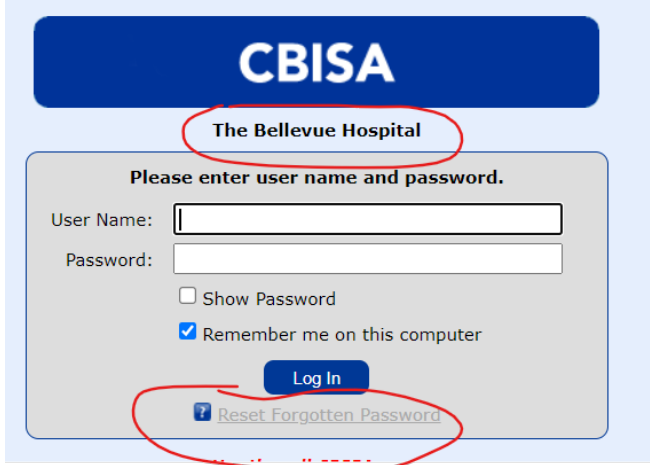
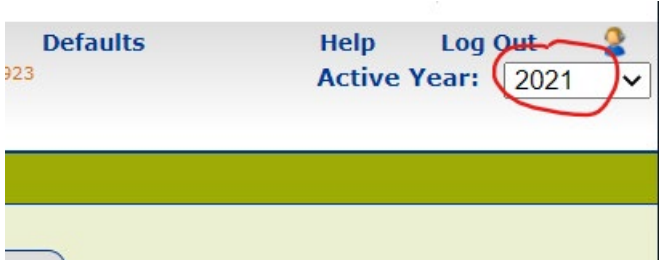
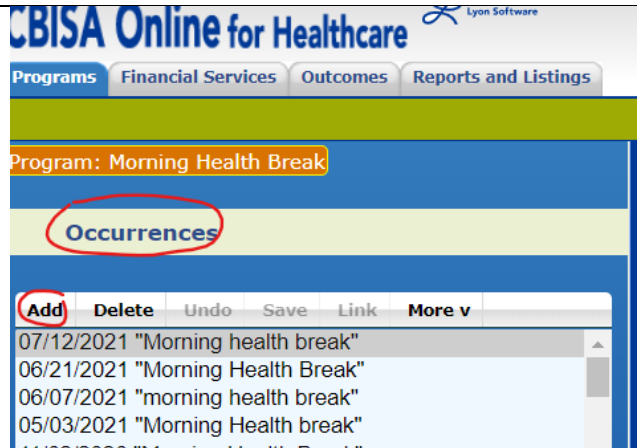


Task:	Entering occurrences into CBISA		
Revision Date:	9/16/21	SWI Reference #:	
Description:	Entering community benefit information into CBISA online software		
Responsibility:	CBISA users, department directors and other assigned designees		
Frequency:	As needed		
Process Steps:	<p>1. Open CBISA online at https://www.cbisaonline.com/tbh_923 or go to Links on TBH Intranet. Be sure The Bellevue Hospital is displayed along the top of the screen. If it does not say The Bellevue Hospital, you may have used the wrong link. The tbh_923 in the URL tells CBISA which company to open.</p>  <p>2. Sign on. If you forgot your password, click on the link to reset your password and you will receive an e-mail with a link to reset your password.</p> <p>3. Once logged in, look in upper right hand corner to make sure you are in correct year. Change year from drop down box if necessary.</p> 		

4. Be sure you have the Programs tab open. Along the left side of the screen you will see a list of community benefit programs that TBH provides. There is only one Program for each program that we do, but there may be many Occurrences for each Program.
5. You will be entering an Occurrence for a Program. Click on a Program from the list to highlight it, then click on the orange Occurrences for this Program box to open the Occurrences.



6. After you have entered the Occurrences screen, you will see all the Occurrences that have been entered previously for the Program. Click on Add to add a new Occurrence.



