InfoServ DD^{SM}

Quick Start Guide For Independent Support Coordinators

INDIVIDUALS | FINANCIAL | EMPLOYEES | MAINTENANCE

Data Entry Instructions for Entering an Individual's Demographics

1. First, check to see if the individual is in the system:

- Go to "Individuals"
- Either check the pull-down list or use the search to enter by last name and click on "Search / Select".

2. If the individual's record is not in the system, add the record via the following steps:

- Go to "Individuals" (if you're not there already)
- Click on "Add Individual" under the "Personal Info" menu heading on the left-hand side.

3. If the individual's record is already in the system, edit their demographics via the following steps:

- Go to "Individuals" (if you're not there already)
- Click on "Edit Demographics" under the "Personal Info" menu heading on the left-hand side.

4. Required Fields

The following fields are required.
First Name
Last Name
Social Security Number
Gender   *(Note that you may choose "N/A" if not known at the time of entry)*
Race   *(Note that you may choose "N/A" if not known at the time of entry)*
Birth Date is marked as required, but I believe it is not required anymore -- please check and update this document and report to Joe to take off "*" if not required.
Site   *(Note, if the sites appearing in the sites list are not from your organization and you're an ISC Agency, the sites are from the individual's residential services provider.)*
Eligibility   *(Note, if unknown, select "Mental Retardation")*
Marital Status
Eye Color   *(Note that you may choose "N/A" if not known at the time of entry)*
Hair Color   *(Note that you may choose "N/A" if not known at the time of entry)*
Legal Status   *(If not known, choose "Adult adjudicated incompetent")*
Class Member   *(If not known, choose "Non Class Member")*

Click on "Save" at the bottom of the screen to save the information, or "Reset" to reset it to the way it was prior to adding or editing.

Entering an Individual's Certification Date

- Go to "Individuals"
- Go to "Encounters / Events"

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- Click on "View Encounters" if you need to see if the information is already in the system (not necessary on a newly added individual).
- Click on "Add Encounter"
- The required fields have an asterisk beside them.
- If the individual does not have a physician listed, then move down the page to find and click on the "Adding a Physician for an Individual" link and then come back to this section and start over.
- Choose "Certification Date" as the encounter type.
- Fill in the certification date in the date area.
- The time is not important and may be left as-is.
- No other information is necessary to enter for a certification date.
- Click on "Submit"

Entering an Individual's Physical Date

- Enter just as you would a Certification Date, except changing the encounter type to Physical Date

Entering an Individual's Visit Date (PAE Date)

- Enter just as you would a Certification Date, except changing the encounter type to PAE Date (a.k.a. "Pre-Admission Evaluation Date")

Entering an Individual's Admit Date (Waiver Admit Date)

- Enter just as you would a Certification Date, except changing the encounter type to Admit Date (a.k.a. "Waiver Admit Date")

Entering an Individual's County

An individual's County is not entered directly -- it is ascertained from the individual's residential site.

Entering an Individual's MR Level

- Go to "Individuals"
- Select the correct individual.
- Go to "Health"
- Go to "Diagnoses"
- Click on "Add…"
- Select "MR Level" as the type
- Select the correct MR Level
- Save the record.

Entering an Individual's AB Level

- Follow the instructions for entering an individual's MR Level, except choosing the "AB Level" category.

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Entering an Individual's Disability

- Follow the instructions for entering an individual's MR Level, except choosing the "Dual-Diagnosis" category.

Linking (Adding) a Physician to an Individual's Record

- Go to "Individuals"
- Select the correct individual
- Go to "Contacts"
- Go to "Professionals"
- Go to "View Prof" to check to see if the physician is already linked
- If not, click on "Link Prof" and type in the physician's last name in the last name box and click on "OK"
- If the physician appears, click on his/her record to link to the selected individual.
- If no physician appears in the results, then the physician must be added into the system from Maintenance.
- To add the physician from Maintenance, click on the "Maintenance" menu choice.
- Go to "Professionals Mgmt"
- Go to "Add Prof" and add the physician's information and save it.

