

CAHIIM HELP for Program Users

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GETTING STARTED

Performing Basic Functions

The top of each screen of the CAHIIM system allows you to view or change user information, log-out, print the page, and access Help.

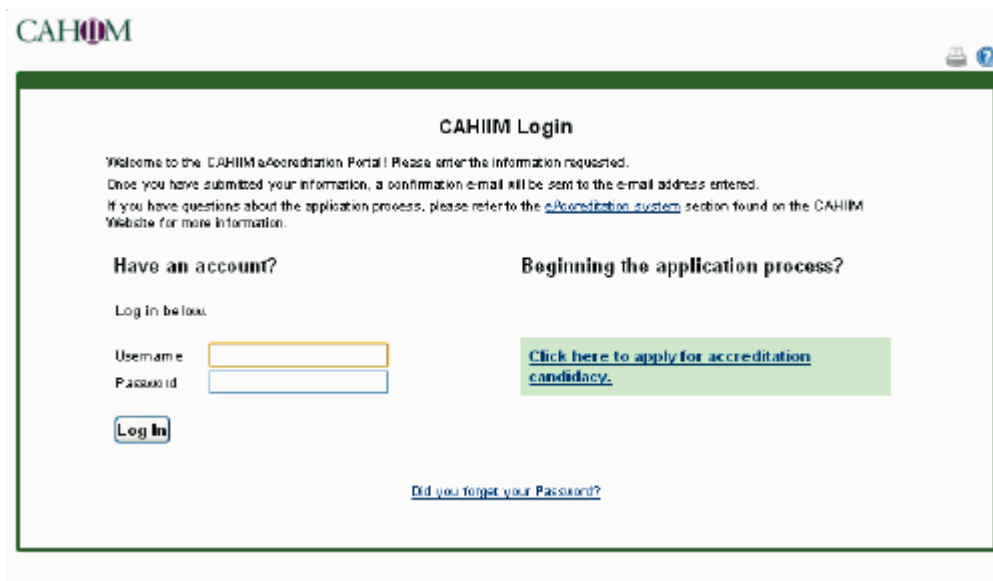
BELOW: Banner



Logging In

Enter username and password. Click **Submit**.

BELOW: CAHIIM Log-In screen



Logging Out

Click log out at top right of the screen.

Resetting Password

If you lost or forgot your login information, you need to reset your password.

1. Click [Did you forget your Password?](#) (centered on bottom of page)
2. Enter your E-mail address on the **Reset Password Page**.
3. Click **Reset Password**.
4. Open your email to retrieve new login information.
5. Click [Return to login page](#) and login.

RULE TO REMEMBER: Username and password must have at least six characters.

Viewing or Changing User Information

1. Login to the system.
2. Click [user info](#) at top right of the screen.
3. For changes or additions, type new text in boxes.
4. Click **Save changes** button.


BELOW: This page opens when you click [user info](#).

The screenshot shows the CAHIIM user profile page for Pamela Ingersoll. The page is titled "User Profile: Pamela Ingersoll" and includes a navigation menu with options: Home, Profile, Staff, Standards, Uploads, Notes, Actions, and Email. The user is logged in as Pamela Ingersoll, Program Director for University of Saginaw / Health Systems. The profile information is displayed in a form with the following fields:

First Name	<input type="text" value="Pamela"/>
Last Name	<input type="text" value="Ingersoll"/>
E-Mail	<input type="text" value="ingersoll@example.com"/>
Telephone	<input type="text" value="(989) 790-1606"/>
Username *	<input type="text" value="ingersoll"/>
Password *	<input type="password"/>
Confirm Password *	<input type="password"/>

Below the form is a "Save changes" button. A note at the bottom states: "* Username and password must be at least six characters long." The page also features a "user info | log out" link and a help icon in the top right corner.


Opening Help

The system has both online and print Help. To access the online version, click the Help symbol  in the upper right of the screen. There is a link to the print version on the top of every page.

Both versions have a glossary -- the online version's glossary is interactive. Click on a [glossary term](#) (like this) to view the full definitions. To access the online Glossary directly, click its link on the top navigation bar.

Online Help has a Contents feature, listing topics and subtopics, as well as an online Search engine. Click the links for both, also on the topic navigation bar.

Printing

Click the printer icon  at top right of every page to print the entire page.

Navigating the System

The CAHIIM Accreditation System (CAS) has everything you need to complete your accreditation process. You will find several navigational tools, and also several ways to view your progress.

Tabs Overview

The CAS interface changes depending on where you are and what role you have in the accreditation process. For example, you might find that you do not have access to some tabs described in Help, or that you can read, but not write, on certain pages.

Most of the variations will come in the following places

- [Home Tab](#), which is a dashboard updating you on your accreditation phase and tasks to be completed for that phase. A task list has links to incomplete standards. As the phase and tasks change, so will this page. The tab also links you to recent communications, such as notes.
- [Staff Tab](#), which only the Program Director and Program Director Designee can see. On this tab, users enter basic personal information, create and edit permissions, appoint a [Program Director Designee](#), and enable and disable users.
- [Standards Tab](#), a gateway to the [standards detail pages](#), where you demonstrate that your school's program meets each standard. Also on this tab, the Program Director and Program Director Designee can put people in charge of completing certain standards ([Edit in-charge users](#)).
- [Standards detail pages](#), accessible from the [Standards Tab](#), will be visible only to those with permissions to them. Some users will have no access, some read-only access, and some will be able to write. These pages will vary in what they ask and in what they allow you to do. Responses from previous phases will be [locked](#), but visible. Accreditation phases that you have not begun will be invisible. [Standards detail pages](#) have notes boxes to the side, where you can write notes to yourself or other users about responding to the standard on that page.
- [Actions Tab](#), which has the same task list as the [Home Tab](#). All users can use this list to access incomplete responses. When all responses are complete, the Program Director and Program Director Designee will see a **Submit** button, which they will click to send the candidacy to CAHIIM.
- [Reports Tab](#), which appears only after CAHIIM has completed the site visit report. Here the Program Director will comment on the report during the Program Response to Review Panel phase.

There are fewer variations in other tabs

- [Profile Tab](#), which is only editable by the Program Director and Program Director Designee. Others will be able to read the content -- background information about candidate programs.
- [Uploads Tab](#), a list of all files uploaded for your candidacy.
- [Notes Tab](#), a list of all notes, or short messages you leave on the standards detail pages.
- [Email Tab](#), where you can draft, edit, send, receive, and organize your emails.

Standards Quick View Bar

BELOW: The standards quick view bar



Appearing at the top of all standards pages, the quick view bar gives you several color-coded views of the standards and is also a navigational tool. The bar represents each standard as a numbered box, the color of which changes depending on the view selected from a drop-down menu.

RULE TO REMEMBER: If you do not have permissions to standards, they will not be visible on the quick view bar.

Using Color-Coded Views

Select the view you want on a drop-down menu in the lower left. There are several views, and some of the choices change depending on your accreditation phase.

For all phases: [CAHIIM Q&A](#), group notes, and [private notes](#)

Status indicators: [progress status](#), [qualitative status](#), [review status](#), [reopened status](#), [site visit decision](#), [response status](#).

There is a key to the color coding in the lower right.

Using for Navigation

Click on any numbered box to go to that [standards detail page](#). Click on the **ALL** box to go to the main [Standards Tab](#).

Status Bar

BELOW: Status bar

Show All SA CR RP Response to RP **SV** Response to SV Board Follow Signoff

This bar appears on the [Actions Tab](#) and each [standards detail page](#). This horizontal list of abbreviations -- each representing an accreditation phase -- shows you where you are in the process: [SA](#), [CR](#), [RP](#), [Response to RP](#), [SV](#), [Response to SV](#), [Board](#), [Follow](#), and [Signoff](#)

Green lettering indicates that the phase is completed or in process and the abbreviation, when clicked, will immediately [show](#) any hidden response to that phase on the page. Faded grey abbreviations indicate that the phase has not yet begun.

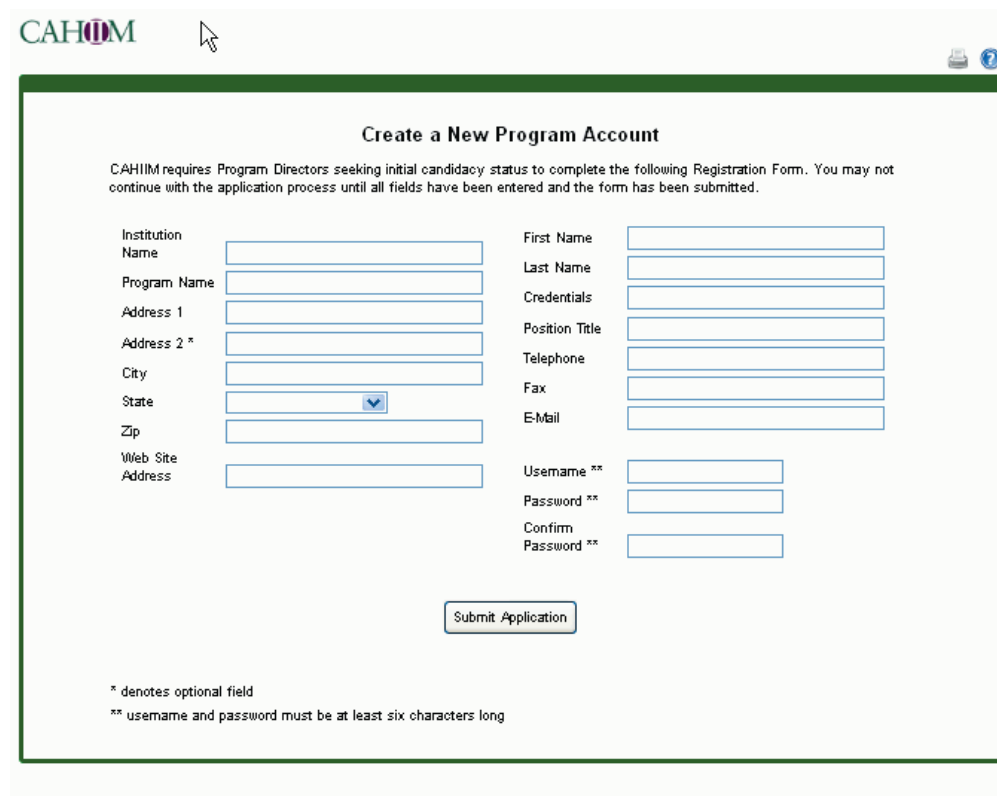
Applying for Candidacy

This first phase in the accreditation process, completing your application for candidacy, takes only 6 easy steps.

