



# **CARE FILE UPLOAD TOOL**

## *User Guide*

March 26, 2023

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# OVERVIEW

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The KDADS *CARE File Upload Tool* application provides a central location for Area Agencies on Aging (AAA), Hospitals, Nursing Facilities (NF), and/or Nursing Facilities for Mental Health (NFMH) to submit files related to CARE Level 1 and CARE Level 2 assessments to the Kansas Department for Aging and Disability Services (KDADS) CARE Team.

The *CARE File Upload Tool* application is housed within the *KDADS Oracle Web Applications* platform available at the following web address: <https://kdads.ks.gov/web-applications>. If you do not have a Login Account to the *KDADS Oracle Web Applications* platform, you must complete the *KDADS Oracle Web Application Access Security Agreement*. A link to the *Security Agreement* is available at the same web address. If you already have a Login Account, you will still require an additional security role configured for your Login Account. To request the additional role, submit a Problem Report requesting access to the *CARE File Upload Tool* application. The *KDADS Applications Help Desk* can assist you if you have any questions about obtaining access. Their contact information is located on the *KDADS Oracle Web Applications* platform's main page and at the end of this document.

# LET'S GET STARTED

After you log into the *KDADS Oracle Web Applications* platform, look for the *CARE File Upload Tool* icon, as shown below.



Once you click on the icon, you should land on the *CARE File Upload Tool Home* page, as shown below.

The screenshot shows the home page of the CARE File Upload Tool. At the top, there is a navigation bar with "Home", "Client Listing", and "Request Listing". Below the navigation bar, the title "CARE File Upload Tool" is displayed. The main content area contains a welcome message, instructions on how to use the application, and two main modules: "Client Listing" and "Request Listing". The "Client Listing" module is described as a place to create and manage Client Identification Records (CIRs). The "Request Listing" module is described as a place to view and manage existing requests. At the bottom of the page, there is a section for "KDADS Applications Help Desk Contact Information" with contact details for phone, email, and fax.

Home Client Listing Request Listing

## CARE File Upload Tool

Welcome to the Client Assessment, Referral and Evaluation (CARE) File Upload Tool application. This application provides a central location for Area Agencies on Aging (AAA), Hospitals, Nursing Facilities (NF), and/or Nursing Facilities for Mental Health (NFMH) to submit files related to CARE Level 1 and Level 2 assessments to the Kansas Department for Aging and Disability Services (KDADS) CARE Team.

This Home Page provides a description of each module within the application in the blocks you see below. Each block links to its corresponding module, so you may click on the desired block or use the Menu items at the top of the page to navigate within the application.

To upload files for a new client, you must first create a "Client Identification Record" (CIR) by clicking on the "Client Listing" module below and then clicking on the "Create New Client" button. Once you have created the CIR, you will then need to create a "Client Request" from the CIR. You will then be able to upload files within the "Client Request".

To upload files for an existing client, first locate and open the client's CIR in the "Client Listing" module. Then you will need to create a "Client Request" from the CIR. You will then be able to upload files within the "Client Request".

[View User Guide](#)

### Client Listing

This module is where you will create new Client Identification Records (CIRs) and also view/edit previously created CIRs for your organization. Once you create a CIR, you can create a request for a client and attach files to send to KDADS.

### Request Listing

This module provides a list of existing requests made by your organization for clients included in the Client Listing. You can edit existing requests from this module; however, to begin a new request, you must select the desired client from the Client Listing module.

### KDADS Applications Help Desk Contact Information

For Assistance or Questions - Contact the KDADS Applications Help Desk

**Help Desk Hours:** 7:00 AM to 5:00 PM Monday - Friday (Closed on weekends and State of Kansas holidays)

**Phone:** 785-296-4987 option 1  
**E-Mail:** kdads.helpdesk@ks.gov  
**Fax:** 785-296-0256

You should find that the application pages contain all the details you need to use the application. This document serves as a desktop quick reference to assist you when using the application.

The main page contains links to the two modules that you will use to submit files to the KDADS CARE Team. To upload files in this application, you must first create a *Client Identification Record*, which includes the client's first name, last name, birthdate, and any additional details you want to include about the client. After you create the *Client Identification Record*, you will then create a *Client Request*, attach files to the request, and finally submit your request to KDADS. If you need to submit a future request for the same client, you will create a new *Client Request*, attach files to it, and submit it to KDADS. The application creates and updates a status for each *Client Request* as the request moves between your organization and the KDADS CARE Team. This will help your organization and the KDADS CARE Team better manage each of your *Client Requests*.

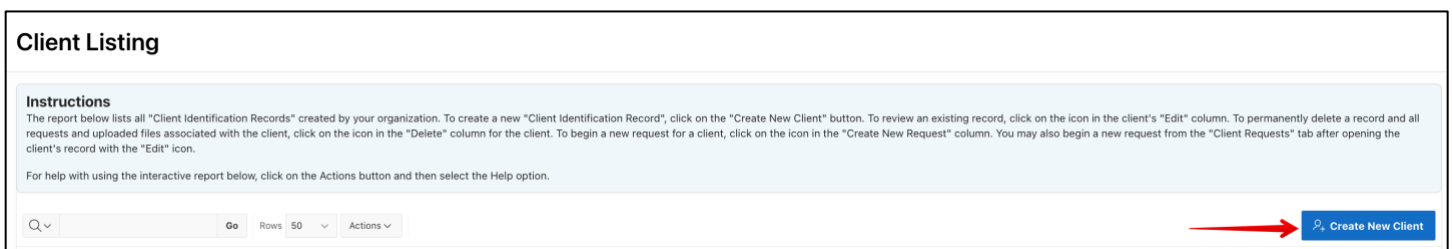
Once you have created a *Client Request*, it will be included in the *Request Listing* report in the *Request Listing* module. The *Request Listing* will help you manage all your *Client Requests*. From the *Request Listing* report, you will be able to filter the report by status, so that you can easily find requests based on your needs.

