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InfoServ DD

<http://216.153.75.126>

Training and Help Documentation

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**To Speak with a Help Desk Representative
Call 1-800-393-3141**

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I. Getting Started

A. Your System Administrator

Your agency/organization should designate at least one employee to act as the “System Administrator” (or “Customer Administrator”). The Customer Administrator’s duties are very important and include:

- Adding and editing agency and site information
- Adding and editing employee information into the system
- Assigning user names and passwords to employees
- Adding and editing pull-down information
- De-activating employee’s user names and passwords
- Setting up access or “permissions” for your employees
- Liaison to Practical Health Systems, Inc. for Help and Enhancement issues

In order for your agency to be ready to use InfoServ DD, first identify all employees that will use the system. List them by title/position, group and by site. If an employee moves from site to site, then have their main site listed as in the example below:

Last Name	First	Middle Name	Title/Position	Group	Site
Doe	John	Allen	House Manager	Direct Care	Orange
Smith	Sally	B.	Behavioral Specialist	Case Manager	McGavock

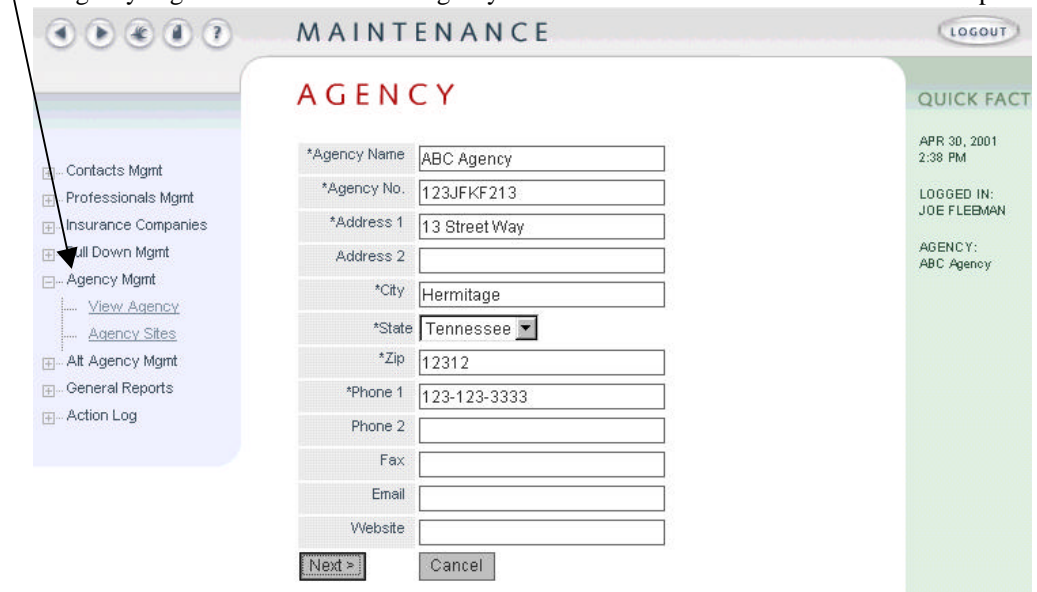
With the help of a PHS consultant, organize the employees so that they can be entered into the system more easily in pre-defined User Groups. These User Groups will have permissions that will apply to all in the group. Then, you may further customize these permissions per employee, if needed.

The Customer Administrator should now login to the system with the username and password given to you by a Practical Health Systems consultant. (See “User Login” for further instructions on logging in.)

B. Setting up Your Agency and Site Information

After successfully logging in, click on the “Maintenance” button located on the top navigation bar.

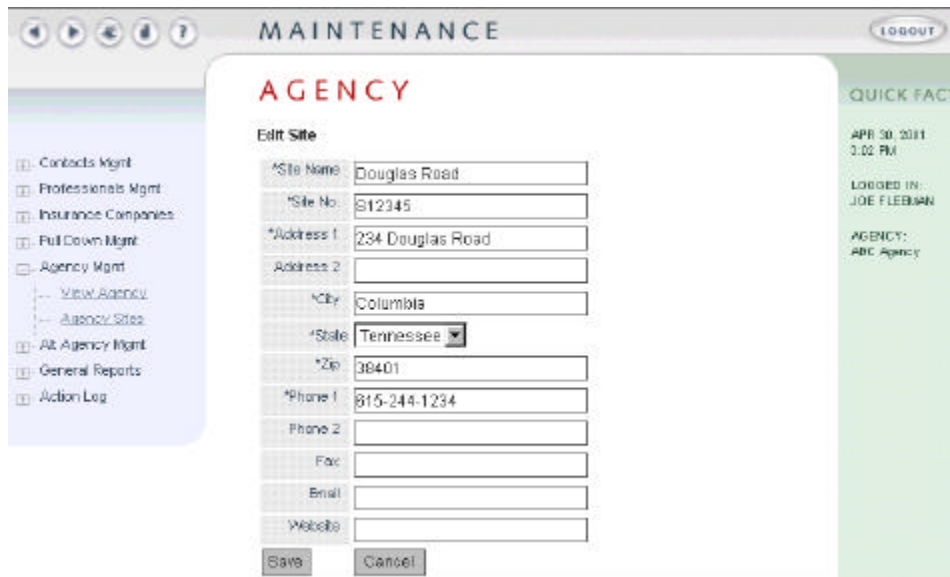
Click on “Agency Mgmt”. Click on “View Agency”. Check over the information that has been pre-loaded



for you. Change or add any information that is needed. Then click “Next” to see any sites that have been pre-loaded.



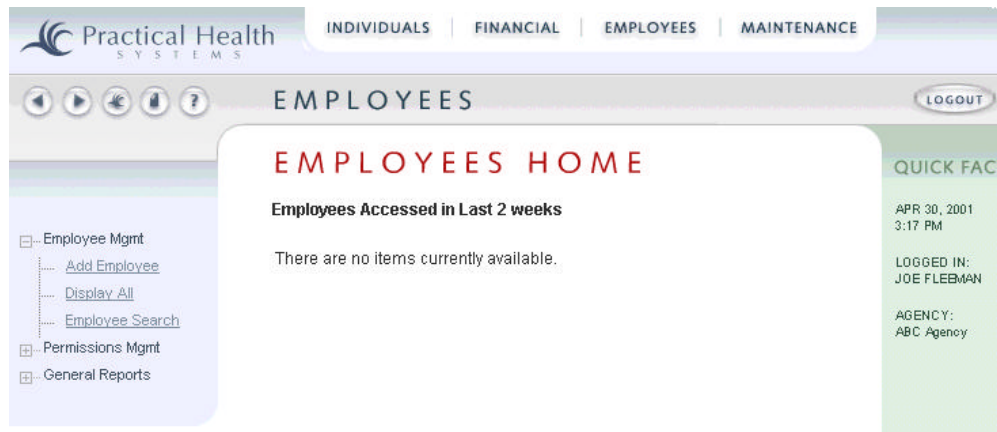
To edit a site that appears on the “Current Sites” list, just click on it once to highlight it, and click on “Edit”. To add a site not yet appearing on the list, click “Add New Site”. In either case, you will receive a screen similar to the following:



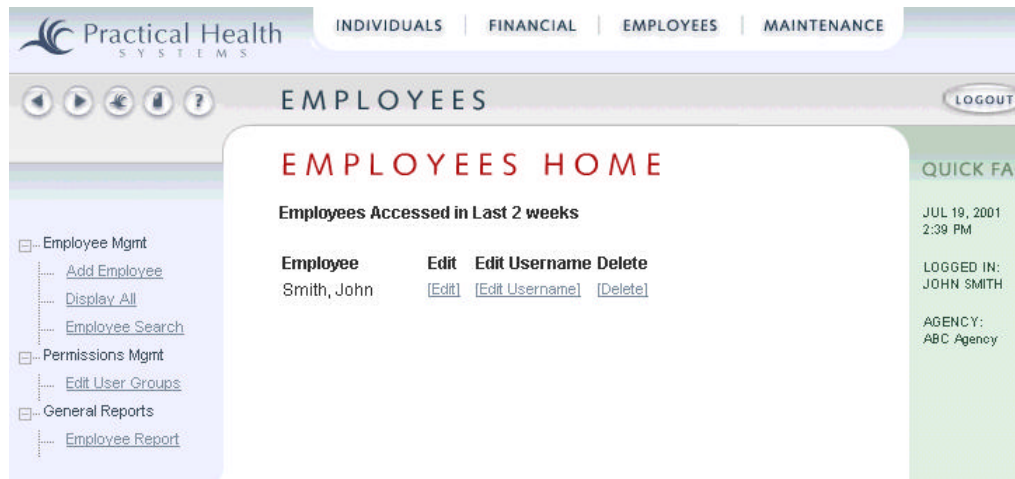
Field names preceded with an asterisk represent “required fields”. This means that you must enter information in the field in order for the form to be saved. All forms will have at least one field (and usually several) that require information to be entered. (For example, in the form above, “*Site Name” requires an entry to be made.)

Move through the different fields on the screen with the “Tab” key and click on “Save” to save the information you entered, or click on “Cancel” if you do not wish to save the information you have entered. Continue adding, editing, or deleting sites as needed. Be sure to type in the phone and fax fields in the format “555-123-1234” (with dashes separating the phone number).