1. Login

Click the link in the green box ([Click here to apply for accreditation candidacy](#)). You will see a screen **Create a New Program Account**.

BELOW: Screen for creating new account.



The screenshot shows a web browser window with the CAHIIM logo in the top left. The main content area is titled "Create a New Program Account" and contains a registration form. The form includes the following fields:

Institution Name	<input type="text"/>	First Name	<input type="text"/>
Program Name	<input type="text"/>	Last Name	<input type="text"/>
Address 1	<input type="text"/>	Credentials	<input type="text"/>
Address 2 *	<input type="text"/>	Position Title	<input type="text"/>
City	<input type="text"/>	Telephone	<input type="text"/>
State	<input type="text" value="v"/>	Fax	<input type="text"/>
Zip	<input type="text"/>	E-Mail	<input type="text"/>
Web Site Address	<input type="text"/>	Username **	<input type="text"/>
		Password **	<input type="text"/>
		Confirm Password **	<input type="text"/>

At the bottom of the form is a "Submit Application" button. Below the form, there are two footnotes: "* denotes optional field" and "** username and password must be at least six characters long".

2. Complete the online form.

Type in the text areas. All fields are required. Click the **Submit Application** button. The online application will open.

3. Click on and complete the Profile Tab.

Note that the dashboard ([Home Tab](#)) shows the status of your application at a glance. Either click the [Profile Tab](#) or the [Profile](#) link on this page.

You complete the entire application from the [Profile Tab](#), which also links to the Requirements and Supporting Docs tabs. For each information box, click [\(Edit\)](#) and fill in all the text areas. When you are finished, click **Save**.

TIP: Make sure to Click (Save) after completing information in each box. Otherwise, all the data you input will be lost.

BELOW: Profile tab.

CAHIIM
Logged in as Jocelyn Mitchell, Program Director for University of the Northeast / Medical Information.
[user info](#) | [log out](#)

Home Profile Requirements Supporting Docs Actions Email

Program Profile

Program Information (Edit)	
Institution Name	University of the Northeast
Program Name	Medical Information
Address	
Address 1	462 Saginaw Road
Address 2	
City	Meridien
State	Connecticut
Zip	02972
Web	www.une.edu

Program Director Information (Edit)			
Name	Jocelyn Mitchell		
Credentials	MD	Address 1	462 Saginaw Road
Position Title	Director	Address 2	
Telephone	203-443-7569	City	Meridien
Fax	203-443-7568	State	Connecticut
Email	jolemont@liaison-intl.com	Zip	02972

President Information (Edit)	
Name	
Credentials	Address 1

4. Complete the Requirements Tab.

When you click [\(Edit\)](#) in the **Program Documentation** box, you will automatically jump to the Requirements Tab. Complete this information. Commentary to CAHIIM staff is optional. Click the **Save Requirement Information** button.

5. Complete the Supporting Docs Tab

Click on the Supporting Docs Tab. Upload the files indicated.

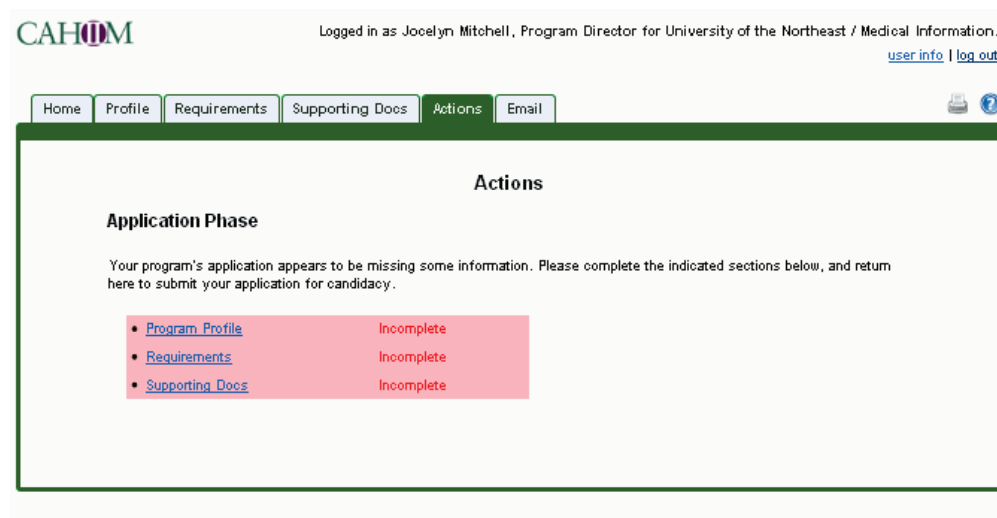
TIP: You can upload files in any format, but PDF files are preferred.

6. Submit the Application on the Actions Tab.

If you are the Program Director or the Program Director Designee, click on the [Actions Tab](#). If you have completed and saved all the necessary information, you will see a **Submit** button. Click this button.

You may see a list of incomplete forms (highlighted in red). If this is the case, click on the links to complete the required information. Return to the **Actions Tab** and submit.

BELOW: Actions tab with incomplete items.



The screen will confirm (see below) that your application is submitted. You will also receive a confirmation email.

TIP: If you do not have time to complete and submit your application, log-out, and return later. Messages on the Home page will update you on what remains to be done.

BELOW: Actions tab from application phase.

The screenshot displays the CAHIM web application interface. At the top left is the CAHIM logo. To its right, the user is logged in as 'Jocelyn Mitchell, Program Director for University of the Northeast / Medical Information.' with links for 'user info' and 'log out'. Below this is a navigation menu with tabs for 'Home', 'Profile', 'Requirements', 'Supporting Docs', 'Actions', and 'Email'. The 'Actions' tab is currently selected. The main content area features a green-bordered box with the following text: 'Your application has been submitted.' followed by the heading 'Actions' and the sub-heading 'Application Phase'. The main message states: 'Your program's application for candidacy has been submitted. CAHIM will contact you by email with further instructions.'

See also [Actions Tab](#), [Profile Tab](#), and [Home Tab](#).

Profile Tab

You will enter basic school and program information on this tab when you first apply for candidacy, and as you progress in the accreditation process, the information, and the Profile Tab, will travel with you.

The CAHIIM Accreditation System (CAS) allows a certain amount of editing on the tab. After the initial application is submitted, CAHIIM must approve all changes.

BELOW: Profile tab

The screenshot shows the CAHIIM web interface. At the top, the CAHIIM logo is on the left, and the user is logged in as 'Jocelyn Mitchell, Program Director for University of the Northeast / Medical Information.' with links for 'user info' and 'log out'. Below the header is a navigation menu with tabs for 'Home', 'Profile', 'Requirements', 'Supporting Docs', 'Actions', and 'Email'. The main content area is titled 'Program Profile' and contains three sections of information:

Program Information (Edit)	
Institution Name	University of the Northeast
Program Name	Medical Information
Address	
Address 1	462 Saginaw Road
Address 2	
City	Meridien
State	Connecticut
Zip	02972
Web	www.une.edu

Program Director Information (Edit)			
Name	Jocelyn Mitchell		
Credentials	MD	Address 1	462 Saginaw Road
Position Title	Director	Address 2	
Telephone	203-443-7569	City	Meridien
Fax	203-443-7568	State	Connecticut
Email	jolemont@liaison-intl.com	Zip	02972

President Information (Edit)	
Name	
Credentials	Address 1

Downloading Supporting Documents

1. Scroll down to the **Supporting Documents** box at the bottom of the page.
2. Click on the name of the file you want to download to your computer.
3. Save the document to a folder in your computer.

Editing Profile Information

Only the Program Director and Program Director Designee can do this.

You can edit information on this page until you submit your preliminary application, when some sections -- **Program Documentation, Commentary to CAHIIM Staff, and Supporting Documents** -- cannot be changed. You can always edit sections other than these, but these edits must be approved by CAHIIM.

1. Scroll to the box containing the information you want to change.
2. Click on Edit in the top left of the box. The text is now editable. (If you do not see the Edit, you probably do not have the permissions needed to edit this page.)
3. Add or change the information.
4. Click the **Save** or **Cancel** button in the lower right of the box.

TIP: Remember to save your information. If you move to another box or page without saving, your information will be lost.

See also [Permissions at a Glance](#) and [Applying for Candidacy](#).

COLLABORATING

Staff Tab

Only the Program Director & Program Director Designee can access this tab.

Listing all members of your accreditation team, the Staff Tab is a resource for the Program Director and Director Designee. It is the place to assign staff, colleagues, or coworkers to roles and tasks in the accreditation process.

1. On this tab you enter basic personal information, create and edit permissions, appoint a [Program Director Designee](#), and enable and disable users.
2. On the [Standards List Tab](#), you can put people in charge of completing certain standards ([Edit in-charge users](#)).

