

## How to Answer a Request for a Data Snapshot

Log in to your CBISA™ program with an Administrator (System or Coordinator) user ID that has the Advance User Options “**Show Micro Reports**” and “**Can Accept Snapshot**” checked.

The screenshot shows a user profile configuration form. The fields are as follows:

- First Name: Trina
- Last Name: Hackensmith
- User Name: tshackensmith@yahoo.
- Email: tshackensmith@yahoo.
- User Role: SystemAdministrator
- Reporting Unit: Sylvania Medical Cen
- Password: [Redacted]
- Update Password:
- Expiration Length: Never
- Additional options (highlighted with an orange box):
  - Show Micro Reports:
  - Can Accept Snapshot:

At the bottom, there are two buttons: "Save" (blue) and "Cancel" (orange).

You will immediately be prompted that the Association Rollup™ organization is requesting a rollup authorization.

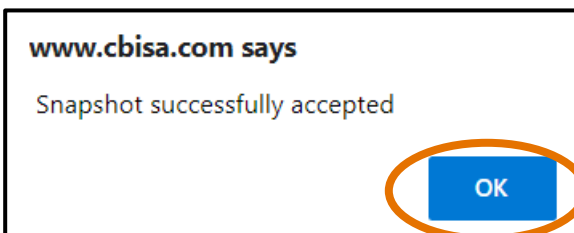
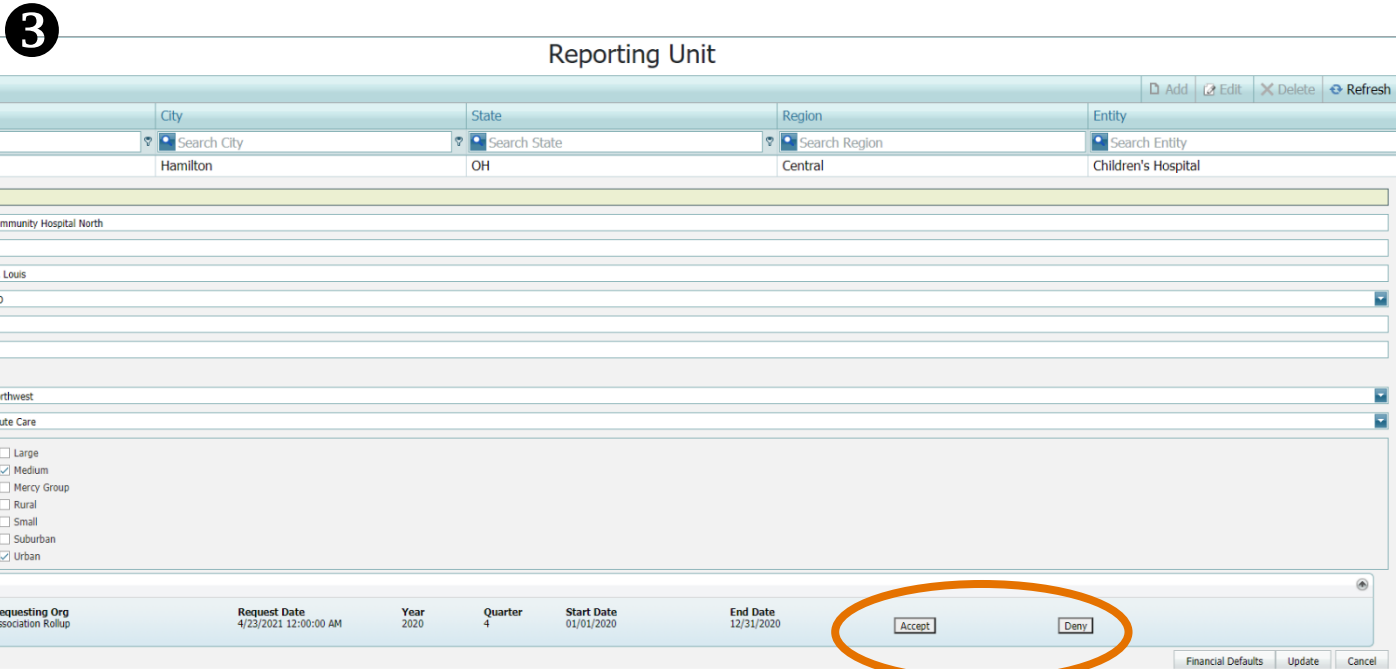
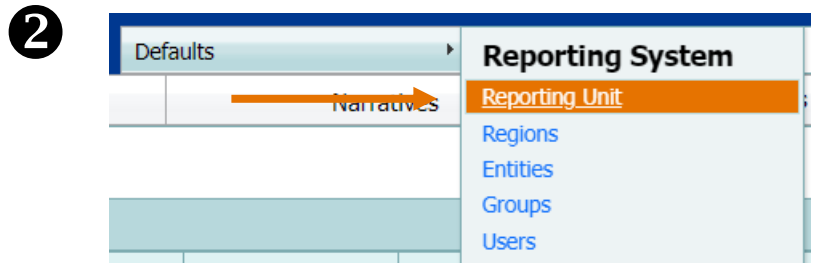
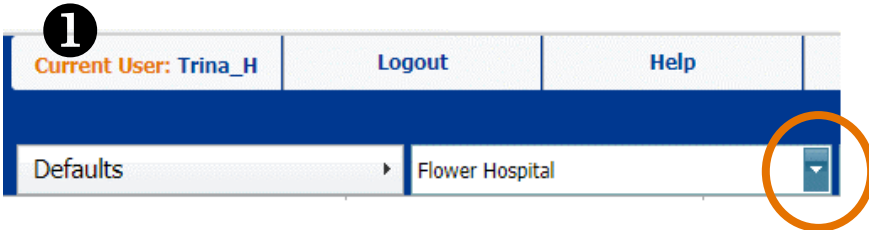
The screenshot shows a dialog box titled "Pending Records" with a question mark icon. The text inside the dialog box is:

- There is 1 pending Program
- There are 3 pending Occurrences
- There is 1 pending Indicator
- There is 1 pending Measurement
- There is 1 pending SnapShot

An orange arrow points from the "There is 1 pending SnapShot" line to a text box on the right that says: "The Snapshot Request is part of your 'micro reporting'". At the bottom of the dialog box is an "OK" button.

Click “OK” to continue working in CBISA. When your data is ready to be sent to the Rollup Organization, follow the steps below:

1. If you are part of a multi Reporting Unit System, first select the Reporting Unit from the Active Reporting Unit dropdown
2. Access the selected Reporting Unit by choosing the "Defaults" dropdown list, then Reporting System>Reporting Unit
3. Scroll to the bottom of the Reporting Unit information page and click on the Accept Rollup Request button.

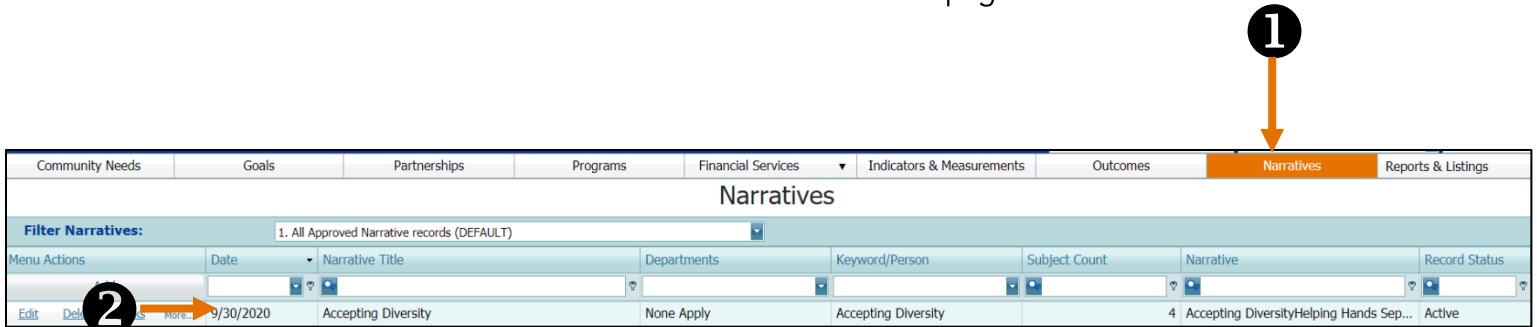


After the "Snapshot successfully accepted" notice presents and you have exited the Rollup request page and the Reporting Unit information screen, the snapshot will be available to your Rollup Administrator to include in any association reports.