# CREATING A NEW CLIENT IDENTIFICATION RECORD

Before creating a new *Client Identification Record*, you should verify that the client does not already exist in your organization's *Client Listing* (refer to the section below entitled *Editing/Deleting Client Identification Records*). Note: The application will attempt to find existing clients with exact or similar first and last names when you attempt to create a new *Client Identification Record*.

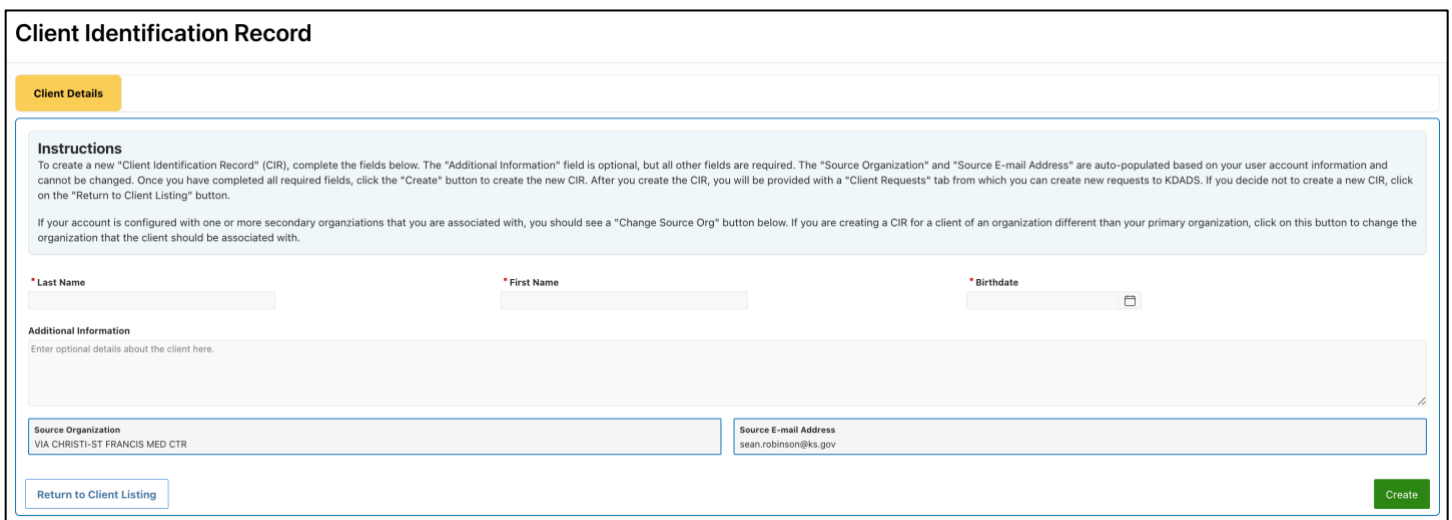
Follow the steps below to create a new *Client Identification Record*.

1. Click on either the *Client Listing* module block on the application's *Home* page or on the *Client Listing* menu option at the top of the application.
2. Once on the *Client Listing* page, click on the *Create New Client* button, as shown below.



The screenshot shows the 'Client Listing' interface. At the top left, the title 'Client Listing' is displayed. Below it is an 'Instructions' section with text explaining how to create, edit, or delete records. At the bottom of the page, there is a search bar with a 'Go' button, a 'Rows' dropdown set to '50', and an 'Actions' dropdown. On the right side, there is a blue button labeled 'Create New Client' with a magnifying glass icon. A red arrow points to this button.

This will open a new *Client Identification Record* form, as shown below.



The screenshot shows the 'Client Identification Record' form. At the top left, the title 'Client Identification Record' is displayed. Below it is a 'Client Details' tab. The form contains an 'Instructions' section, followed by three required fields: 'Last Name', 'First Name', and 'Birthdate'. Below these is an 'Additional Information' section with a text area. At the bottom, there are two auto-populated fields: 'Source Organization' (VIA CHRISTI-ST FRANCIS MED CTR) and 'Source E-mail Address' (sean.robison@ks.gov). A 'Return to Client Listing' button is on the bottom left, and a green 'Create' button is on the bottom right.

If you have requested and have been approved by the KDADS CARE Team to be able to view and/or create *Client Identification Records* for multiple organizations, then you will have an additional *Change Source Org* button, as shown below.

### Client Identification Record

**Client Details**

**Instructions**  
 To create a new "Client Identification Record" (CIR), complete the fields below. The "Additional Information" field is optional, but all other fields are required. The "Source Organization" and "Source E-mail Address" are auto-populated based on your user account information and cannot be changed. Once you have completed all required fields, click the "Create" button to create the new CIR. After you create the CIR, you will be provided with a "Client Requests" tab from which you can create new requests to KDADS. If you decide not to create a new CIR, click on the "Return to Client Listing" button.

