ATTACHMENT J-15a
Remedy's HHS-22 Form
User Guide
(Last updated October 17, 2007)

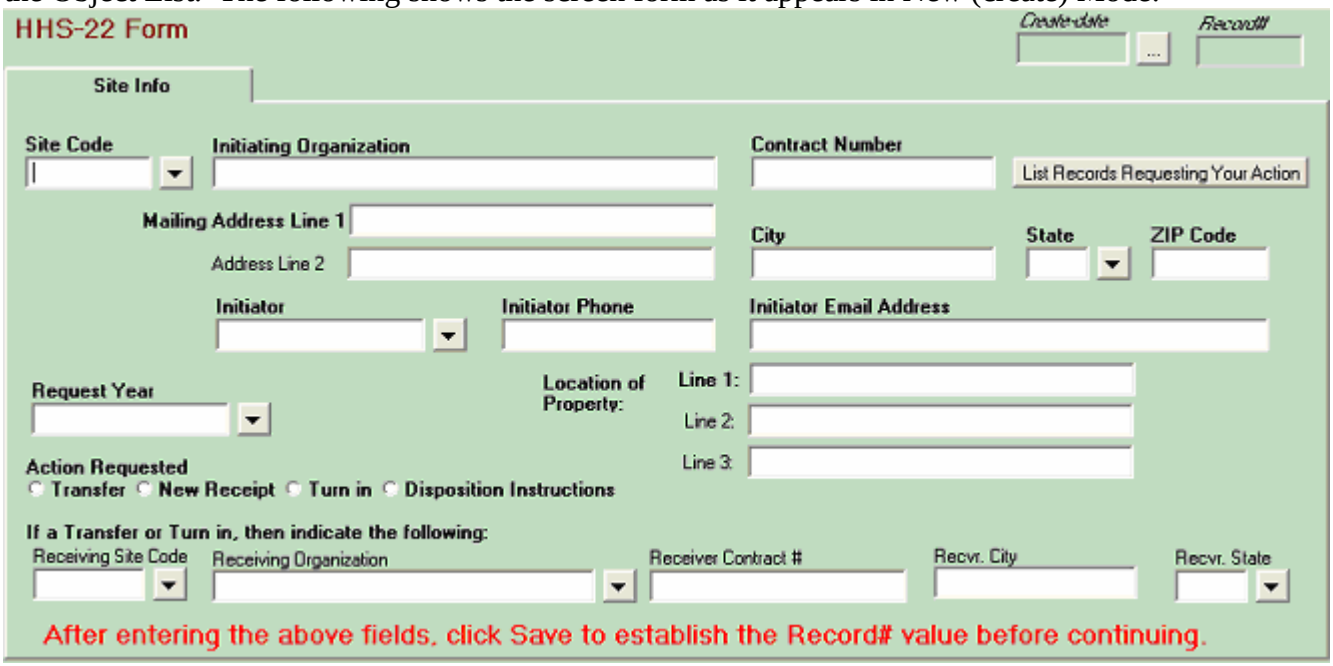
The paper HHS-22 form has been the main vehicle for getting approval and documenting changes in government owned assets held by contractors. HHS-22 documents must be filed with the Department of Health and Human Services Properties Division as justification for adjustments in each contractor's 565 Report of Accountable Property filed every year.

CMS is requiring that all management and reporting of government (IT) property be done in Remedy. Therefore, a new HHS-22 form has been created in Remedy and is the tool to be used from now on to electronically create, route, report, and store HHS-22 history.

Contractors that have government (IT) property must track and report that property in Remedy's Inventory form. An HHS-22 must be filed whenever acquiring new or additional property or transferring or disposing of property. This includes whenever:

- previously reported property is being transferred to another contractor (Transfer)
- new or used property is being purchased or received via transfer (New Receipt)
- previously reported property is needing to be disposed (Disposition Instructions)

Appropriate users of Remedy can access the HHS-22 form by doing a File/Open and selecting it from the Object List. The following shows the screen form as it appears in New (create) Mode:



Field Descriptions:

Create-date This field is auto-filled by the system when the user first clicks the Save button after populating all the required (bold labeled) fields.

Record# This field is auto-filled by the system when the user clicks the Save button. As indicated in the red text at the bottom of the Site Info tab, this number must be established before configuring fields on the Inventory Items tab.

