



# Montana HEART CM Program

Web Portal Training Document



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# CMI SIMS Incentive Manager (IM) Web Portal Overview



# CMI

## Who is CMI?

- CMI is a digital health company focused on innovation, development, and supplying evidence-based technology that improves treatment for Substance Use Disorder (SUD).
- Our mission is to design, develop, and supply the most advanced technologies that enable care teams to improve the success of their Substance Use Disorder treatment programs and interventions.
- Our solutions consist of patient mobile applications connecting to a health care team portal.
- CMI improves connection, communication, support, and insight while increasing availability, accessibility and program success.
- CMI's technology-enabled contingency management solutions are a significant scientific and clinical advancement that improves treatment for SUD.

## What is our role in this program?

- CMI will configure, delivery, and implement a web-based, provider-facing portal that will support this pilot program.
- CMI will train DPHHS, Providers, and CM coordinators on the use of this portal.
- CMI will further support stakeholders through trainings, troubleshooting, and a support center accessible via telephone.
- CMI will support DPHHS and Providers in accessing and analyzing data from this program to support better outcomes.
- CMI's US based teams are available to DPHHS and Providers for education, training, and support.



# CMI SIMS IM Portal

## Design Specifications

- Accessibility through all modern web browsers – Chrome, Safari, Edge, and other Chromium-based browsers.
- UDT information captured and archived for reporting and analysis
- Automated incentive determination and distribution based upon UDT events configured specifically to the DPHHS Program rule sets
- Comprehensive and extensible demographics and program data capture
- Highly extensible program reporting and business intelligence
- Strict compliance with industry information security and privacy standards (e.g., NIST SP 800 Standards, FIPS 140-2 encryption standards via AES-256 encryption, etc.).





# CMI Incentive Manager Portal

## Privacy, Security, and Compliance

### Privacy

- Control access to vaulted, secure environments housing sensitive data with defense-in-depth constructs and privilege access module (Arcsight)
- Follow *federal guidelines (FIPS 140-2 level 3) for data at rest and data transfers* requiring a secure transfer (encryption) and access control.
- Monitor critical data transfer internally and externally using state of the art surveillance software

### Security

- *HIPAA attestations* with annual external 3rd party review of information systems to validate via penetration tests
- Follows *NIST 800-53* and Defense in Depth frameworks
- Monitored with *CrowdStrike SOC (24/7/365)*

### Compliance

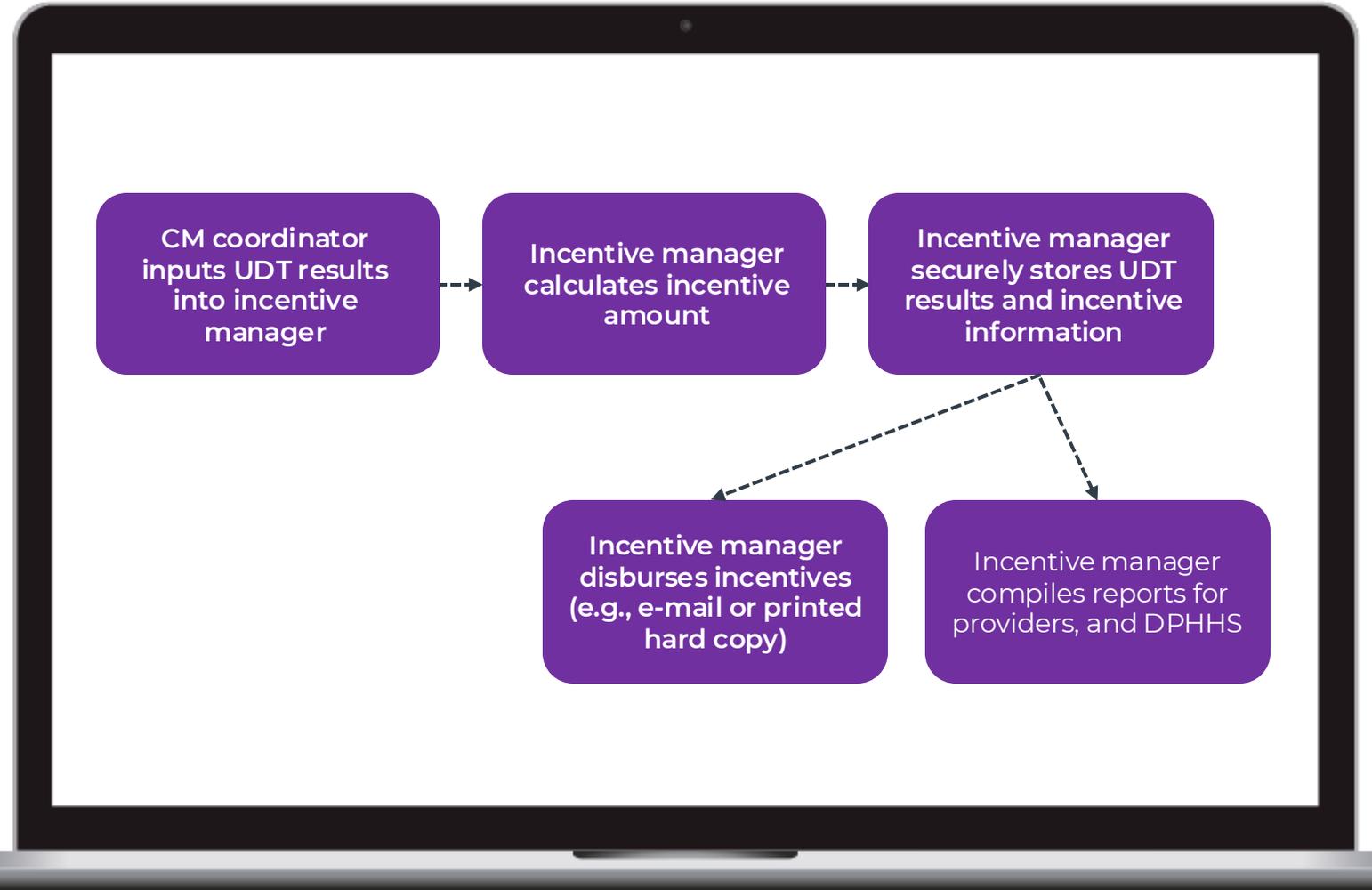
- Monitor platform for compliance NIST (42CFR) and HIPAA Compliance using CrowdStrike CNAPP Tool Suite
- Platform hosted on FedRAMP compliant *AWS GovCloud* instance
- FedRAMP compliant call center technology and service



# CMI Incentive Manager Portal

## Incentive Mechanics

- UDT results are entered
- System automatically assesses member-specific circumstances
- System automatically applies correct incentive amount
- Incentive amount is “dispatched” meaning CM coordinator can select delivery method for the member
- Incentive transaction is logged





# CMI Incentive Manager Portal

## Key User Activities

### DASHBOARD

- Adding new users into the program
- Generating and Analyzing population-level analytics related to member progress

### Members

- Managing member progress
- Logging UDT results or absences
- Calculating, Offering, and Dispensing incentive rewards

### REPORTS

Compiling and Downloading standard reports for Provider organizations

**SIMS**  
State Incentive Management System

Dashboard  
Members  
Reports  
Help & support

Search... REGISTER MEMBER William Swift Provider

Hello, William Swift!  
Pathways CMH  
Here is what is going on today.

