

EDMIS_{Rx} Setup Form

OutreachSystems' EDMIS_{Rx} service provides SBDCs, WBCs, and other entities that report to SBA with ongoing EDMIS data validation and error detection. Monthly, OutreachSystems will automatically kick off an error checking process against your database. Upon completion of this process, an e-mail is sent to the EDMIS contact persons listed below to let them know that any records requiring data correction have been made available in WebCATS for each of the sub-centers to review.

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. This is because EDMIS has its own history of client and counseling records. For example, a record may have been certified (i.e. locked) by EDMIS, but the record was nonetheless changed within WebCATS, 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. The WebCATS administrator at the lead center will continue to perform the quarterly export upload to the EDMIS system.

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

Network Name: _____ OutreachSystems Mailbox: _____

Primary EDMIS Contact

Name: _____ Title: _____

E-Mail: _____ Phone: _____

Additional EDMIS Contact

Name: _____ Title: _____

E-Mail: _____ Phone: _____

Additional EDMIS Contact

Name: _____ Title: _____

E-Mail: _____ Phone: _____

Note: All contacts will receive e-mail notices and reports from EDMIS_{Rx}. Please provide at least one backup contact in addition 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, 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. 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

Please fax completed form to 805-456-0330 or e-mail it to outreach@outreachsystems.com.