Site Code Populate this field from its drop-down menu. It indicates the site for whose inventory reporting the HHS-22 is being created.

Initiating Organization, Contract Number, Mailing Address Line 1, 2, **City, State, ZIP Code**
These auto-populate when the Site Code field is populated. The user should check their accuracy and correct the information if inaccurate.

Initiator This field defaults to the entry user's login name when the site code is entered. However, the menu will list Remedy users from the site indicated in the Site Code field and the user can select one of those names. Alternative free-hand entry is allowed but not recommended. The Initiator should be a person that can access the record in response to notifications.

Initiator Phone, Initiator Email Address
These fields auto-fill if the Initiator entry is a Remedy user login name.

Location of Property: Line 1, 2, and 3
These fields auto-fill based on the Site Code entry. Correct the information if inaccurate. Line2 and Line 3 are optional.

Request Year This field must be populated. The menu will start with the date range values for the 565 reporting which when this form was created was: 7/1/2007 – 6/30/2008 (for ESRDs) and 10/1/2007 – 9/30/2008 (for non-ESRD sites). Each year two more menu choices will be added for the new year of processing. The main purpose for this field is to give users a means of selecting records for annual reporting in the related HHS22-Items form.

Action Requested
This field describes the type of HHS-22 request. **Transfer** indicates the site is requesting approval to transfer existing inventory items to another site. If selected, the user will need to fill several fields identifying the Receiving site. If Transfer is not the Action Requested, all Receiving site fields in the form will be auto-filled with NA.

Indicate **New Receipt** if the site has received new property items via the Purchase Request/ERB process or new or used items via a transfer. ***Note: All transfers from one site to another require two HHS-22 records being filed: A Transfer from the sending site and a New Receipt from the receiving site.***

Turn in is seldom appropriate except at contract termination. Like a transfer, if selected, the Receiving site fields will need to be populated.

Select **Disposition Instructions** if you are seeking approval for disposal of previously reported inventory items.

Receiving Site Code
This field is auto-filled as NA unless the Action Requested is Transfer. In that case, enter the code value from the field menu.

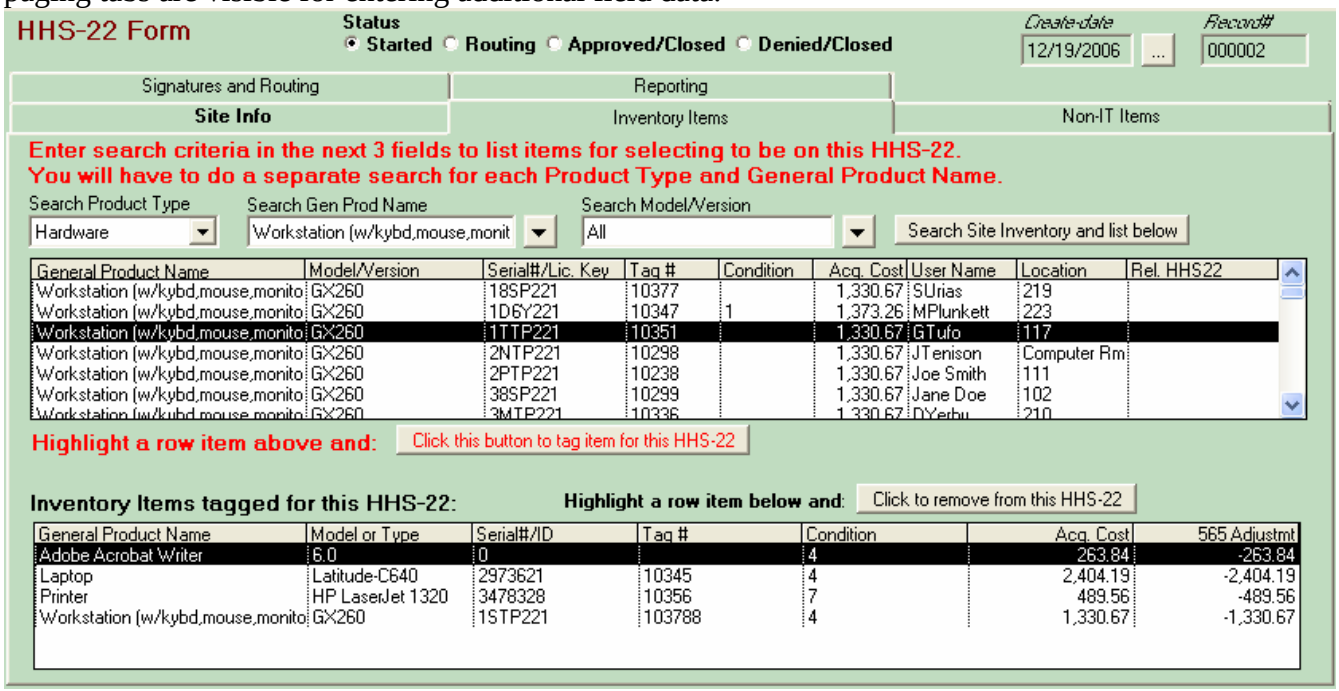
Receiving Organization, Receiving Contract #, Recvr. City, Recvr. State