BELOW: Staff tab

Program Staff

Directors and Designees (full access)

Name	Username	Email	Status
deepa_sjs	myschool3	123sss@yho.com	Program Director (Enabled)
Joseph Conrad	conrad12	jconrad@example.com	Enabled <input checked="" type="radio"/> Disabled <input type="radio"/>

Program Staff

Name	Username	Email	Status
Joe Blow	jbjbjb	jb@example.com	Enabled <input type="radio"/> Disabled <input checked="" type="radio"/>
Joseph Conrad	conrad12	jconrad@example.com	Enabled <input checked="" type="radio"/> Disabled <input type="radio"/>
Richard Lovelace	lovelace12	rlovelace@example.com	Enabled <input checked="" type="radio"/> Disabled <input type="radio"/>

Add User

Name (First, Last)	<input type="text" value="First"/> <input type="text" value="Last"/>
Email	<input type="text"/>
Telephone	<input type="text"/>
Username *	<input type="text"/>
Password *	<input type="password"/>
Confirm Password *	<input type="password"/>
Roles	<input type="checkbox"/> Program Director Designee (full access)

* Username and password must be at least six characters long.

RULE TO REMEMBER: Users must be entered on the Staff Tab to appear in other parts of the program as choices for in-charge users or recipients of [notes](#) and [emails](#).

Sorting Staff Information

Sort staff tables on this page by clicking on the arrows in the table headings. For example, to sort staff by status, click the **Status** heading. Click arrows to the left of the headings to toggle between ascending and descending order.

Displaying Staff Details

Click on a staff member's name to view that person's details in the box at the bottom of the page. When a staff member's name has been clicked, the box title changes to **User Information**. To return to the default view, click the **Cancel** button or Staff Tab.

Changing Staff -- Adding Staff, Editing Staff Information, Assigning Permissions

Adding Staff Members

1. Scroll to the box at the bottom of the page.
2. Add the new staff member's information in the text input areas.
3. Click in the [Program Director Designee](#) check box if you want to give the user full access to the program.
4. Click the **Save** or **Cancel** button.
5. New users receive an email confirming name, email, username, password, and system URL.

TIP: Make sure the box at the bottom of the Staff page says Add User, and the text areas are empty (default view). If the box says User Information and displays previously entered information, click the Cancel button or the Staff Tab to return it to the default view.

Editing Staff Information

1. Display staff details.
2. Make changes.
3. Click **Save** button.

Enabling or Disabling Staff

Please note that when individuals leave an institution or are no longer active, they are NOT deleted from the system. Instead, they are simply disabled and will eventually be archived. Click the radio buttons in the last column of the **Program Staff** table to enable or disable staff.

Deleting Staff

Staff cannot be deleted. See directions (above) for disabling staff.

Setting & Editing Permissions

CREATING PROGRAM DIRECTOR DESIGNEE

For a new user,

1. Follow directions above for [Adding a Staff Member](#).

2. Click the check box **Program Director Designee** at the bottom of the **Add User** box.
3. Click the **Save** button.

For an existing user,

1. Display [staff details](#).
2. In the **User Information** box, click the check box **Program Director Designee**.
3. Click the **Save** button.

RULE TO REMEMBER: Program Director Designees have full access to the program.

ASSIGNING PERMISSIONS

1. Display [staff details](#).
2. In the top left of the **User Information** box, click [Edit Permissions ...](#)
3. A new page (Permissions for [name]) will open displaying all standards with check boxes for **Can Read** and **Can Write**.
4. Assign privileges by clicking in these boxes or by clicking the shortcut menu at the top left for [Check all Read](#), [Uncheck all Read/Write](#), [Check all Read/Write](#) and [Uncheck all Write](#).
5. Click the **Save Permissions** button at the top or bottom of the page.
6. A notification (**Permissions saved.**) will appear in green above the page title.
7. Click the Staff Tab to return to where you began.

RULE TO REMEMBER: Permissions, with the exception of those of the Program Director Designee, can only be set once a staff member has been entered into the system. The [Edit Permissions ...](#) does not appear in the Add User box.

EDITING PERMISSIONS

1. [Display staff details](#).
2. Make changes in the **User Information** box or by clicking [Edit Permissions ...](#) and using the Permissions page menu or check boxes.
3. Click **Save Permissions**.

See also [Permissions at a Glance](#) and [Standards Tab](#).

Permissions at a Glance

Legend: R = read, W = write, R* / W* = read / write privileges for assigned standards

ROLES	Program Director	Program Director Designee	Standard Manager	Faculty/Staff User	Senior Administrator	Advisory Reviewer
ACTIVITIES						
Add Users	R / W	R / W				
Approve/Review Reports	R / W	R / W				
Assign Roles	R / W	R / W				
CAHIIM Q&A	R / W	R / W	R / W	R / W		
Edit Standards Managers Permissions	R / W	R / W				
Email	R / W	R / W	R / W	R / W	R / W	R / W
Enable/Disable Users	R / W	R / W				
Program Notes	R / W	R / W	R / W	R / W		
Administrative Notes					R / W	
Advisors Notes						R / W
Program Notes	R / W	R / W	R / W	R / W		
Set Status	R / W	R / W	R* / W*			
Standard Detail Tabs	R / W	R / W	R* / W*	R* / W*		
Submit to CAHIIM	R / W	R / W				
User Info	R / W	R / W	R / W	R / W		

See *also* [Staff Tab](#) and [Editing in-charge users](#).

Notes Tab

This page is a single view of notes for all standards. The information is presented in sortable tables. Read the beginning of the note in the first column of both the **Program** and **Private Notes** tables.

Accessing Notes

Click on the links in the **Standard** column to view the note on the appropriate [standards detail pages](#) under the [Standard Tab](#).

See also [Using Notes](#), [Email Tab](#), [standards detail pages](#), and [Home Tab](#).

Using Notes

The system's notes function let's you communicate with all individuals collaborating on the same standard. Located on the right side of the [standards detail pages](#), notes are written to yourself or to others working on the standard. They refer to a single standard and appear in full on that standard's page.

BELOW: Notes boxes

Alerts [hide](#)

Liaison Admin answered your question. [Clear](#)
(2010-06-21 18:05)

CAHIIM Q&A [show](#)

Program Notes [hide](#)

[Clear notes](#)

Test Post by Naveed.
Martin vincent1, 2010-06-21 17:34 [Edit](#)

Post a note:

[Select users to alert](#)

Private Notes [hide](#)

[Clear notes](#)

Private Note number 2
Martin vincent1, 2010-06-21 17:35 [Edit](#)

Post a note:

Types of Notes

Alerts	Another user wants you <i>in particular</i> to read a program note.
--------	---

CAHIIM Q&A	Notes, usually questions, addressed to CAHIIM administrators. Replies to these questions also appear in this box.
------------	---

Private Notes	Notes, such as reminders, to yourself and visible only by you. These notes refer to a single standard and will appear in full only
---------------	--

	on that standard's page.
Administrative Notes	Notes from the final reviewer(s) for the program.
Advisors Notes	Comments made by program advisor.

Creating Notes

To create a note, make sure you are on the correct standards page. Notes are always associated with particular standards.

1. Go to the appropriate notes box.
2. Write the note in the text area.
3. Click the Select users to alert link if you want certain people to receive alerts. (Some notes do not have this feature.)
4. Click the **Post** button.

Creating Alerts

Alerts are automatically created in users' programs when they are selected for a note.

RULE TO REMEMBER: All users with program access will be able to see the note, but only the user(s) chosen in Select users to alert will receive alerts.

Finding Notes

There are several ways to access notes in this program:

- Click links to notes in the Alerts, Notes, and CAHIIM Q&A boxes on the [Home Tab](#), OR
- Read notes on [individual standards pages](#), OR
- Find which standards have notes on the [standards quick view bar](#). Click on the numbered boxes to go directly to the standards detail page with the note, OR
- Click on the [Notes Tab](#) and use links in the tables on that page to go to individual notes.

Showing & Hiding Notes

Clicking on the Clear notes link hides the note. To see it again, click on the Show old notes link.

Deleting Notes

Because notes are a record of accreditation activity, they cannot be deleted.

See also [Notes Tab](#), [standards quick view bar](#), [standards detail pages](#), and [Home Tab](#).

Email Tab

Exchange emails with staff (input on the Staff Tab), and save and receive them. All emails (inbox, sent, drafts) are listed in sortable tables.

RULE TO REMEMBER: Emails will appear both in this system and in the recipients default email system.

BELOW: Email tab

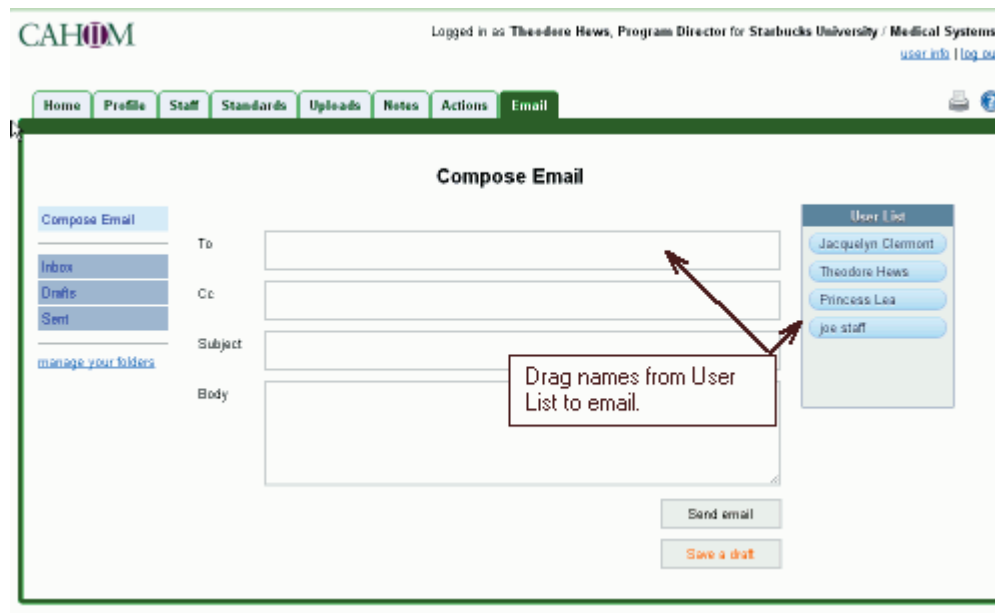
The screenshot shows the CAHIIM web application interface. At the top, the CAHIIM logo is on the left, and the user is logged in as 'deepa sjs, Program Director for cahiiimschool.' with links for 'user info' and 'log out'. A navigation menu includes 'Home', 'Profile', 'File Cabinet', 'Staff', 'Standards', 'Uploads', 'Notes', 'Actions', and 'Email' (which is highlighted). Below the menu, the 'Inbox' section is displayed with a table of emails.

