. GT Financial shall submit budget revisions for their budgets to the Area Agency on Aging (Region). In the illustration above, request for budget revisions must be sent to High County COG, which is Region D.

Budgets are set up in ARMS at the beginning of the State Fiscal Year, but with ARMS processes being a month behind; August 1 is when Area Agencies can key new budgets for the year. Provider Agencies are not allowed to add services to new clients or key units of services until the Area Agency have set the budgets up in ARMS. If budgets are not set up by 10th calendar day of the month, provider agencies should call or e-mail the Area Agency of that county.

Provider Cod Agency Nam	D160 GT FINA	NCIAL SE	RVICES-YANCEY			
SRWCode	Description	Region	County	Service		
501	CDS- PERSONAL ATTENDANT	D	Yancey	CDC-PERSONAL ATTENDANT(501)	Details	Service Totals
503	CDS- FINANCIAL MGMT SERVICES	D	Yancey	CDC-FINANCIAL MANAGEMENT SERVICES(503)	Details	Service Totals

Service Totals

The local agency can only assign these two budget services for clients of GT Financial as shown below.

Service Code	Name	Service Status				
501	CDC-PERSONAL ATTENDANT	Active 💌				
503	CDC-FINANCIAL MANAGEMENT SERVICES	Active 💌				
Previous Next Cancel						

Allowable Services

A budget for all other Consumer Directed service codes, 500, 502, 504, 505, 506, and 507 will be set up under the Provider Code of local provider agency.

<u>Clients</u>

The local agency will be responsible for all client entry. This includes setting up new client in ARMS, completing assessment information and adding client to SRW based on service. Therefore, the local agency has full access to GT Financial.

Code	Provider	Status	Address	City			
D060	YANCEY CO COMMITTEE ON AGING	Α	PO BOX 546	BURNSVILLE	Details	Clients	Services
D160	GT FINANCIAL SERVICES-YANCEY	Α	113 N MONROE ST	STURGIS	Details	Clients	Services

Local Agency Home Screen

Local Agency will log into ARMS, click on clients link next to GT Financial Service Code. This will allow local agencies to add clients to GT Financial and assign contracted service(s).

Add Client Providers										
Client List										
Provide Agency	Provider Code : D160 Agency Name : GT FINANCIAL SERVICES-YANCEY									
Index o	on Last Name: 🚺	AII - <u>A</u> - <u>B</u> - <u>C</u>	- <u>D</u> -	E - F - G - H - I	<u>J-K-L-M-N-O-P-C</u>	<u>0 - K - S - I - U - V -</u>	<u> </u>			
SSN4	Last Name	First Name	<u>Sex</u>	Date Of Birth	Provider Client Status	Registration Date				
0000	CROUSE	ELVIRA	F		Active	11/28/2007	Details			
0000	EDWARDS	ANNA	F	2/17/16/1	Active	5/1/2012	Details			
3055	2007 MILLER EDNA F 1_, 2 Active 5/10/2011 <u>Details</u>									
Add	Add Client Providers									

Provider Client List

	Provider Clien	Provider Client Services										
Services	Service Code	Service Nan	ne	Service Status	Allow Care Recipients							
assigned to	503	CDC-FINANCIAL MANAGE	MENT SERVICES	Α	No							
client <	501	CDC-PERSONAL ATTENDA	NT	Α	No							
	Add/Update \$	Add/Update Services										
	Provider Client Assessments											
	Assessment D	ate	Functional Stat	us Nutrition He	alth Score							
	3/20/2012		At Risk .	Good Nutrition	Details							
			Asse	essment —								

Services assigned to Client

Local agency will set up Site/Route/Worker (SRW) Codes for budgeted services and add clients to Service Totals data entry screen to key units of services. Refer to ARMS Provider User Manual, pages 54-58. This manual can be found on the ARMS Support Website at www.ncdhhs.gov/aging/arms/manual/ARMS_ProviderUser.pdf.