SHOW ALL FILTERS Program All

**Overview**

Total UDTs (Neg + Pos) <b>782</b> ↑ 11% in the past 30 days	Total incentives earned <b>\$11,789.50</b>	Total incentives received <b>\$10,433.50</b> ↑ 5% in the past 30 days	Current incentives banked <b>\$1,356</b> ↑ 11% in the past 30 days
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**Events & alerts**

- You have not captured the past 3 UDT visits of [Sean Pitt](#). 02/13/2024 14:31 [CHECK]
- You have to reaffirm the Medihealth of [Stephanie Lane](#). 02/12/2024 14:31 [CHECK]
- Member [Anna Delvey](#) has been enrolled into the DPHHS CM Program. 02/11/2024 14:31
- Member [Taylor Gomez](#) has been disenrolled from the DPHHS CM Program. 02/10/2024 14:31
- [Sam Veritas](#) has completed the program. 02/10/2024 11:31

DISMISS ALL

Avg length of treatment  
**11 weeks**

Total Members  
**37**

Avg % of available incentives  
**75%** (banked/earned)

Active 34  
Completed 2  
Dis-Enrolled 1

**CM visits information**

Total CM visits <b>810 visits</b>	Negative UDT results <b>672 tests</b>	Positive UDT results <b>110 tests</b>
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# Know your Portal Role



# User Roles

## Overview

Stakeholder	Role	Eligibility Approver
DPHHS Leadership	DPHHS User	N/A
DPHHS Administration	DPHHS User	N/A
CM Supervisor	CM Coordinator	CMI, DPHHS or Training Partner
CM Coordinator	CM Coordinator	CMI, DPHHS or Training Partner
Backup CM Coordinator	CM Coordinator	CMI, DPHHS or Training Partner
CMI	Administrator	CMI, DPHHS
Support Team	Administrator	CMI, DPHHS

**Note:** Members do not have roles in the system. Members are managed by CM coordinators



# User Roles

## Access Rights

	USER ACCOUNT CREATION			MEMBER MANAGEMENT					ANALYTICS AND REPORTS	
	DPHHS	County	CM Coordinator	Add new member	Change member site / county	View Progress	Log UDT results	Dispense Incentives	State-level	Site-level
Admin	✓	✓	✓	✓	✓	✓			✓	✓
DPHHS		✓	✓		✓	✓			✓	✓
CM Supervisor / Coordinator			✓	✓		✓		✓		✓



# User Roles

## Admin / DPHHS

	USER ACCOUNT CREATION			MEMBER MANAGEMENT					ANALYTICS AND REPORTS			
	DPHHS	County	CM Coordinator	Add new member	Change member site / county	View Progress	Log UDT results	Dispense Incentives	State-level	County-level	Site-level	Member-level
DPHHS	✓	✓	✓		✓	✓			✓	✓	✓	✓

### Who are you

- CMI, DPHHS leadership or DPHHS administration
- DPHHS contractor (given DPHHS leadership approval)

### What is your responsibility?

- Managing the program
- Assessing program outcomes
- Monitoring for fraud, waste and abuse

### What are your access rights?

- Creation of new users (except DPHHS roles)
- Addition or changes to member information (i.e., changing site)
- View all information related to program



# User Roles

## CM Supervisor / Coordinator

	USER ACCOUNT CREATION			MEMBER MANAGEMENT					ANALYTICS AND REPORTS			
	DPHHS	County	CM Coordinator	Add new member	Change member site / county	View Progress	Log UDT results	Dispense Incentives	State-level	County-level	Site-level	Member-level
CM Supervisor / Coordinator				✓		✓	✓	✓			✓	✓

### Who are you

- Licensed Practitioners of the Healing Arts (LPHAs) or Certified Peer Support Specialists
- Substance use disorder (SUD) counselors that are certified / registered by a DPHHS recognized organization and accredited with the National Commission for Certifying Agencies
- Other trained staff under supervision of an LPHA

### What is your responsibility?

- Collect CM services consent and enter member information
- Collect and enter urine drug test (UDT) results and ensure delivery of incentive to member
- Communicate with clinical staff regarding UDT results and any information of clinical relevance
- Refer Members to treatment and recovery staff for follow-up

### What are your access rights?

- Create new member account
- Manage member progress and log UDT results
- Select and dispense incentive awards
- View member level information



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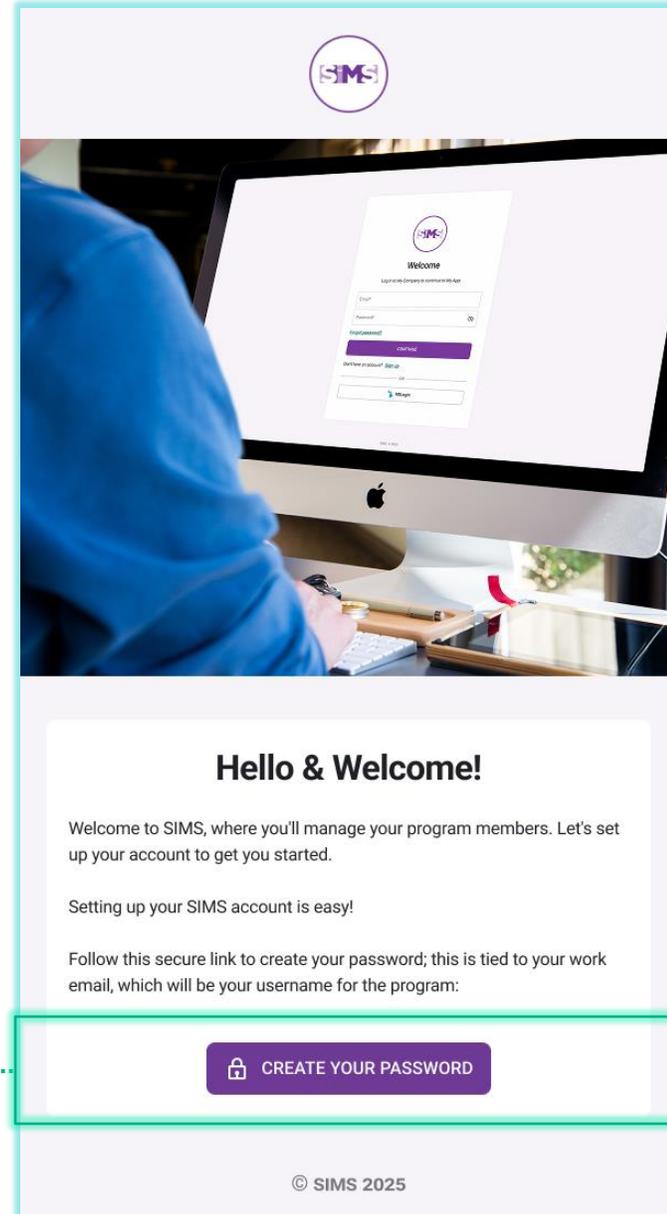
# Password Creation and Log-In



# Welcome E-mail

All

- Each new user will receive a specific welcome email (not applicable to Members)
- The email will introduce the user to the service
- It will provide a **unique link to create a new password**
- This link will take you to a password creation page (see next page)
- Please note this unique link will provision access right as defined by user role.
- **Note:** This link expires after 72 hours for security purposes.





# Password Creation

All

- Usernames will be the email address provided upon account creation
- Passwords must comply with the following requirements:
  - Contain at least 8 characters
  - capital letter
  - Number
  - special character such as “\$”



### Change Your Password

Enter a new password below to change your password.

New Password\*  
\*\*\*\*\*

Re-enter new password\*  
\*\*\*\*\*

Your password must contain:

- ✓ At least 8 characters in length
- ✓ At least 3 of the following:
  - ✓ Lower case letters (a-z)
  - ✓ Upper case letters (A-Z)
  - ✓ Numbers (0-9)
  - ✓ Special characters (ex. !@#)

**RESET PASSWORD**

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# Managing Beneficiaries (Members)

*Note: Member & Beneficiary are used interchangeably, you may see Members referred to as "Beneficiaries in the SIMS IM Portal.*



# Beneficiary Registration (Members)

CM Coordinator: General Information (Tab 1)

- Open “dashboard” or “Beneficiaries” pane
- Click “REGISTER Beneficiary” button which is located at the top of the screen
- Member’s legal first name, last name, and date of birth
- Address information is not required, aside from ZIP code
- Input optional information (Phone & Email - these fields support incentive delivery – email highly recommended)

The screenshot displays the SIMS State Incentive Management System interface. On the left is a dark purple sidebar with navigation options: Dashboard, Members (selected), Reports, and Help & support. The main content area shows a 'Register Member' modal form. The form is divided into two tabs: 'GENERAL INFORMATION' and 'SIMS INFORMATION'. The 'GENERAL INFORMATION' tab is active and contains the following fields: First name (DPHHS), Last name (Member), Email (email@email.com), Phone number (+1 555 555 5555), Date of birth (01/01/2000), Address line 1, Address line 2, City, State, and ZIP Code (55555). At the bottom of the form are 'CANCEL' and 'REGISTER' buttons. The background shows a table with columns for Name, Date of Birth, Status, and Amount. A 'REGISTER MEMBER' button is highlighted in the top right of the background interface.



# Beneficiary Registration (Members)

CM Coordinator: SIMS Information (Tab 2)

- Choose the predefined CM Treatment Plan (Twice-Weekly UDTs targeting Stimulant Abstinence)
- Choose a standard CM visit schedule (Monday/Thursday or Tuesday Friday)
- Choose your Provider Site
- Select a Provider (Primary CM Coordinator)
- Client ID Number will automatically generate a unique system ID
- Consent form is not required in the IM Portal
- If the Member is a Medicaid client, select “Yes” otherwise (GPR) select “No”,

\* **Note:** The Members are only permitted to be enrolled at one site. Please see next page.