7. After selecting Add, you will get a blank Occurrence screen on the right. **Be sure you are adding a new Occurrence and not overwriting an existing Occurrence.**
8. To enter a new Occurrence, you will need to change the Occurrence date as it will default to January 1 of the current year. Fill in the other fields as requested. For Department, use the drop down to select your own department in which the costs occurred. In the example below, Patient & Community Education used their department to enter their information. However, if you are Nutrition Services and entering food for this same event, or Lab entering test processing costs for this same event, you will select your department and not Patient & Community Education. ***See section about reporting clinical setting for students at the bottom of this document.**

Occurrence Date: 7/12/2021

Description: Morning health break Fringe %: 0

Primary Service Zip Code: 44811

Targeted For: Broader Community

Department: Patient and Community Education 7140

Hours:

Staff Hours: 14.5 Volunteer Hours: 3.5 Volunteer Staff Hours: 0

Outputs:

Persons Served: 25

Total Expenses: \$462 [Show Detail](#)

Less: Total Offsetting Revenue and Adjustments: \$490 [Show Detail](#)

Net Benefit: \$-28

Memo Fields: [Show Detail](#)

Notes User Codes

Meal served, lab and registration hours?

9. Next you will enter the total staff hours from your department. If you have 2 employees who each worked 2 hours for the event, you will enter 4 hours. Do not enter a number in Persons Served unless you are the Department in charge of the event. In this example, Jackie entered 25 because she knows how many people attended. Nutrition Services and Lab would keep this section blank. That is because if each department entered 25, then when we ran a report for this Program, it would show 75 people served.
10. The next two sections, for Total Expenses and Offsetting Revenues, may be opened or closed. If the two blue boxes shown above say Show Detail, you will click on the boxes to open up the space. If they say Hide Detail, they are opened and ready to enter data.
11. In the Expense section, you will need to enter the same number of Staff Hours that you entered above into the box below for Department Hours. Do not enter anything in the Rate box. At the end of the year, average hourly rates by department will be entered into CBISA and it will automatically calculate a rate behind the scenes. Fill in any other expenses such as Purchased Services or Supplies in the appropriate boxes. If the Occurrence used a hospital meeting room, you can add the room cost x the number of hours the room was used under Indirect Expenses. See separate 2022 Room Rates for Community Benefit Reporting sheet located on the intranet under Links, CBISA.

Total Expenses: \$462 Hide Detail

Salaries: A. Dollars Reported:

B. Hours & Rates:

Department Hours: Rate:

Total Hours x Rates: \$261

Fringe Benefits:

Purchased Services:

Supplies:

Other Direct Expenses:

Indirect Expenses:

Total Expenses: \$462

Direct Entry
(Indirect Method)

12. If you collected any fees for this Occurrence, you will enter that in the next section, Total Offsetting Revenue and Adjustments. Again, only the Department in charge of collecting fees for the event will enter any fees collected.

Less: Total Offsetting Revenue and Adjustments: \$490 Hide Detail

(Source of Grant)

Fees:

Restricted Contributions:

Restricted Grants:

Other:

Total Adjustments: \$490

Net Benefit: \$-28

13. At the bottom of the screen there is a Notes section. Please enter any additional information that will help the reviewer to confirm that all information has been gathered. For example, in the sample above, there is a note that meals were served and lab tests were given. This will help the reviewer to be sure that Occurrences have been entered by Nutrition Services for the food and by Lab for processing the lab tests.
14. When everything has been entered for the Occurrence, be sure to click on Save to save the entry. Click on the orange Program box to leave the Occurrences menu and return to the Program menu.

Program: Morning Health Break

Occurrences

Add	Delete	Undo	Save	Link	More v
07/12/2021	"Morning health break"				
06/21/2021	"Morning Health Break"				
06/07/2021	"morning health break"				
05/03/2021	"Morning Health break"				

***SPECIAL NOTE FOR CLINICAL SETTING FOR STUDENTS:** If you are entering an Occurrence for Clinical Setting for Students, be sure to only count staff hours at 25%. For example, if a student was here for 80 hours, you would only enter 20 hours in Staff Hours at the top of the Occurrence and 20 hours in the Department Hours section. Then please place a note in the Note section that student was here 80 hours and reporting staff hours at 25% so that the reviewer does not have to question if the hours are reported as total hours or 25%.

Needed Supplies/Resources:	
Key:	