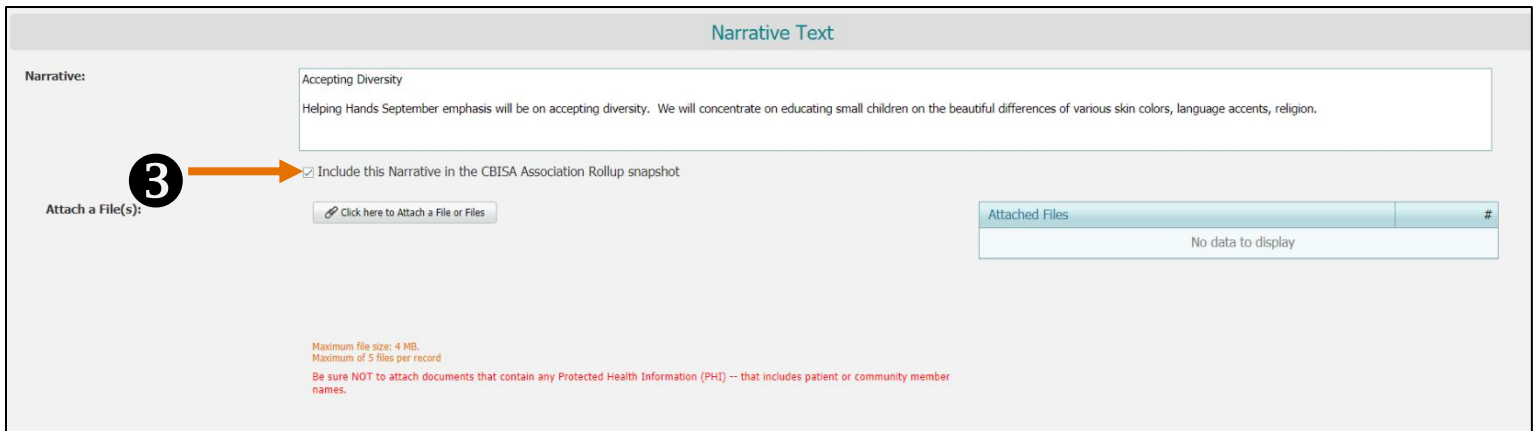
## How to Include a Narrative Entry in Your Snapshot

In order for your Association to receive records from the Narratives module, you must indicate which entries you would like included in the snapshot. To include a narrative in your snapshot, follow the steps below.

1. Open the Narratives module
2. Select the narrative you wish to include from the list contained in the browse box on the control panel or the data record grid, making sure the date falls within the appropriate fiscal time period
3. Check the box at the bottom of the Narrative page.



Community Needs	Goals	Partnerships	Programs	Financial Services	Indicators & Measurements	Outcomes	<b>Narratives</b>	Reports & Listings
<b>Narratives</b>								
<b>Filter Narratives:</b> 1. All Approved Narrative records (DEFAULT)								
Menu Actions	Date	Narrative Title	Departments	Keyword/Person	Subject Count	Narrative	Record Status	
Edit	9/30/2020	Accepting Diversity	None Apply	Accepting Diversity	4	Accepting DiversityHelping Hands Sep...	Active	



**Narrative Text**

**Narrative:**

Accepting Diversity

Helping Hands September emphasis will be on accepting diversity. We will concentrate on educating small children on the beautiful differences of various skin colors, language accents, religion.

Include this Narrative in the CBISA Association Rollup snapshot

Attach a File(s): [Click here to Attach a File or Files](#)

Attached Files	#
No data to display	

Maximum file size: 4 MB  
Maximum of 5 files per record  
Be sure NOT to attach documents that contain any Protected Health Information (PHI) -- that includes patient or community member names.

## What Information Is Included in a Snapshot Request?

1. All Programs that are assigned a standard Category (A-G) or a state reportable category (customized Defaults) that have Occurrences for the requested fiscal quarter. All fiscal quarter requests are cumulative, so if your Association has requested Q4 2020, they are asking for twelve (12) months of your data. In this example, the snapshot request will include all of the occurrences that belong to fiscal year 2020.
2. Financial Service data including Financial Assistance, Medicaid, Other Means-tested Programs, Medicare, and Bad Debt for the requested fiscal time period.
3. Any Narratives with a date that is part of the requested fiscal time period and has the "Include this Narrative..." box checked.