These fields auto-fill based on the Receiving Site Code entry or are auto-filled as NA for non-transfer action requests.

When the Save button is clicked by the user in New Mode, the entry information is immediately saved as a database record and the system opens the form in Modify mode for continuing the entry process. Most importantly the Record# is established for the record.

The HHS-22 Form in Search or Modify Mode

When the HHS-22 form is opened in Search or Modify mode, a Status field is visible and several paging tabs are visible for entering additional field data.



Status The default value is **Started**. This status means the user is configuring a new form ticket and is not yet ready to start routing.

Once the initiator of the ticket has specified which inventory items the ticket applies to (using fields on the Inventory Items tab and/or the Non-IT Items tab) and has determined the first non-site user to route the ticket to via email notification (configured on the Signatures and Routing tab), the system will auto-set the Status to **Routing**.

Once the ticket has received all require electronic signatures the Status should auto-set to **Approved/Closed**. The initiator will receive an email informing them of the approval and instructing them to update the associated Inventory and/or Non-IT-Inventory records as appropriate.

Any of several authorized users can kill the HHS-22 request by not signing the ticket and setting the Status to **Denied/Closed**. This will trigger an email to the Initiator.

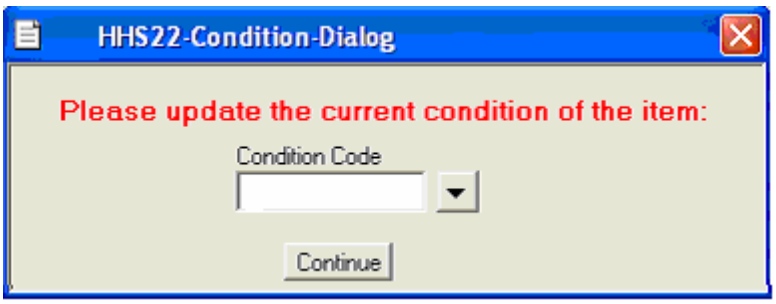
The Inventory Items tab fields:

This tab and others become visible when the form is not in New Mode. The fields on this tab allow the user to select items from Remedy's Inventory table for this HHS-22. The previous snapshot shows four items (bottom table field) have been tagged for this HHS-22 request.

The three fields called Search Product Type, Search Gen Prod Name, and Search Model/Version allow the user to enter search criteria for displaying records from the Inventory data table for the site.

When the user clicks the Search Site Inventory and list below button, the system displays all matching items in the **search results** table field.

The user can tag a row item for inclusion in this HHS-22 by clicking to highlight the table row for the item and then clicking the Click this button to tag item for this HHS-22 button. The following dialog window appears:



The HHS-22 report requires that the Inventory items show a Condition Code. The menu choices are:

1-New or Unused
4-Usable
7-Repairable (economically reasonable)
X-Salvage (has value but repair not practical)
S-Scrap (no value except for its material content)

After entering a Condition Code value and selecting the Continue button, the display immediately removes the selected row from the (top) table field and shows it in the (bottom) **Inventory Items tagged for this HHS-22** table field.

If items of a different Product Type, Gen Product Name, or Model/Version are to be included in this HHS-22, the user will need to repopulate the Search criteria fields to bring up those items for tagging.