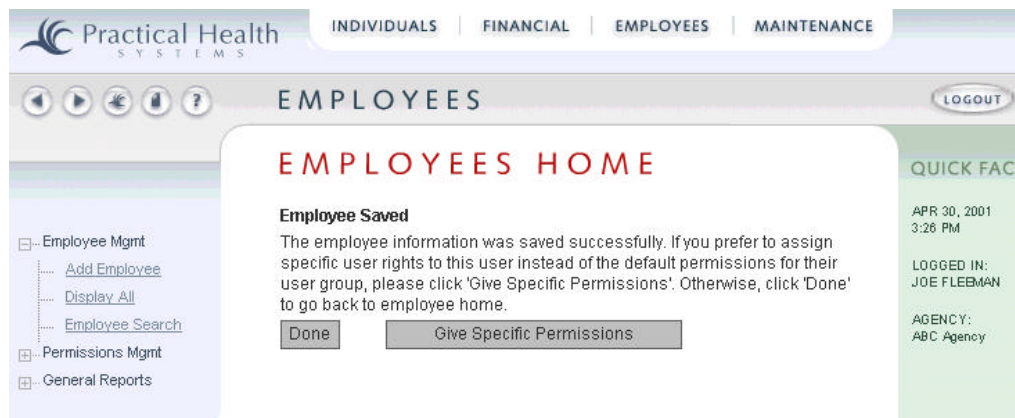
C. Setting up Employees in the System



Click on the “Employee” button located on the top navigation bar.



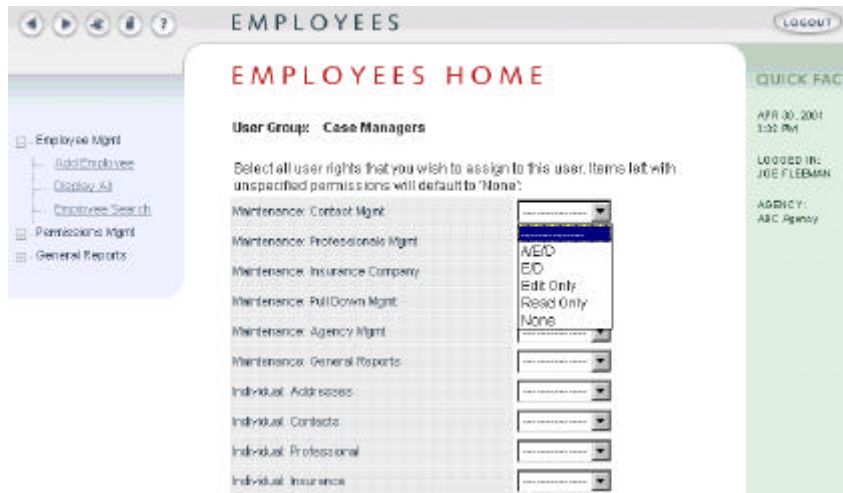
Next, click on “Display All” on the left-hand menu to show the employees associated with your agency.



Click on “Edit” to view the information associated with the employee(s) listed and change information as needed or click on “Add Employee” to add additional employees to the system. Create usernames and passwords that are easy to remember, and record them in a separate location that only you have access to.

When you wish to save the employee information, click on “Next” and you will receive the following screen:

At this time, you have the choice of clicking on “Done” to save the employee information, or to set up system access for the employee by clicking on “Give Specific Permissions”. If you choose to give specific permissions, the next screen will list the different areas of the system that are available. Scroll down to the bottom of the screen to find the “Edit Permissions” button and click it.



Each part of InfoServ DD is represented in the list. To the right of each item is a set of permissions. “A/E/D” means the employee has full access to the item. The employee can “Add”, “Edit”, “Delete”, and “Read” or view records for that item. “E/D” means the employee can “Edit”, “Delete”, and “Read” (view) records for the item, but cannot “Add” new records. “Edit Only” means the employee cannot “Add” or “Delete”, but can edit and view a record. “Read Only” means the employee may only view the record. “None” means the employee has no access to the item at all.

D. Deactivating Users

When an employee/user is terminated, your Customer Administrator should deactivate him from being able to use the system (for security reasons). To do this, edit the employee’s record and change his or her password so that no one (but you) knows the new password.

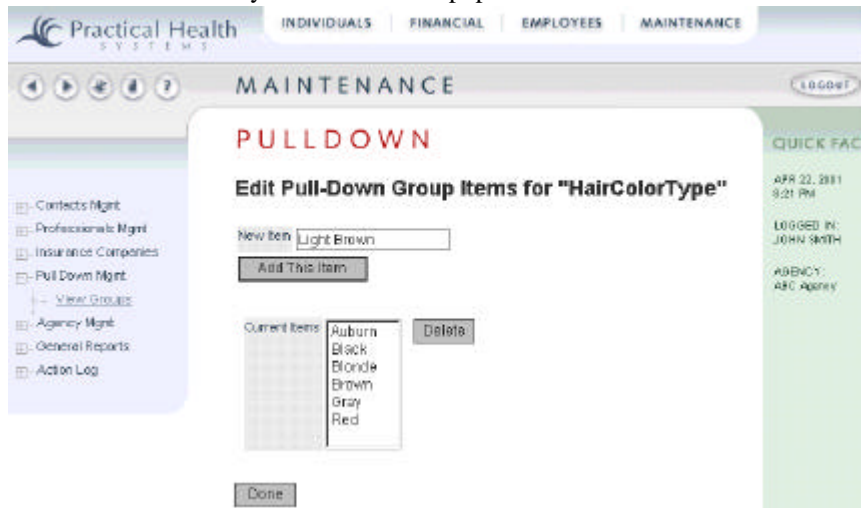
E. Pull-Down Entries

As your Customer Administrator works through adding basic information into the system, he or she may find it necessary to add additional choices to the pull-down entries that appear on the screens. If an item were specific only to your agency/organization, you would add the item to the appropriate pull-down group under the “Maintenance” option. If the item applies to most agencies/organizations in your state, then please contact PHS with a request to add a new pull-down item.

F. Your Role as a Liaison to Practical Health Systems, Inc.

(For Help and Enhancement issues)

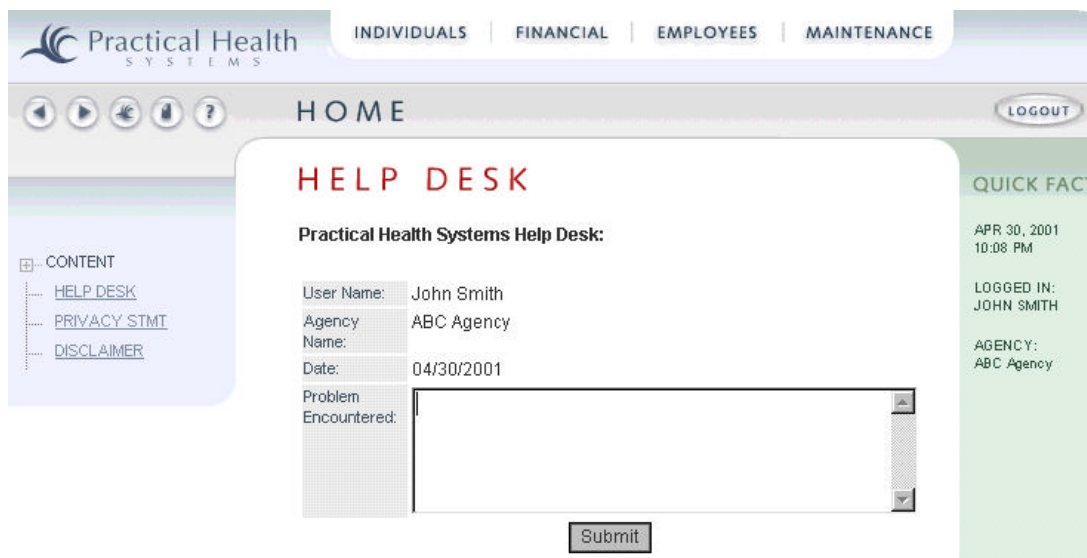
As a Customer Administrator (or System Administrator), you also serve as the central point of contact for Practical Health Systems. Sometimes this is necessary in order to help us better understand problems or to handle problems more efficiently. The two most popular forms of communication with us are by calling



The screenshot shows the 'MAINTENANCE' section of the Practical Health Systems web application. The main heading is 'PULLDOWN' and the sub-heading is 'Edit Pull-Down Group Items for "HairColorType"'. A 'New Item' field contains 'Light Brown' and an 'Add This Item' button is below it. A 'Current Items' list shows 'Auburn', 'Black', 'Blonde', 'Brown', 'Gray', and 'Red', with a 'Delete' button next to it. A 'Done' button is at the bottom. On the right, a 'QUICK FACT' sidebar shows the date 'APR 22, 2011 9:21 PM', 'LOGGED IN: JOHN SMITH', and 'AGENCY: ABC Agency'. A navigation menu on the left includes 'Contacts Mgmt', 'Professional Mgmt', 'Insurance Companies', 'Pull Down Mgmt', 'View Groups', 'Agency Mgmt', 'General Reports', and 'Action Log'.

our toll-free phone number or by using the Help Desk form provided with InfoServ DD.

You will find the Help Desk form on the menu that appears on the left after you initially Login.