	From	Subject	Date
Compose Email			
Inbox	SYSTEM EMAIL	CAHIIM: You have added a program staff user	Fri, Jul 16, 2010
Drafts	SYSTEM EMAIL	CAHIIM: You have added a program staff user	Fri, Jul 16, 2010
Sent			

[manage your folders](#)

Composing Emails

BELOW: Drag names from User List.



1. Click **Compose Email** on the left navigation bar.
2. Drag names from User List on the right to the email (To or Cc box). Remove names by clicking the x to the right of each name.
3. Write your email in the space provided.
4. Click the **Send email** or **Save a draft** button.

Viewing Emails

Retrieve and view emails that have been received, sent, and saved as drafts.

1. Click **Inbox**, **Drafts**, or **Sent** on the left navigation bar. A [sortable table](#) of emails appears.
2. Scroll down to the email you want to read.
3. Click on its title.

Creating Drafts

1. Click **Compose Email** on the left navigation bar.
2. Check for email addresses on the [Staff Tab](#).
3. Write your email in the space provided.
4. Click the **Save a draft** button.

Retrieving, Revising & Sending Drafts

1. Click **Drafts** on the left navigation bar.
2. Scroll down to the draft you want to open.
3. Click on the title to open your draft.

4. Make any revisions.
5. Click the **Save a draft**, **Send email**, or **Delete this draft!** button.

Replying to Emails

1. Open email to which you want to reply.
2. Click **Reply to this email**.
3. Write your response in the email form that appears.
4. Click the **Send email** or **Save a draft** button.

Deleting Emails

Only drafts can be deleted. Emails that have been sent or received through the CAHIIM Accreditation System are saved as a permanent record of your accreditation process.

PREPARING STANDARDS' RESPONSES

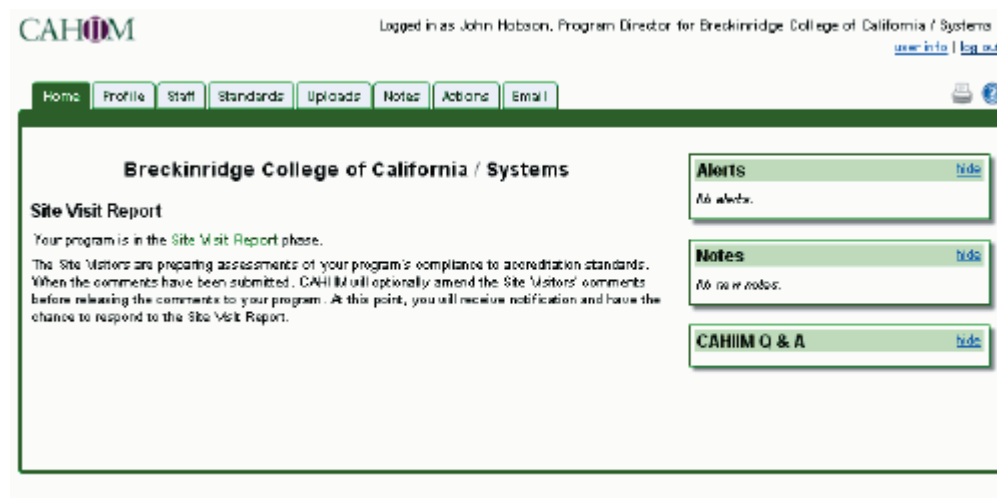
Home Tab

Home is a dashboard that will keep you up-to-date on where you are in the accreditation process and whether or not you have new notes or alerts.

You will find on the Home Tab:

1. The name of your school and program.
2. A heading indicating where you are in the accreditation process.
3. A brief explanation of that phase.
4. A list of incomplete standards (depending on phase). The same list will appear on the [Actions Tab](#).
5. Boxes indicating new notes and alerts.

BELOW: Home page updates you on where you are in the accreditation process.



Accessing Incomplete Standards



The screenshot shows a list of standards on the left and their corresponding status on the right. A callout box with a black border and white background points to the link for standard 8. II.A.4. Communities of Interest. The status for each standard is shown in a red box.

Standard Title	Status
2. I.A. Sponsoring Educational Institution	
3. I.B. Responsibilities of the Sponsoring Educational	
4. II.A. Program Goals	
7. II.A.3. Students and Graduates	Missing responses
8. II.A.4. Communities of Interest	Missing responses
9. II.A.4.a. Advisory Committee	Missing responses and uploads
10. II.B.1. Program Evaluation	Missing responses
11. II.B.2. Assessment.	Missing responses
12. II.B.3. Results.	Missing responses
13. II.B.4. Implementation	Missing responses
14. III.A.1.a. Program Director Qualifications	Missing responses and uploads
15. III.A.1.b. Responsibilities - Program Director	Missing responses and uploads
16. III.A.1.c. Professional Development-Program Director	Missing responses and uploads
17. III.A.2.a. Faculty Qualifications	Missing responses
18. III.A.2.b. Responsibilities - Faculty	Missing responses and uploads

The system will note any missing responses in a red box.

1. Click on the title of the standard with a missing response. You will find yourself on the page where you can complete your response.
2. Provide missing information or files.
3. Return to the Home or Actions Tab to ensure the standard is completed. (Standard will disappear from red list.)
4. Click the **Submit** button.

RULE TO REMEMBER: Links in these red "task boxes" work only when you have access to a standard.

Viewing notes and alerts

Notes and alerts are always associated with a standard. Click on links in the notes boxes to go directly to the [standards detail page](#) with the full text of the note.

See also [Using Notes](#), [Notes Tab](#), and [standards detail pages](#).

Standards Tab (Standards List Tab)

This tabular list of CAHIIM standards with columns for status, "last updated," standards managers, access (read, write), and the presence of alerts is an invaluable tool for managing your accreditation process. It is an overview of activity on your ongoing accreditation phase; headings change depending on where you are in this process. Finally, it is a gateway to the [detail pages](#) where you respond to each CAHIIM standard.

RULE TO REMEMBER: Only standards to which you have access will appear on this list.

BELOW: Standards List Tab

CAHIIM Logo | Logged in as Howard prov12, Program Director for Medical University of Seattle / Health Systems.

Home Profile Staff **Standards** Uploads Notes Actions Email

Standards quick view bar Standards

Show: Review Status Not Yet Reviewed Reviewed

[Edit in-charge Users for Review Panel/Site Visit phases](#)

#	Standard	Site Visit Decision	Review Status	Last Updated	In Charge	Access	Alerts
1	1.A. Sponsoring Educational Institution	Pending	Not Yet Reviewed	2010-09-09 15:42 lester4.g@mh	Howard prov12	Write	View Program note
2	1.A. Sponsoring Educational Institution	Pending	Not Yet Reviewed	2010-09-09 15:42	Howard prov12	Write	
3	1.B. Responsibilities of the Sponsoring Educational Institution	Pending	Not Yet Reviewed	2010-09-09 15:42	Howard prov12	Write	
4	1.A. Program Goals	Pending	Not Yet Reviewed	2010-09-09 15:42	Howard prov12	Write	
5	1.A.1. Curriculum	Pending	Not Yet Reviewed	2010-09-09 15:42	Howard prov12	Write	
6	1.A.2. Faculty Development	Pending	Not Yet Reviewed	2010-09-09 15:42	Howard prov12	Write	
7	1.A.3. Students and Graduates	Not Not	Not Yet Reviewed	2010-09-09 15:42 Liaison Admin	Howard prov12	Write	

Using the Quick View Bar

Use the [quick view bar](#) at the top of the page to view the status of each standard and whether or not it has notes. This bar will also appear on the [standards detail pages](#).

Navigating with the Standards Table

Standards are listed in a [sortable table](#). Click on the standard title to go its [standards detail page](#). Click on links in the alerts column to go to new notes on the [standards detail pages](#).

RULE TO REMEMBER: Only users previously added on the Staff Tab appear in the drop-down menus on the Standards Managers page. If a user does not appear, check the Staff Tab and re-enter that person into the system.

Editing Standards Managers

Only the Program Director and Program Director Designee can do this.

1. Click [Edit standards managers](#) on the top left above the table -- below the [standards quick view bar](#) (Only users with permission to make changes will see this link.)
2. The **Edit Standards Managers** page will open.
3. Use the [sortable table](#) (if you want) to reorder information.
4. Use the drop-down menu in the **Set Standards Manager** column to select a user.
5. Click the **Save Standards Managers** button on the top or bottom left of the table.
6. *Standards managers saved* will appear in green above the page title to confirm your change.
7. Click [Return to Standards List](#) (top left above table).

RULE TO REMEMBER: You can select new standards managers for each accreditation phase if you want. Otherwise, the system defaults to the standards manager from the most recent phase.