If your account is configured with one or more secondary organizations that you are associated with, you should see a "Change Source Org" button below. If you are creating a CIR for a client of an organization different than your primary organization, click on this button to change the organization that the client should be associated with.

\* Last Name  \* First Name  \* Birthdate

**Additional Information**  
 Enter optional details about the client here.

Source Organization: VIA CHRISTI-ST FRANCIS MED CTR  
 Source E-mail Address: sean.robinson@ks.gov

[Return to Client Listing](#) [Change Source Org](#) [Create](#)

If you do not have this button, then skip ahead to Step 3 below. If you do have this button and need to change the source organization to one different than the one listed in the *Source Organization* read-only field in the *Client Details* region, click on the *Change Source Org* button. This will bring up the *Change Source Organization* dialog box, as shown below.

#### Change Source Organization

To change the source organization for this record, select from the list of available organizations below and click the Save button.

**Your Available Organizations**

- VIA CHRISTI-ST FRANCIS MED CTR
- VIA CHRISTIE HOSPITAL-MANAHTTAN

[X Cancel / Close](#) [Save](#)

To change the source organization, select the desired organization from the list of available organizations and click the *Save* button. Note: If the list of available organizations is missing an organization that you think should be included, contact the KDADS Applications Help Desk. The *Source Organization* field in the *Client Details* tab should update to the new organization. Continue with Step 3 below.

3. Enter in the *Last Name*, *First Name*, and *Birthdate* of the client in the appropriate fields on the form. Note: The *Birthdate* should be selected from the calendar provided when you click in the *Birthdate* field. If you choose to type in the birthdate, then use the format of Month/Day/Year, i.e., 9/7/2022 or 09/07/2022.
4. Enter optional comments regarding the client, not the request, in the *Additional Information* field.
5. Click on the *Create* button to create the new *Client Identification Record*. Note: The application will attempt to find any existing clients that have the same or similar first and last names as the ones you have entered for the new *Client Identification Record*. If the module finds any matches, it will present them to you in a pop-up dialog box. If you are certain that none of the clients presented in the dialog box are the same as the client you are attempting to create, then you can continue with the creation of the new *Client Identification Record*. If the application does not find any matching clients, or if you continue with the

creation of the new record when the application does find a possible match, the application will then update the form to include the *Client Requests* tab, as shown below.

### Client Identification Record

Client Name	Birthdate	Source Organization
FLINTSTONE, FRED	01/01/1950	VIA CHRISTI-ST FRANCIS MED CTR

Client Details
Client Requests

**Instructions**  
 To make changes to the "Client Details," edit the desired field(s) and click the "Save" button. To delete the "Client Identification Record" and all associated requests and files, click on the "Delete" button. To edit an existing request or add a new request for this client, click on the "Client Requests" tab above.  
 If your account is configured with one or more secondary organizations that you are associated with, you should see a "Change Source Org" button below. If you need to change the client's source organization to a different organization than what is shown, click on this button to change the organization. Note: Once you create a request for this client, you will not be able to change the client's source organization.

\* Last Name:       \* First Name:       \* Birthdate:

**Additional Information**  
 Enter optional details about the client here.

Source Organization  
 VIA CHRISTI-ST FRANCIS MED CTR

Source E-mail Address  
 sean.robinson@ks.gov

Add User  
 TESTUSER02

Add Date  
 02/09/2023 10:52 AM

Mod User

Mod Date

Return to Client Listing
Delete
Save

If you have the additional *Change Source Org* button on the *Client Details* tab, you can change the *Source Organization* for a client at any time prior to submitting a request for the client by clicking on the *Change Source Org* button, selecting the correct organization, and saving your selection.

If you need to correct any of the client details you entered prior to creating the new *Client Identification Record*, simply edit the details and then click the *Save* button.

Your newly created client will now appear in the *Client Listing* report. To see the report from the *Client Identification Record*, either click on the *Client Listing* menu item at the top of the application or click on the *Return to Client Listing* button at the bottom of the *Client Identification Record*. The Client Listing report with the record created in the above steps is shown below.

### Client Listing

**Instructions**  
 The report below lists all "Client Identification Records" created by your organization. To create a new "Client Identification Record", click on the "Create New Client" button. To review an existing record, click on the icon in the client's "Edit" column. To permanently delete a record and all requests and uploaded files associated with the client, click on the icon in the "Delete" column for the client. To begin a new request for a client, click on the icon in the "Create New Request" column. You may also begin a new request from the "Client Requests" tab after opening the client's record with the "Edit" icon.  
 For help with using the interactive report below, click on the Actions button and then select the Help option.

Go Rows: 50 Actions Create New Client

Edit	Delete	First Name	Last Name	Birthdate	Additional Information	Source Organization	Source E-mail Address	Add User	Add Date	Mod User	Mod Date	Request Count	Start New Request
		FRED	FLINTSTONE	01/01/1950		VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	TESTUSER02	02/09/2023 10:52 AM			0	

You can now create a new *Client Request* for the client. Refer to the next section for details.



# CREATING A NEW CLIENT REQUEST

To create a new *Client Request* for an existing client, you can use one of two options. Begin by opening the *Client Listing* module. Once there, follow one of the options below.