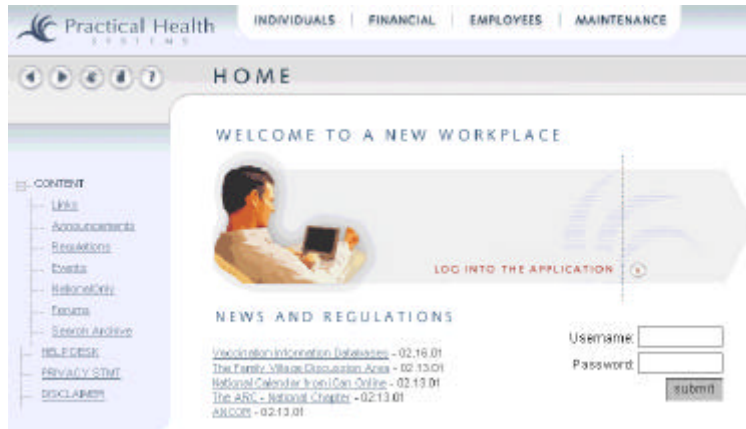
The screenshot shows the 'HOME' section of the Practical Health Systems web application. The main heading is 'HELP DESK' and the sub-heading is 'Practical Health Systems Help Desk:'. The form includes fields for 'User Name: John Smith', 'Agency Name: ABC Agency', and 'Date: 04/30/2001'. A large text area is labeled 'Problem Encountered:' and a 'Submit' button is at the bottom. On the right, a 'QUICK FACT' sidebar shows the date 'APR 30, 2001 10:08 PM', 'LOGGED IN: JOHN SMITH', and 'AGENCY: ABC Agency'. A navigation menu on the left includes 'CONTENT', 'HELP DESK', 'PRIVACY STMT', and 'DISCLAIMER'.

Simply fill out the text box with a description of your problem, question, or request and click on the "Submit" button. Be sure that your employee record includes the correct email address for us to reply to, or else you will need to include your email address in the text box.

G. User Login

The User Login screen is a security feature that allows the user to gain access to the InfoServ DD system. The option for logging into the InfoServ DD System is located on the right-hand side of the InfoServ home page.

- 1.) In the space provided, fill in the User ID, as designated by your customer administrator.



- 2.) When finished, press the tab key, to move to the Password area. Type in the password, in the space provided, as designated by the agency (Customer Organization) that the user is associated with.

- 3.) Next, select Submit, and the user should be admitted into the InfoServ DD System.

a. Inability to gain access:

- 1.) If the login fails, the user will receive a message stating that the “Login Failed!” The user should then re-enter the information making sure that no unnecessary characters are used.
- 2.) If the user continues to receive this message, it is possible that the Customer Organization has not yet entered the user’s information into the system.
- 3.) If the user does not receive the “Login Failed!” message, and is still unable to access the InfoServ System, it is possible that the Customer Organization has yet to give the user permission to access information. To remedy this, the user should contact the InfoServ Customer Administrator.

b. If You Forget Your Password:

- 1.) Under the submit button on the login screen is a link labeled “Forgot your password?”
- 2.) Select this link and enter the requested information. A Practical Health Systems representative will send the user’s password to the InfoServ Customer Administrator.
- 3.) The user will then obtain their password from the InfoServ Customer Administrator.

II. Now What?

Now that your Customer Administrator has entered your employees and permissions, sites, and pull-down choices, it is time to get down to business.

In this section we'll show you how to enter Individual information, Contacts, Professionals, Locations/Addresses, and Insurance Company information.

Since contacts, professionals, locations, and insurance companies can be linked to multiple individuals, it may be more efficient for you to add these into the system after adding the individuals. Generally speaking, the order for information entry should be:

1. Add Individuals from the Individuals menu
2. Add Professionals from the Maintenance menu (and link to Individuals)
3. Add Insurance Companies from the Maintenance menu (and link to Individuals)
4. Add Contacts from the Maintenance menu (and link to Individuals)
5. Add Locations/Address from the Individuals menu
6. Add important dates associated with Individuals from the "Encounters" area
7. Add important dates associated with Individual gate-keeping from the "Movement" area
8. Add medications and prescriptions associated with Individuals from the MAR section of the Individual menu
9. Link/Associate Professionals, Contacts, and Insurance Companies with Individuals (if not yet linked)
10. Add the Diagnosis information for the Individuals
11. Add the ISP for the Individuals
12. Add personal property associated with Individuals
13. Add checkbook beginning balances (at least) associated with Individuals
14. Add Medical Conditions, Devices, Supplies, etc. associated with Individuals from the Charting section in the Individuals menu.
15. Add Service Plans
16. Add Cost Plans

A. Adding Individuals

An Individual is also referred sometimes as a client or a consumer.

To add an Individual:

1. Click on the "Individuals" menu on the top navigation bar.
2. Click on "Add Individual".
3. Fill in the fields on the Individuals data entry screen.
4. Use the Tab key to move down to the next field. Hold down the shift key and press the Tab key to go back up one field. You can scroll up or down the screen by dragging the right scroll bar up or down the page. Fields that follow an asterisk ("*") must be entered in order to save.
5. Save the Individual's record.

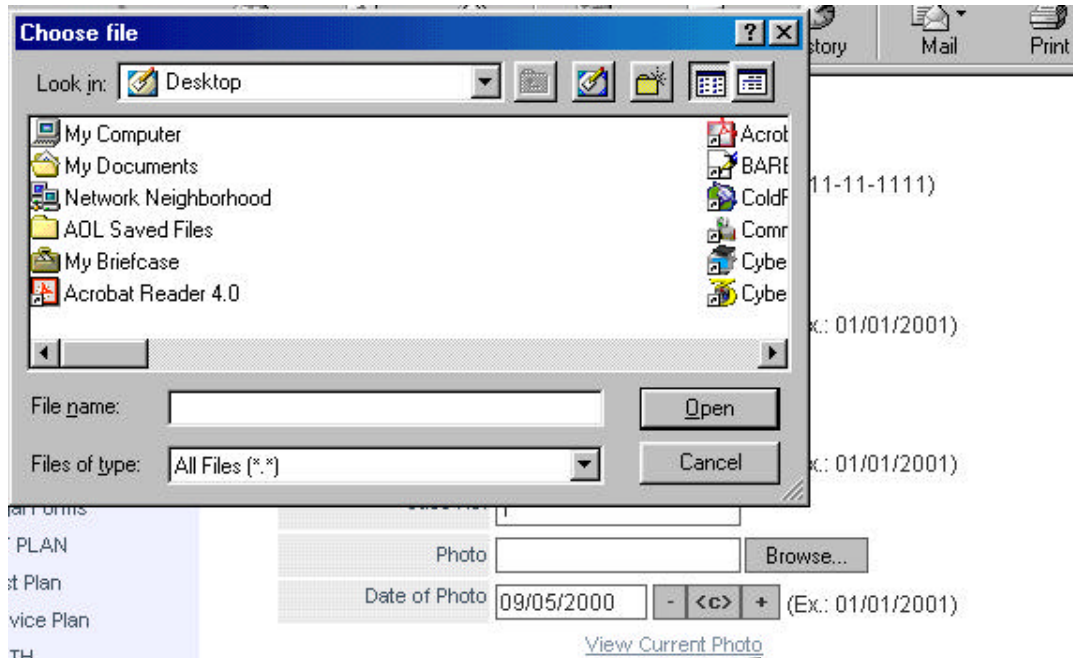
Note: *The following fields have been added to the Individual Demographics page:*

Identifying Marks or Features	(Description)
Scar(s)	(Description)
Tattoo(s)	(Description)
Birth Mark(s)	(Description)
Glasses?	(Yes/No)
Contacts?	(Yes/No)
Hearing Aid	(Left /Right/Both)
Dentures?	(Yes/No)
Prosthesis?	(Yes/No)

Bridgework?	(Yes/No)
Mobility	(Pull-down) (Walks unassisted, Cane, Walker)
Medicare Number	(Alpha/numeric – force upper case)
Case Number should not be required	(or force to zero if blank)
Citizen?	(Yes/No)
Primary Language	(Pull-down) (i.e. “English”, “Spanish”, etc.)
Diet Patterns/Preferences	(Description)
Special Needs/Techniques for dining/nutrition	(Description)
Special Care of Personal Equipment	(Description)
Transferring Needs	(Description) (When driving/transporting)
Can Hear?	(Yes/No/Partial)
Can Speak?	(Yes/No/Partial)
Date of Photo	(Date)
How I communicate when I’m not well	(Description)
Symptoms that show you I’m not well	(Description)
What an emergency looks like for me and what to do	(Description)
Normally, I cooperate well but if there are problems, you should:	(Description)

1. Adding an Individual’s Photo

An individual’s most current photo can be kept with their record in the system. To do so, the photo should be a digital image/file. A digital camera or scanner may be used to create this digital image. It would be suggested that these images be stored on a single computer at your agency in a folder called “Photos”. You would then name each photo such as “Doe John 09012001” as a “JPG” file type. Once the photo exists on your computer or on diskette, you would click on “Edit Personal Info” and click on the “Browse...” button (to the right of the “Photo” field) in order to help you identify where the photo is on the computer and its name. Once you have selected the photo, click on “Open” in the “Choose file” window and then save the



individual’s record. If you upload another photo, it simply overwrites the one already on file for that individual.

Click on this link to view a previously uploaded photo.

2. Viewing an Individual's Photo

The "View Photo" link does not become available unless a photo has already been uploaded. If it is available, simply click the "View Photo" link and the photo will appear. Be aware that photos are graphical images and usually take some time to show on the screen, depending on your computer speed and the speed of your Internet connection.

B. Adding Professionals

A professional is a physician, nurse, or specialist who provides care for an individual. A professional needs only to be added to the system once. Many individuals may then be linked or associated with that professional. This reduces keying errors and simplifies your processes. If a professional changes his or her address, you only have to change it one time in the system for the change to take place "everywhere".