# Beneficiary Registration (Members)

## Confirm Member Payer Information

- There are two options, Medicaid or GPRA (Grant Funding)
- For Medicaid clients, select Medicaid and add in their subscriber ID or CIN
- For GPRA (Grant Clients) select GPRA and add in their Grant number



The screenshot displays the SIMS interface for managing a beneficiary named Dominic2 Trupiano. A modal window titled "Select Payer Plan" is centered on the screen, prompting the user to "Select an existing payer plan or create a new one for this enrollment." The modal includes a dropdown menu currently showing "Medicaid" and a section for "New Payer Plans" with "Medicaid" and "GPRA" listed. Buttons for "GO BACK TO LIST", "CANCEL", and "SAVE" are at the bottom of the modal. In the background, the beneficiary's information is visible, including "MONTANA TRAINING PROGRAM / PROVIDER SITE: ALTERNATIVES / PROVIDER: MONTANA ALTERNATIVES" and "PROGRAM DURATION: 02/02/2026". A "REGISTER MEMBER" button is highlighted with a yellow box on the right side of the interface.



# Double Entries

## CM Coordinator

### CM Coordinators may see **error at right**

- This occurs when a member's information has or may match an existing entry.
- This functionality is a safeguard against Members who may try to enroll in multiple centers simultaneously – this is against protocol
- This may occur because a member is seeking to transfer to your clinic from another.
  - Please see guidance on changing member location
- This may occur because a member is seeking to transfer to your clinic from another.

### Register Beneficiary

**PROGRAM NAME 1**  
MDHHS: NORTHCARE NETWORK / PROVIDER SITE: PATHWAYS CMH

GENERAL INFORMATION   SIMS INFORMATION

First Name SIMS	Last Name Beneficiary
Member may already exists. Contact SIMS Support. Email Beneficiary@sims.com	Member May already Exist. Contact SIMS Support. Phone number +1 555 555 5555
Date of Birth 01/01/2000	
ZIP Code 02116	

CANCEL REGISTER



# Member Location Changes

CM Coordinator

**Only Admin users can adjust treatment location. Below is the approval procedure:**

- CM Coordinator is informed by member about necessary location change
- CM Coordinator assists member in site selection
- CM Coordinator contacts new site to ensure they can accept the additional caseload
- CM Coordinator calls the call center (find via help section) to inform them of the details of the necessary change

The call center will contact CMI to make this change.

Note: All such changes must be logged in the electronic health record system



# Member Information Changes

CM Coordinator

- Under “Action” in the members chart, click “Edit”
- If there was a typo in the client profile information, the CM Visit Schedule changes, or the member is adding in/ updating a phone number/ email address on file
- At any point, a can call the call center to assist with these changes. [Contacts can be found here.](#)

**SIMS**  
State Incentive Management System

Dashboard  
Members  
Reports  
Help & support

Members list

Total 27 Active 24 Completed 2 Dis-enrolled 1

**Edit Member**

DPPHS CM PROGRAM  
DPPHS: NORTHCARE NETWORK / PROVIDER SITE: PATHWAYS CMH / PROVIDER: WILLIAM SWIFT

First name\* Stephanie  
Last name\* Lane  
Email stephlane@gg.ccc  
Phone number +1 000 000 213  
Date of birth (mm/dd/yyyy)\* 08/12/1987  
Campaign Campaign 1  
Status Active  
Client ID Number (CIN)\* 12345678A  
CM visit schedule Monday - Thursday  
Medicaid eligibility Yes

MOVE CANCEL SAVE

View  
Edit  
Disenroll

Member Name	First Name	Last Name	Date of Birth	Status	Client ID Number	CM Visit Schedule	Medicaid Eligibility	Inc. received	Action	
Yorke, Charles	Annia Jones		01/22/25	Inactive				\$44.00	\$44.00	⋮
Veritas, Sam	Damian Travis		01/08/25	Active				\$36.00	\$12.00	⋮
Sahar, Saurabh	Larry Miller		02/01/25	Active				\$26.00	\$0.00	⋮



# Select Member

## CM Coordinator

- Open “dashboard pane”
- Find member either by **sorting** or **searching**
- Click on the member’s name (you will note that it is underlined)
- This action will open that specific patient’s chart (next page)

**SIMS**  
State Incentive Management System

Dashboard  
Members  
Reports  
Help & support

Search...

William Swift  
Provider

**Members list**

Total 37 Active 34 Completed 2 Dis-enrolled 1

DPHHS CM PROGRAM / PIHP: NORTHCARE NETWORK / PROVIDER SITE: PATHWAYS CMH

Search member [ ] [ ] REGISTER MEMBER

Filter by program: DPHHS CM Program  
Filter by OU: Pathways CMH  
Filter by status: All  
Filter by provider: All

Full name ↓	Provider ↓	CM start date ↓	CM end date ↓	Status ↓	Inc. earned ↓	Inc. received ↓	Action
<u>Lane, Stephanie</u>	William Swift	12/23/24	-	Active	\$164.00	\$142.00	⋮
<u>Delvey, Anna</u>	William Swift	08/15/24	-	Active	\$40.00	\$40.00	⋮
<u>Pitt, Sean</u>	William Swift	09/01/24	12/02/24	Completed	\$576.00	\$539.00	⋮
<u>Gomez, Taylor</u>	Scott Mendez	02/03/25	-	Active	\$12.00	\$12.00	⋮
<u>Ramirez, Seg</u>	William Swift	01/13/25	-	Active	\$72.00	\$40.00	⋮
<u>York, Charles</u>	Annia Jones	01/22/25	-	Inactive	\$44.00	\$44.00	⋮
<u>Veritas, Sam</u>	Damian Travis	01/08/25	-	Active	\$36.00	\$12.00	⋮
<u>Sahar, Saurabh</u>	Larry Miller	02/01/25	-	Active	\$26.00	\$0.00	⋮

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# Member Chart

## CM Coordinator

This page contains member-specific information: (from top to bottom)

- Reconfirmation of eligibility for program (completed monthly by CM coordinator)
- Member profile information and summary of incentives earned by year
- Rewards Bank
- Incentive history (date, delivery type, merchant, and amount)
- Next visit entry
- List View (Below) CM visits results and any Incentives earned by visit and week

The screenshot displays the SIMS interface for a CM Coordinator. On the left is a purple sidebar with navigation options: Dashboard, Members (selected), Reports, and Help & support. The main content area shows the profile for Stephanie Lane, including a search bar, a 'REGISTER MEMBER' button, and the provider name 'William Swift'. The profile information includes program details, dates, contact info, and a summary of incentives earned and received. A 'REDEEM BALANCE' button is visible next to a bank balance of \$22.00. Below this is a section for 'UDT Visits' with a calendar view for the current week (Feb 2nd to 8th, 2025) and a 'List view' option at the bottom.



# Member Pane

## CM Coordinator

Every 30 days, the CM coordinator must attest to the members eligibility:

- Navigate to the Member’s Pane (screen on right)
- Locate the **“Reconfirm CM eligibility in:” section** in the top right of the screen:
  - The system has a countdown to 30 days
  - The system will allow for attestation 14 days after the last attestation – giving 16 calendar days to attest
- Simply click the “confirm button” when this is available





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# Managing Incentive Rewards



# Overview

## CM Coordinator

### How are rewards calculated?

- Rewards will be earned after a negative urine drug test is logged in the system.
- Rewards are calculated by the system using a well-defined schedule.
- For weeks 1-12 (2 visits per week), the reward amounts start at \$14 and will increase by \$2 after the first consecutive negative UDT, and then \$2 after each two consecutive negative UDTs. The rewards will “reset” to \$14 after a positive UDT or unexcused absence. The reward will “recover” to the previous level after 2 consecutive negative UDTs.

### How are rewards delivered?

- Rewards are offered as vendor-specific gift cards.
- Rewards can also be “banked” to aggregate earnings to larger amounts.
- Rewards can be delivered via text, email, or printed out in the office..
- If shared via text or email, the reward can be added to an Apple or Google wallet.

### What are the limitations on rewards?

- As of pilot kick-off, the member is limited to \$599 of total earnings (the reward schedule is oriented to this maximum).
- Gift cards are only available for vendors who restrict purchase of alcohol, tobacco, cannabis, lottery tickets, and other gambling services.
- Wal-Mart additionally restricts the purchase firearms or ammunition.



