WV IMS Quick Tips

General Information

1. **My agency name and/or contact information are incorrect.**
   Send an email to april.m.goebel@wv.gov with the correct information and it will be updated.

2. **There is a lot to learn with this new system. I'm concerned about entering and following up on incidents within timelines.**
   *BMS has granted an exception to timelines for both incident entry and follow up through 10/31/23. This will allow users to become familiar with the system. Note that incidents that occurred after 8/1/23 should **not** be entered into the old system.*

Logging In

3. **I have not received my username and temporary password.**
   If you were not enrolled as a user in the training site (Sandbox) prior to 8/1/23, your manager will need to enter you as a worker and send a user request via the system. This will trigger BMS to activate your user account. You will then receive an email with your credentials.

4. **When I login, I get an error message that says, "Group code has changed."**
   Notify BMS at april.m.goebel@wv.gov that you have received this error. You will receive additional instructions at that time.

Member Records

5. **We do not see all the members our agency serves.**
   All agencies should have access to all members with a couple of exceptions:
   1. *Aged and Disabled Waiver Case Management: if you do not see members for whom your agency provides Case Management, send a **secure** email to april.m.goebel@wv.gov with a list of those members.*

2. _User attempting to access members under wrong agency:_ agencies were created in the IMS using individual Tax Identification Numbers. For this reason, you may not recognize your agency name or even be able to find it. If this applies to you, reach out to _april.m.goebel@wv.gov_ for assistance.

6. I can see all the members that our agency serves, even those not on my caseload.

Once the Agency Administrator assigns each member to a Case Manager, the Case Manager/Service Provider role will be able to access those members only. All Agency Administrators have access to all members served by the agency.

7. Some members on my list have been discharged or are deceased.

Some members who have been discharged are still visible in the IMS. BMS will address this issue in the future to allow for more efficient access and incident entry.

Alerts And Messages

8. Unread Alert Notes on the My Work landing page says "0", but when I click on it, I see alerts.

This is an error that is under repair. Until BMS announces that the issue is fixed, be sure to open the link frequently to ensure you are not missing anything.

9. The State Reviewer has marked my incident complete, but it still shows in my Ticklers.

Dismiss the tickler by going to the far right of the row on your agency's incident page. Using the dropdown menu provided, select complete. This will remove the incident from your ticklers. If there is no complete option, select edit and change the status in the popup. Be sure to save.

Assigning Case Managers

10. I am an Agency Administrator, but I am not able to assign members to their Case Manager.

The Assignment Worker is an **additional** Agency Administrator user account for assigning Case Managers to members only. To use the Assignment Worker account, login with your agency ID and the default password provided. If you

do not know your agency ID and default password, send an email to april.m.goebel@wv.gov and it will be provided.

Agency leadership should decide who has the login information to this account, but BMS suggests that there are at least two so that someone has access to it at all times.

Incident Entry And Follow Up

11. **The Add Incident option is not showing from the file menu.**
Be certain that you are on the demographics tab in the member record. Go to File then choose Add Incidents.

12. **I entered an incident into the old WV IMS.**
Do not enter any further incidents into the old system. Go ahead and enter the same incident in the new system.

13. **The Type of Report field is grayed out and says, "Value to be updated by system automation" on the Incident Tracking page.**
The Type of Report automatically updates when you complete the Incident Details page Type of Report field and change the status from Pending to Complete. Don't forget to save by going to File and clicking on Save and Close Incident Details form.

14. **I completed the Incident Tracking form. Are there other steps I need to take when I enter an incident?**
After completing the Incident Tracking form, be certain to go to file and select Save and Close Incident Tracking. Doing so triggers the Workflow Wizard—you will see two options in the upper left corner: Incident Details Page and Forms and Attachments. Complete the Incident Details page, being sure to change the Status to Action Completed. Save and Close.

If you are ready to enter follow-up, do so by selecting Forms and Attachments and completing a note on that page. It's important that when follow-up is entered, you change the status to Action Completed before saving this page.

15. **My incident has been reviewed by the State Reviewer and is in Review Complete status. The disposition says it's still Awaiting Agency, though.**

The State Reviewer has forgotten to change the disposition from Awaiting Agency to Incident Closed. Please notify the State Reviewer so it can be corrected.

16. **I have received an email from the State Reviewer that corrections are required, but I cannot find what corrections are needed.**
Open the incident and click on Attachments and Follow Up. If additional information is needed, the status will be Alert or New Message. Click on the row; this will open Attachments and Follow-Up; there will be a note from the State Reviewer that explains what is needed.

17. **I have entered an incident under the wrong member.**
Send an email to april.m.goebel@wv.gov to request the incident be deleted. After the incident for the wrong member is removed, you can enter a new incident for the correct member.

18. **The State Reviewer has closed my incident, but I need to enter follow up information.**
This should not occur, and was likely done in error. Please contact the State Reviewer, who will reverse the disposition of the incident so that additional information can be added.

19. **I checked out an incident and the row completely grayed out. I no longer have access to this incident at all and do not see an option to check it back in.**
This was removed in September 2023, but some users checked out incidents when it was still available. BMS will correct this issue; just send an email with the incident number and a description of the issue.

20. **I cannot tell if I'm finished with my incident. I *think* I completed everything.**
You will know that no further action is needed when the State Reviewer changes the disposition of the incident to Incident Closed and the Status to Review Complete.