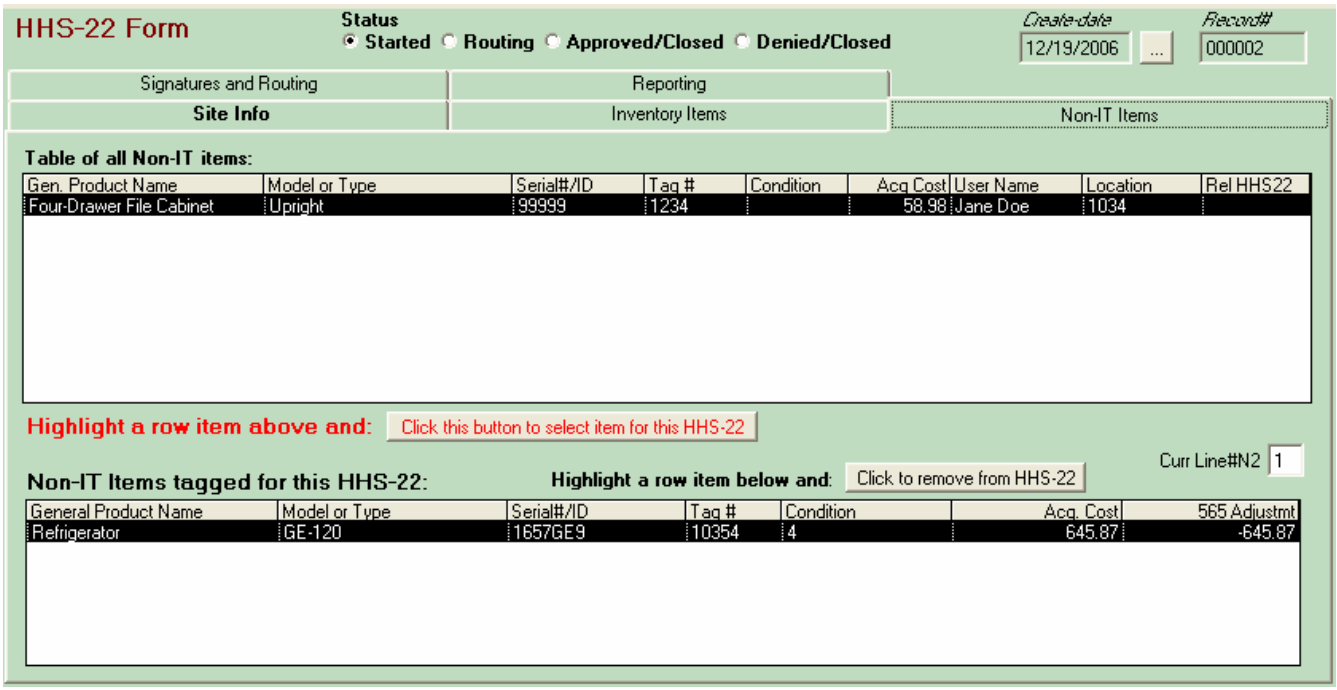
If a wrong item is tagged, the user can highlight the item in the bottom table and click the Click to remove from this HHS-22 button.

Note: When an Inventory item is selected for a HHS-22, a copy of many of the Inventory field values is made into corresponding fields in another form called HHS22-Items. Very useful reports are available from the HHS22-Items form. See the User Guide for that form for details about its reports.

The Non-IT Items tab:

If you have chosen to record your site's non-IT inventory in Remedy's Non-IT-Inventory form for HHS-565 reporting, you can use this tab to include any of those items in a HHS-22 request for transfer, new receipt, or disposal. In fact, Remedy Inventory form items selected on the previous tab and items from Remedy's Non-IT-Inventory form can be mixed into one HHS-22 if desired.

The fields on this tab are similar to those just described on the Inventory Items tab. There are no Search criteria fields, however. All records from your site's Non-IT-Inventory form are automatically listed in the first table field.



This sample screen shot only shows one record in the Table of all Non-IT items. If you are using the Non-IT-Inventory form, there will probably be several records in this table.