# Reward Calculator

## CM Coordinator

- Navigate to the “Member pane”
- Follow instructions for inputting appropriate result (i.e., UDT result or absence)
- The system will automatically **calculate the correct incentive award** in advance of UDT input
- If the UDT input is negative, the reward will be immediately available for dispense (see next page)
- Rewards will be calculated for that particular visit given that week’s unique methodology



**SIMS**  
State Incentive Management System

Dashboard  
Members  
Reports  
Help & support

Search... REGISTER MEMBER William Swift Provider

MEMBERS LIST > STEPHANIE LANE

**Stephanie Lane** RECONFIRM ELIGIBILITY

**Information** SL

DPHHS CM PROGRAM / DPHHS: NORTHCARE NETWORK / PROVIDER SITE: PATHWAYS CMH  
PROGRAM DURATION: 12/27/24 - MOBILE APP STATUS: SENT  
CM start date: 12/27/2024 Date of birth: 08/12/1987  
CM end date: - Incentives earned: \$164.00  
ID number: 0886820 Incentives received: \$142.00  
Email: stephlane@email.com 2025 incentives: \$154.00 of \$596.00  
Phone: +1 555 555 5555 Status: Active

Bank balance \$22.00 REDEEM BALANCE

UDT RESULTS CAPTURE INCENTIVE HISTORY STATISTICS Enrollment period: Montana - 12/27/2024

**UDT Visits**  
CURRENT VISIT 13

**Current week**  
SUNDAY FEBRUARY 2ND 2025 - SATURDAY FEBRUARY 8TH 2025

Sunday Feb. 2nd	<b>Monday Feb. 3rd</b> ENTER RESULT UDT Neg = \$22.00	Tuesday Feb. 4th	Wednesday Feb. 5th	Thursday Feb. 6th	Friday Feb. 7th	Saturday Feb. 8th
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List view WEEKS 1-12

SIMS © 2025



# Enter UDT Results

## CM Coordinator

Once you are on the Member Pane:

- Identify the next available session
  - This will be the “Enter UDT result” button which is not gray
  - Other session buttons will not work when clicked on as they are locked
- Click the “Enter Result” button **(note: the text will change to the selected result)**
- **From the dropdown list, select the relevant option\*:**
  - **If the UDT was negative** for stimulants, select “UDT – Stimulant Negative (\$)”
  - **If the UDT was positive** for stimulants, select “UDT – Stimulant Positive”
- The system will automatically calculate the correct incentive reward



**Note:** UDT results can only be input at least 48 hours after the previous input. This will be limited in the system.

\* Please provide appropriate praise for stimulant-negative UDT and encouragement in the case of stimulant-positive UDT as directed by DPHHS

The screenshot displays the SIMS interface for a CM Coordinator. The main panel shows the member profile for Stephanie Lane, including contact information and program details. A modal window titled "Add UDT Results" is open, allowing the user to select a result type from a dropdown menu. The selected result type is "UDT - Stimulant Negative (\$)", which has automatically calculated an incentive reward of \$22.00. The interface also shows a calendar view for the current week (February 2nd to 8th, 2025) with the "ENTER RESULT" button highlighted in blue. The background shows the member's information and a "REGISTER MEMBER" button.



# Confirm Selection

## CM Coordinator

- Before submitting either a Stimulant Negative or Stimulant positive result, you will be asked to confirm which of the 7 DPHHS Approved UDT Cups was used
- The IM Portal will default to your sites standard UDT Cup on file
- If you are using a different one, you may select the correct one from the drop-down menu
- You will be prompted to confirm the Member's Date of Birth
- Ask the Member for their Date of Birth, and enter it in.
- Select the 'Radio Button' to confirm the information is correct
- If you are certain of your input, please select "yes" when prompted
- If not, select "no" and re-input your selection



The screenshot displays the SIMS interface for a CM Coordinator. On the left is a dark purple sidebar with the SIMS logo and navigation options: Dashboard, Members, Reports, and Help & support. The main content area shows the profile for member Stephanie Lane, including her information, UDT visits, and a calendar for the current week (Sunday, Feb. 2nd to Saturday, Feb. 8th). A modal window titled 'Add UDT Results' is open, allowing the user to enter details for 'WEEK 7 VISIT #13'. The modal contains a date picker for the visit date (02/03/2025), a dropdown for the result (UDT - Negative), and a dropdown for the 'OU UDT Cup' (CLIAWaived, INC (12 Panel IDTC Cups...)). Below these are several options for different UDT cups, such as 'CLIAWaived, INC' and 'Lochness Medical'. The background interface includes a search bar, a 'REGISTER MEMBER' button, and the user's name 'William Swift' as the provider.



# Analytes Selection

## CM Coordinator

- Only 'Stimulant Negative' UDTs award incentives
- You will be asked to confirm if the Member tested positive for any additional substances
- If 'no' you may submit the entry and proceed
- If 'yes' you will be asked to select which additional substances the Member tested positive for
- The specific substances will automatically display based on the specific DPHHS approved UDT cup you are using



The screenshot displays the SIMS (State Incentive Management System) interface. On the left is a navigation sidebar with options: Dashboard, Members, Reports, and Help & support. The main content area shows the profile for member Stephanie Lane, including program duration (12/27/24 - 12/27/24), start date, and contact information. A modal window titled 'Add UDT Results' is open, asking for confirmation of positive results for substances other than stimulants. The 'Yes' option is selected. Below this, a list of substances is provided with checkboxes: BAR (Barbiturates), BZO (Benzodiazepines), BUP (Buprenorphine), THC (Cannabis), MDMA (Ecstasy), FET (Fentanyl), KET (Ketamine), MTD (Methadone), EDDP (Methadone Metabolite), MDMP (Bath Salts) [checked], OPI/MOR (Opiates), OXY (Oxycodone), PCP (Phencyclidine), PPX (Propoxyphene), TRA (Tramadol), TRM (Tramadol Metabolite), and TCA (Antidepressants). At the bottom of the modal are 'CANCEL' and 'CONTINUE' buttons. The background interface includes a search bar, a 'REGISTER MEMBER' button, a user profile for William Swift, and a 'REDEEM BALANCE' section showing a balance of \$22.00.



# Invalid Sample

## CM Coordinator

- A UDT sample may be invalid for one or more of the following reasons;
  - Temperature not within range
  - pH
  - Specific Gravity
  - Creatinine
  - Other (Please explain – free text)
- Invalid UDTs will be considered “Stimulant Positive” UDTs and should be documented with any associated reason



The screenshot shows the SIMS interface with a modal window titled "Add UDT Results" for member Stephanie Lane. The modal is for "Week 2 VISIT #4" and is marked as "Invalid Sample". The form contains the following fields:

- Visit date: 01/19/2026
- Result\*: UDT - Positive
- Cup\*: 14 Panel Bio-Cup with Fentanyl
- Invalid Reasons: Temperature (selected)

