



**NOTICE OF INSTRUCTION # 050806-CIRTS-INTEG-CMS-GS**

*Assistance. Advocacy. Answers on Aging.*

**TO:** Ellen Campbell, Executive Director, Meals on Wheels PLUS of Manatee  
Ann Darby, Director, Polk County Elderly Services  
Sandy Foster, Executive Director, Nu-Hope Eldercare Services, Inc.  
Fred Loveland, Director, Manatee County Community Services  
Ann Martin, Director, Hardee Council on Aging  
Myra Price, Director, Hillsborough Co. Department of Aging Services

**CC:** Tracie Adams, Manatee County Community Services  
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Phil Hollister, Contracts & Grants, WCFAAA  
Debra Slade, Nu-Hope Eldercare Services, Inc.  
Felicia Southers, Hillsborough Co. Department of Aging Services  
Frank Wagoner, LAN Administrator, WCFAAA  
Leah Wilson, Polk County Elderly Services

**FROM:** Gloria D. Schuyler, Fiscal Director

**DATE:** May 8, 2006

**SUBJECT:** Notice of Instruction: Activities related to the installation of the Integrated  
CIRTS / CMS software application

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The purpose of this notice is to outline the activities required as a result of the integration of the CMS and CIRTS databases. The DOEA has been working closely with Frank Wagoner, WCFAAA LAN Administrator. This notice is to request your assistance in providing the resources necessary to insure a successful transition to the new system.

**Data Synchronization and Cleanup**

The integration of CMS and CIRTS includes the consolidation of the existing 18 CMS and 11 AAA CIRTS databases into a single statewide database. This consolidation requires the reconciliation of client records.

Clients who have moved between various PSAs, as well as clients seen both by CARES and the aging network, will have multiple records. Rules have been developed to process records for duplicate Social Security numbers. Ninety-four percent of the clients that appeared in more than one database can be processed automatically.

PSA 6 has **987** of the 8,750 clients making 17,403 appearances in the databases that must be addressed manually.

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Typically, the spelling of a name is too different for the computer program to treat as a match, so the client will need to be identified manually. If it appears to be the same client in both databases, the record can remain to be processed automatically. If it appears to be distinct clients with the same SSN, Provider, AAA and CARES staff will need to communicate to research the client and correct the records in CIRTS and CMS as appropriate.

During the consolidation of the databases, the demographics record from the database where the client was most recently assessed will be retained. WCFAAA will provide you with a list of your portion of the 987 clients for you to verify. Frank Wagoner will be your CIRTS Data Manager's contact.

### **Transition to the New System**

The integrated CIRTS/CMS application will be installed in one PSA at a time over a period of six months. The tentative "go-live" for PSA 6 is scheduled for Thursday, September 7.

As each area has the application installed, the screens of the new system will be unavailable to those offices already using the new integrated CIRTS system during the data load, however reporting and ad hoc queries will be available.

The process will begin at noon on the "go live" date, which will be on a Thursday. The new system will be available on the following Monday.

The dates which will affect PSA 6 providers are as follows:

September 7 & 8  
September 21 & 22  
October 5 & 6  
October 26 & 27

### **PSA 6's DISCOVERER Request for Payment billing system will be affected.**

The integration of the CMS and CIRTS databases will affect the DISCOVERER reports used to create your Request for Payments in September and October.

- **September:** The last day to input units and complete the Request for Payment process in September will be 5:00 PM, September 5. This will allow WCFAAA's Fiscal Staff, Wednesday, September 6 to download and reconcile your billing reports.
- **October:** The last day to input units and complete the Request for Payment process in October will be 5:00 PM, Tuesday, October 3. This will allow

WCFAAA's Fiscal Staff, Wednesday, October 4 to download and reconcile your billing reports.

- **HCE Subsidy Download:** The HCE subsidy information must be in the system by close of business Tuesday, September 19. This will allow Frank, Wednesday, September 20, to download and reconcile your HCE subsidy information.

### **User Administration**

Frank Wagoner will be responsible for assigning user roles in the new system and providing the assignments to the Information Technology office at Elder Affairs. Passwords will be assigned and distributed by the DOEA to Frank, who will in turn, distribute the information to our providers.

### **User Training**

The DOEA will require the PSA LAN Administrators to train all aging network users in their PSA on the new system. There will be little change for end users. The new system will have several new features and processes, including the ability to transfer clients between PSAs, and the ability to see CARES assessments and level of care determinations. Designated users will have the ability to see client data from other PSAs.

### **Batch Transmission of Data Must Use EDI Protocol**

The integrated CIRTS/CMS will not accept batch transmissions. All data exchange must be done using HIPAA compliant EDI transmissions. If you need specifications for the EDI transmissions, please contact Frank Wagoner via email at [wagonerf@elderaffairs.org](mailto:wagonerf@elderaffairs.org) with your request.

### **Oracle Discoverer and Ad-Hoc Reports May Require Changes**

Any Oracle Discoverer reports developed will need to be reviewed and modified to accommodate the new table structures and locations. Please be patient as our MIS staff works diligently to modify the reports.

### **Installation of Required Workstation Software**

WCFAAA will provide a security certificate and a small software module for your LAN Administrators to install on each workstation that will access the combined CIRTS/CMS application.

Thank you for your assistance with making the CIRTS / CMS integration project a success. As always, we appreciate your contribution to the team effort of providing quality services to the elders of Florida.