Option 1: Locate the desired client record in the *Client Listing* report and then click on the icon in the record's *Start New Request* column, as shown below. This will open a new *Client Request* form. Skip below to the paragraph that begins after the figure of the *Client Request* form shown under Option 2.

**Client Listing**

**Instructions**  
The report below lists all "Client Identification Records" created by your organization. To create a new "Client Identification Record", click on the "Create New Client" button. To review an existing record, click on the icon in the client's "Edit" column. To permanently delete a record and all requests and uploaded files associated with the client, click on the icon in the "Delete" column for the client. To begin a new request for a client, click on the icon in the "Create New Request" column. You may also begin a new request from the "Client Requests" tab after opening the client's record with the "Edit" icon.

For help with using the interactive report below, click on the Actions button and then select the Help option.

Q  Go Rows 50 Actions [Create New Client](#)

1 - 50 of 102 >

Edit	Delete	First Name	Last Name	Birthdate	Additional Information	Source Organization	Source E-mail Address	Add User	Add Date	Mod User	Mod Date	Request Count	Start New Request
		CALLIE	ANTRONICA	04/28/1988		VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	SEANROBINSON	03/21/2023 07:50 AM	TESTUSER02	03/25/2023 09:53 PM	0	
		YVONNE	APPLEMAN	09/07/1986	Escens Sea Ex Quas Latine Rec.	VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	SEANROBINSON	03/21/2023 07:50 AM	SEANROBINSON	03/21/2023 10:16 AM	0	

Option 2: Navigate to the client's *Client Identification Record* by selecting the icon in the client's *Edit* column in the *Client Listing* module, as shown below.

**Client Listing**

**Instructions**  
The report below lists all "Client Identification Records" created by your organization. To create a new "Client Identification Record", click on the "Create New Client" button. To review an existing record, click on the icon in the client's "Edit" column. To permanently delete a record and all requests and uploaded files associated with the client, click on the icon in the "Delete" column for the client. To begin a new request for a client, click on the icon in the "Create New Request" column. You may also begin a new request from the "Client Requests" tab after opening the client's record with the "Edit" icon.

For help with using the interactive report below, click on the Actions button and then select the Help option.

Q  Go Rows 50 Actions [Create New Client](#)

1 - 50 of 102 >

Edit	Delete	First Name	Last Name	Birthdate	Additional Information	Source Organization	Source E-mail Address	Add User	Add Date	Mod User	Mod Date	Request Count	Start New Request
		CALLIE	ANTRONICA	04/28/1988		VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	SEANROBINSON	03/21/2023 07:50 AM	TESTUSER02	03/25/2023 09:53 PM	0	
		YVONNE	APPLEMAN	09/07/1986	Escens Sea Ex Quas Latine Rec.	VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	SEANROBINSON	03/21/2023 07:50 AM	SEANROBINSON	03/21/2023 10:16 AM	0	

Once you have opened the *Client Identification Record*, click on the *Client Requests* tab, as shown below.

**Client Identification Record**

Client Name: ANTRONICA, CALLIE Birthdate: 04/28/1988 Source Organization: VIA CHRISTI-ST FRANCIS MED CTR

Client Details **Client Requests**

**Instructions**  
The report below lists all "Client Requests" created for this client. To create a new "Client Request" for this client, click on the "Create Request" button. To review an existing request, click on the icon in the request's "Edit" column. To permanently delete a request and all uploaded files associated with the request, click on the icon in the "Delete" column for the request.

For help with using the interactive report below, click on the Actions button and then select the Help option.

Q  Go Actions [Create Request](#)

No requests found for this client.

[Return to Client Listing](#)

Click on the *Create Request* button on the *Client Requests* tab. This will open a new *Client Request* form, as shown below.

**Client Request**

Client Name: ANTRONICA, CALLIE      Birthdate: 04/28/1988      Source Organization: VIA CHRISTI-ST FRANCIS MED CTR

**Request Details**

**Instructions**  
To create a new request for this client, complete the fields below and click the "Create" button. After you create the request, you will be provided with a "File Upload" tab and a Comments region below.  
If you do not wish to create a new request at this time, click on any of the "Return to" buttons below or select one of the options from the main menu above.

Current Status: WORK IN PROGRESS

Assessment Type:  CARE Level 1    Resident Review      CL1 Assessment Date: [calendar icon]      Does the CL1 Contain a CL2 Referral?:  No    Yes

Return to Request Listing   Return to Client Listing   Return to Client Record   **Create**

Note: The default *Current Status* is set to *WORK IN PROGRESS* for new requests. This status will remain unchanged until you submit the request to KDADS, as detailed in the steps below.

Perform the following steps to create a new *Client Request*:

1. Enter one of the following dates, depending on your organization type:

- CL1 Assessment Date (AAA & Hospital only)
- Previous CL2 Determination Letter Date (Hospital, NF, and NFMH for Resident Reviews)
- Special Admission Date (NF only)

Note 1: Nursing Facility (not NFMH) users will have to first choose whether the *Assessment Type* is a *Special Admission* or a *Resident Review*, after which the appropriate date field will be shown.

Note 2: Hospital users will have to first choose whether the *Assessment Type* is a *CARE Level 1* or *Resident Review*, after which the appropriate date field will be shown, as shown in the figure above.