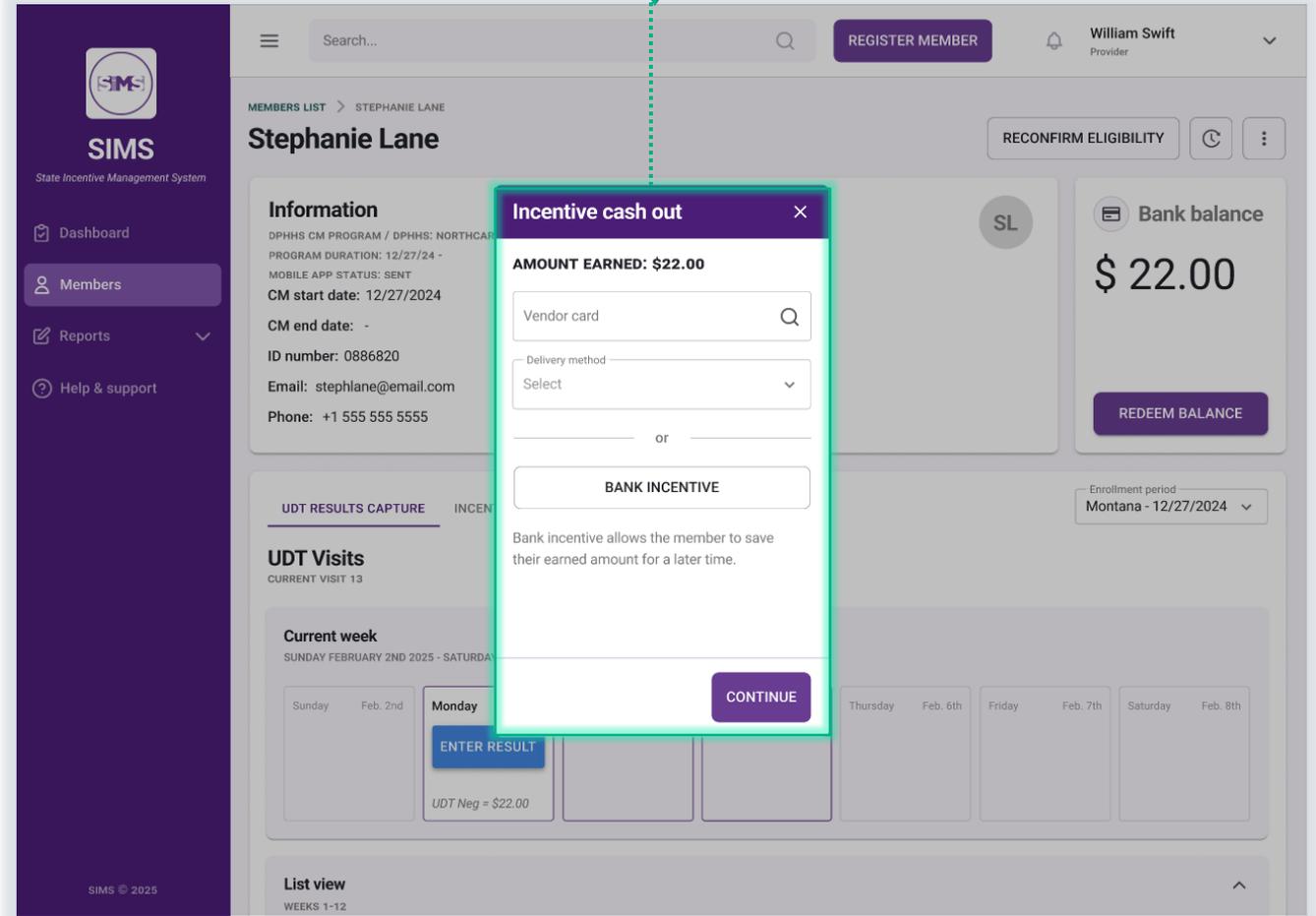
At the bottom of the modal, there are "CANCEL" and "CONTINUE" buttons. The background interface shows member information, a dashboard with "Members" selected, and a bank balance of \$22.00.



# Reward Type Selection

## CM Coordinator

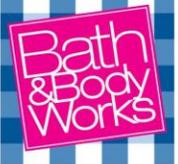
- Only once a Stimulant Negative UDT is input, the system will offer the **reward type selection**.
- CM coordinators will work with the Member to select the preferred vendor.
- There are 2 options:
  1. **Gift card for a specific vendor**  
(see next page for list of vendors)
  2. **Adding funds to a “bank”**
- Simply click the preferred option and proceed to **“delivery type”** selection





# Gift Card Vendors

CM Coordinator

Department/ Entertainment	Food Drink	Clothing	Tools / General
  * **    	        	          	          ***  

Please remember this gift card cannot be used to purchase alcohol, tobacco, cannabis, and/or lottery tickets or other gambling services.

\*Wal-Mart additionally restricts the purchase of firearms or ammunition.

\*\*Wal-Mart gift card allows for the purchase of gasoline at participating locations.

\*\*\* Conoco Phillips gift cards can be printed but can only be redeemed digitally through the free Chevron/Texaco app called "Fuel Forward" at the pump and not in store at participating locations.





# Rewards Bank

CM Coordinator

Rewards are also able to be “banked” or saved:

- If the member chooses not to redeem the reward immediately, they can save earnings in the rewards bank
- To select “banking” as an option, **click the “X” on the vendor selection**
- Once the rewards are banked, they can be converted into gift cards at any time **by selecting the rewards bank.**
- This will return you to the vendor selection screen (previous page).



**Incentive cash out** ✕

**AMOUNT EARNED: \$22.00**

Vendor card

Delivery method

or

**BANK INCENTIVE**

Bank incentive allows the member to save their earned amount for a later time.

**CONTINUE**

---

REGISTER MEMBER William Swift Provider

RECONFIRM ELIGIBILITY

SL **Bank balance \$22.00**

**REDEEM BALANCE**

NETWORK / PROVIDER SITE: PATHWAYS CMH

Date of birth: 08/12/1987  
 Incentives earned: \$164.00  
 Incentives received: \$142.00  
 2025 incentives: \$154.00 of \$596.00  
 Status: Active

Enrollment period: Montana - 12/27/2024

FEBRUARY 8TH 2025

ENTER RESULT   
 UDT Neg = \$22.00

List view WEEKS 1-12



# Reward Delivery Type Selection

## CM Coordinator

- Once a reward type is selected, the system will offer the **delivery type option**.
- For vendor-specific gift cards, the Member can select text, email, or printed in person.
- For “banking” of rewards, this screen will not show up.
- For texts, Members will be required to input their phone number.
- For emails, Members will be required to input their email address.
- Text and email gift cards can be added to Apple or Google wallets.

The screenshot shows the SIMS (State Incentive Management System) interface. On the left is a dark purple sidebar with the SIMS logo and navigation options: Dashboard, Members, Reports, and Help & support. The main content area shows the profile for Stephanie Lane, including her information (start/end dates, ID number, email, phone), UDT Results Capture, and UDT Visits. A modal titled 'Incentive cash out' is open, displaying 'AMOUNT EARNED: \$22.00'. The modal has three sections: 'Vendor card' with a search bar showing 'Walmart (ATF Restricted)', 'Delivery method' with a dropdown menu showing 'Text (SMS)', and 'Bank balance' showing '\$ 22.00'. Below these is a 'REDEEM BALANCE' button. At the bottom of the modal is a 'CONTINUE' button. A green arrow points from the top of the page down to the modal.

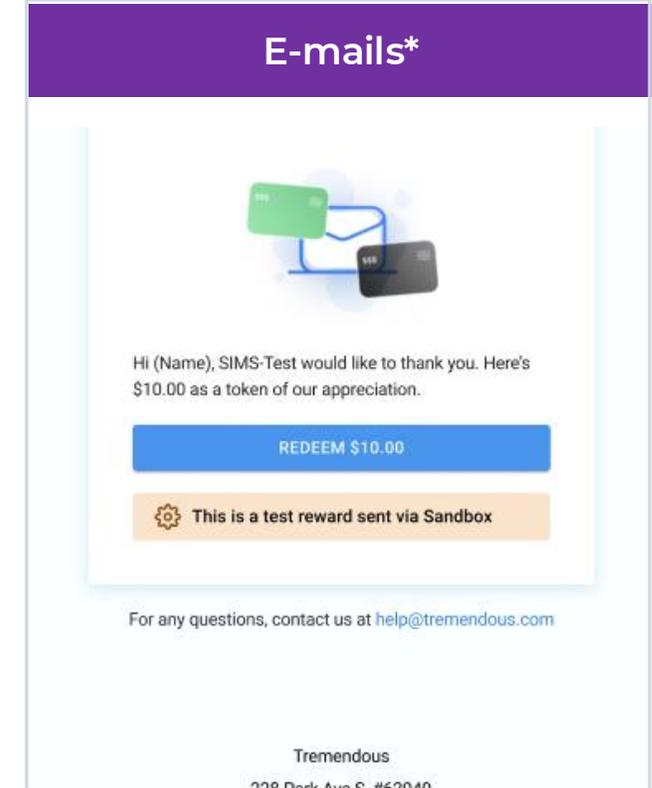
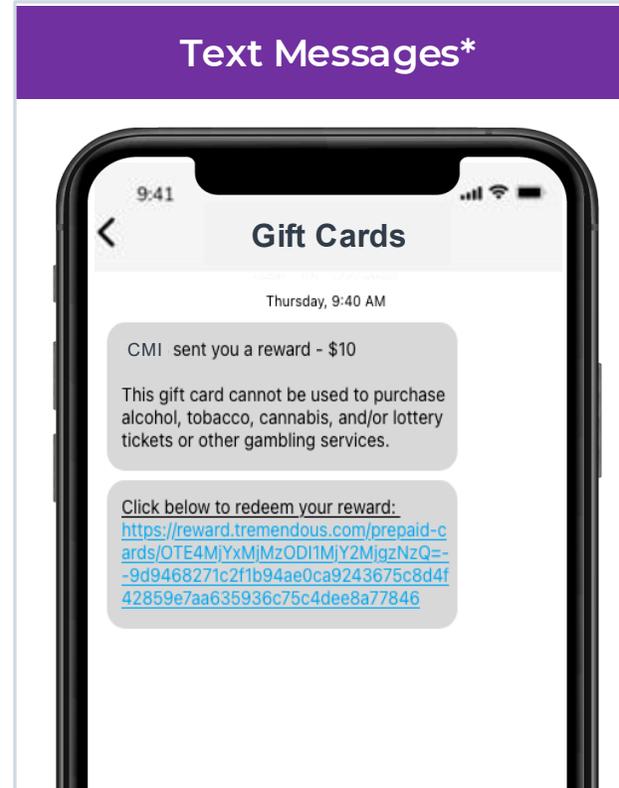


# E-mailing or texting Rewards

CM Coordinator

**Gift Cards will be delivered by the same address each time:**

- The text message will come from same number each time
- The email will come from CMI via Tremendous (rewards@tremendous.com)
- We recommend having the member save this contact (as shown at right)
- The member can use the code in the email or add to their Apple or Google Wallet



\* Deleted messages cannot be regenerated. Please do not delete rewards texts or emails.