Responsibilities

Local Agency responsible for entering units and data for service codes:

- 1. 500 Care Advisor
- 2. 502 Adult day health
- 3. 504 Personal care supplies, etc.
- 4. 505 Home delivered meals
- 5. 506 Emergency Response Equipment
- 6. 507 Medical Adaptive Equipment

GT Financial responsible for entering units and data for service codes:

- 1. 501 Personal Assistant
- 2. 503 Financial Management Services

Implementation (Start-up)

- 1. AAA must request a separate provider code for GT Financial for each county where they provide financial management services (FMS). GT Financial name should be "GT Financial-County Name." Example: *GT Financial-Alleghany*.
- 2. DAAS ARMS Staff will assign a unique Provider Code and register the Provider in ARMS. DAAS ARMS Staff will inform the AAA of the new Provider Code.
- 3. AAA must have local provider complete <u>separate</u> 732 forms for the budget of CDS units of service for service codes 501 and 503 to be entered to ARMS by GT Financial and for the local provider agency to enter those units service for all other service codes.
- 4. AAA must request ARMS Provider User access for GT Financial designated personnel to enter units for service codes 501 and 503. The **ARMS User Request Form must be submitted via link in ARMS from the AAA and not from GT Financial.** (revised 1/25/2018)

- 5. GT Financial and/or the Local Agency will not be able to access this new provider code until a budget has been set up in ARMS by the AAA and the new provider code added to their login.
- 6. Local service provider should have ARMS access to all CDS service codes for purposes of monitoring and oversight of all funds budgeted for CDS.

Service Codes for Funding Plan

- <u>Service Code 503</u> has a set unit rate of \$75.00
- Each client will receive <u>1 unit</u> of code 503 the <u>first month</u> they receive service. This unit will cover the costs associated with setting up a new client and employee.
- Each client will receive <u>one unit</u> every month for monthly payroll services provided by GT Financial
- (Note- This means that the very first month of service by GT, a client will receive two units for 503. Every month after they will receive only one unit)
- <u>Service code 501</u> should initially be set up with unit rate of \$10.87 (per DAAS).
- Twice a year (December 30 and June 30, prior to yearend closeout), <u>GT will send</u> <u>the local agency a breakdown of actual costs</u> for the Personal Assistant code for the preceding six month period.
 - Agency will then need to calculate the updated unit rate. They will take the <u>total actual costs</u> and divide that by the number of units reported to ARMS year to date.
 - Agency will complete a 732r with new unit rate for service code 501 and submit to AAA for ARMS entry. GT Financial will be advised of the new reimbursement rate for service code 501 by the AAA.
 - The new unit rate will apply to all units reported for the year to date and ARMS will adjust the reimbursement rate in the following month's payment.

- 7. AAA should request 40% of state funds for HCCBG 501 budget for GT Financial from DAAS before service begins. At least 30 days is recommended.
 - Once signed HCCBG contract is received by AAA, AAA will release advance to local provider.
 - Note- Provider can agree to pay GT Financial the 40% advance before they receive payment from the AAA (in the case of a hold up in HCCBG contract). GT Financial will not be able to start services until advance is received

Monthly Reimbursement

ZGA-370 report: This report shows service specific reimbursements by service codes in each county and serves as a monthly invoice of services provided by both GT Financial and the local provider agency.

RUN DA MONTH	NORTH CAROLINA DIVISION OF AGING AND ADULT SERVICES RUN DATE: 08/16/2012 PROVIDER REIMBURSEMENT REPORT - ZGA370 MONTH REPORTING:July 2012 REGION D COUNTY 100 Yancey											
PRINT	PRINT DATE: 08/24/2012 PROVIDER D160 GT FINANCIAL SERVICES-YANCEY											
					CATEGORY II	I HOLL AND	JOITONI DEN	1020				
SERV CODE	GROSS BUDGETED SERVICE COST	PROGRAM GROSS HCCBG ALLOTMENT	CURRENT UNITS	GROSS UNIT RATE	GROSS CURRENT MONTH EXP	CURRENT MONTH CS/PI	OTHER ADJ	ADJ CURRENT MONTH EXPEND	CURRENT MONTH LOCAL SHARE	NET CURRENT MONTH EXPEND	NSIP CURRENT MONTH REIMB	TOTAL REIMB
501	4,580	763	88	10.8700	957	0	-194	763	76	687	0	687
503	976	163	1	75.0000	75	0	0	75	8	67	0	67
CAT	EGORY IN HOME	AND SUPPORT	SERVICES 1	TOTAL								
	5,556	926	89		1,032	0	-194	838	84	754	0	754
PRO	VIDER D160 GT	FINANCIAL SE	RVICES-YAN	ICEY TOTAL								
	5,556	926	89		1,032	0	-194	838	84	754	0	754
	NTV 100 V											
00	5,556	926	89		1,032	0	-194	838	84	754	0	754
					-							

Sample ZGA-370 Reimbursement Report

To calculate amount to be paid each month, the AAA will need to:

- 1. Add together the "total reimbursement" columns for code 501 and 503.
- 2. Take that total and divide it by 0.9. The new amount will be the total reimbursement to be paid to GT that month. (*note- The reimbursement amount on the ZGA report is 90% of expenditures reported. The 10% local match is provided from local resources and not GT Financial)
- 3. CDS reimbursements other than service codes 501 and 503 will be remitted to the local agency for the services rendered by the agency or for payment to a contracted local provider.