To add a professional:

1. Click on the "Maintenance" menu on the top navigation bar.
2. Click on the plus sign ("+") next to "Professionals Mgmt".
3. Click on "Add Prof."
4. Fill in the fields on the Professionals data entry screen.
5. Click on "OK" to save the professional's record. If the information you entered was not valid, the system will inform you of the error. Correct the error and click on "OK" again. When the information has been entered successfully, you will receive the following screen:

The screenshot shows the Practical Health Systems Maintenance interface. The top navigation bar includes "INDIVIDUALS", "FINANCIAL", "EMPLOYEES", and "MAINTENANCE". The "MAINTENANCE" menu is active, and the "Professionals Mgmt" sub-menu is selected. The main content area displays a confirmation message: "PROFESSIONAL" in red, followed by "The new Professional was added!". Below this, there is a question: "Associate new Professional with a client?" with "Yes" and "No" buttons. A "QUICK FACT" sidebar on the right shows: "MAY 1, 2001 12:10 PM", "LOGGED IN: JOHN SMITH", "AGENCY: ABC Agency", and "INDIVIDUAL: John Doe NO: 1". A left sidebar contains a menu with options like "Contacts Mgmt", "Professionals Mgmt", "Insurance Companies", etc.

You have the option to associate this professional to the individuals that he or she serves. If your individuals have already been entered into the system and have not yet had their professionals linked to them, then certainly this is an option for you. Otherwise, we can delay linking the professional to different individuals by clicking "No". We will link them later from the "Professionals" sub-menu under the "Individuals" menu.

Notes:

- Fields marked with an asterisk ("*") are required fields. This means that you must enter information in the field or else it cannot save the entire entry (record).
- The "Address Name" may be a physician's practice name or business name.
- Choose an "Address Type" that best describes the location associated with the professional. For example, if the professional is a physician, then the address is probably an "Office / Work" address.
- The Phone field should follow the format "555-123-1234" (with dashes).

- Choose a “Professional **” (professional type) from the pull-down. If the professional type that you need does not exist, then ask your Customer Administrator to request PHS to add it to your State’s pull-down choices.
- The “TIN **” field (*tax identification number*) has been changed so that it is not a required field. It serves to hold the professional’s tax identification number, which may be necessary for your agency/organization. If you do not know what the professional’s TIN is, simply type a zero (0) in the field.

C. Adding Insurance Companies

An insurance company needs only to be added to the system once. The policy type and/or group is not added to the insurance company at the time that the insurance company is added to the system. This is because the insurance company may serve more than one role to different individuals. For example, a company may have a Life Insurance policy with one individual, while providing a Burial policy for another. Many individuals may then be linked or associated with that insurance company. This reduces keying errors and simplifies your processes. If an insurance company changes its address, you only have to change it one time in the system for the change to take place “everywhere”.

To add an Insurance Company:

1. Click on the “Maintenance” menu on the top navigation bar.
2. Click on the plus sign (“+”) next to “Insurance Companies”.
3. Click on “Add Company”.
4. Fill in the fields on the “Add Insurance Company” data entry screen. Fields marked with an asterisk (“**”) are required fields. This means that you must enter information in the field or else it cannot save the entire entry (record).
5. Scroll down the page and click on the “Add” button when you have entered all of the applicable information into the Add Insurance Company data entry screen.

The screenshot displays the 'MAINTENANCE' interface with a sub-section for 'INSURANCE'. The main content area is titled 'Add Insurance Company:' and includes the instruction: 'Below is the information of the insurance company. You may edit or add any of the information below:'. The form contains the following fields:

- * Company Name: [Text Input]
- Description: [Text Area]
- * Street Address: [Text Input]
- * City: [Text Input]
- * State: [Dropdown Menu (Tennessee selected)]
- * Zip: [Text Input]
- Email: [Text Input]

On the right side, a 'QUICK FACT' sidebar shows system information: MAY 1, 2001 12:35 PM, LOGGED IN: JOHN SMITH, AGENCY: ABC Agency, and INDIVIDUAL: John Doe NO: 1. A 'LOGOUT' button is visible in the top right corner.

We will associate the insurance company to one or more individuals later. Continue adding in additional insurance companies associated with the individuals at your agency/organization.

D. Adding Contacts

A contact is a person important in the life of an individual, yet not serving as a physician, nurse, or medical or behavioral specialist. A contact can be a parent, guardian, advocate, family member, lawyer, friend, etc. A contact needs only to be added to the system once. The contact type (Parent, Family Member, or other designation) is not added to the contact at the time that the contact is added to the system. This is because the contact may serve more than one role to different individuals. For example, a “Parent” to one individual may be an “Advocate” for another. Many individuals may then be linked or associated with that contact. This reduces keying errors and simplifies your processes. If a contact changes his or her address, you only have to change it one time in the system for the change to take place “everywhere”.

To add a contact:

1. Click on the “Maintenance” menu on the top navigation bar.
2. Click on the plus sign (“+”) next to “Contact Mgmt”.
3. Click on “Add Contact”.
4. Fill in the fields on the Contacts data entry screen. Fields marked with an asterisk (“*”) are required fields. This means that you must enter information in the field or else it cannot save the entire entry (record).
5. Click on “OK” to save the contact information.

The screenshot displays the 'CONTACT' data entry screen. The top navigation bar includes 'MAINTENANCE' and a 'LOGOUT' button. The sidebar on the left lists various management options, with 'Contacts Mgmt' expanded to show 'Add Contact', 'Edit Contact', and 'Delete Contact'. The main form area is titled 'CONTACT' and contains the following fields:

- Contact First Name:*
- Contact Middle Name:
- Contact Last Name:*
- Address Type: (Dropdown menu with 'Residence' selected)
- Address Name:*
- Street:*
- City:*
- State: (Dropdown menu with 'Tennessee' selected)
- Zip:*
- Email:
- Phone:*

The 'QUICK FACTS' sidebar on the right displays the following information:

- MAY 1, 2001 12:25 PM
- LOGGED IN: JOHN SMITH
- AGENCY: ABC Agency
- INDIVIDUAL: John Doe NO: 1

You may optionally associate the contact with one or more individuals after saving or you may answer “No” to the “Associate Contact...” question and simply continue adding other contacts into the system.

You should now have a good idea as to how the system works!

Please refer to the documentation that follows for instructions on adding Encounters, Movement records, Medication Administration, Cost Plans, Service Plans, Linking Contacts, Professionals, and Insurance Policies, and more.

III. Individual Info

A. Individual Info:

Important information about persons with developmental disabilities, or “Individuals” (sometimes also referred to as “consumers” or “clients”) is tracked in InfoServ DD under the Individuals section of the program. This section is accessible from the top of the screen on what we call the “top navigation bar”. On this bar you will also find the sections “Financial”, “Employees”, and “Maintenance”.

1. Individual Info: Edit Personal Info

After an Individual has been selected, you may click on “Edit Personal Info” as long as you been set up by your System Administrator to allow you to edit Individual information. If you receive the message “Access Denied”, then you do not have “rights” or “permissions” to edit this information. Otherwise, you may click somewhere in the box (sometimes referred to as a “field”) to the right of the label “* First Name”. You can move around within the box with your keyboard’s arrow keys, your mouse, or by pressing your keyboard’s “Home” key to go to the beginning of the field or the “End” key to go to the end (or last character typed within) the field. Move to the next field by pressing your computer’s “Tab” key or by clicking on it with your mouse. (Note: Move your mouse down to the next field and click with your mouse’s left button.)

Dates must be entered with slashes (“/”) between the month, day, and year (i.e. 01/01/1999). The entries like gender are called “pull-downs” and contain pre-loaded choices in order to insure accuracy. Note that you may click within the pull-down to display most or all of the choices. Then you would move up or down through the choices with either your mouse or your up or down arrow keys to select the entry you want in a pull-down. Once you are familiar with the choices, you can take a short cut. For example, if you know the Individual’s gender and you have tabbed to the gender field, simply type an “M” or “F” for “Male” and “Female”, respectively. Click on “Save” at the bottom of the form in order to retain the information you have entered. By clicking on “Reset” (prior to clicking on “Save”) you would be eliminating or canceling the changes you made.

Edit Individual Personal Info:	
* First Name:	John
* Last Name:	Doe
Middle Name:	Albert
Nickname:	
* SSN:	111-11-1111 (Ex.: 111-11-1111)
* Gender:	Male
* Race:	White
* Birth Date:	12/01/1950 - <c> + (Ex.: 01/01/2001)
* Site:	R100 - Clover Residential
Deceased:	<input type="checkbox"/>
Deceased Date:	- <c> + (Ex.: 01/01/2001)
* Case No.:	1
* Eligibility:	Mental Retardation
* Marital Status:	Single
Birthplace:	Farmington Illinois

APR 9, 2001 11:13 PM
LOGGED IN: JOHN SMITH
AGENCY: ABC Agency
INDIVIDUAL: John Doe NO: 1

2. Individual Info: Add Individual

After an Individual has been selected, you may click on “Add Individual” as long as you been set up by your System Administrator to allow you to add an Individual to the system. If you receive the message “Access Denied”, then you do not have “rights” or “permissions” to add this information. Otherwise, you may click somewhere in the box (sometimes referred to as a “field”) to the right of the label “* First Name”. You can move around within the box with your keyboard’s arrow keys, your mouse, or by pressing your keyboard’s “Home” key to go to the beginning of the field or the “End” key to go to the end (or last character typed within) the field. Move to the next field by pressing your computer’s “Tab” key or by clicking on it with your mouse. (Note: Move your mouse down to the next field and click with your mouse’s left button.) Dates must be entered with slashes (“/”) between the month, day, and year (i.e. 01/01/1999). The entries like gender are called “pull-downs” and contain pre-loaded choices in order to insure accuracy. Note that you may click within the pull-down to display most or all of the choices. Then you would move up or down through the choices with either your mouse or your up or down arrow keys to select the entry you want in a pull-down. Once you are familiar with the choices, you can take a short cut. For example, if you know the Individual’s gender and you have tabbed to the gender field, simply type an “M” or “F” for “Male” and “Female”, respectively. Click on “Save” at the bottom of the form in order to retain the information you have entered. By clicking on “Reset” (prior to clicking on “Save”) you would be eliminating or canceling the changes you made.