# Printing Rewards

CM Coordinator

Rewards are available for printing in the office immediately after the rewards are earned:

- Much of the effort here will be focused on linking a printer to the computer.
- Once “Print Now” is selected, the print screen will come up as shown at right.
- Please note that printed cards CANNOT be re-printed within the system. Once these are generated, the member must keep track of these rewards.
- It is highly recommended that all members provide an email address, as they’ll receive a copy of any printed card they earn

The screenshot shows the SIMS interface for a CM Coordinator. The left sidebar contains navigation options: Dashboard, Members, Reports, and Help & support. The main content area displays the profile for Stephanie Lane, including her information, UDT Results Capture, and UDT Visits. A modal titled 'Incentive cash out' is open, showing a Walmart (ATF restricted) reward of \$22.00. The modal includes a confirmation checkbox and a 'CASH OUT' button. A green arrow points to the 'CASH OUT' button.

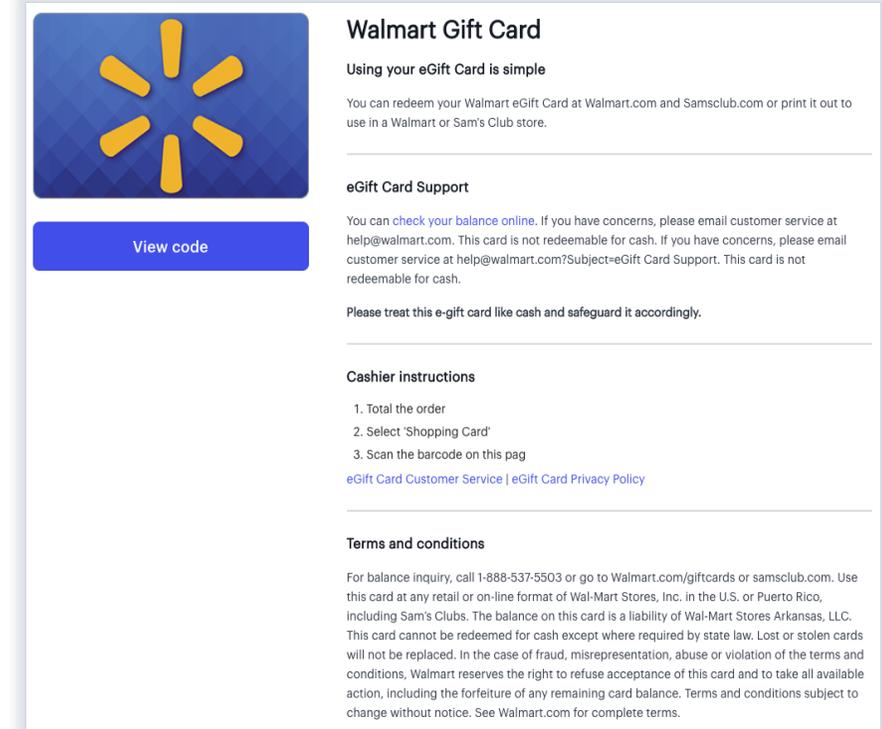
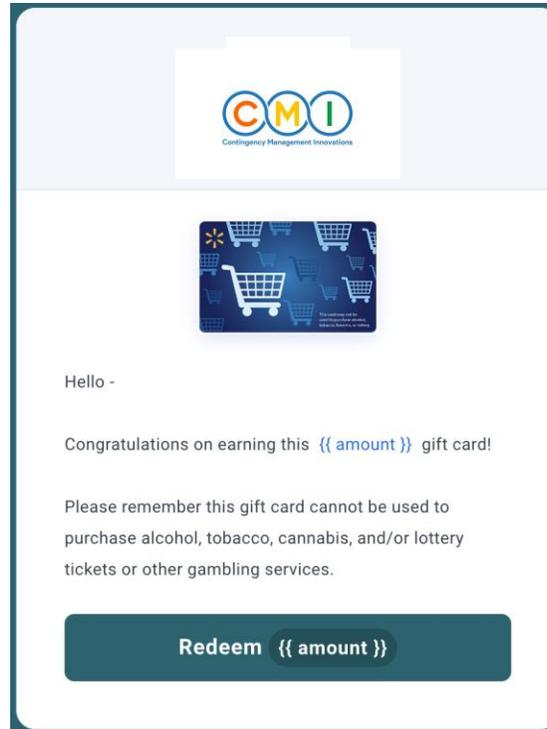


# Printing Rewards (Contd.)

CM Coordinator

The portal will route you to a new tab in your browser:

- You will click the “redeem” button on the screen
- Then you will click “view code” on the subsequent screen
- After you’ll click “Open redemption page” to access the full printable version
- You will then be able to print the following screen for use



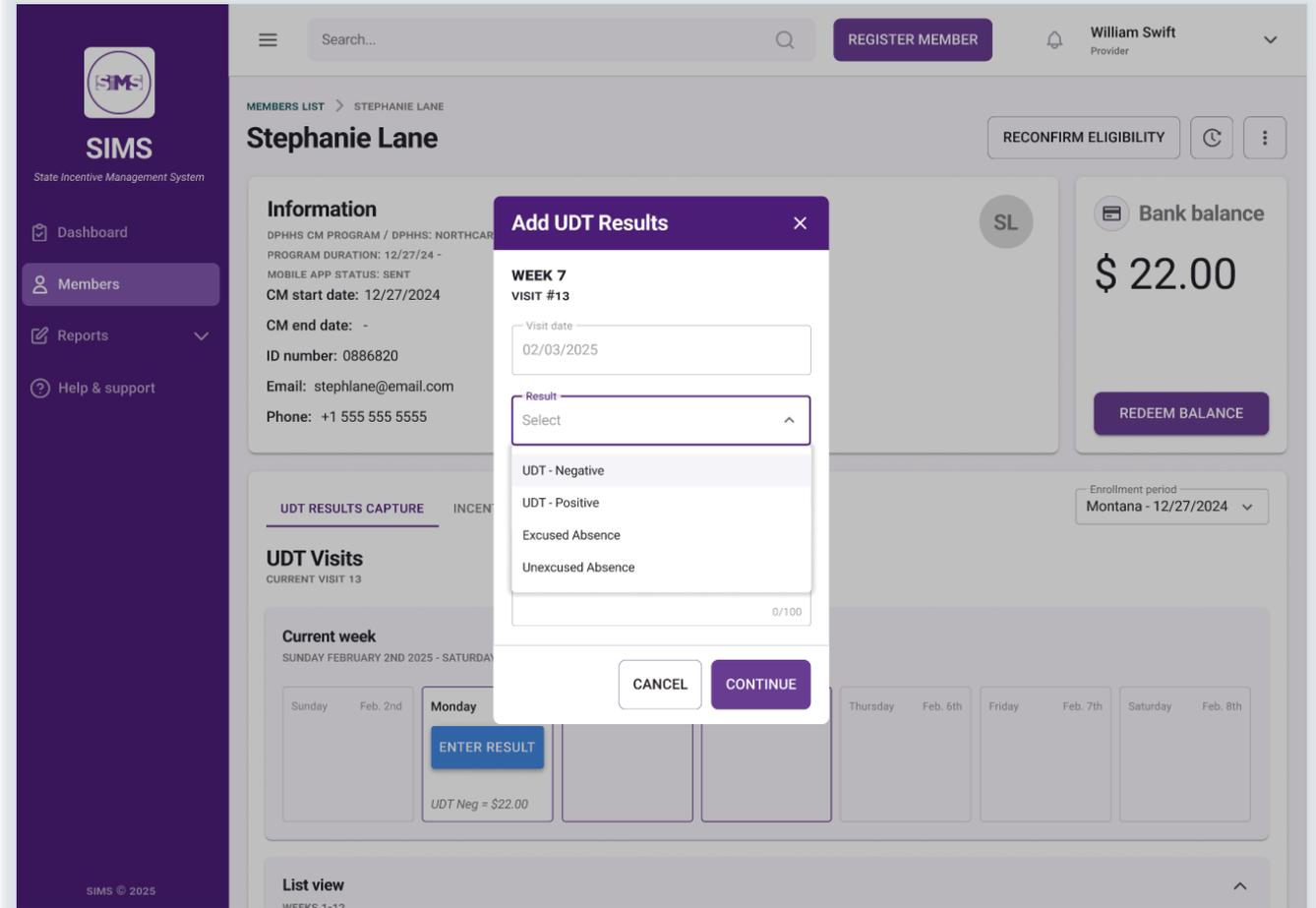


# Managing Absences

## CM Coordinator

In addition to logging a UDT result, you can also log absences:

- Excused absences do not trigger a “reset” while unexcused absences do.
- Excused absences can only be logged if:
  - A member informs you in advance
  - There is a valid reason for the absences
  - The member presents valid documentation supporting the absence
  - They have missed MAXIMUM 2 sessions in a row
- Selections are made in the same way as UDT results (click submit button)





# Submitting Excused Absences

CM Coordinator

- In addition to confirming submission of the “excused absence”, **you will be asked to input a note.**
- This note should capture the reasoning behind the excused absence.
- **Note:** In the subsequent visit, you will be asked to confirm that documentation was provided to support this reasoning.
- **Note:** You must track this information in your EHR as well.





# Confirming Excused Absences

CM Coordinator

In the subsequent visit, you will be asked to confirm your input:

- If the member provides adequate documentation supporting their excused absence, please confirm.
- You will **confirm by clicking “excused”**.
- If the member does not provide documentation, you must reverse the excused absence.
- You will **change entry by clicking “unexcused”**.
- **Note:** Unexcused absences trigger a “reset”.
- **Note:** Only 2 excused absences are allowed in a row before a 3<sup>rd</sup> incurs a reset.



**Lane**

CONFIRM EXCUSED ABSENCE

WEEK 5  
VISIT #18  
Date: 06/13/2024

Please add the confirmation of the previous excused absence.

Notes

0/100

If you select "Unexcused Absence" the prior result will be changed to "Unexcused Absence"

Change to Unexcused Absence

CANCEL SUBMIT



# Missed Entries and Corrections

## Missed Entries:

- **Weeks 1-12**

- CM coordinators must make 2 entries per week per member (i.e., you must log unexcused absences on the day the absence occurred).
- If you do not do this, the system will automatically create an absence entry (for M-W or W-S visits).
- Upon subsequent visit, the system will prompt you with the same screen as confirming the absence type (i.e., select excused or unexcused absence).
- If no entries are made in a week, they will be assumed as unexcused absences.

## Incorrect Entries:

- **Input positive UDT when intended to do negative UDT**

- Call the call center
- Keep member in the office
- This change will (ideally) be made within minutes
- Worst case, this will be made within 24-48 hours, and the reward will be placed in the rewards bank

- **Input negative UDT when intended to do positive UDT**

- Do not generate a gift card
- Call the call center
- This change will (ideally) be made within minutes
- Worst case, this change will be made within 24-48 hours, and the reward will be placed in the rewards bank

- **Input wrong type of absence**

- Correct upon subsequent visit as shown on previous page



# Rewards History

CM Coordinator

Rewards history can be seen in two ways:

## 1. As a comprehensive list of every reward earned:

- Date
- Delivery type
- Vendor
- Amount

## 2. As a summary of results earned in total:

- Total earnings
- Percentages of sessions with negative UDT



The screenshot shows the SIMS interface for a member named William Swift. The top navigation bar includes a search bar, a 'REGISTER MEMBER' button, and the user's name 'William Swift' with a dropdown arrow. Below the navigation bar, there is a summary section for the member: ID number: 0886820, Email: stephane@email.com, Phone: +1 555 555 5555, Incentives received: \$142.00, 2025 incentives: \$154.00 of \$596.00, and Status: Active. A 'REDEEM BALANCE' button is also present.

The main content area displays the 'INCENTIVE HISTORY' tab, which shows a table of transactions. The table has columns for Timestamp, Transaction, Value, and Provider. The enrollment period is set to 'Montana - 12/27/2024'. The table contains 13 rows of data, including transactions for 'Bank redeem', 'Earned & banked', 'Visit cashed out', and 'Reverse'.

Timestamp ↓	Transaction ↓	Value ↓	Provider ↓
01/04/2025 09:01h	Bank redeem	-\$37.50	William Swift
01/03/2025 09:01h	Earned & banked	+\$13.00	William Swift
01/02/2025 10:01h	Earned & banked	+\$11.50	William Swift
01/02/2025 09:02h	Visit cashed out ⓘ GIFT CARD LINK	-\$10.00	William Swift
01/02/2025 09:01h	Earned	+\$10.00	William Swift
12/20/2024 09:01h	Earned & banked	+\$10.00	William Swift
12/18/2025 09:01h	Full redeem	-\$23.50	William Swift
12/09/2025 09:01h	Visit cashed out ⓘ	-\$10.00	William Swift
12/04/2025 09:01h	Earned	+\$10.00	Jane Doe
12/01/2025 09:01h	Reverse	+\$10.00	William Swift

At the bottom of the table, there is a pagination control showing 'Rows per page: 10' and '1-5 of 13'.



# Appropriate Disclaimer(s)

## CM Coordinator

- Incentive rewards cannot be used for the following uses:
  - Alcohol
  - Tobacco
  - Gambling
  - Cannabis
- Vendor-specific gift cards are either for vendors who do not offer these items OR have inherent restrictions
- Incentive rewards cannot be re-distributed once already delivered
- “Please remember this gift card cannot be used to purchase alcohol, tobacco, cannabis, and/or lottery tickets or other gambling services.”
- Wal-Mart additionally restricts the purchase firearms or ammunition.



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# Analytics and Reports



# Dashboard Analytics

CM Coordinator

Site Dashboards will contain aggregate CM Program information for your site:

- Filterable Information included will be;
  - Incentives Earned & Awarded
  - CM Visit/ UDT Results
  - Evens & Alters
  - Member caseload by status



**SIMS**  
State Incentive Management System

Dashboard

Benificiaries

Reports

Help & support

Search...

REGISTER BENEFICIARY

William Swift  
Provider

Hello, William Swift!  
Pathways CMH  
Here is what is going on today.

SHOW ALL FILTERS

Program: All

**Overview**

Total UDTs (Neg + Pos) <b>782</b> ▲ 11% in the past 30 days	Total incentives earned <b>\$11,789.50</b>	Total incentives received <b>\$10,433.50</b> ▲ 5% in the past 30 days	Current incentives banked <b>\$1,356</b> ▲ 11% in the past 30 days
---	---	---	--

**Events & alerts**

- You have not captured the past 3 CM visits of **Jill Doe**.  
02/13/2024 14:31 [CHECK]
- You have to reaffirm the Eligibility of **Stephanie Lane**.  
02/12/2024 14:31 [CHECK]
- Beneficiary **John Doe** has been enrolled into the Pilot program.  
02/11/2024 14:31
- Beneficiary **Jane Doe** has been disenrolled from the Pilot program.  
02/10/2024 14:31
- Jim Doe** has completed the program.  
02/10/2024 11:31

DISMISS ALL

Avg length of treatment  
**11 weeks**  
▲ 12% in the past 30 days

Avg % of available incentives  
**75%** (banked/earned)  
▲ 11% in the past 30 days

Total Beneficiaries  
**37**

Active	34
Completed	2
Dis-Enrolled	1

**CM visits information**

Total CM visits <b>810 visits</b> ▲ 14% in the past 30 days	Negative UDT results <b>672 tests/83%</b> ▲ 11% in the past 30 days	Positive UDT results <b>110 tests/14%</b> ▲ 12% in the past 30 days
UDT Negative by percentage Neg / All UDTs <b>697 tests</b> ▲ 14% in the past 30 days	Neg (All UDTs + Un. Abs) <b>794 test</b> ▲ 6% in the past 30 days	Excused CM visits <b>16 visits/2%</b> ▲ 14% in the past 30 days
		Unexcused CM visits <b>12 visits/1%</b> ▲ 11% in the past 30 days