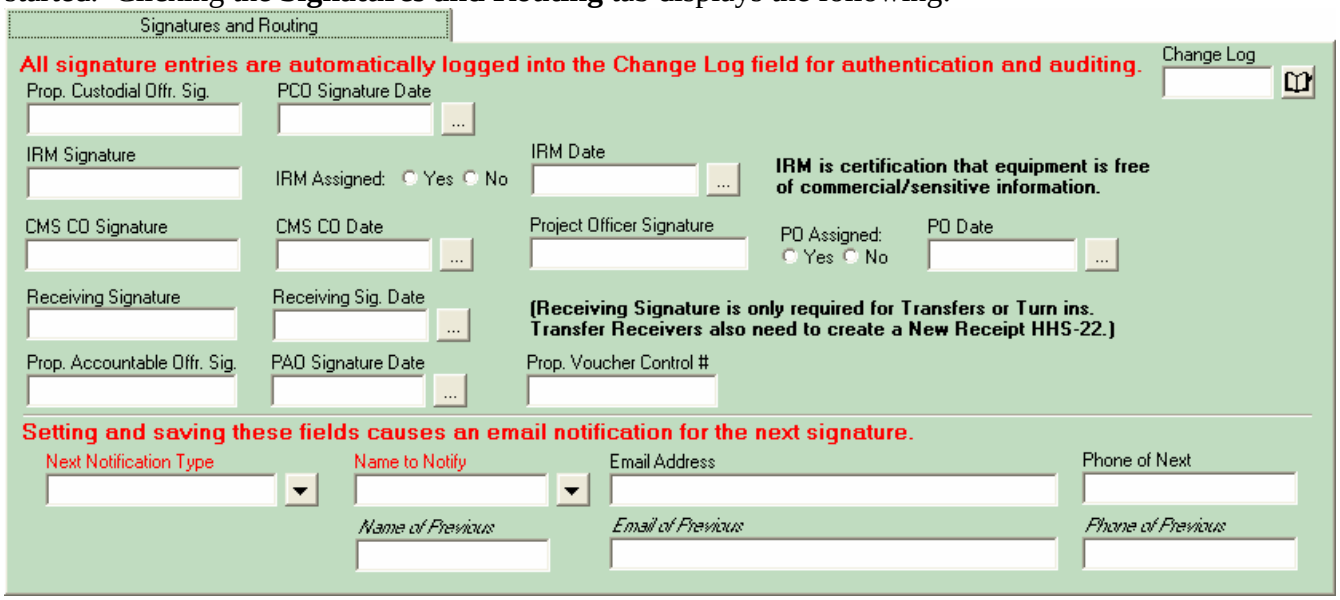
As the screen instructions indicate, you can click to highlight one row item at a time and click the Click this button to select item for this HHS-22 button to tag the record for inclusion in this HHS-22. At that moment the row item is removed from the top table and displays in the "Items tagged for this HHS-22" table field.

If a wrong item is tagged, it can be untagged by the user highlighting the item in the bottom table and clicking the Click to remove from HHS-22 button.

Note: When a Non-IT-Inventory item is selected for a HHS-22, a copy of many of the its field values is made into corresponding fields in another form called HHS22-Items. Very useful reports are available from the HHS22-Items form. See the User Guide for that form for details about its reports.

The Signatures and Routing tab:

After all desired items have been tagged for inclusion on the HHS-22, routing for signatures can be started. Clicking the **Signatures and Routing** tab displays the following:



The Change Log field can be used at any time by any user to add comments or notes permanently. The system also uses this field to create a permanent audit trail of processing events.

The signature fields are in the top area of the tab and as much as possible in processing order.

The Initiator user will start the routing process by populating the "Next Notification Type" and "Name to Notify" fields. Saving the ticket after populating and/or changing these two fields causes an email notification to the person named in the "Name to Notify" field.

Each person (other than Initiator) being notified receives the following email text:

> Your action is requested in Remedy's HHS-22 form Record #000001.
>
> Please log into Remedy, File Open the HHS-22 form in Search Mode, and press the List Records Requesting Your Action button.
>
> Update appropriate fields on the Signatures and Routing tab.
>
> If you approve,
> 1. add your electronic signature,
> 2. select an appropriate Next Notification Type and Name to Notify next,
> 3. and click Save.
>
> If you have questions, contact the Initiator either directly or via the Next Notification Type field process.
> If you have authority to deny the request and wish to, set the Status to Denied/Close and click Save.
> If you are no longer responsible for the approval signature, please contact Sharon Hargrove at 410-786-6745 or Sharon.Hargrove@cms.hhs.gov.

The system checks each signature as it is entered to make sure it matches the Remedy login name of the person making the entry. Make sure you enter your exact Remedy login name for your electronic signature.