Fields which have labels preceded by an asterisk (“*”) are required. This means that information must be entered for these items. If you do not have a case number, then enter a zero for it.

B. Individual Selection

Choices for searching for an Individual include:

- Last two weeks: Show all individuals I have worked with in the last two weeks
- Entire Site: Show all the individuals linked to my default site
- Entire Agency: Show all individuals linked to my agency
- Search: Search by name for individuals at this agency
- List Alternates: Show all Individuals that are part of another organization/agency that you have been granted access to by the individual’s primary agency.

The following screen lists the results of a search “**Entire Agency**”, showing only two individuals currently associated with the agency “ABC Agency”.

The screenshot shows the Practical Health SYSTEMS web application interface. The main content area is titled "INDIVIDUALS HOME" and displays a search result for "Entire Agency". The search results are as follows:

Name	SSN	Birth Date	Select	Edit	Del
John Doe	111-11-1111	12/01/1950	Select	Edit	Del
Sally Doe	111-22-2222	11/01/2000	Select	Edit	Del

Below the table, there is a "Return to Search" link. The sidebar on the right shows "QUICK FACTS" with the following information: MAY 1, 2001 3:16 PM, LOGGED IN: JOHN SMITH, AGENCY: ABC Agency, INDIVIDUAL: JOHN DOE NO: 1.

A search by **“Entire Site”** should display all Individuals who have been set up with a site (usually a residential site) that matches the site that you (as an employee) have been set up with. The Individuals will be in alphabetical order by last name. There may be too many Individuals to fit on one page. If this is the case, the system will present you with a “Next” button to allow you to look through the next page of Individuals.

To **search for an individual by name** or social security number, click on “Search” below the “Individual Selection” menu on the left-hand side. Then type in any name or partial name and click “Search”. For example, if you want to list all individuals whose last name begins with the letter “D”, then type a “D” for the first name and click “Search”. Or, to search for individuals whose last name starts with “Smith”, type in “Smith” in the last name field and click on “Search”. The individuals will then be listed in alphabetical order by last name. There may be too many individuals to fit on one page. If this is the case, the system will present you with a “Next” button to allow you to look through the next page of individuals.

The primary agency of an individual may grant you (and your agency) the rights to be able to add, edit, delete, or view specific information about an individual. To show individuals that have a primary agency other than yours, click on **“List Alternates”**. You may select an individual that may appear on the list and begin working with the individual’s record.

Individual Display Page

Once an individual has been searched for and selected, the Individual Display Page contains current information relevant to the individual. This page includes personal information such as name, gender, Medicaid number, race, etc.

An individual’s **contacts** are listed below the personal information on this page for easy access. Contacts are listed in alphabetical order with options to edit or delete.

Directly below the individual’s contacts are the **location(s)** that are important to the individual.

When you choose to edit a contact or location, you are taken to the appropriate entry form and may change the data for the chosen form.

If you choose to delete a contact or location from the individual Display page, you are really just taking away the link from the individual to the contact or location. The contact will still exist within the system. This is because contacts are added under the “Maintenance” heading and can be linked to multiple individuals within the system. The location will actually be deleted.

1. Individual Selection: Last Two Weeks

In order for social workers (or case managers) to quickly access their caseload, we have provided this feature to show individuals that they have been working with within two weeks prior to today’s date.

2. Individual Selection: Entire Site

A search by **“Entire Site”** should display all individuals who have been set up with a site (usually a residential site) that matches the site that you (as an employee) have been set up with.

Note: The individuals will be in alphabetical order by last name. There may be too many individuals to fit on one page. If this is the case, the system will present you with a “Next” button to allow you to look through the next page of individuals. “Prior” will go back to the prior page.

3. Individual Selection: Entire Agency

A search by **“Entire Agency”** should display all individuals who have been set up within the agency that you (as an employee) have been set up with.

Note: The individuals will be in alphabetical order by last name. There may be too many individuals to fit on one page. If this is the case, the system will present you with a “Next” button to allow you to look through the next page of individuals. “Prior” will go back to the prior page.

4. Individual Selection: List Alternates

To show individuals that belong to another agency, click on “**List Alternates**”. You may select an individual that may appear on the list and begin working with the Individual’s record. The principal agency must grant you rights to be able to add, edit, delete, or view information about the individual.

Note: The individuals will be in alphabetical order by last name. There may be too many individuals to fit on one page. If this is the case, the system will present you with a “Next” button to allow you to look through the next page of individuals. “Prior” will go back to the prior page.

C. Addresses

Addresses important to an individual may be entered or viewed from here. Examples of important addresses for an individual might be the nearest emergency room, the individual’s residence address, or the individual’s work address. Unlike Contacts, Professionals, and Insurance records, Addresses do not need to be entered from the Maintenance section of the program.

1. View Addresses

To view addresses that have already been added to this individual’s record, you would click on this option. The addresses appear in alphabetical order based on address type. An address type may be a residence, nearest emergency room, and employer / work address, etc. These types are chosen from a pull-down; therefore, additional types may be added to the system when needed.

a. View Addresses: Edit Address

After expanding the “Addresses” menu option (by clicking on the plus (“+”) sign to the left of it and clicking on “View Addresses”, you will be shown addresses that have already been added for the Individual. You then may click on the “Edit” option to the right of an address. At that point, you may edit (or modify) the information presented to you on the address screen.

An address type may be a residence, nearest emergency room, employer / work address, etc. These types are chosen from a pull-down; therefore, additional types may be added to the system when needed. The address name field may be a hospital name, an employer’s business name, or a head of household at a residence. It is a required field, so you must type in an entry.

Click on the box by “Is it an Emergency Location” if the address is an emergency location where the individual should receive services in the event that an emergency should occur. The emergency location will appear on the individual’s Individual Support Plan (Part A).

Click on “**Submit**” in order **to save**, or “Cancel” if you do not wish to save. Another way to cancel the add is to simply click on another menu option.

Fields that must be filled out (**required fields**) include:

- Address type
- Address name
- Street (first line only)
- City
- State
- Zip
- Phone

b. Delete Address

After expanding the “Addresses” menu option (by clicking on the plus (“+”) sign to the left of it and clicking on “View Addresses”, you will be shown addresses that have already been added for the individual. You then may click on the “Delete” option to the right of an address if you wish to delete the address. At that point, you will be asked if you are sure that you want to delete the address. If you are absolutely sure, then click on the “Yes” button, if not then click on the “No” button.

2. Add Address

After expanding the “Addresses” menu option (by clicking on the plus (“+”) sign to the left of it, click on “Add Address” in order to add a location that is important to the Individual. An address type may be a residence, nearest emergency room, or employer / work address, etc. These types are chosen from a pull-down; therefore, additional types may be added to the system when needed. The address name field may be a hospital name, an employer’s business name, or a head of household at a residence. It is a required field, so you must type in an entry.

Click on the box by “Is it an Emergency Location” if the address is an emergency location where the individual should receive services in the event that an emergency should occur. The emergency location will appear on the individual’s Individual Support Plan (Part A).

Click on “**Submit**” in order **to save**, or “Cancel” if you do not wish to save. Another way to cancel the add is to simply click on another menu option.

Fields that must be filled out (**required fields**) include:

- Address type
- Address name
- Street (first line only)
- City
- State
- Zip
- Phone

D. Contacts

1. View Contacts:

If you would like to see information about the contacts that are associated with an individual, then select “View Contacts”.

Each contact will be categorized by type, such as Parent/Guardian, Family, Advocate, Lawyer, etc. The contact was originally added through the Maintenance section of the program.

You are then able to link an individual or several individuals to the contact. The same person may serve as a parent to one individual and as an advocate to another. Therefore, the contact type is determined at the time of the link. These types are chosen from a pull-down; therefore, additional types may be added to the system when needed.

a. View Contacts: View

After expanding the Contacts menu by clicking on the plus sign to the left of the word “Contacts”, the first menu option under it is “View Contacts”. By selecting it, you will see any contacts that have already been associated with the individual. A contact may have several addresses, so the address most often associated with them – the “Default Address” is shown. Also note that the options of “Edit Address”, “Edit Type”, and “Delete” may appear to the right of each contact listed. Additionally, the option “Associate a contact with this individual” appears below the last contact (at the bottom of the page). When you associate a

contact with this individual, you are simply being asked to link another contact to the individual you are working with. This is possible only if the contact has already been added through the Maintenance section of the program.

b. View Contacts: Edit Address

When editing a contact's address from the Individuals section of the program, what you are really doing is changing the address from the current one to another address the contact has that was added from the Maintenance section of the program. More often than not, the contact will only have one address; therefore, it would not be necessary to edit the contact's address from here. If the address on file is wrong and the contact does not maintain multiple addresses, then you would go to the Maintenance section of the program and edit the address for the contact. At that point all individuals associated with that contact and using that address would automatically be linked to the new address.

c. View Contacts: Edit Type

You set the type only through this menu option. After viewing contacts, you may change the contact type by clicking on "Edit Type". This does not affect the relationship of this contact with others.

d. View Contacts: Delete

You may delete the link from the individual selected to the contact shown by clicking on the "Delete" option to the right of the contact (as long as you have been given permissions to do so by your System Administrator). Once chosen, the program will ask if you are sure you want to delete the link. By answering "Yes", the link to the contact will be deleted; otherwise, the link will remain.