Deleting a Physician from an Individual's Record

- Go to "Individuals"
- Select the correct individual
- Go to "Contacts"
- Go to "Professionals"
- Go to "View Prof" to find the physician you wish to delete.
- Click on the "Delete Link" option to the right of the physician you wish to delete.

Linking (Adding) a Contact (Family member, friend, etc.) to an Individual's Record

- Go to "Individuals"
- Select the correct individual
- Go to "Contacts"
- Go to "Contacts"
- Go to "View Contacts" to check to see if the physician is already linked
- If not, click on "Link Contact" and type in the person's last name in the last name box and click on "OK"
- If the contact's name appears, click on his/her record to link to the selected individual.
- If the contact's name does not appear in the results, then the contact must be added into the system from Maintenance.
- To add the physician from Maintenance, click on the "Maintenance" menu choice.
- Go to "Contact Mgmt"
- Go to "Add Contact" and add the contact's information and save it.

Deleting a Contact from an Individual's Record

- Go to "Individuals"
- Select the correct individual

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- Go to "Contacts"
- Go to "Contacts"
- Go to "View Contacts" to find the contact person you wish to delete.
- Click on the "Delete Link" option to the right of the contact you wish to delete.

Other Client Information

- Discharge Date -- should be entered from "Movements / Transfers"
- Discharge Reason -- should be entered from "Movements / Transfers" on the comments section of the above "Discharge" date record.
- Diagnosis -- could be entered from "DSMIV" type if it exists under the Diagnosis menu under "Health" (like MR Level, AB Level).
- Region -- is already known from individual's agency
- Medicaid Number -- under Personal Demographics

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Service Plans

Overview

Service Plans are created for individuals in order to obtain State authorization to provide services to him/her. An individual's Service Plan is actually a set of service requests. The set is made up of different service records. An individual typically will have a residential service, a day service, a support coordination service, and a transportation service. Some individuals will have ancillary services or other miscellaneous services.

Typically, a service plan also contains documentation to support the services needed. **InfoServ DD℠** allows you attach or scan in this documentation to a specific service plan record, or to all service plan records in the service plan year. The service plan year begins on the individual's Individual Support Plan (ISP) effective Date. In order for the system to automatically attach the ISP to the service plan record to be emailed to the State, the annual ISP or ISP amendment must be entered in the system first.

"Provider agencies" provide the direct services such as residential, day, and transportation services while Independent Support Coordination or Case Management agencies provide a support coordination (administrative) service. Provider agencies see only the services they provide for the individual, while Independent Support Coordinator Agencies or government agencies see all the services for the individuals they serve.

Pre-requisites

1. Employees must be in the system (with correct email addresses).
2. Individuals must be loaded into the system.
3. Individuals should have ISCs assigned (assign caseloads).
4. State Services must be loaded for the current fiscal year (PHS).
5. Current agencies and agency sites must be loaded (PHS).
6. ISP effective dates and documents should be entered into the system.
   - Select an individual
   - Click on the ISP menu
   - Click on Add ISP
   - Click on Part B
   - Change the date to the ISP effective date (or amendment date if an amendment)
   - Click on Finish
   - Click on Upload to the right of the top ISP record listed
   - Click on Browse
   - Locate the ISP file – in My Documents

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- Click Open
- Click OK
- If this ISP was an Annual, then we're done for this one
- If this ISP was an Amendment, then we Edit and change the type to Amendment (click on link)
- Repeat steps above for next ISP
- When finished, validate that all plans are in the system by running the ISPs Due report under Maintenance, General Reports.
7. Employees should be trained on this service plan module.

