	Action Steps-Getting Started	CBISA Plus™ Response
1	With Finance, collect financial default information including fiscal starting and ending dates, operating revenues and expenses, average fringe percent, and reporting unit average hourly rate.	Choose Options/Org Defaults/Reporting Unit. Enter the appropriate financial defaults and information.
2	With Finance, discuss how indirect expense dollar amounts will be captured for A-G Category Programs.	Choose Options/Org Defaults/Reporting Unit. Enter percentage rates for In Unit, In Community, and Special (if applicable). Review Chapter 4 Guideline 3 in the *2015 Guide for Planning and Reporting Community Benefit* for additional help with indirect costs.
3	Decide how often Financial Services numbers will be entered into the software (monthly, quarterly, annually) and who will input the data. Make sure you know who will be inputting additional IRS Form 990 Schedule H information (i.e. Medicare, Bad Debt, Questions for Part I, III, and VI and Joint Ventures)	Enter statistics for Financial Assistance, Medicaid, and Other Means Tested Programs in the Financial Services module. Choose the applicable financial service from the sub-menu, and then from the control panel, click on "Add" to add a new record. "Save" each record. Complete additional IRS 990H screens including Medicare, Bad Debt, Questions and Joint Ventures. Complete the Ratio of Patient Cost to Charge screen if applicable.
4	Identify which departments are currently involved with collecting/tracking/reporting community benefit data, and a contact person for each. Check with finance regarding average salary rates.	Choose Options/Edit Defaults/Department. Add each department and contact information. Add average salary rates.
5	Identify users at each permission level	Choose Options/Org Defaults/Users. Add users for each reporting unit at each applicable user permission level View the narrated PowerPoint located on the Lyon Software website (http://lyonsoftware.com/support-center) entitled "10 User Permission Levels" for additional helpful information.
6	Using Categories and Definitions from the 2015 *Guide*, IRS 990H Instructions, CHA's "What Counts" on their website, or other available resources, begin to identify programs that qualify as community benefit and the category that should be assigned to each (Program Inventory).	From the list of pre-populated programs, make any necessary edits (titles, descriptions, targeted population, department), mark as "inactive" any programs that you are not currently doing (but might do in the future) and delete any programs that you will not be offering. Decide which additional sub-menu pages and additional information should be completed for each Program and begin collecting data. Add any new programs that do not appear in the pre-populated list.
7	Begin collecting statistical Occurrence form information for the identified Programs as events take place.	In the Programs module, identify the correct Program in the browse box for which an event has happened and statistics (persons served, expenses, offsetting revenue) have been collected. Open the appropriate Program and click on the link to the Occurrences. From the Control Panel, choose the function button "Add". Complete applicable statistics and save the record.
8	From your CHNA and other sources, collect the significant needs that your hospital will be addressing.	In the Needs module, enter your significant needs by adding each record or by uploading from a simple Excel spreadsheet. A sample spreadsheet can be found in the Help file for the Needs/General page.

9	For each identified need, create a goal. Begin discussing other community benefit goals to add and track.	In the Goals module, enter (add) the Reporting Unit goals based on significant identified needs or other goals as determined. Goals may be entered as “System Goals” which will protect the goal title from editing (from anyone other than a System Administrator).
10	Collect information for your community partners and those with whom you collaborate.	Create the Areas of Interest for your partnerships in Options/Edit Defaults. Select the Areas of Interest tab, and add the different defaults. Each Area of Interest will appear as a checkbox in the Partnerships module on the Areas of Interest sub-menu screen. In the Partnerships module, add your partners, enter any additional contacts, and select all applicable Areas of Interest.
11	Track your progress with indicators and measurements. Link the appropriate indicators to a need, goal, partnership, program, outcome, or narrative with the relationship manager.	Indicators are available for selection in the dropdown list after they have been imported from the framework library or custom added (Options/Edit Defaults/Indicators). After the indicator is added, begin measuring your progress with Baseline, Actual, Target, and Anecdotal measurements.
12	Discuss what types of narratives you wish to include in your community benefit report. Decide on specific subjects, keywords, or persons that need to be added into the defaults.	Choose Options/Edit Defaults/Subjects. Add any additional General subjects or create your own subject groups and subjects. Choose Options/Edit Defaults/Person/Keyword. Add any defaults that you need to successfully “tag” your narratives so they can be included in specific reports. In the Narrative module, begin collecting stories. From the control panel, choose “Add”. Complete the General, Subjects, and Narrative pages. “Save” your record.
13	Evaluate the effectiveness of your community benefit programs.	On the Program/Objectives page insure that the applicable information for program evaluation has been completed. Through the Relationship Manager, link the Program to the appropriate Goal & Indicators that will help you to report community health impact.
14	As soon as some data has been entered for Programs and Occurrences, begin previewing reports and reorganize data, as necessary.	From Reports & Listings, preview the Program Detail report under Programs, the Complete Summary - Unclassified report under Summaries, and Occurrences-Selected Programs/Categories under Statistics.
15	Report “system-wide” using the Multi Reports menu	Make sure that you have created any Regions, Entities, and Groups for Multi Reporting. Access Options/Org Defaults, add any reporting distinctions (Regions = Geographical location, Entities = types of facilities, and Groups = any user defined criteria) and then edit each reporting unit (on the Reporting Unit tab, select the RU and click “Edit”). From the information page, select from the applicable dropdown a Region, an Entity, and check the box(es) for one or more Groups. From Reports & Listings, open the Multi Menu. For any report, select the desired reporting distinction. Selection options include Organization (which combines all Reporting Units); Single (allows you to select just one RU); and Regions, Entities and Groups (which include only those RUs that belong to the reporting distinction).

Additional Consideration:

1. Naming conventions for Programs to aid in consistency in reporting community benefit service categories
2. Customized Partnership, Program, and Narrative defaults for consistency in reporting (when does the System need consistent reporting and when is it fine for the reporting unit to be unique?)
3. Do some CBISA™ users need access to more than one Reporting Unit? If so, you need to create "multi" users and may need to create "Groups". Multi Users will need access granted to all applicable Reporting Units.
4. Is training needed? Does your system or facility need to host a webinar training or an on-site full day hands on training session. To view our training options visit our website: http://lyonsoftware.com/training-options/
    - Take advantage of our two free monthly webinar sessions.
        - Defaults and Data Entry
            - Designed for Administrators, Coordinators, and Finance Personnel responsible for capturing, tracking, and reporting community benefit needs, goals, statistics, and narratives.
        - Role of the Reporter
            - Designed for Reporters and the Coordinators responsible for importing the pending data records. The Reporters training will provide basic instruction on accessing, navigating, and data entry.