2. Link Contact

This is also referred to as "Associate a contact with this Individual". The option "Associate a contact with this individual" appears below the last contact (at the bottom of the page) after you "View Contacts". When you associate a contact with this individual, you are simply being asked to link another contact to the Individual you are working with. This is possible only if the contact has already been added through the Maintenance section of the program.

3. Contact Report

If you want a report of ALL contacts linked to this Individual, simply leave all selections blank and click on "Submit".

If you want to see all contacts linked to this individual of a certain contact type, then specify a single contact type. You may see contacts linked to this individual in a certain state, with a certain last name, first name, or within a certain city. You may combine these options, as well. Additionally, you may specify a last name, first name, or city that may "begin with" certain letters. (In other words, you could type a "J" for the first name and click "Submit" and you would be presented with all contacts whose first name begins with a "J".)

Normally, an individual will have ten or fewer contacts, so a simple "Submit" with no specific information being filtered will suffice and give you a report of all contacts for the individual.

Once the report displays, you may click on your browser's "Print" button if you wish to print it to your printer. Click on the "Back" button to go back to the contact menu.

E. Professionals:

1. Professionals: View Professional

After expanding the Professionals menu by clicking on the plus sign to the left of the word "Professionals", the first menu option under it is "View Prof.". By selecting it, you will see any professionals that have

already been associated with the individual. A professional may have several addresses (offices in multiple cities), so the address most often associated with them – the “Default Address” is shown. Also note that the options of “Edit Address”, “Edit Type”, and “Delete” may appear to the right of each professional listed. Additionally, the option “Associate a professional with this individual” appears below the last professional (at the bottom of the page). When you associate a professional with this individual, you are simply being asked to link another one to the individual you are working with. This is possible only if the professional has already been added through the Maintenance section of the program.

a. Professionals: View: Edit Address

When editing a professional’s address from the individual section of the program, what you are really doing is changing the address from the current one to another address the professional has that was added from the Maintenance section of the program. More often than not, the professional will only have one address; therefore, it would not be necessary to edit the contact’s address from here. If the address on file is wrong and the professional does not maintain multiple addresses, then you would go to the Maintenance section of the program and edit the address for the contact. At that point all individuals associated with that professional and using that address would automatically be linked to the new address.

b. Professionals: View: Delete

You may delete the link from the individual selected to the professional shown by clicking on the “Delete” option to the right of the professional (as long as you have been given permissions to do so by your System Administrator). Once chosen, the program will ask if you are sure you want to delete the link (or association). By answering “Yes”, the link to the professional will be deleted; otherwise, the link will remain.

2. Professionals: Link Professional

This is also referred to as “Associate a professional with this Individual”. The option “Associate a professional with this individual” appears below the last professional (at the bottom of the page) after you “View Prof.”. When you associate a professional with this individual, you are simply being asked to link another professional to the Individual you are working with. This is possible only if the professional has already been added through the Maintenance section of the program.

F. Insurance:

Insurance companies are added to the system through the Maintenance section of the program. The specific policies that an individual may have are created from the Individuals section of the program.

1. Insurance: View Providers

After expanding the Insurance menu by clicking on the plus sign to the left of the word “Insurance”, the first menu option under it is “View Providers”. By selecting it, you will see any insurance policies that have already been associated with the individual. You will then see the options to “Edit” or “Delete” the insurance policy record associated with the individual.

a. Insurance: View: Edit

After clicking on “View Providers”, you may click on the “Edit” option to the right of the insurance policy record that you wish to change. You will then be presented with the policy form. You may modify the information. Once completed, simply click on “Submit” to save; otherwise, the changes you made will not be recorded.

Note: If a policy changes, it is most often best to add another policy with a new effective date. This way, the old policy history is still in place and there may be instances where you need to settle on old claim so that record would need to be there. Check with your policy administrator on your specific policy on deleting policy information.

b. Insurance: View: Delete

After clicking on “View Providers”, you may click on the “Delete” option to the right of the insurance policy record that you wish to change. You will then be presented with a form that asks if you are sure you want to delete the policy. Answer “Yes” to delete it; otherwise the deletion will not take place.

Note: If a policy changes, it is most often best to add another policy with a new effective date and NOT delete the old one. This way, the old policy history is still in place and there may be instances where you need to settle on old claim so that record would need to be there. Check with your policy administrator on your specific policy on deleting policy information.

2. Insurance: Add Provider

After expanding the “Insurance” menu option (by clicking on the plus (“+”) sign to the left of it, click on “Add Provider” in order to add an insurance policy that is important to the Individual. Insurance companies that have been loaded into the system under the “Maintenance” section of the program will appear in the pull-down on the add form. The type of policy pull-down includes types such as “MCO”, “BHO”, “Health”, “Life”, “Burial”, and others. You should enter a group name and a policyholder (usually the Individual). The coverage amount may only apply to certain policies so it is not a required field. Comments are optional.

Click on “**Submit**” in order **to save**, or “Cancel” if you do not wish to save. Another way to cancel the add is to simply click on another menu option.

Fields that must be filled out (**required fields**) include:

- Insurance company
- Insurance type
- Group name
- Policy holder
- Effective date

3. Insurance: Provider Report

Leave all entries blank to see all policies associated with the individual. Otherwise, you may filter the report output by Insurance Type, Insurance Company, Amount, Effective Date From, and Effective Date To. Once the report displays, you may click on your browser’s “Print” button if you wish to print it to your printer. Click on the “Back” button to go back to the insurance menu.

G. Checkbook (Keeping track of an individual’s personal checking):

Checking for Individuals is handled here. You may initially set up a “Beginning Balance” credit at the start of a month and then track all checking deposits and withdrawals from then on for the individual.

1. Checkbook: View Entries

After expanding the “Checking” menu from the Individuals section of the program, click on “View Entries” to see the entries that have been added to the system.

a. Checkbook: View Entries: Edit

Once you have clicked on “View Entries” and entries appear, you will see that each entry has an “Edit” and possibly a “Delete” option to the right of the entry. By clicking on “Edit”, you will be taken to the checking entry form and the information associated with the entry you chose would be loaded. You may then modify the entries.

Click on “Submit” to save the changes you made, or click on “Cancel” to discard the changes you made.

Fields that must have entries (required fields) include:

- Transaction type

Amount
Pay to / Received from
Transaction date

b. Checkbook: View Entries: Delete

Once you have clicked on “View Entries” and entries appear, you will see that each entry has an “Edit” and possibly a “Delete” option to the right of the entry. By clicking on “Delete”, you will be taken to a screen that asks you if you are sure that you would like to delete the transaction. Answer “Yes” to verify the deletion, or “No” to discontinue to delete process (and keep the transaction).

c. Checkbook: Search Entries

Because there could be such a large number of checking transactions, you will need to use the “Search Entries” menu option in order to see specific checking transactions. You must select a transaction type to look for. Today’s date appears in both the “From date” and the “To date” fields. You may modify the date range if you like.

Once you have the correct transaction type and date range to search for, simply click “Submit” to view all the transactions that meet these options.

2. Checkbook: Add Entry

Once you have expanded the “Checkbook” menu, you will see the menu option “Add Entry”. Click on it to add another checking transaction for the individual. You will be taken to the checking entry form and the information associated with the entry you chose would be loaded. You may then modify the entries.

Click on “Submit” to save the changes you made, or click on “Cancel” to discard the changes you made.

Fields that must have entries (required fields) include:

Transaction type
Amount
Pay to / Received from
Transaction date

3. Checkbook: Checking Report

Leave all entries blank to see all checking transactions associated with the individual. Otherwise, you may filter the report output by Item Type, Search From, and Search To entries.

Once the report displays, you may click on your browser’s “Print” button if you wish to print it to your printer. Click on the “Back” button to go back to the checking menu.

H. Property (Keeping track of an Individual’s personal property):

1. Property: View Property

After expanding the “Property” menu from the Individuals section of the program, click on “View Property” to see the entries that have been added to the system.

a. Property: View Property: Edit

Once you have clicked on “View Property” and entries appear, you will see that each entry has an “Edit” and possibly a “Delete” option to the right of the entry. By clicking on “Edit”, you will be taken to the property entry form and the information associated with the entry you chose would be loaded. You may then modify the entries.

Click on “Submit” to save the changes you made, or click on “Cancel” to discard the changes you made.

Fields that must have entries (required fields) include:

- Item name
- Quantity
- Transaction date

b. Property: View Property: Delete

Once you have clicked on “View Property” and entries appear, you will see that each entry has an “Edit” and possibly a “Delete” option to the right of the entry. By clicking on “Delete”, you will be taken to a screen that asks you if you are sure that you would like to delete the transaction. Answer “Yes” to verify the deletion, or “No” to discontinue to delete process (and keep the transaction).

2. Property: Add Property

Once you have expanded the “Property” menu, you will see the menu option “Add Property”. Click on it to add another property transaction for the Individual. You will be taken to a blank property entry form. You may then modify the entries.