Each user that enters his or her signature needs to then forward the ticket by selecting from the Next Notification Type field menu and Name to Notify menu. When the user selects a new value for the Next Notification Type, the values in the Name to Notify, Email Address, and Phone of Next fields are

cleared after copying into the corresponding Name of Previous, Email of Previous, and Phone of Previous fields. The user will then select the name and contact information for the next user notification.

The values for the Next Notification Type field are:

Property Custodial Officer (PCO) Signature Request

The Name to Notify menu will consist of names of all Remedy users from the initiation site.

IRM Signature Request

When selected, the Name to Notify menu will consist of the names of all Remedy users from the initiating site. This signature is to certify that the equipment is free of commercial and/or sensitive information.

CMS CO Signature Request

When selected, the Name to Notify menu will consist of the name(s) of the CMS CO designated contact for authorizing the request. This signature should be the first sought outside of the site.

Project Officer (PO) Signature Request

When selected as the Next Notification Type, the menu for the Name to Notify field will consist of the names of all the CMS Project Officers that have Remedy accounts. When the user selects the appropriate Project Officer name, the system will auto-fill the Email Address and Phone of Next fields.

Receiving Official Signature Request

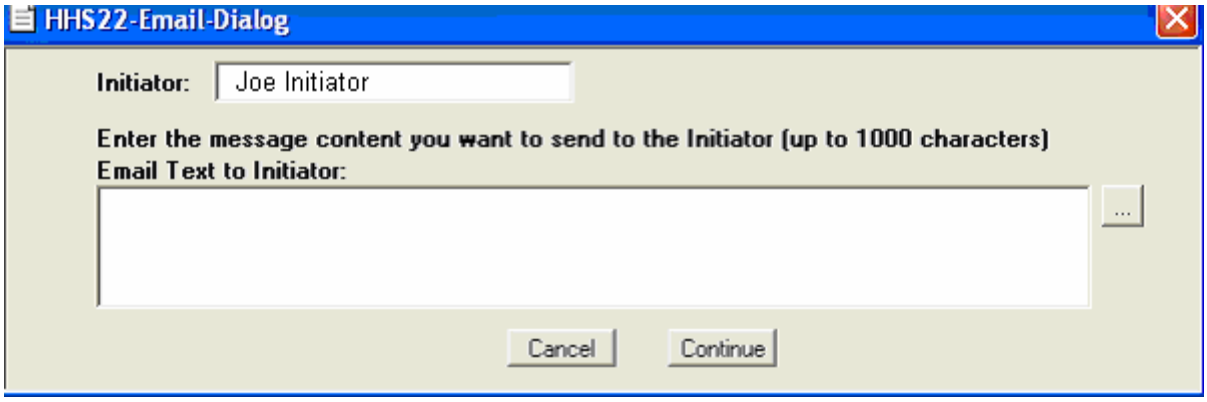
This signature is only needed for HHS-22s that are transfers. If not a Transfer or Turn in, selecting this will generate an error. The Name to Notify menu will consist of all Remedy users from the receiving site. This signature only indicates that the receiving site is willing to receive the products listed in the HHS-22. After the transfer, the receiving site will need to initiate a separate "New Receipt" HHS-22 record.

Property Accountable Officer (PAO) Signature Request

When this is selected, the Name to Notify menu will consist of users from the HHS Properties office. After adding the PAO signature, Properties can print the HHS-22 Detail report for filing and the HHS-22 action can be executed by the site users.

Initiator

This Next Notification Type choice is primarily to let the initiator know when the signature process is complete, has been denied, or that the user has a question. When this Initiator choice is selected, the following dialog box for free entry of message content is opened.