Accessing Standards Detail Pages

You can access [standards detail pages](#) from this page one of two ways:

1. Click the number of the standard on the [standards quick view bar](#), OR
2. Click the title of the standard in the standards list on this page.

Returning to this Page

Return to this page at any time by clicking on the Standards Tab or by clicking the **ALL** box on the [standards quick view bar](#).

See also [Standards Detail Page](#), [Using Notes](#), and [Staff Tab](#).

Standards Detail Page

Each standard has its own detail page with (from top to bottom) the [standards quick view bar](#), standard number and title with a [show/hide](#) Description and Interpretation, [a status bar](#), and [show/hide](#) areas.

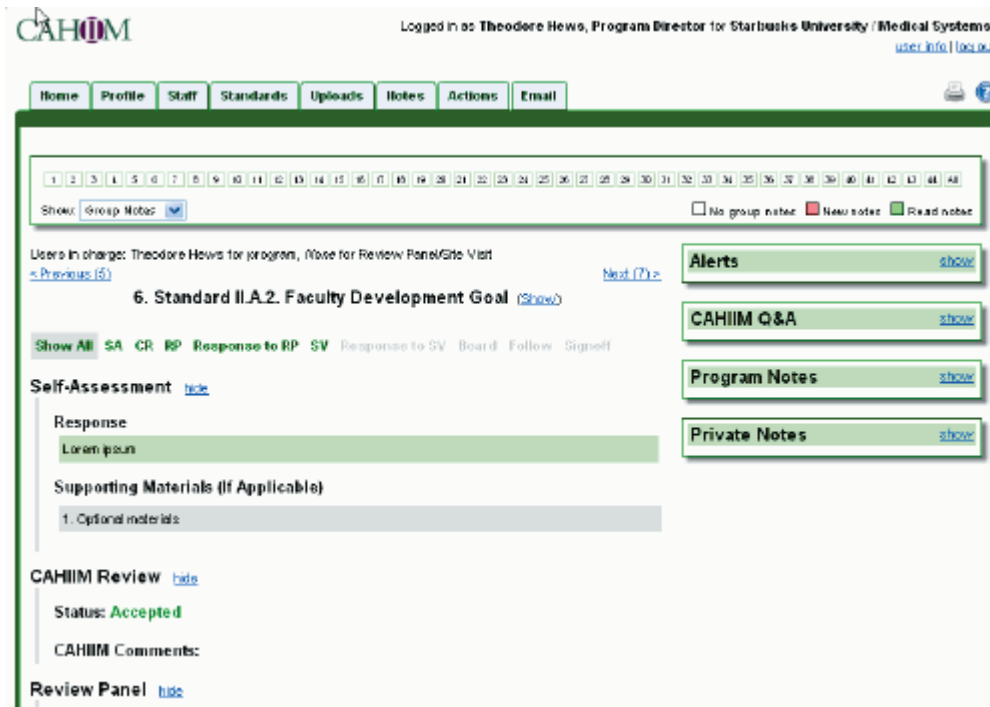
This is where you prepare responses to each standard, and the information you supply and statements you compose differ with each phase of the accreditation process. After submission, your responses to the different accreditation phases are "locked down" but visible both to you and CAHIIM. Depending on your [permissions](#), you will also set a status for the standard on this page.

After the Program Director or Program Director Designee hit the **Submit** button on the [Actions Tab](#), your responses are locked down, but both you and CAHIIM will see text from the current and all completed phases.

In some cases, CAHIIM will re-open standards for further program input, and you will again be able to edit and amend your responses.

CAHIIM at all times can view your responses and notes, with the exception of private notes.

BELOW: Standards detail page.



RULE TO REMEMBER: You will see only those pages to which you have permissions. Only the Program Director or Program Director Designee have access to all pages.

Responding to the Standard

In general, you earn your accreditation on the standards detail pages. Here you must write convincingly that your program adheres to a standard and attach documents that support your claims. For most standards, there are focused questions, which must be taken into account when you prepare your response. When you are satisfied that each question has been covered in your response, check off the corresponding focused question. Make sure you respond based on the standard. Do not simply respond to the focused questions.

Setting Status

The Program Director, Program Director Designee, or Standards Manager set the status of the standard. To set status,

1. Use the drop-down menus provided. The location and choices vary according to accreditation phase.
2. Select the correct status.
3. Check the color coding on the [standards quick view bar](#) to confirm your choice.

Responding to Individual Standards

Focused Questions with Text Response

1. Read the applicable standard and focused question.
2. Write a statement about how your school meets the standard.
3. Format your response using standard formatting tools (optional).
4. Review the focused question. When you feel you have responded to it adequately, click the check boxes.
5. Click the **Save Response** button.

TIP: The best way to respond to focused questions is to write a statement or essay about how your school meets a standard first and use the check boxes as reminders. Avoid writing your statement in response to each item on the checklist.

Entering Text

Boxes for writing text open and close -- when they do not, responses in them are [locked](#).

Open a box by clicking [Edit](#) to the right of the box's title. Enter your text, and use the formatting tools if you wish. Click the **Save** button to close the box. Open again by clicking [Edit](#).

BELOW: Closed box. Click [Edit](#) to open.

Site Visit Report on Program Strength Edit
Testing

BELOW: Opened box. Input text and click Save to close box.

Supporting Materials

You will need to upload documents to support your written statements. These documents should offer proof that your school meets a standard. You can upload documents in *any file format* from your own computer or network, but PDFs are preferred.

To upload from your computer or network

1. Type a file name in the upload dialogue box.
2. Click the **Browse** button and select a file.
3. Click the **Upload** button.

TIP: Annotate your supporting documents with highlights and notes to help readers find the relevant passages.

Deleting Uploaded Files

1. On a standards detail page, [show](#) the numbered item where you uploaded the file. Uploaded files are listed in a table.
2. Scroll down to the line listing the uploaded file.
3. Click the **Delete** button beside the file.

You can also delete uploaded files on the [Uploads Tab](#).

RULE TO REMEMBER: Files uploaded into the system can be removed before the material is submitted. Responses and uploaded files are locked (cannot be changed or deleted) after submission.

Using Notes

Create [note\(s\)](#) in the page's right column. Users with read-only access to standards will use the system's notes feature to respond to the standards or leave messages for colleagues.

Returning to Default Standards Tab (Standards List)

Return to the standards list page by clicking the [Standards List Tab](#) or the **ALL** box on the [standards quick view bar](#).

See also [Using Notes](#) and [Notes Tab](#), the [Standards Tab](#), the [Standards Detail Page by Phase, Permissions at a Glance](#).

Standards Detail Chart

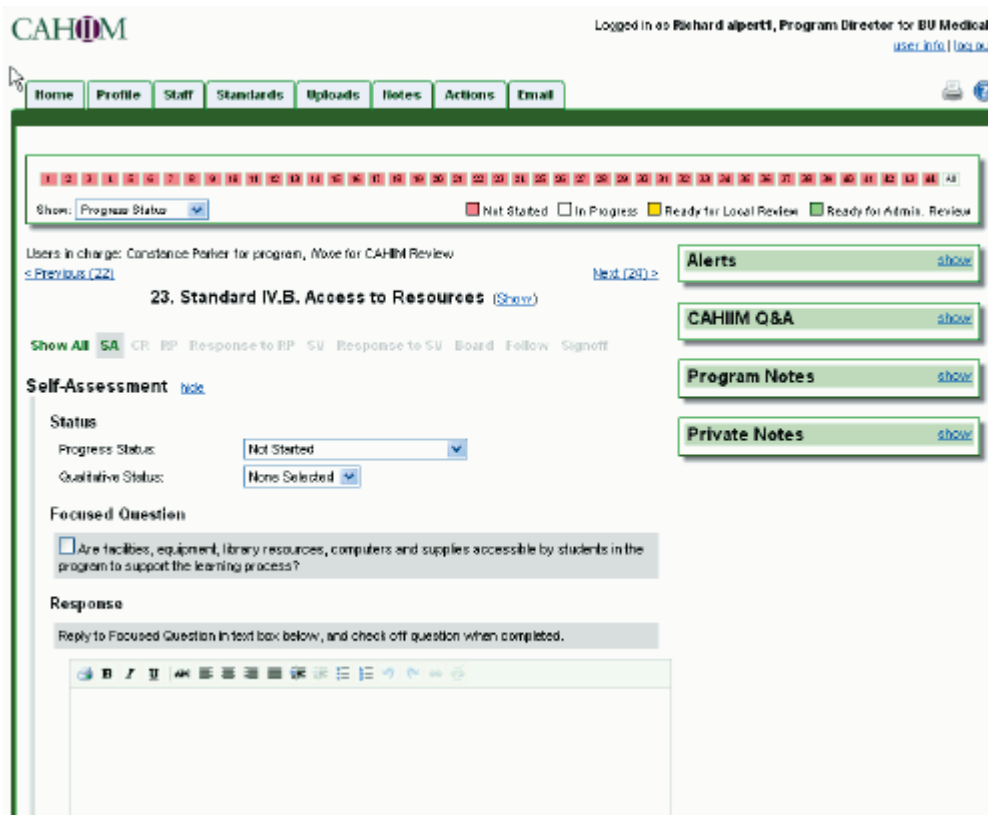
Standards Detail Page by Phase

Online version only > In Sample column, click the link to open a popup, then click anywhere on the page to close it.

