

EDMIS_{Rx} Setup Form

OutreachSystems' EDMIS_{Rx} service provides SBDCs and WBCs with regular monthly WinCATS EDMIS data validation and error detection. Each month, OutreachSystems will automatically kick off the 'CATS-based error checking process against your database. Upon completion an email will be sent to the EDMIS contact persons listed below to let them know that the records requiring data correction have been made available in WebCATS for each of the sub-centers to review.

The Database Administrator at the lead center will continue to perform the quarterly export upload to the EDMIS system.

Unfortunately, the automated error checking that is part of EDMIS_{Rx} is not all inclusive, and some additional EDMIS errors may still be found by the SBA validation process once you upload your records. The reason EDMIS_{Rx} can't find all the errors is because EDMIS has its own history of client and counseling records. Sometimes a record may have been "certified" (i.e. locked) by EDMIS but the record was nonetheless changed within 'CATS, thus creating a historical mismatch.

If there are additional errors found as part of the EDMIS error checking performed by SBA, these errors will also be made available in WebCATS for sub-center correction upon import into WinCATS.

Please provide the following information to configure EDMIS_{Rx} to your needs.

Network Name: _____ OutreachSystems Mailbox: _____

Primary EDMIS Contact Name: _____ Title: _____

E-Mail: _____

Phone: _____

Second EDMIS Contact Name: _____ Title: _____

E-Mail: _____

Phone: _____

Third EDMIS Contact Name: _____ Title: _____

E-Mail: _____

Phone: _____

(Note: All contacts will receive email notices and reports from EDMIS_{Rx}. Please provide at least one backup contact to the Primary Contact.)

EDMIS Export Configurations

By default, EDMIS^{Rx} will provide monthly error checking of SBA funded sessions for all Centers in your database. If you would like to exclude certain centers from the error checking process or would like us to conduct error checking of sessions that are not necessarily SBA funded, then please indicate this below:

Centers (center ID of centers NOT to be exported):

Funding Sources (funding sources to be exported):

Preferred Validation Date

Each month we will initiate the validation check on a specific day of the month. Please let us know your preferred date range.

- During 1st week of each month
- During 2nd week of each month
- During 3rd week of each month
- During 4th week of each month

Auto-Error Correction Scripting

- Yes, EDMIS^{Rx} may automatically reconcile Signature/Start dates with the initial Counseling Session dates to comply with EDMIS
- Yes, EDMIS^{Rx} may automatically reconcile the SBA Client type with the initial Counseling Session Contact Type to comply with EDMIS