Note 3: AAA users will have the option to indicate that they are requesting a CL1 extension, in which case, they will not enter a CL1 Assessment date.

2. After completing all requested information on the form, click on the *Create* button. The application will then update the form by adding the *File Uploads* tab and a *Comments History* region, as shown below.

### Client Request

Client Name <b>ANTRONICA, CALLIE</b>	Birthdate 04/28/1988	Source Organization VIA CHRISTI-ST FRANCIS MED CTR
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**Request Details** | File Uploads (0)

**Instructions**

To make changes to the "Request Details," edit the desired field(s) and click the "Save" button. To add a new comment regarding this request, click on the "Add Comment" button in the "Comments History" region below.

To delete the request and all associated comments and files, click on the "Delete" button. To edit existing files or add new files for this request, click on the "File Uploads" tab above.

When you are ready to submit this request and associated files to KDADS, click the Submit button.

**NOTE 1: You cannot submit the request until you have uploaded at least one file.**

**NOTE 2: Once you submit the request, you will no longer be able to edit the request or add any comments or files.**

Current Status  
WORK IN PROGRESS

Assessment Type:  CARE Level 1  Resident Review

CL1 Assessment Date: 03/24/2023

Does the CL1 Contain a CL2 Referral?:  No  Yes

Comments History Add Comment

No comments found.

Return to Request Listing | Return to Client Listing | Return to Client Record

Delete | Save

Note: The File Uploads tab indicates how many files are attached to the request in parentheses.

If you need to make any changes to the request details, you can edit any of the items and click the *Save* button.

3. To add a comment regarding this request, click on the *Add Comment* button. The application will open the *Add/Edit Comment* dialog box, as shown below.

**Add/Edit Comment** ✕

---

**Submitter Comment**

Enter comment(s) regarding this request.

✕ Cancel
Save

Enter your comment(s) regarding the request in the *Submitter Comment* text area. When finished, click on the *Save* button. Your comment(s) will then appear in the *Comments History* region, as shown below.

## Client Request

<b>Client Name</b> <span style="color: red;">ANTRONICA, CALLIE</span>	<b>Birthdate</b> 04/28/1988	<b>Source Organization</b> VIA CHRISTI-ST FRANCIS MED CTR
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Request Details
File Uploads (0)

**Instructions**

To make changes to the "Request Details," edit the desired field(s) and click the "Save" button. To add a new comment regarding this request, click on the "Add Comment" button in the "Comments History" region below.

To delete the request and all associated comments and files, click on the "Delete" button. To edit existing files or add new files for this request, click on the "File Uploads" tab above.

When you are ready to submit this request and associated files to KDADS, click the Submit button.

**NOTE 1: You cannot submit the request until you have uploaded at least one file.**

**NOTE 2: Once you submit the request, you will no longer be able to edit the request or add any comments or files.**

**Current Status**  
WORK IN PROGRESS

**Assessment Type**  
 CARE Level 1     Resident Review

**CL1 Assessment Date**  
 03/24/2023 📅

**Does the CL1 Contain a CL2 Referral?**  
 No     Yes

**Comments History** [Add Comment](#)

YOU Level II referral pending receipt of signed documents from guardian. ←

TESTUSER02 - 03/26/2023 01:20:00 PM [Edit](#)

Return to Request Listing
Return to Client Listing
Return to Client Record

Delete
Save

Note 1: You can edit your comments by clicking on the *Edit* link below your comment while the request is in one of the following statuses:

- WORK IN PROGRESS
- INCOMPLETE – FOLLOW-UP NEEDED

Note 2: Your comments will be tagged with the word *YOU* in the *Comments History* region.

When you are ready to attach files to your request, click on the *File Uploads* tab and follow the instructions in the next section.

# UPLOADING FILES & SUBMITTING A REQUEST

Once you have successfully created the *Client Request*, you can upload files associated with the request. After uploading your files, you will be able to submit the request to KDADS. Perform the following steps to upload one or more files and submit the request:

1. On the *Client Request* record, click on the *File Uploads* tab.
2. Click on the *Add File(s)* button, as shown below, to open the *Upload File(s)* dialog box. Follow the instructions in the dialog box to upload one or more files to the *Client Request*.

**Client Request**

Client Name	Birthdate	Source Organization
ANTRONICA, CALLIE	04/28/1988	VIA CHRISTI-ST FRANCIS MED CTR

Request Details **File Uploads (0)**

**Instructions**  
The report below lists files uploaded by your organization for the current request. If the list does not include any files, then either your organization has not uploaded any files, or the KDADS CARE Team has deleted the files after their review.  
To upload one or more new files for this Client, click on the "Add File(s)" button. To download a file from the report below, click on the linked "Filename" of the desired file. To delete a file from the report below, click on the icon in the "Delete" column of the file you want to delete.  
For help with using the interactive report below, click on the Actions button and then select the Help option.

Q v Go Rows 50 Actions v

No files found.