NOTE: The AAA handles funds for the CDS program per established procedures of the Region for paying providers of HCCBG funded services.

Appendix D – Provider Agency Form – DAAS-150

DEPARTMENT OF HEALTH DIVISION OF AGING AN PROVIDER AGENC	H & HUMAN SERVICES D ADULT SERVICES Y INFORMATION
1. TYPE OF INFORMATION 2. DATE 3. Check (V) only one 1 NEW 1 2 CHANGE 2	REGION 4. PROVIDER CODE 5. CONTRACT YEAR
6. AGENCY NAME 8. AGENCY ADDRESS	7. TELEPHONE - - FAX NUMBER (ontimal)
CITY 9. CONTACT PERSON(S) FOR AGING SERVICES	STATE ZIP CODE
NAME	TITLE
NAME E-MAIL ADDRESS	TITLE
10. TYPE AGENCY 1 Non-Profit Check (V) all applicable 2 Profit 3 Public 4 *Minority	11. TYPE SERVICES PROVIDED Supportive Check (V) all applicable Nutrition-Congregate
FOR NUTRITION PR	ROVIDERS ONLY
12. Providers of Congregate Nutrition Service, only - indicate the num Image: Logic line in the service of	mber of facilities by type: Senior Center Religious Public or Low Rent Housing All Others DME DELIVERED MEALS - NUMBER OF DAYS DELIVERING 1 6 5 4 3 2 1
14. Serving More than One (1) Meal Per Day 16. Set	erving More than One (1) Meal Per Day
Yes No	Yes No
* Minority Provider - An organization or business concern that is: (a) at lea African American, Hispanic origin, American Indian/Native Alaskan/Native Hawa business having at least 51 percent of its stock owned by one or more minority individuals in the case of a private non-profit); <u>and</u> (b) has its management and NOTE: This form is not applicable to subcontractors of provider agencies. DAAS:150 (Rev. 2/6/2007)	est 51 percent owned by one or more individuals who are either an aiian, Asian American/Pacific Islander minority, or a publicly owned individuals (or is governed by a board consisting of at least 51% minority daily business controlled by one or more minority individuals.

Department of Health and Human Services NC DIVISION OF AGING AND ADULT SERVICES Aging Resources Management System (ARMS)

FORMS INSTRUCTIONS

PROVIDER AGENCY INFORMATION DAAS-150

A. <u>PURPOSE</u>

Provider Agency information is collected each year and/or updated as needed in the ARMS system. This information must exist in ARMS before provider budgets or contract segments can be setup in ARMS and before service unit, consumer contributions, and non-unit reimbursement data, can process for reimbursement.

B. <u>GENERAL INSTRUCTIONS</u>

- 1. This form is completed for new aging service providers or Department of Social Services (DSS) providing services under Option B. The local service provider must have a contract with the AAA. This form is not applicable to subcontractors.
- 2. All **new** forms must be sent to the Division of Aging and Adult Services (DAAS). DAAS will enter the information in the ARMS system.
- 3. DSS should send the form to DAAS and maintain a copy for their files, if they are providing services under Option B.

C. <u>SPECIFIC INSTRUCTIONS FOR EACH ITEM</u>

- 1. TYPE OF INFORMATION: Indicate what action is being taken with this form. Check one item only. REQUIRED
 - a. New Check this item the first time this form is completed each contract year
 - b. Change Check this item when information which was previously submitted is being changed.
- DATE: Enter the date the form is being completed. Enter a two (2) digit number to reflect the month and days. Precede one (1) digit months and days with a zero (0). Enter the four (4) digit year. REQUIRED
- 3. REGION: Enter the one (1) digit alpha or numeric character which identifies the region. REQUIRED
- 4. PROVIDER CODE: Leave the four (4) digit Provider Code field **blank** when submitting **new information**. The State ARMS Coordinator will assign a provider code. A provider code for a DSS will be identical to the county code with the region code preceding (example: A022). REQUIRED
- 5. CONTRACT YEAR: Enter the four (4) digit fiscal year. REQUIRED