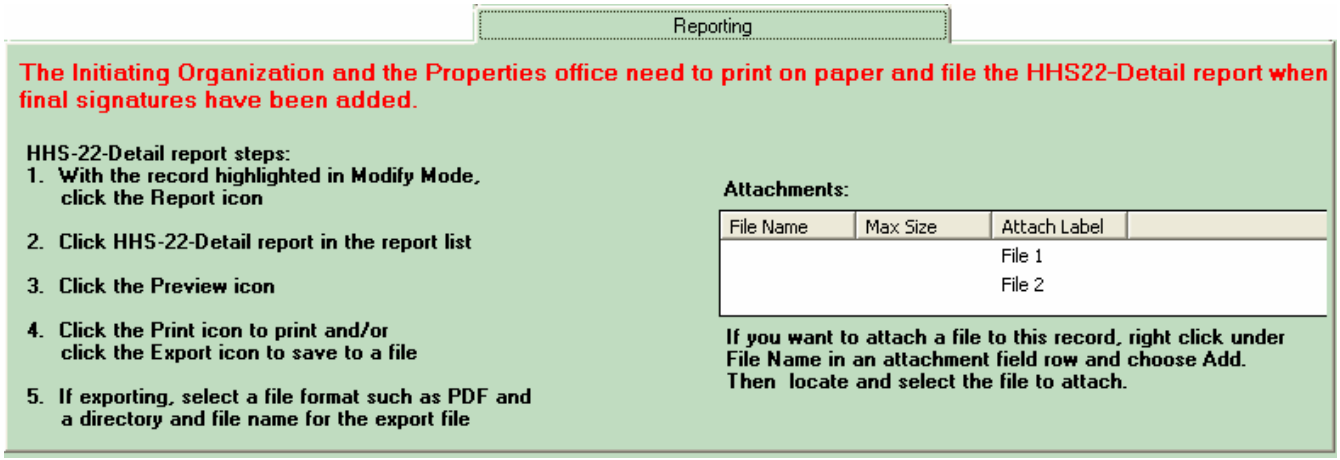


Reporting

Users can create a paper copy of the information in one or more HHS-22 records. Users select the HHS-22 records they want included by:

1. Opening the form in Search Mode
2. Specifying the search criteria by populating screen fields and/or using the Advanced button
3. (Optionally) clicking the Search button to perform the search and switch the screen to Modify Mode with a (top-of-screen) Results window listing all records matching the criteria and using combinations of clicks, Shift-clicks, and/or Ctrl-clicks to highlight the records you want in the report. Note: If you skip clicking the Search button, the report will include all records matching the search criteria.
4. Select the Report icon in the toolbar.
5. Select the report name (in this case HHS-22-Detail). Note: Report names start with the exact name or an abbreviation of the form name they are based on.
6. Select the Preview or Print icon in the toolbar.

Similar instructions are listed on the Reporting tab of the HHS-22 form. But those instructions assume you are only reporting on one record and it is on the screen in Modify Mode.



An example of the HHS-22-Detail report is on the next page.

Printed: 12/27/2006
Record#: 000001

Department of Health and Human Services

Request for Property Action

Date of Request: 12/19/06

Initiating Organization Arkansas Foundation For Medical Care	Custodial Code HHSM-500-2005-AR001C
Mailing Address 2201 Brooken Hill Drive PO Box 180001	Admin Code CAN No.
City: Fort Smith; State: AR; ZIP: 72908	Location of Property 2201 Brooken Hill Drive PO Box 180001 Fort Smith, AR 72908
Contact Name: John Contractor; Telephone No.: 515-457-3712	

Action Requested:
Transfer

Receiving Organization Lumetra	Receiver Custodial Code HHSM-500-2006-CA002C
Location San Francisco CA	CAN No.

Barcode/ Decal #	Serial#	Description of Property	QTY	Unit of Issue	Cond.	Unit Cost	Total Cost
10394	D8G7S11	Workstation (w/kybd,mouse,monitor) GX260	1	Each	4	1,330.67	1,330.67
10397	2BG7S11	Workstation (w/kybd,mouse,monitor) GX260	1	Each	7	1,330.67	1,330.67
10448	Unknown	Adobe Acrobat Writer 5.0	1	Each	4		
	G862Z71	File Server Dell PowerEdge 2800	1	Each	X	6,620.01	6,620.01

Project Officer Assigned: No PO Signature: Mary Projecto Date: 12/20/2006

IRM Clearance: Yes IRM Signature: John Contractor Date: 12/20/2006

Signature of Property Custodial Officer /Initiator John Contractor	Date 12/20/2006	Property Section Only
Signature of Receiving Official Rich Californian	Date 12/27/2006	Property Custodial File Update/Final Property Action
Signature of Property Accountable Officer (PAO) Diane Jones	Date 12/27/2006	Initials of Property Technical/Accountable Officer — Date

Prop. Voucher Control #: BR-459

HHS-22

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