Click on “Submit” to save the changes you made, or click on “Cancel” to discard the changes you made.

Fields that must have entries (required fields) include:

- Item name
- Quantity
- Transaction date

3. Property: Property Report

Leave all entries blank to see all property transactions associated with the individual. Otherwise, you may filter the report output by Item Type and by Date Entered.

Once the report displays, you may click on your browser’s “Print” button if you wish to print it to your printer. Click on the “Back” button to go back to the property menu.

1. Legal Forms:

Currently, the Freedom of Choice and Authorization to Release Information forms are available. Other forms may be added as needed. The advantage to having the forms done on-line is that they are associated with an Individual and the employee who entered them. You also have a record of when a form was entered and can go back and report on this information.

1. Legal Forms: Select Legal Form

Once you have expanded the “Legal Forms” menu, you will see the menu option “Select Legal Form”. Click on it to add another transaction for the individual. You will be taken to a screen with a legal form pull-down. Choose the form type you would like to see and click “Go” to filter by forms already in the system of that type. Or click on “Add” to add a new form of the type chosen.

a. Legal Forms: Select Legal Form: Add a Record

Once you have selected a legal form from the pull-down, click on “Add” and you will be adding a legal form transaction of the type chosen from the pull-down. Fill out the form. Scroll down the form to see the options available and select the applicable option.

b. Legal Forms: Select Legal Form: Edit

Once you have selected a legal form from the pull-down, click on “Go” and you will see forms of the type chosen from the pull-down. Find the appropriate form you are looking for and click on the “Edit” option. Fill out the form. Scroll down the form to see the options available and select the applicable option.

c. Legal Forms: Select Legal Form: Delete

Once you have selected a legal form from the pull-down, click on “Go” and you will see forms of the type chosen from the pull-down. Find the appropriate form you are looking for and click on the “Delete” option. You will be asked if you are sure that you want to delete the form. Answer “Yes” if you are absolutely sure you want to delete it; otherwise, it will not be deleted.

IV. Cost Plan

A. Cost Plan:

1. Cost Plan: View Plans

From the Individuals section of the program, expand the “Cost Plan” menu and find the choice “View Plans”. All cost plans associated with the currently selected individual will be available for viewing. However, initially only a single cost plan service category is displayed. To see all cost plans for this individual, change the pull-down choice of “Select Service Group” to “-----All Groups-----” and click on the “Select” button. You will then be shown all cost plan records for this individual. Notice the “Edit” and “Delete” options to the right of each record. These are available as long as you have access rights to these options.

a. Cost Plan: View Plans: Edit

To edit a cost plan record, simply click on the “Edit” link to the right of the cost plan records seen on the “View Plans” menu selection under the “Cost Plans” menu. Remember that the computer defaults to a single service group, so if the cost plan record you are looking for does not appear, then be sure to change the “Select Service Group” pull-down to “-----All Groups-----” or to the specific service group that you wish to view.

You may change the cost center as long as a monthly billing cycle has not been created from the cost plan record you are editing. If you wish to discontinue the cost plan, you should change the end date. However, the system will automatically change the end date to the day prior to the start date of any cost plan record with the same cost center or cost center group (in the same fiscal year). If the cost plan was entered and a monthly billing occurred, yet was added to the system in error, you must change the end date and “unauthorize” the plan by removing the check mark from the “Authorized” check box. The start date is used as a way to further distinguish the service. There may be only one service per cost center per fiscal year in the services table; however, an individual may have many cost plan records with the same cost center per fiscal year as long as the start and end dates do not overlap between records. For example, if John Doe has a cost plan record with a 62000 cost center starting 7/1/2001 and ending 7/5/2001, he may also have another 62000 cost plan record as long as the start date comes after 7/5/2001.

b. Cost Plan: View Plans: Delete

To delete a cost plan record, simply click on the “Delete” link to the right of the cost plan records seen on the “View Plans” menu selection under the “Cost Plans” menu. Remember that the computer defaults to a single service group, so if the cost plan record you are looking for does not appear, then be sure to change the “Select Service Group” pull-down to “-----All Groups-----” or to the specific service group that you wish to view. You may not delete a cost plan that has already gone through a billing cycle. You may change the end date and/or click on the “Authorized” check box so that it is not checked (unauthorized).

2. Cost Plan: Add Plan

To edit a cost plan record, simply click on the “Add Plan” link under the “Cost Plan” menu. You must enter a cost center and a valid start date for the record. The system then searches to see that a cost center for the fiscal year that the start date given exists. If it does, you may then fill out the site (location) within your organization for which the service is being given and fill out the number of capped units if the service is a capitated service.

3. Cost Plan: Cost Plan Report

To see cost plan records between any two dates for the individual selected, click on the “Cost Plan Report” option under the “Cost Plan” menu. You are then presented with a screen of choices to further specify the cost plan records you wish to see. You may choose to leave the choices blank and simply click on “Submit” in order to see all cost plan records for the individual selected. Or you may wish to restrict the date range or site/location of the service. Additionally, you may select only cost plans that are authorized, unauthorized, or both.

B. Service Plan:

1. Service Plan: View Plans

From the Individuals section of the program, expand the “Service Plan” menu and find the choice “View Plans”. All service plans associated with the currently selected individual will be available for viewing. However, initially only a single service plan service category is displayed. To see all service plans for this individual, change the pull-down choice of “Select Service Group” to “-----All Groups-----” and click on the “Select” button. You will then be shown all service plan records for this individual. Notice the “Edit” and “Delete” options to the right of each record. These are available as long as you have access rights to these options.

a. Service Plan: View Plans: Edit

To edit a service plan record, simply click on the “Edit” link to the right of the service plan records seen on the “View Plans” menu selection under the “Service Plans” menu. Remember that the computer defaults to a single service group, so if the service plan record you are looking for does not appear, then be sure to change the “Select Service Group” pull-down to “-----All Groups-----” or to the specific service group that you wish to view.

You may change the service center as long as a monthly billing cycle has not been created from the service plan record you are editing. If you wish to discontinue the service plan, you should change the end date. However, the system will automatically change the end date to the day prior to the start date of any service plan record with the same cost center or cost center group (in the same fiscal year). If the service plan was entered and a monthly billing occurred, yet was added to the system in error, you must change the end date and “unauthorize” the plan by removing the check mark from the “Authorized” check box. The start date is used as a way to further distinguish the service. There may be only one service per cost center per fiscal year in the services table; however, an individual may have many service plan records with the same cost center per fiscal year as long as the start and end dates do not overlap between records. For example, if John Doe has a service plan record with a 62000 cost center starting 7/1/2001 and ending 7/5/2001, he may also have another 62000 service plan record as long as the start date comes after 7/5/2001.

b. Service Plan: View Plans: Delete

To delete a service plan record, simply click on the “Delete” link to the right of the service plan records seen on the “View Plans” menu selection under the “Service Plans” menu. Remember that the computer defaults to a single service group, so if the service plan record you are looking for does not appear, then be sure to change the “Select Service Group” pull-down to “-----All Groups-----” or to the specific service group that you wish to view. You may not delete a service plan that has already gone through a billing cycle. You may change the end date and/or click on the “Authorized” check box so that it is not checked (unauthorized).

2. Service Plan: Add Plan

To edit a service plan record, simply click on the “Add Plan” link under the “Service Plan” menu. You must enter a cost center and a valid start date for the record. The system then searches to see that a cost center for the fiscal year that the start date given exists. If it does, you may then fill out the site (location)

within your organization for which the service is being given and fill out the number of capped units if the service is a capitated service.

V. Health

Direct care workers and others will enter health reports on a frequent periodic basis in order to comply with regulations and in order to provide required documentation of the individual's care. This section includes medical reports, non-regular and regular medical assessments, and various diagnosis records that are associated with an individual.

A. Charting

What is "Charting"? Charting includes tracking an individual's medical conditions, medical supplies, medical devices, weight records, seizure records, infections, exposures, and other similar information. New charting categories may be added to the system.

1. Work With Charts

After expanding the "Charting" menu from the Individuals section of the program, click on "Work With Charts" to see the entries that have been added to the system. Charts that exist for the individual will appear and the following options are available:

a. Charting: View Chart: Edit

Once you have clicked on "Work With Charts" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Edit", you will be taken to the charting entry form and the information associated with the entry you chose would be loaded. You may then modify the entries.

Click on "Submit" to save the changes you made, or click on "Cancel" to discard the changes you made.

Fields that must have entries (required fields) include:

- Charting Category
- Charting Description
- Entry
- Professional
- Transaction date

b. Charting: Working With Charts: Delete

Once you have clicked on "Working With Charts" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Delete", you will be taken to a screen that asks you if you are sure that you would like to delete the transaction. Answer "Yes" to verify the deletion, or "No" to discontinue to delete process (and keep the transaction).

1. Add Chart

Once you have clicked on "Work With Charts", you will see the button "Add Chart" near the bottom of the screen. Click on it to add another charting transaction for the individual. You will be taken to a blank charting entry form. You may then modify the entries.

Click on "Submit" to save the changes you made, or click on "Cancel" to discard the changes you made.

Fields that must have entries (required fields) include:

- Charting Category
- Charting Description
- Entry
- Professional
- Transaction date

2. Charting Report

Leave all entries blank to see all charting transactions associated with the individual. Otherwise, you may filter the report output by Charting Category and by Date Entered.

Once the report displays, you may click on your browser's "Print" button if you wish to print it to your printer. Click on the "Back" button to go back to the charting menu.