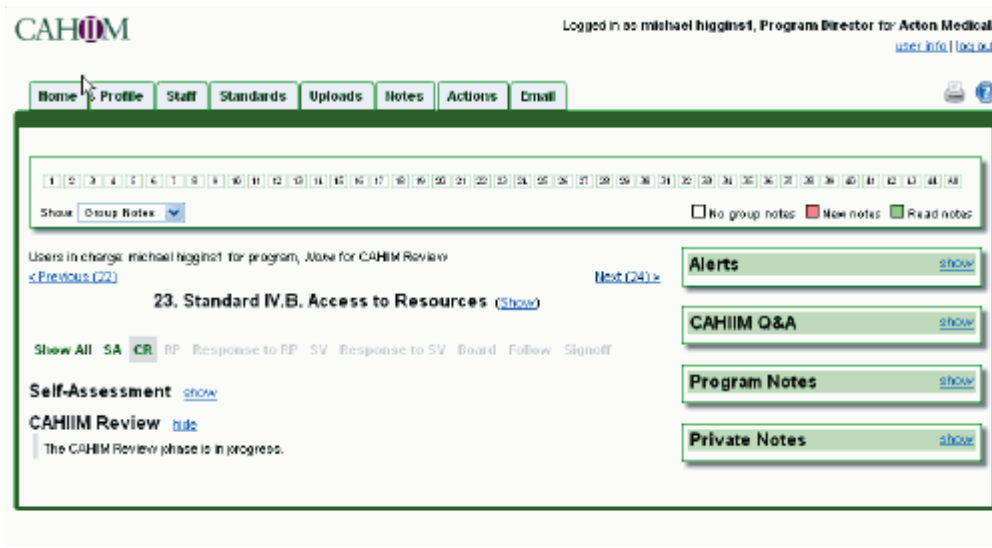
Action/View > Phase	Typical Response	Sample Page	Actions (for Program Director or Program Director Designee)
SA (Self Assessment)	Respond thoroughly to the standard. Include responses to all focused questions. Upload documents. Exchange notes with colleagues. Set Progress & Qualitative Status.	SA view	Submit
CR (CAHIIM Review)	You are waiting to hear from CAHIIM.	CR view	None
Response to CR	<i>For reopened standards only</i> Respond thoroughly to the standard. Include responses to all focused questions. Upload Documents. Exchange notes with colleagues.	Response to CR view	Submit
RP (Review Panel)	You are waiting to hear from the Review Panel.	RP view	None
Response to RP	<i>For Standards marked "Concerned, Action Required,"</i> respond to the Review Panel's concerns by preparing a reply in the text box provided under "Program Response to Review Panel." Upload supporting documents as needed. Exchange notes with colleagues.	Response to RP view	Submit
SV (Site Visit)	Participate in the site visit. Upload documents requested by the site visit team. Add comments as appropriate.	SV view	None
Response to SV	Correct any factual errors in the Preliminary-Site-Visit Report. Write explanatory and/or confirming response statement in box provided. Upload supporting documents as needed. Click check box confirming that you have reviewed each standard.	Response to SV view	Submit

See also [Standards Tab](#) and [Standards Detail Page](#).