- 6. AGENCY NAME: Enter the complete Agency Name. Spaces and dashes are allowed. If adequate spaces are not available, enter as much of the name as possible. Enter no more than one (1) letter per space. REQUIRED for new forms.
- 7. TELEPHONE: Enter the agency telephone number, include area code. REQUIRED EXTENSION: OPTIONAL FAX NUMBER: Enter the agency FAX number, include area code. OPTIONAL
- 8. AGENCY ADDRESS: Enter the Agency's mailing address. Spaces and dashes are allowed. If adequate spaces are not available, enter as much of the address as possible. Enter no more than one (1) letter per space. Address, City, State, and the first five (5) digits of the zip code are REQUIRED.
- 9. CONTACT PERSON(S): Enter the first and last name and title of an agency contact person to contact regarding the program and services. At least one contact person, title and a valid e-mail address REQUIRED.
- 10. TYPE AGENCY: Check the type of agency which is applicable (Non-Profit, Profit, Public, Minority). An agency cannot be Non-Profit and Profit, or Public and Profit, etc. But an agency can be Non-Profit and Minority or Profit and Minority. Those not applicable should be left blank. At least one agency type is REQUIRED.
- 11. TYPE SERVICES PROVIDED: Check all types of services provided by the agency which are funded by DAAS administered funds. If your agency provides supportive services only, do not complete the remainder of the form. All items can be checked as appropriate. At least one service type is REQUIRED.
- 12. NUMBER OF FACILITIES BY TYPE: The Number of Facilities by Type for providers of Congregate Nutrition ONLY. Indicate the number of facilities your agency operates by type. Those not applicable should be left blank. At least one (1) type must have a number greater than zero (0).
- 13. CONGREGATE NUMBER OF DAYS SERVING: Indicate the number of days serving perweek. This is REQUIRED for providers of Congregate Nutrition.
- 14. SERVING MORE THAN ONE MEAL PER DAY: Indicate whether the agency serves more than one (1) meal per-day. Check YES if the agency habitually serves more than one (1) meal per-day and NO if it does not. This is REQUIRED for providers of Congregate Nutrition.
- 15. HOME DELIVERED MEALS NUMBER OF DAYS DELIVERING: Indicate the number of days the agency normally provides Home Delivered Meals per-week. This is REQUIRED for providers of Home Delivered Meals.
- 16. DELIVERING MORE THAN ONE MEAL PER DAY: Indicate if more than one (1) Home Delivered Meal is delivered per day per person by checking YES or NO. This is REQUIRED for providers of Home Delivered Meals.

Revised 3/28/2007

Appendix E – Monitoring

Excerpt - Monitoring Website - http://www.ncdhhs.gov/divisions/daas/monitoring

The Division of Aging and Adult Services (DAAS) is dedicated to monitoring and assessing aging services and programs funding through the Older Americans Act and State Allocations.

Monitoring includes a periodic in-depth review of programs and the day to day oversight and guidance of programs. Through a strong monitoring process, the DAAS uses this monitoring process to work toward growth of quality programs and services serving older adults and adults with disabilities and their caregivers.

Tools

- 1. DAAS Compliance Monitoring Tools
- 2. DAAS Fiscal Monitoring Tools
- 3. DAAS Programmatic Monitoring Tools
- 4. DAAS Self-Assessment Guide for Monitoring of Area Agencies on Aging
- 5. DAAS Subcontractor Performance Evaluation Tools
- 6. DAAS Other Monitoring Tools

Policies/Procedures/Service Standards

- 1. <u>Consumer Contribution Policy and Procedures</u>
- 2. Division of Aging and Adult Services Monitoring Policy
- 3. DHHS Monitoring Policy
- 4. Section 308 of AAA Policies and Procedures Manual
- 5. <u>Service Standards</u>

- 1. ARMS Support Web page
- 2. Administrative Letters
- 3. Provider User Manual
- 4. Reimbursement Manual
- 5. Report User Manual
- 6. <u>County Budget Instructions Documents</u> Home and Community Care Block Grant (HCCBG) <u>http://www.ncdhhs.gov/document/home-and-community-care-block-grant-hccbg-county-budget-instructions-documents</u>