SIMS © 2024



# Reports Pane

CM Coordinator

Reports will be compiled automatically by the system:

- Reports are always available, either a provider level or member level
- Reports are available at all levels available for your role (see access rights) – you can select **via dropdown**
- Reports can be selected for or providers, or member caseloads – and at the aggregated levels
- Run report, and click “Download Excel” or “Download PDF” to generate

**SIMS**  
State Incentive Management System

Dashboard  
Members  
**Reports**  
Provider report  
Member's report  
Help & support

SEARCH... REGISTER MEMBER William Swift Provider

**Provider report**

DOWNLOAD EXCEL DOWNLOAD PDF

Program: Program 1 OU: Pathways CMH Provider: Provider Date of service from: Select

Date of service to: Select RUN REPORT

Provider name	NPI	Role	Start date	PIHP	Provider site	# of benef.	# of visits	Total Neg	Total Pos	Total Exc.	Total Unex.	Missed entries	Incentives generated	Incentives disbursed
William Swift	939203456A	Provider	03/15/23	Northcare Network	Pathways CMH	22	143	104	22	3	17	3	\$1,231.00	\$1,012.00
John Smith	281038272B	CM coordinator	12/01/23	Northcare Network	Pathways CMH	23	145	105	23	4	18	3	\$1,235.00	\$1,015.00
Jane Wilson	944980293C	CM supervisor	06/01/23	Northcare Network	Gogebic CMH	1	2	2	0	0	0	0	\$98.00	-
Jane Wilson	962402593F	CM supervisor	11/01/23	Northcare Network	Pathways CMH	2	4	3	1	0	0	0	\$98.00	\$370.50
Jane Doe	492839289Q	Provider	05/01/23	Northcare Network	Pathways CMH	2	5	2	1	0	0	0	\$380.00	\$370.50

Rows per page: 10 1-5 of 5

SIMS © 2025



# Reports Pane

## CM Coordinator

- Once a specific report is selected, it will be downloaded as a .pdf to your local machine.
- Once these reports are **downloaded** you can open the .pdf file to view the contents



**SIMS**  
State Incentive Management System

Dashboard  
Members  
**Reports**  
Provider report  
Member's report  
Help & support

Member report

Number of Members 930

DOWNLOAD EXCEL DOWNLOAD PDF

Program: Program 1, Pathways CMH, Provider: William Swift

Name	CIN	Site	Provider	Provider NPI	Enrollment period	Status	Total Neg.	Total Pos.	Abs.	Inc. earned	Inc. received	Bank balance
<a href="#">Stephanie Lane</a>	0886820	Pathways CMH	W. Swift	000223634F	06/28/23	Active	15	3	-	\$200.00	\$162.50	\$37.50
<a href="#">Anna Delvey</a>	1234569	Pathways CMH	W. Swift	000223296G	06/28/23	Active	19	3	1	\$59.00	\$30.00	\$29.00
<a href="#">Sean Pitt</a>	8635679	Pathways CMH	W. Swift	000223623H	06/28/23	Active	27	5	2	\$79.00	\$69.00	\$10.00
<a href="#">Taylor Gomez</a>	7384909	Pathways CMH	W. Swift	000223611S	05/30/23	Active	25	1	2	\$16.00	\$16.00	\$0.00
<a href="#">Seq Ramirez</a>	6781922	Pathways CMH	W. Swift	000223609T	07/24/23	Active	10	4	3	\$42.00	\$16.00	\$26.00
<a href="#">Stephanie Yong</a>	0869212	Pathways CMH	W. Swift	000223686D	09/14/23	Active	13	2	1	\$83.00	\$13.00	\$70.00
<a href="#">Sam Veritas</a>	4738291	Gogebic CMH	W. Swift	000223126R	03/24/23 - 11/30/23	D.Enro	8	2	1	\$156.00	\$133.00	\$23.00
<a href="#">Sam Veritas</a>	4738291	Pathways CMH	W. Swift	000223698F	12/01/23	Active	3	-	-	\$35.00	\$30.00	\$5.00
<a href="#">Saurabh Sahar</a>	0938432	Pathways CMH	W. Swift	000223609W	02/30/23	Active	6	2	-	\$55.00	\$5.00	\$50.00



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# Help Center and Support



# Locating the Portal Help Center

- From any pane you can find the **help button**
- The button is in the same spot for each portal view



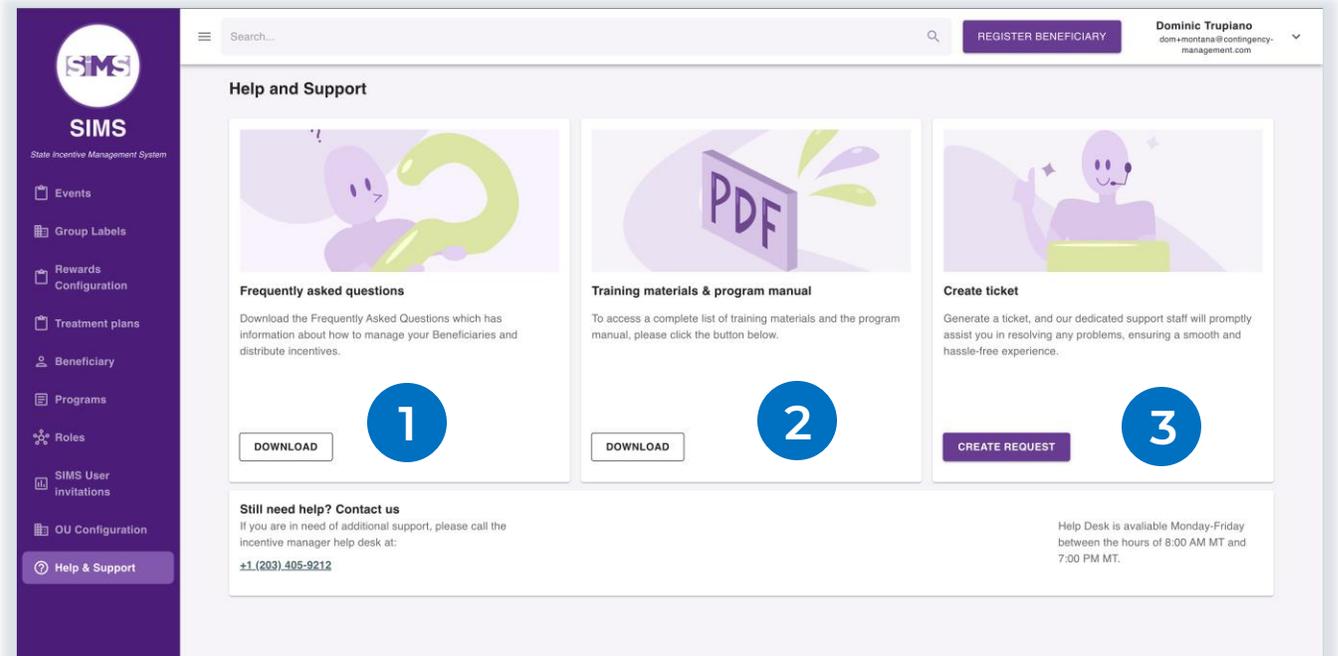
The screenshot shows the SIMS (State Incentive Management System) portal interface. On the left is a dark purple navigation sidebar with the SIMS logo and menu items: Dashboard, Members, Reports, and Help & support. The 'Help & support' item is highlighted with a green box and a blue arrow. The main content area is light purple and features a search bar, a 'REGISTER MEMBER' button, and a user profile for William Swift. Below this is a 'Hello, William Swift!' greeting and a 'SHOW ALL FILTERS' button. The 'Overview' section contains four cards: Total UDTs (782), Total incentives earned (\$11,789.50), Total incentives received (\$10,433.50), and Current incentives banked (\$1,356). The 'Events & alerts' section lists several notifications with 'CHECK' buttons. The 'CM visits information' section at the bottom shows Total CM visits (810), Negative UDT results (672 tests), and Positive UDT results (110 tests).



# Overview of the Portal Help Center

There are 3 types of support available in the portal:

- 1 Frequently Asked Questions Documents (.pdf)
- 2 Training Materials (UCLA site)
- 3 Help Desk available by phone or email for technical/ system questions & support





# CMI Call Center

Call Center

**DPHHS Program Call Center**  
+1 (203) 405-9212