CAHIIM HELP for Program Users

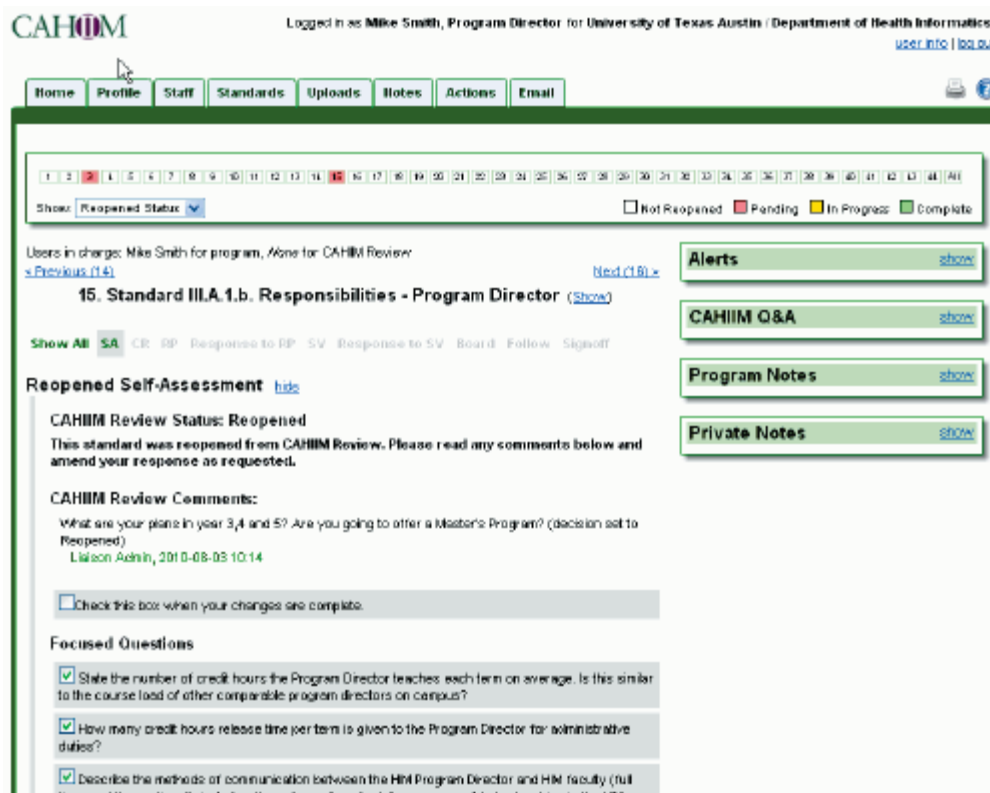


ABOVE: Sample screen from Self Assessment phase

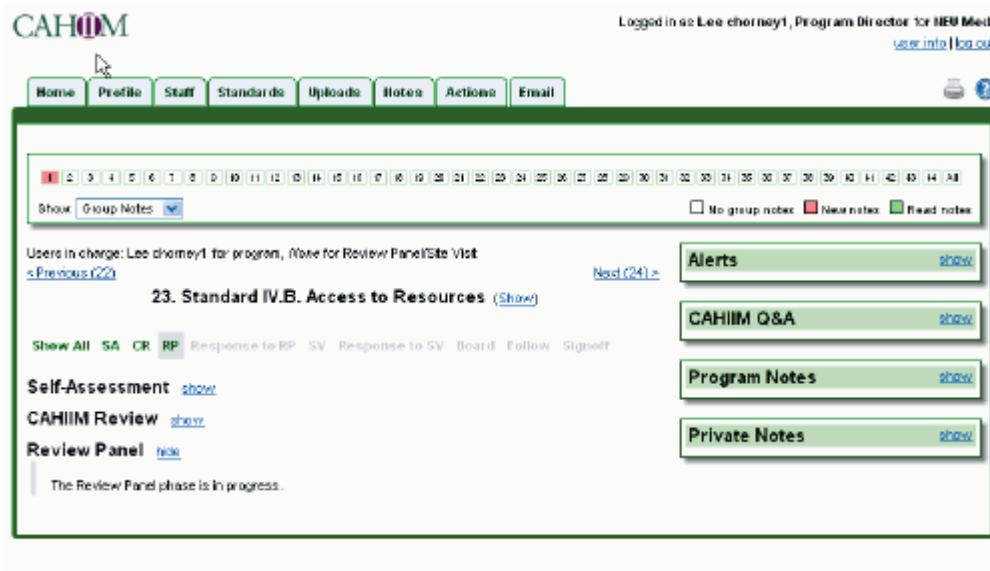


ABOVE: Sample screen from CAHIIM Review phase

CAHIIM HELP for Program Users

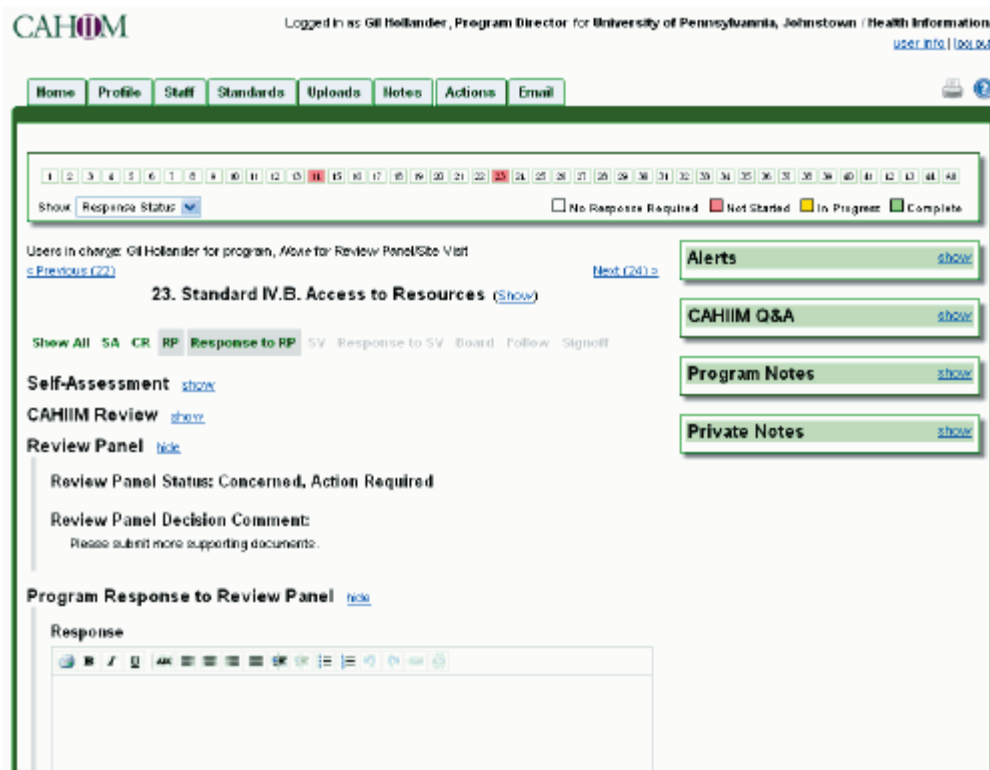


ABOVE: Sample screen from Program Response to CAHIIM Review phase

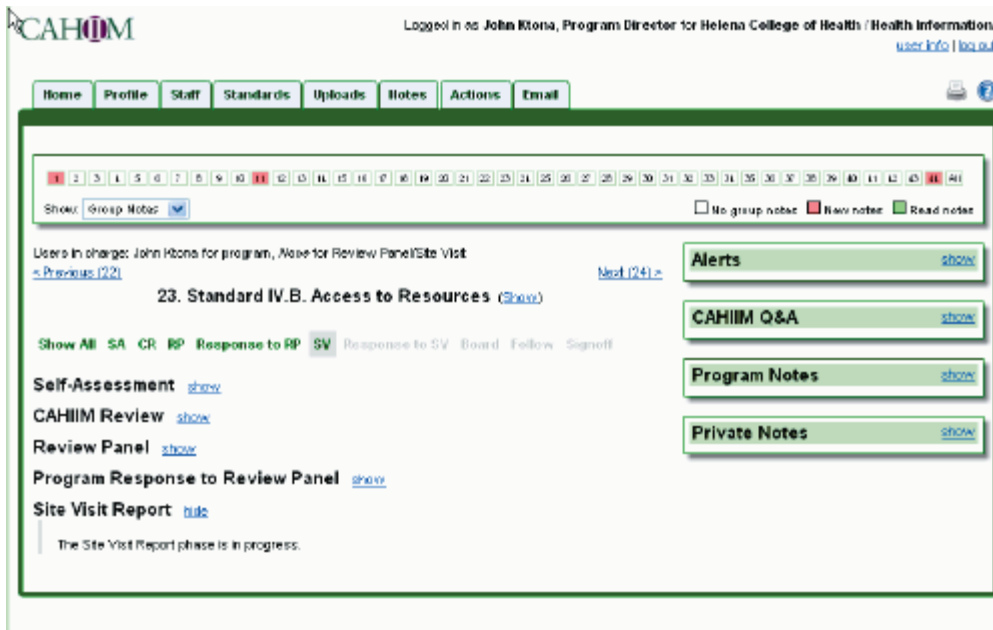


ABOVE: Sample screen from Review Panel phase

CAHIIM HELP for Program Users

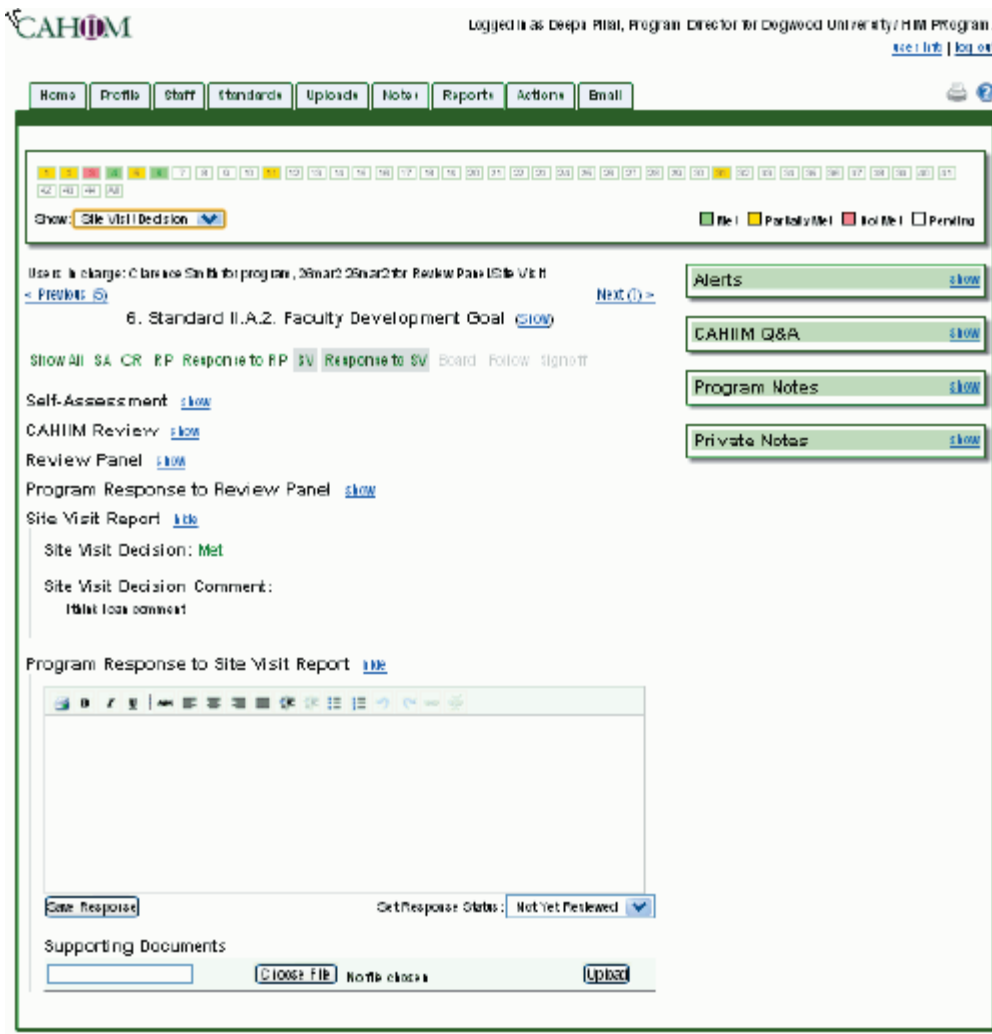


ABOVE: Sample screen from Program Response to Review Panel phase



ABOVE: Sample screen from Site Visit phase

CAHIIM HELP for Program Users



ABOVE: Sample screen from Program Response to Site Visit Report phase

Reports Tab

The Reports Tab is the electronic site-visit report, with basic information about your program and overall comments on its strengths and weaknesses. It will appear in your system only after CAHIIM has officially submitted the site-visit report, and you will find an announcement and link to this tab on your home page.

BELOW: Reports Tab.

The screenshot shows the CAHIIM web interface. At the top, it says "Logged in as Deepa Pillai, Program Director for Dogwood University / HIM Program." with links for "user info" and "log out". A navigation menu includes Home, Profile, Staff, Standards, Uploads, Notes, Reports (highlighted), Actions, and Email. The main content area is titled "Site Visit Report" and contains several sections:

- Site Visit Dates:**

Site Visit Start Date	
Site Visit End Date	
- Site Visit Report prepared by:**

deepa2 ku	Review Panel/Site Visit Team Leader
Deepa2 la	Review Panel/Site Visit Member
deepa3 ka	Review Panel/Site Visit Member
deepa4 ku	Review Panel/Site Visit Member
- Accreditation History:**

Institutional Accreditation Agency	Other
Other Accrediting Organization	ACIDS
Most Recent Award Category	
Year Awarded	
Next Review Date	
Type of Sponsoring Institution	
- Site Visit Report on Program Strength:**

--
- Site Visitor Suggestions for Improvements:**

--
- Program Responses to the Site Visit Report (Edit):**

	Click here.
--	-------------
- Check here when your response is completed.

Creating a Text Response

Only the Program Director or Program Director Designee can enter text.

You will find a box for your comments.

1. Click Edit to the right of the box's title. The box will open for text entry.
2. Write a statement in the space provided.
3. Format your response using standard formatting tools (optional).
4. Click the **Save** button.
5. When you are finished, make sure you click the check box at the bottom of the page (**Check here when your response is completed.**)

RULE TO REMEMBER: The system will recognize the report as being complete only when you click the check box at the bottom of the page.

Accessing Site Visit Comments to Standards

You can respond to standard-specific site-visit comments on each [standards detail page](#).

See also [Standards Detail Page](#).

Uploads Tab

All uploaded files are displayed in a [sortable table](#) on this tab, where you can view, sort, download and delete them.

BELOW: Uploads Tab

CAHOM
Logged in as amanda.spring1, Program Director for Daytona Medical. [user info](#) | [log out](#)

Home Profile Staff Standards Uploads Notes Actions Email

Uploads

Name	Filename	Upload Date	Standard	Delete
curriculum vita	Curriculum Vita.doc	2010-05-26 11:45		Delete
synopsis of curriculum	Synopsis of Curriculum.doc	2010-05-26 11:45		Delete
chart	Dummy text.doc	2010-05-26 10:00	I.B. Responsibilities of the Sponsoring Educational Institution	Delete
catalog	Dummy text.doc	2010-05-26 10:01	I.B. Responsibilities of the Sponsoring Educational Institution	Delete
mission statement	Dummy text.doc	2010-05-26 10:02	II.A. Program Goals	Delete
PPE evaluation plan	Dummy text.doc	2010-05-26 10:02	II.A. Program Goals	Delete
committee members	Dummy text.doc	2010-05-26 10:04	II.A.4.a. Advisory Committee	Delete
minutes	Dummy text.doc	2010-05-26 10:04	II.A.4.a. Advisory Committee	Delete
prog direct	Dummy text.doc	2010-05-26 10:09	III.A.1.a. Program Director Qualifications	Delete
job descript	Dummy text.doc	2010-05-26 10:09	III.A.1.b. Responsibilities - Program Director	Delete

Viewing Uploaded Files

1. If you want, sort the table.
2. Find the file you would like to view.
3. Scroll down to its row in the table.
4. Click on the file.
5. In the download dialogue box, select **Open**.

Downloading Uploaded Files

Perform the steps above and **Save** the document to your computer.