[Return to Request Listing](#) [Return to Client Listing](#) [Return to Client Record](#)

[Add File\(s\)](#)

3. Confirm that your files uploaded. They should appear on the *File Uploads* report, as shown below.

**Client Request**

Client Name	Birthdate	Source Organization
ANTRONICA, CALLIE	04/28/1988	VIA CHRISTI-ST FRANCIS MED CTR

Request Details **File Uploads (1)**

**Instructions**  
The report below lists files uploaded by your organization for the current request. If the list does not include any files, then either your organization has not uploaded any files, or the KDADS CARE Team has deleted the files after their review.  
To upload one or more new files for this Client, click on the "Add File(s)" button. To download a file from the report below, click on the linked "Filename" of the desired file. To delete a file from the report below, click on the icon in the "Delete" column of the file you want to delete.  
For help with using the interactive report below, click on the Actions button and then select the Help option.

Q v Go Rows 50 Actions v

Delete File	Filename	Description	Category	Other Category	File Size (bytes)	Add User	Add Date	View File
	<a href="#">Test_File1 for Upload.docx</a>		Release of Information (ROI) Form		12,125	TESTUSER02	03/26/2023 01:22 PM	

1 - 1 of 1

[Return to Request Listing](#) [Return to Client Listing](#) [Return to Client Record](#)

[Add File\(s\)](#)

4. To delete an uploaded file, click on the "trash can" icon in the *Delete File* column of the desired file.
5. To download an uploaded file, click on the linked filename of the file in the *Filename* column.
6. To view an image file (pdf, png, bmp, jpg, etc.), click on the "binoculars" icon in the *View File* column of the file. The image should open in a new web browser tab.

7. Once you have completed uploading files for the request, you are now ready to submit the request and associated files to the KDADS CARE Team for review. To do so, return to the *Request Details* tab and click on the *Submit* button, as shown below.

**Client Request**

Client Name <b>ANTRONICA, CALLIE</b>	Birthdate 04/28/1988	Source Organization VIA CHRISTI-ST FRANCIS MED CTR
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**Request Details** | File Uploads (1)

**Instructions**  
To make changes to the "Request Details," edit the desired field(s) and click the "Save" button. To add a new comment regarding this request, click on the "Add Comment" button in the "Comments History" region below.  
To delete the request and all associated comments and files, click on the "Delete" button. To edit existing files or add new files for this request, click on the "File Uploads" tab above.  
When you are ready to submit this request and associated files to KDADS, click the Submit button.  
**NOTE 1: You cannot submit the request until you have uploaded at least one file.**  
**NOTE 2: Once you submit the request, you will no longer be able to edit the request or add any comments or files.**

**Current Status**  
WORK IN PROGRESS

**Assessment Type**  
 CARE Level 1  Resident Review

**CL1 Assessment Date**  
03/24/2023

**Does the CL1 Contain a CL2 Referral?**  
 No  Yes

**Comments History** Add Comment

**YOU** Level II referral pending receipt of signed documents from guardian.  
TESTUSER02 03/26/2023 01:20:00 PM [Edit](#)

[Return to Request Listing](#) [Return to Client Listing](#) [Return to Client Record](#) [Delete](#) [Save](#) [Submit](#)

After submitting the request, the application will update the *Client Request* form showing the status as *SUBMITTED TO KDADS* and making all fields read-only, as shown below.

**Client Request**

Client Name <b>ANTRONICA, CALLIE</b>	Birthdate 04/28/1988	Source Organization VIA CHRISTI-ST FRANCIS MED CTR
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**Request Details** | File Uploads (1)

**Instructions**  
This request is read-only due to its current status. You can, however, delete the request, if necessary. To delete the request and all associated comments and files, click on the "Delete" button.

**Current Status**  
SUBMITTED TO KDADS

**Assessment Type**  
 CARE Level 1  Resident Review

**CL1 Assessment Date**  
03/24/2023

**Does the CL1 Contain a CL2 Referral?**  
 No  Yes

**Submitter Username**  
TESTUSER02

**Submitter E-mail Address**  
sean.robinson@ks.gov

**Initial Submit Date**  
03/26/2023 01:24:57 PM

**Comments History**

**YOU** Level II referral pending receipt of signed documents from guardian.  
TESTUSER02 03/26/2023 01:20:00 PM

[Return to Request Listing](#) [Return to Client Listing](#) [Return to Client Record](#) [Delete](#)

Note: You will not be able to upload any additional files or add any additional comments once you submit the request.

# TRACKING REQUESTS

After submitting a request, you can track its status in the *Request Listing* module, as shown below.

### Request Listing

**Instructions**  
The report below lists all "Client Requests" created by your organization, if any. To review an existing request, click on the icon in the request's "Edit" column in the report below. To delete a request and all associated files and comments, click on the icon in the request's "Delete" column. To begin a new request, go to the "Client Listing" module to first select the desired client.  
To filter the report by one or more statuses, use the Status checkbox group below. For help with using the interactive report below, click on the Actions button and then select the Help option.

Status  
 WORK IN PROGRESS  SUBMITTED TO KDADS  IN REVIEW  INCOMPLETE - FOLLOW-UP NEEDED  DENIED  ACCEPTED

Q  Go Rows 50 Actions

1 - 1 of 1

Edit	Delete	Request Number	Status	File Count	Client First Name	Client Last Name	Client Birthdate	Source Organization	CL2 Referral	Prior CL2 Determination Letter Date	Add Date	Submitted By	Initial Submit Date	Return by KDADS Date	Resubmit Date	Accepted By	Accepted Date	Latest KDADS Comment
		161	SUBMITTED TO KDADS	1	CALLIE	ANTRONICA	04/28/1988	VIA CHRISTI-ST FRANCIS MED CTR	Y		03/26/2023 01:17 PM	TESTUSER02	03/26/2023 01:24 PM					

1 - 1 of 1

NOTE 1: The *Prior CL2 Determination Letter Date* column shown above only shows for Hospitals, Nursing Facilities, and Nursing Facilities for Mental Health. The report will include the *CL1 Assessment Date* column for AAA and Hospital organizations and the *Special Admission Date* column for Nursing Facilities only.