"Viewing an Individual…" Mode

1. **Adding a Service Plan Record**
   - Choose the correct individual from the pull-down at the top of the screen.
   - Click on the "Add Service Plan" button at the bottom left of the screen.
   - Choose the ISP or ISP amendment to associate with this service plan record.
   - Choose the ISP type – 1) Initial, 2) Annual continuation, 3) Annual continuation with modifications, and 4) Amendment to current annual plan.
   - Choose the request type.
   - Enter the start date or estimated start date for the service plan record.
   - Click on the "Save and Continue" button.
   - Choose the service.
   - If the service needed is not shown, choose the "Unlisted" choice and then enter the requested rate (i.e. 10.00 – no dollar sign). If the service is shown, choose it and skip the requested rate.
   - Enter any notes you wish to communicate with the State in the "Notes to State" text box. This may include the "M-Code".
   - Enter the units requested.
   - Enter the end date or estimated end date.

2. **Renewing a Service Plan Record**
   - Choose the "Renew" link (under the "Options" heading) on the record from last year's plan that should be continued/renewed.
   - Choose the "Edit" link and change the start or end dates and other information as necessary.
   - Click on the "Save" button at the bottom of the screen.

3. **Editing a Service Plan Record**
   - Choose the "Edit" link (under the "Options" heading) on the record you wish to edit.
   - Change the information as needed.
   - Click on the "Save" button at the bottom of the screen.

4. **Attaching a document or spreadsheet to a Service Plan Record**
   - Choose the "Attach" link (under the "Options" heading) on the record you wish to attach a document or spreadsheet (or other file type) to.
   - Click on the "Browse" button and locate the file you wish to attach. (Usually this file is stored under the "My Documents" folder on your "C:" drive.
   - Click on "Open".
   - Click on "OK".

5. **Changing the Disposition from "Draft" to "In-House Review"**
   - Click on the "Draft" link under the Disposition heading on the record you wish to change.
   - Change the pull-down entry from "Draft" to "In-House Review".
   - Choose the "Change Disposition" button to save the change.

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"View All…" Mode

1. **Submitting a Service Plan Record**
   - Click on the "Submit" link next to the record you wish to submit.
   - The disposition is automatically changed to "Pending DMRS…".
   - The Service Plan Report is created in the body of the email.
   - The ISP or ISP amendment is automatically attached.
   - The attachment or scan to the Service Plan are attached to the email.
   - The email is sent to the submitter for verification (and can optionally be sent directly to the State).

2. **Printing a Service Plan Report**
   - Click on the "Print" link (under the "Options" heading) on the record you wish to print.
   - After the report appears, simply click on your browser's "Print" button.

3. **Deleting a Service Plan record**
   - You are only able to delete a service plan that has a draft or in-house review disposition.
   - Click on the "Del" link (under the "Options" heading) for the record you wish to delete.
   - Click on the "Yes" button if you really want to delete the record.

"New (unapproved) Format"

The unapproved format is just another way to present the service plan information.

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Reports of Specific Interest to ISC Agencies

Menu: MAINTENANCE, +General Reports

1. **Master Caseload Report**
   Filter by: Client name, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients

2. **Caseload Weighting**
   Filter by: Client name, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients

3. **Re-certifications**
   Filter by: Due by This Date, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients
   Sort by: Client name

4. **Physical Dates**
   Filter by: Due by This Date, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients

5. **ISP's Due**
   Filter by: Due by This Date, County, Site/Home

6. **ISP Dates**
   Filter by: Client name, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients

7. **Monthly Tracking**
   Filter by: Client name, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients

8. **Outcomes**
   Filter by: County, Site/Home, Fund Source

9. **Monthly Support Notes**
   Filter by: Client name, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients

10. **Support Notes Audit**
    Filter by: Client name, County, Site/Home, Support Coordinator, Lead Support Coordinator/Manager, Active or Inactive clients

Menu: EMPLOYEES, +General Reports

1. **Caseload**
   Filter by: Client name, Client SSN, Client Date of Birth, Birthday Month, County Work Site/Home, Department/Discipline, Position/Title

2. **Caseload Outcomes**
   Filter by: Outcome Type, by Employee

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Monthly Support Notes

InfoServ DD^{SM} captures Monthly Support Note types (face-to-face, general note, home visit, outcome note, provider visit and ISP info. Gathering), date of contact, month, year, units, the action taken, the purpose, the outcome of the visit, the next step, and the support coordinator entering the note, as well as the date and time the note was entered into the system.

