

The basic outline contained in this document represents the training material that will be covered over 6 consecutive sessions. You may attend each free session as many times as you like; however, you must register for each individual training day.

You will notice next to some of the items contained in the outline a page number, or page numbers. The page numbers correspond to pages in the *User Guide for CBISA Online™ System Administrators and Coordinators*. You may download a copy of the *User Guide* from our [website](#) for additional information regarding the topics covered in the training sessions.

For **Session VI: The Role of the Facility Reporter**, the page numbers correspond to the pages in the *User Guide for CBISA Online™ Reporters* (also on our [website](#))

Trainings begin promptly at the time listed for each session. Please sign in to the training site per the instructions provided at least 10 minutes prior to the start time. Call in to the teleconference number about 5 minutes prior to the start time. You should plan for each session to last approximately 60 minutes.

For questions regarding training sessions, email [Brittany Younts](#), Training Coordinator.

For all other questions, contact our support team at 419-885-4593 or via [email](#).

I. Session I: Basic Training

- A. Workstation Setup (P6)
- B. Navigating CBISA Online™ (P8)
- C. Accessing Organizational Defaults (P9, 16)
 - 1. Editing a Facility
 - 2. Setting the Active Fiscal Year
- D. Role Based Access (P11-15)
 - 1. Ten User Permission Levels
 - 2. Adding a New User
- E. Accessing Edit Defaults (P17-24)
 - 1. The Importance of the Department Rate Table
 - 2. Quick Overview of Remaining Default Tabs
- F. Basics of Reporting (P37-39)

II. Session II: Capturing Program Data

- A. Programs (P29)
 - 1. General Screen
 - 2. Objectives
 - 3. Additional Program screens
- B. Occurrences (P30)
 - 1. Inputs
 - 2. Outputs
 - 3. Expense Detail
 - 4. Offsetting Revenue (show also B & C)
- C. Important Reports

III.	Session III: The Role of Finance	(Appendix C)
A.	Additional Financial Defaults	(P16, 25-26)
	1. Facility Financial Defaults	
	2. Adding new Group Rates	
B.	IRS 990 Schedule H	
C.	Financial Services	(P58-59)
D.	Important Reports	
IV.	Session IV: Tell Your Story and Additional Functionality	
A.	Narratives	(P 31)
B.	Outcomes	(P 31)
C.	Copying/Moving Records	(P 37)
D.	Marking Records as Inactive	(P 37)
E.	Locking & Closing a Fiscal Year	(P60-63)
F.	Filters and Pending Data	(P35-36, App. B)
G.	CBISA Customization	(P24-25)
H.	Important Reports	

V. Session V: Partnerships, Needs, and the Relationship Manager

- A. Partnerships
- B. Linking Records together with the Relationship Manager
- C. CBISA Plus™: A New CBISA Product
- D. Adding Needs Records
- E. Important Reports

VI. Session VI: The Role of the Reporter

- A. Updating Your Password (P7)
- B. Adding Programs (P9-10)
- C. Adding Occurrences (P11-15)
- D. Adding Narratives (P16-18)