Deleting Uploaded Files

1. Follow steps 1-3 above.
2. Click the **Delete** button in the fifth column of the table.

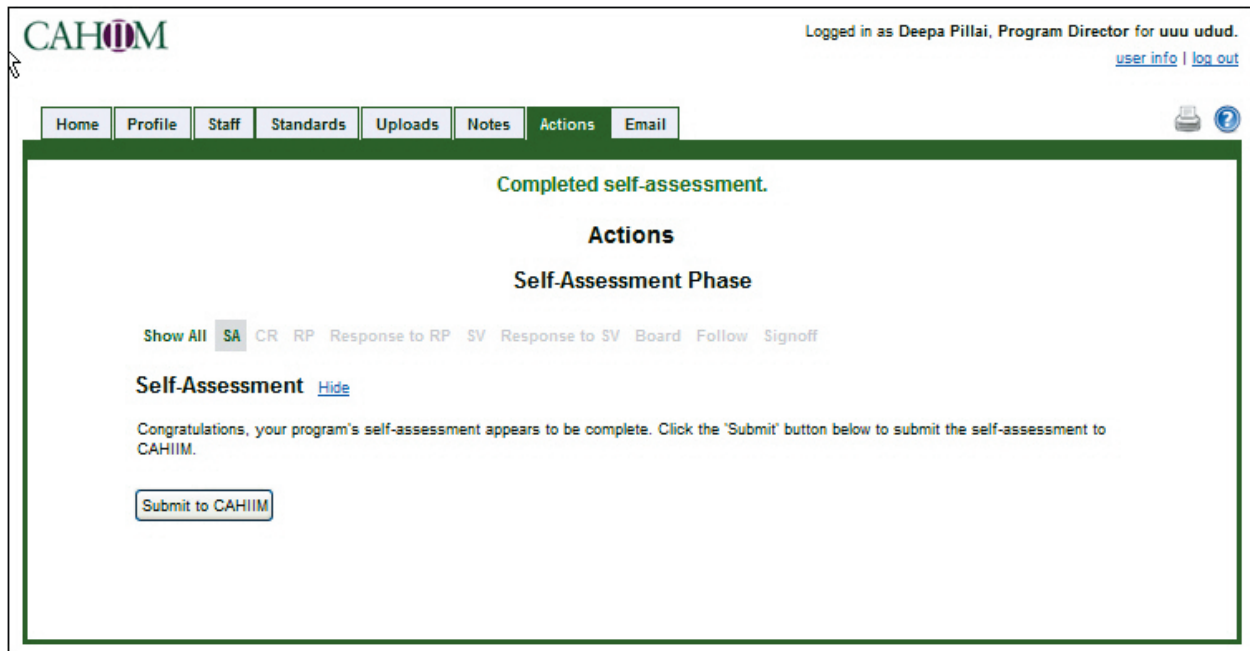
See also [Standards Detail Page](#) and [Profile Tab](#).

Actions Tab

Submit your completed candidacy materials on this tab or view what is missing and track where you are in the accreditation process.

The content of this tab changes depending on your accreditation phase and permissions. Sometimes there will be a message that the accrediting agency is reviewing your submission. At other times, you will see a red box that is essentially a to-do list you must complete before the **Submit** button appears.

ABOVE: Actions tab



Using the Status Bar

A [status bar](#) will always appear on the **Actions Tab** and on the Standards Detail Tab.

Accessing Phase-by-Phase Information

View a summary of completed actions for a each accreditation phase by using the [show/hide](#) feature beside that phase's heading.

Completing Responses

BELOW: Red "task boxes" like this one show incomplete standards.



The screenshot shows a list of standards on the left and their completion status on the right. A callout box with a black border and white background points to the link for standard 8. II.A.4. Communities of Interest. The background of the list area is light red. The callout box contains the text: "List of standards to be completed. Click on standard title to go to its page."

• 2. I.A. Sponsoring Educational Institution	
• 3. I.B. Responsibilities of the Sponsoring Educational	
• 4. II.A. Program Goals	
• 7. II.A.3. Students and Graduates	Missing responses
• 8. II.A.4. Communities of Interest	Missing responses
• 9. II.A.4.a. Advisory Committee	Missing responses and uploads
• 10. II.B.1. Program Evaluation	Missing responses
• 11. II.B.2. Assessment.	Missing responses
• 12. II.B.3. Results.	Missing responses
• 13. II.B.4. Implementation	Missing responses
• 14. III.A.1.a. Program Director Qualifications	Missing responses and uploads
• 15. III.A.1.b. Responsibilities - Program Director	Missing responses and uploads
• 16. III.A.1.c. Professional Development-Program Director	Missing responses and uploads
• 17. III.A.2.a. Faculty Qualifications	Missing responses
• 18. III.A.2.b. Responsibilities - Faculty	Missing responses and uploads

The system will note any missing responses in a red box.

1. Click on the title of the standard with a missing response. You will find yourself on the page where you can complete your response.
2. Provide missing information or files.
3. Return to the Actions Tab to ensure the standard is completed. (Standard will disappear from red list.)
4. Click the **Submit** button.

RULE TO REMEMBER: The link will work only when you have access to a standard.

Submitting Responses

The **Submit** button will appear only when you have responded to all questions and uploaded all required documents. Click on this button to send your application to the accrediting agency and lock your responses.

After submitting your accreditation phase, you will no longer be able to change your responses to the standards.

Glossary

A

Administrative Notes: Notes from the final reviewer(s) for the program

Advisors Notes: Comments made by program advisor

alert: appears when another user has created a note for you

application: first step in the accreditation process. CAHIM must accept program applications before schools can submit candidacy materials for full accreditation.

B

Board: CAHIIM Board Report

C

CAHIIM Q&A: notes box on both the program or administrative side for questions and answers between CAHIIM and the programs.

CAS: CAHIIM Accreditation System

clear(ed): user has read note and clicked clear to hide it

Cleared: user has read note and clicked clear to hide it

Complete: Reopened Status during program response to CAHIIM Review or Response Status during Program Response to Review Panel: program has completed its response

Concerned, Action Required: status in Review Panel: response is inadequate. Need additional input from program.

Concerned, No Action Required: status in Review Panel: response is adequate

Copy of standards manager(s): user(s) who has(have) final say on response to a standard

CR: CAHIIM Review (includes the "Re-Open" stage for Programs)

D

D: candidacy status: Denied

E

EPC: Educational Program Code

F

Follow: Program Follow-up to Board Report

G

glossary term: click on the term to "show" the definition; click again to hide it.

group note(s): note to selected members of group

H

HI: health informatics

hide: click - sign or the word "hide" to hide text

HIM: health information management

I

In Progress: Reopened Status during program response to CAHIIM Review or Response Status during Program Response to Review Panel: program response has begun

IP: in progress

L

locked: in program, refers to previously input information that users can read but cannot change

M

M: master's degree

Major Concern: refers to quality of response to standard -- need to rethink response and redraft

Met: status in Site Visit -- school meets the standard

Minor Concern: refers to quality of response to standard -- going in the right direction, but needs more work

N

NA: candidacy status: Not Assigned

No Response Required: Response Status during Program Response to Review Panel -- no action required

Not Met: status in Site Visit -- school does not meet the standard

Not Reopened: Reopened Status during Program Response to CAHIIM Review: response to standard was acceptable; standard was not reopened for comment

Not Started: Response Status during Program Response to Review Panel -- program has not yet begun its response

note(s): short message that appears in the user's program

O

old note(s): note that has been read

On Target: refers to quality of response to standard -- response to standard is acceptable

P

Partially Met: status in Site Visit -- school meets some of the standard, or almost meets the standard

Pending: Reopened Status during program response to CAHIIM Review: standard has been reopened; program has not yet responded; also, refers to site visitors' assessment of standard response: assessment is yet to be made

private notes: notes written to yourself, such as reminders

Program Director Designee: individual with the same system-access rights or permissions as the Program Director

program notes: notes written to others working on the standard

progress status: stage at which you are in completing your response to a standard

progress status for SA: Not Started, In Progress, Ready for Local Review, Ready for Administrative Review

Q

qualitative status: quality of your response to a standard

quick view bar: horizontal list of standards represented by numbered boxes.

R

Ready for Administrative Review: refers to progress on accreditation standard -- entry is ready for final submission

Ready for Local Review: refers to progress on accreditation project -- entry is complete and ready for internal review

Rejected: status in CAHIIM Review: response fails to meet standards requirements

reopen: refers to a rejected submission made editable again for revision

reopened status: status of standard -- indicated required user action

Response Status: status of standard during program response to Review Panel

Response to RP: Program Response to Review Panel Report

Response to SV: Program Response to Site Visit Report

Review Panel Notes: notes to other review panel members

Review Status: refers to status of standard -- requires user review

RP: Review Panel

S

S: submitted

SA: Self Assessment

Satisfied: status in Review Panel: response is complete & convincing.

show: click + sign or the word "show" to display hidden text

show/hide: Show/hide boxes allow you to adjust the amount of information you see on a page. Expand or contract these information areas by clicking on the + and - signs, or the words "show" and "hide".

Signoff: Final Decision by CAHIIM

Site Visit Decision: refers to site visitors' assessment of standard response

sortable table: sort by clicking on the headings; click on arrows to the left of the headings to toggle between ascending and descending order.

standards detail page: page where programs enter most of their information and where CAHIIM comments on this information

standards list tab: default view of standards tab; standards appear in a list on the page. This is the default view of the Standards Tab.

standards manager: user who has final say on response to a standard

standards quick view bar: horizontal list of standards represented by numbered boxes.

status bar: horizontal list of all accreditation phases; completed or ongoing phases are green.

submitted: user with full rights has clicked Submit on the Actions Tab, sending the material to the agency for review and locking all input data

SV: Site Visit Report

SV Comment Status: status indicator for completion of program response to site visit report

T

T: candidacy status: Tentatively Approved

terms (like this): this is a glossary term