NOTE 2: The *Latest KDADS Comment* column only shows the first 70 characters of the comments provided by KDADS. You can hover your mouse over the contents to see the full comments. Additionally, the column only shows the most recent comment(s) from KDADS. To see the entire comment history, open the *Client Request* record and review the *Comments History* region.

You can quickly filter the *Request Listing* report by one or more statuses by using the *Status* checkbox group in the *Instructions* section above the report, as shown in the figure above.

Once the KDADS CARE Team receives your request, a CARE Team member will review your request and update the status to one of the following options:

- IN REVIEW
- ACCEPTED
- INCOMPLETE – FOLLOW-UP NEEDED
- DENIED

If the CARE Team accepts your request, then you can consider the request to be complete. If the CARE Team returns your request due to missing and/or incomplete information, the status will be changed to *INCOMPLETE – FOLLOW-UP NEEDED*. If the CARE Team finds your request to be unacceptable, they will change the status to *DENIED*. In all three cases, the application will send an automated e-mail to the e-mail address of the request's submitter notifying them of the *ACCEPTED*, *INCOMPLETE*, or *DENIED* status. If the KDADS CARE Team returns your request as *INCOMPLETE* or *DENIED*, they should include a comment explaining why. Check the *Comments History* region of the *Client Request* record to find their comments. An example is shown below.

### Client Request

Client Name <b>ANTRONICA, CALLIE</b>	Birthdate 04/28/1988	Source Organization VIA CHRISTI-ST FRANCIS MED CTR
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**Request Details** | File Uploads (1)

**Instructions**  
 To make changes to the "Request Details," edit the desired field(s) and click the "Save" button. To add a new comment regarding this request, click on the "Add Comment" button in the "Comments History" region below.  
 To delete the request and all associated comments and files, click on the "Delete" button. To edit existing files or add new files for this request, click on the "File Uploads" tab above.  
 When you are ready to submit this request and associated files to KDADS, click the Submit button.  
**NOTE 1: You cannot submit the request until you have uploaded at least one file.**  
**NOTE 2: Once you submit the request, you will no longer be able to edit the request or add any comments or files.**

**Current Status**  
INCOMPLETE - FOLLOW-UP NEEDED

Assessment Type <input checked="" type="radio"/> CARE Level 1 <input type="radio"/> Resident Review	CL1 Assessment Date 03/24/2023	Does the CL1 Contain a CL2 Referral? <input type="radio"/> No <input checked="" type="radio"/> Yes
Submitter Username TESTUSER02	Submitter E-mail Address sean.robinson@ks.gov	
Initial Submit Date 03/26/2023 01:24:57 PM	Return Date 03/26/2023 01:33:29 PM	KDADS Reviewer SEANROBINSON

**Comments History** Add Comment

- SB Invalid Level I. Last line of ROI needs to be completed.  
SEANROBINSON (KDADS) 03/26/2023 01:33:23 PM
- YOU Level II referral pending receipt of signed documents from guardian.  
TESTUSER02 03/26/2023 01:20:00 PM [Edit](#)

[Return to Request Listing](#) | [Return to Client Listing](#) | [Return to Client Record](#)

[Delete](#) [Save](#) [Submit](#)

You will notice that the *Request Details* tab now includes the *Return Date* and the *KDADS Reviewer* fields to identify which KDADS CARE Team member returned your request and when they returned it.

If the request was returned as *INCOMPETE*, provide the necessary information, including updated and/or additional files, based on the feedback from the KDADS CARE Team member and resubmit the request. Be sure to add any clarifying comments for the KDADS CARE Team prior to resubmitting the request. If the request was returned as *DENIED*, the request will be in read-only status. If you disagree with the denial, contact the KDADS CARE Team.

Once you resubmit a request, the *Request Details* tab will update to include the date and time that you resubmitted the request, as well as making the fields read-only and changing the status to *SUBMITTED TO KDADS*, as shown below.



### Client Request

Client Name: ANTRONICA, CALLIE | Birthdate: 04/28/1988 | Source Organization: VIA CHRISTI-ST FRANCIS MED CTR

Request Details | File Uploads (1)

**Instructions**  
This request is read-only due to its current status. You can, however, delete the request, if necessary. To delete the request and all associated comments and files, click on the "Delete" button.

Current Status: SUBMITTED TO KDADS

Assessment Type:  CARE Level 1  Resident Review | CL1 Assessment Date: 03/24/2023 | Does the CL1 Contain a CL2 Referral?:  No  Yes

Submitter Username: TESTUSER02 | Submitter E-mail Address: sean.robinson@ks.gov

Initial Submit Date: 03/26/2023 01:24:57 PM | Return Date: 03/26/2023 01:33:29 PM | Resubmit Date: 03/26/2023 01:38:12 PM

**Comments History**

- YOU** Updated ROI attached. TESTUSER02 - 03/26/2023 01:38:06 PM
- SR** Invalid Level I. Last line of ROI needs to be completed. SEANROBINSON (KDADS) - 03/26/2023 01:33:23 PM
- YOU** Level II referral pending receipt of signed documents from guardian. TESTUSER02 - 03/26/2023 01:20:00 PM

Return to Request Listing | Return to Client Listing | Return to Client Record | **Delete**

If the KDADS CARE Team returns the request again for modifications, continue to update the request and resubmit it until the CARE Team accepts it.