There are two ways to enter or edit this information:

1. From the **INDIVIDUALS** module, select the client you wish to enter the note for, and then click on the plus sign to the left of the menu option **"ISC Mo. Support Note"**. Click on **"View Notes"** and find the note to edit or else then find the link "Add a Monthly Support Note" and click it to add a new one. Use the **"Monthly Tracking"** report under **MAINTENANCE** and **General Reports** to print the results of your notes for the month.

2. Or, from the **MAINTENANCE** module, click on the plus sign to the left of the menu **General Reports** and find the report called **"Monthly Tracking"** and click on it. Be sure to select a support coordinator from the list so that the report does not have to run for all coordinators. The report will give you a list of clients with their Monthly Support Note dates as well as other dates such as their last ISP Effective date. Click on the client's name (which should be a link) you wish to edit. This link will take you to a data entry screen that will allow you to update the Monthly Support Note dates. NOTE: When using this method of data entry, you will only be updating the Monthly Support Note dates. No other details will be captured. However, this information is the most valuable information involved and gives you a terrific way to insure that all notes have been done in time.

ISP Uploads

Prerequisites:
The "ISPs Due" report should be run to determine exactly what is out of date or not in the system. This should be done first so that Outcomes data entry will be easier and more accurate.
Run the ISP Dates report from Maintenance, General Reports to insure that inactive consumers are marked as such and therefore are not included.
Use the report to insure that you are only adding ISPs that need to be added.

> *Data entry personnel should:*
> *   Select an individual
> *   Click on the ISP menu
> *   Click on Add ISP
> *   Click on Part B
> *   Change the date to the ISP effective date (or amendment date if an amendment)
> *   Click on Finish
> *   Click on Upload to the right of the top ISP record listed

- Click on Browse
- Locate the ISP file – in My Documents
- Click Open
- Click OK
- If this ISP was an Annual, then we're done for this one
- If this ISP was an Amendment, then we Edit and change the type to Amendment (click on link)
- Repeat steps above for next ISP
- When finished, validate that all plans are in the system by running the ISPs Due report under Maintenance, General Reports.

Outcomes, Outcome Actions

After entering Outcomes and Outcome Actions, you may run a report, which can be saved to your computer and inserted into the client's ISP.

If you are copying outcome information from a pre-existing ISP:

Data entry personnel should:
- Start Microsoft Word
- Select an Individual
- Click on the ISP menu
- Click on View ISP
- Click on View Upload
- Search for Outcomes (Ctrl-F – to find)
- Copy Outcomes section by highlighting the text and using Ctrl-C
- Click on the Back button
- Click on the Outcomes menu
- Click on View Outcomes
- Go to Word and paste the Outcomes section with Ctrl-V
- Compare ISP Outcomes to Outcomes in InfoServ DD
- If any are missing, click on Add Outcome
- Copy (Ctrl-C) from Word document each Outcome Action and Paste onto InfoServ DD
- Make sure the Outcome date is correct
- Make sure you mark whether or not an Individual's Implementation Plan (IIP) is required
- If an IIP has been marked and you have the paper IIP, add the Implementation Plan to the system now. Otherwise, see below (#3).
- We need to determine if the Outcome is completed or has been discontinued and mark it as such (if known). Otherwise, we can come back to this step in another process.

- Repeat steps above
- When finished, validate that all Outcomes are in the system by running the Outcomes report under Maintenance, General Reports.