### Deleting a Request

Note: Deleting a *Client Request* record as described below will delete the request and all comments and files associated with the request. The *Client Identification Record* will not be deleted, however.

To delete a *Client Request* record, you can use one of the following options:

Option 1: Click on the "trash can" icon in the *Delete* column of the desired *Client Request* record in the *Request Listing* report, as shown below.

### Request Listing

**Instructions**  
The report below lists all "Client Requests" created by your organization, if any. To review an existing request, click on the icon in the request's "Edit" column in the report below. To delete a request and all associated files and comments, click on the icon in the request's "Delete" column. To begin a new request, go to the "Client Listing" module to first select the desired client.

To filter the report by one or more statuses, use the Status checkbox group below. For help with using the interactive report below, click on the Actions button and then select the Help option.

Status:  WORK IN PROGRESS  SUBMITTED TO KDADS  IN REVIEW  INCOMPLETE - FOLLOW-UP NEEDED  DENIED  ACCEPTED

Go Rows: 50 Actions: ▾

Edit	Delete	Request Number	Status	File Count	Client First Name	Client Last Name	Client Birthdate	Source Organization	CL2 Referral	Prior CL2 Determination Letter Date	Add Date	Submitted By	Initial Submit Date	Return by KDADS Date	Resubmit Date	Accepted By	Accepted Date	Latest KDADS Comment
		161	SUBMITTED TO KDADS	1	CALLIE	ANTRONICA	04/28/1988	VIA CHRISTI-ST FRANCIS MED CTR	Y		03/26/2023 01:17 PM	TESTUSER02	03/26/2023 01:24 PM	03/26/2023 01:33 PM	03/26/2023 01:38 PM			Invalid Level I. Last line of ROI needs to be completed.

Option 2: Open the *Client Request* record from the *Request Listing* report and then click on the *Delete* button on the *Request Details* tab.

# EDITING/DELETING CLIENT IDENTIFICATION RECORDS

When you need to edit or delete a *Client Identification Record*, you will first need to locate the record from the *Client Listing* report in the *Client Listing* module.

Once you are on the *Client Listing* page, you should see all clients previously created by your organization, as shown below. Note: If you are assigned to secondary organizations, your list will include all clients created by your primary organization and all secondary organizations. Ensure you are selecting the correct client prior to initiating the delete action.

**Client Listing**

**Instructions**  
The report below lists all "Client Identification Records" created by your organization. To create a new "Client Identification Record", click on the "Create New Client" button. To review an existing record, click on the icon in the client's "Edit" column. To permanently delete a record and all requests and uploaded files associated with the client, click on the icon in the "Delete" column for the client. To begin a new request for a client, click on the icon in the "Create New Request" column. You may also begin a new request from the "Client Requests" tab after opening the client's record with the "Edit" icon.  
For help with using the interactive report below, click on the Actions button and then select the Help option.

Q  Go Rows: 50 Actions [Create New Client](#)

1 - 50 of 102 >

Edit	Delete	First Name	Last Name	Birthdate	Additional Information	Source Organization	Source E-mail Address	Add User	Add Date	Mod User	Mod Date	Request Count	Start New Request
		CALLIE	ANTRONICA	04/28/1988		VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	SEANROBINSON	03/21/2023 07:50 AM	TESTUSER02	03/25/2023 09:53 PM	1	
		YVONNE	APPLEMAN	09/07/1986	Escens Sea Ex Quas Latine Rec.	VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	SEANROBINSON	03/21/2023 07:50 AM	SEANROBINSON	03/21/2023 10:16 AM	0	
		ANTOINE	APPLONIE	12/28/1984	O His Veniam Molestiae Assuev.	VIA CHRISTI-ST FRANCIS MED CTR	sean.robinson@ks.gov	SEANROBINSON	03/21/2023 07:50 AM	SEANROBINSON	03/21/2023 10:16 AM	0	

To open a *Client Identification Record*, click on the pencil icon in the *Edit* column of the desired client. Once you are on the *Client Identification Record*, you can edit any of the client's data, as well as access all of the requests created for the client by your organization via the *Client Requests* tab in the *Client Identification Record*.

To permanently delete the *Client Identification Record* and all requests, comments, and uploaded files associated with the client, click on the *Delete* button on the *Client Details* tab of the *Client Identification Record*.

You can also delete a *Client Identification Record* from the *Client Listing* report by clicking on the "trash can" icon in the *Delete* column of the desired client. This will also permanently delete the record and all associated requests, comments, and files.

**For assistance with the *CARE File Upload Tool*, contact the KDADS Applications Help Desk.**

Help Desk Hours: 7:00 AM to 5:00 PM Monday - Friday (Closed on weekends and State of Kansas holidays)

Phone: 785-296-4987 option 1

E-Mail: [kdads.helpdesk@ks.gov](mailto:kdads.helpdesk@ks.gov)

Fax: 785-296-0256