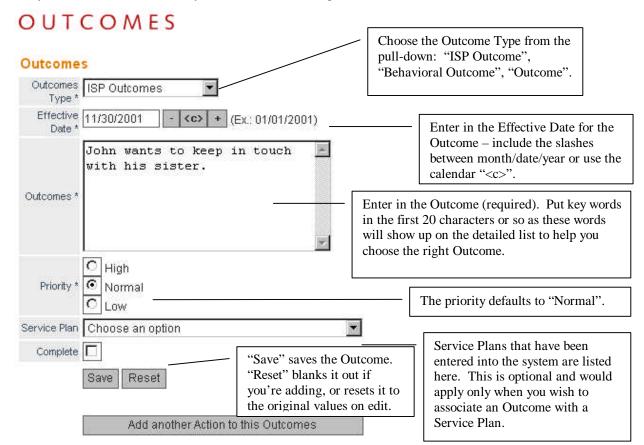Otherwise, enter Outcomes using the following method:

Outcomes are entered and maintained in the system in the Individuals section. From InfoServ DD, click on the plus sign to the left of "OUTCOMES" in the menu on the left-hand side. The "Current Outcomes" link gives you a list of Outcomes and their Actions, Status records, and Implementation Plans. You do not yet see the Progress Notes from this link. (See the example below.)

Current Outcomes

From the Current Outcomes screen, you may add a new Outcome, edit an existing Outcome, add or edit an Outcome Action or Status record or Implementation Plan. You may also add a Progress Note from this screen, but you'll need to choose the Implementation Plan to associate it with.

A user may have Add/Edit/Delete/Read-Only access (or any variation thereof) to Outcomes, Actions, and Status Records, along with a separate access level to Implementation Plans and Progress Notes. (See your System Administrator for details).

When you add or edit an Outcome, you will see the following screen.

Associated Actions

Start Date	Responsible Party			
11/30/2001	John Smith	Delete	Edit	View
11/30/2001	John Smith	Delete	Edit	View

Below the "Add another Action to this Outcome" button, you see any Associated Actions that have already been added to this Outcome. If you have the access rights to do so, you may "Delete", "Edit", or "View" any of the Actions listed by clicking the appropriate link to the right of the Action.

Action

Outcomes: 11/30/2001 - John wants to keep in touch with his sis

Action *:
```
Weekly Call Setup: Mr. Smith
will talk with John's sister
about the best time to
schedule a weekly call.
```

You can add or edit an Outcome Action from either the detailed list or from the Outcome screen (above).

Describe the Action here (required).

Priority *:
- ○ High
- ● Normal
- ○ Low

You may optionally prioritize this Action.

ResponsibleParty *: John Smith

List the Responsible Party or parties here.

Funding Source *: Self

If the funding source is known, choose it here. If not, either choose "Provider" or "Self" funded.

Funding Source Description:

Implementation: ☑ Check if one is needed with this action

Review Frequency: Daily

Start Date *: 11/30/2001 [-] [<c>] [+] (Ex.: 01/01/2001)

End Date *: 11/29/2002 [-] [<c>] [+] (Ex.: 01/01/2001)

[Save] [Reset]

Outcomes need Actions added to them. From the Outcome Add/Edit screen you would first "Save" the Outcome and then click "Add another Action…" to add your first Action or any additional Actions to the Outcome.

Associated Statuses

Status Date	Status	Employee			
11/30/2001	In Progress	John Smith	Delete	Edit	View

Any Status records added to this Action appear here. You may Delete, Edit, or View each Status.

Associated Implementations

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Implementation Date	Strategy	Complete	
11/30/2001	Call Sister Weekly.		Delete Edit View

In addition, and Action could have a Status record or many Status records associated with it in order to describe the progress of the Action and the next review date for the Action. Here is the Add/Edit screen for a Status:

OUTCOMES

Status

Action	11/30/2001 - 11/30/2001 (Weekly Call Setup: Mr. Smith will talk w)
Notes	Going very well so far

Status Date * 11/30/2001 - <c> + (Ex.: 01/01/2001)

Status * In Progress

Next Review 12/30/2001 - <c> + (Ex.: 01/01/2001)

Save   Reset

The first 30 characters of the Action description are listed.

Click within the checkbox if an Implementation Plan is needed for this Action.

Status choices include: "In Progress", "Completed", "Deferred", "Not Started", and "Waiting on Someone Else".

If you wish to record the "Next Review " date for the Action that this Status record is associated with, then do so here.