B. Diagnosis

1. View Diagnoses

After expanding the "Health" and then "Diagnosis" menus from the Individuals section of the program, click on "View Diagnoses" to see the entries that have been added to the system.

2. Add Diagnosis

Once you have expanded the "Diagnosis" menu, you will see the menu option "Add Diagnosis". Click on it to add another diagnosis transaction for the Individual. You will be taken to a blank diagnosis entry form. You may then modify the entries.

Click on "Submit" to save the changes you made, or click on "Cancel" to discard the changes you made.

Fields that must have entries (required fields) include:

- Diagnosis Type (or Category)
- Diagnosis Item (or Description)
- Professional
- Transaction date

3. Edit Diagnosis

Once you have clicked on "View Diagnosis" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Edit", you will be taken to the diagnosis entry form and the information associated with the entry you chose would be loaded. You may then modify the entries.

Click on "Submit" to save the changes you made, or click on "Cancel" to discard the changes you made.

Fields that must have entries (required fields) include:

- Diagnosis Type (or Category)
- Diagnosis Item (or Description)
- Professional
- Transaction date

An optional process that can be associated with a diagnosis includes scanning original documents by clicking on the "**Scan**" button on the diagnosis screen. The document is automatically compressed and associated with the diagnosis record and can be viewed or printed. Other options are available as well including rotating the image, changing the contrast of the image and more.

4. Delete Diagnosis

Once you have clicked on "View Diagnosis" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Delete", you will be taken to a screen that asks you if you are sure that you would like to delete the transaction. Answer "Yes" to verify the deletion, or "No" to discontinue to delete process (and keep the transaction).

5. Diagnosis Report

Leave all entries blank to see all diagnosis transactions associated with the individual. Otherwise, you may filter the report output by Diagnosis Type and by Date Entered.

Once the report displays, you may click on your browser's "Print" button if you wish to print it to your printer. Click on the "Back" button to go back to the diagnosis menu.

VI. Med. Admin. (Medication Administration)

Overview

Any medication, whether it is a psychotropic or other drug or an over-the-counter medication, may be entered and tracked in the system. Medications are first entered per consumer through the "Add Med" link. When adding a medication, it also presents you with the first prescription information to enter. Once that information has been entered, you may optionally schedule the dates and times for the medication to be given. A direct caregiver would then click on the "Give Medication" link in order to record whether a medication that was scheduled was given or not. If a medication is discontinued, then the medication is marked as "Yes" for the question "Is this an end date?" that appears on the "Give Medication" screen. The "List Open MARs" link gives you another option for recording medication administration in case you opt not to use the scheduling calendar function.

Some organizations may opt to simply keep track in InfoServ DD the medications used per consumer at first and plan for full implementation later as all users involved become more familiar with the system.

A. MAR (Medication Administration Record)

1. Give Medication

This link allows you to record the administration of the medication. The first time that a medication is given, InfoServ DD will automatically "Create a MAR" start date (which may be ended when the medication is discontinued). The screen contents are the same, other than the fact that a newly created MAR won't ask if this is the end date (since it is the first record and therefore it is the start date).

Create New MAR:

(* means required field)

* Date: *	1/2/2002	-	<c>	+
* Time: *	2	36	am	<input type="radio"/> pm <input checked="" type="radio"/>
Medication: *	Enalapril - Vasotec			
Quantity of Measure	1			
Measurement	tbl			
Quantity of Container	1			
Medicine Container	tablet			
* Diagnosis: *	Hypertension			
Method of Administration:	Oral			
Comments:				
Allergies:	There are no allergies on record			
Diet Instructions:	There are no diet instructions on record			

Click on the "Medication Not Given" button if the medication was not given so that the reason may be recorded. Click on the "Next" button to save this record and have the option of entering in any vital signs taken at the time of the administration. Click on "Cancel" if you do not wish to save the record at all. If you do choose "Next" and wish to record vital signs (optional), then you will receive a screen that gives you a list of vital sign types to choose from such as "Temperature", "Blood Pressure", etc. Choose one and type in the reading or entry in the "Entry" field. To record another vital sign, simply select another vital sign type and fill in an additional reading/entry. Click on "Done" when finished.

2. List Open MARs

What is an "Open MAR"? An open MAR is a medication administration record or group of records that has already been created for a specific medication for a specific individual. You must first have added the medication and prescription for the medication prior to adding a MAR. An "Open MAR" is one that has not yet been closed out. You can close out a MAR by clicking on the "Is this an end date" check box. A MAR would be closed out if the medication is no longer needed to be given (even though the prescription is still valid).

3. Add MAR

If a medication exists and there is not yet an open MAR for it, you may create an open MAR.

4. Edit MAR

You may edit a MAR from this option whether or not it is open or closed (ended).

4. Delete MAR

You may delete a MAR from this option as long as you have the rights to do so.

5. MAR Report

The MAR report lists all the medication administration record information associated with the currently selected individual. The Tennessee MAR lists it in the Tennessee format.

Note: The MAR has a scheduling mechanism per person, per day, per dose. You are able to schedule the administration of the medication for multiple times per day with varying dosages and times per day of week.

B. Med / Prescrip (Medications and Prescriptions)

1. Add Med

In order to be able to add a medication administration record, the medication and a prescription for it must first exist. The medication and prescription areas are split out into separate areas in case you wish to have supervisors set up medications for individuals, while having direct care workers actually doing the medication administration record entry. When you first enter a medication, it also asks for start and stop dates for the medication's prescription. You enter this information one time, and then all subsequent prescription renewals can be created with the information carried forward.

Add Medication

Individual Name: Sally Doe

Medication Info:

Medication Name: * Enalapril

Brand: * Vasotec

Generic: * Enalapril

Medication Type: * Medication

Approval Info:

Guardian / Individual: 1/2/2002 - <c> +

Human Rights: 1/2/2002 - <c> +

Interactions:

Prescription Info:

Start Date: 1/2/2002 - <c> +

End Date: 1/1/2003 - <c> +

Quantity of Measure: 1

Measurement: * tbl

Quantity of Container: 1

Medicine Container: * tablet

Refill - Reorder Date: 2/2/2002 - <c> +

Administration Instructions: Take one in the morning

Reason For Med: * Hypertension

Side Effects: * Dry mouth, cough

Professional: new, professional

Qty of Measure is the amount being taken. Most of the time, it equals 1 and the measurement equals "pill".

What is the next refill date?

Associate a professional with this client

2. Edit Med.

To change information associated with a medication, simply click on "Edit Med." from the "Med./Prescrip" menu. The change in the medication information is immediately reflected in all reports listing that medication.

3. Delete Med

To delete a medication, simply click on "Delete Med" from the "Med/Prescrip" menu. Note that the medication may not be deleted if a medication administration record has been created for it. (If you must delete the medication anyway, then delete the medication administration record first, and then delete the medication.) The change in the medication information is immediately reflected in all reports listing that medication.

4. Prescriptions

To edit a prescription that already exists, click on the "Prescriptions" option from the "Med/Prescrip" menu. You must fill in the start and end dates for the entire prescription period. Once a prescription runs out, you may click on "Renew Prescription" to renew it.

The Prescriptions area links to a scheduling component so dates, times, and dosage amounts can be maintained. Supervisors, nurses, and/or case managers could fill in the scheduler at the main agency office so that the direct care worker simply clicks on the appropriate medication from the individual's calendar and fills out the time given, etc. InfoServ DD allows for dosage amounts to be variable.

Also note -- We will pull medications, dosages, directions, and side effects from an on-line Physician's Desk Reference database in the near future.

Manage Prescriptions for Enalapril:

Name: Sally Doe

Medication Info:

Medication Name: Enalapril

Brand: Vasotec

Generic: Enalapril

Medication Type: Medication

Approval Date & Other Information:

Guardian / Individual: 01/02/2002

Human Rights: 01/02/2002

Interactions:

Prescriptions:

1. Jan 2, 2002 - Jan 1, 2003 [Edit](#) | [Delete](#)

Renew Prescription

Search Again

"Manage Prescriptions" is available immediately after you save after adding a medication or from the "Prescriptions" link under "Med/Prescript".

You can create a medication schedule for this medication. Please select one of these two options:

- Single part schedule
(Ex: one tablet after awakening)
 - Two part schedule
(Ex: one tablet after awakening AND one tablet before bedtime)
- Create A Schedule

You will normally accept the "Single part schedule" and then click on "Create a Schedule" if you want to schedule the dates and times for the medication to be administered. Even though you're accepting the single part schedule, you'll still have the opportunity to schedule the medication to be given multiple times per day.

5. Scheduling

The goal here is to make the recording of medication(s) given very easy by integrating a daily calendar with pre-scheduled medications listed for the individual selected. This makes it much easier and quicker to mark a medication as given, etc. We have linked a schedule of dates and times per each medication an Individual may receive with the default dosage and default method of administration to the Medication/Prescription and to a MAR record. The Direct Care Worker will access the "Give Medication" page and accept all defaults (or change if applicable) and enter the time given or click on the "Medication Not Given" button and fill out a reason why. Reports based on medications not given or medications where the dosage is not the default may be created. Once you have clicked on "Create Schedule", you will see the following screen:

MAR

Please click the "use" link next to the scenario that best exemplifies your input needs. The basic formula stays the same, but the different variables, of the scenario may change, according to your needs. You will then be shown a screen with the appropriate input choice for you scenario.

- [use](#) dictate the hours per day (8:00 AM, 3:00 PM, 9:00 PM, etc.)
- [use](#) 3 cc every 2 hours
- [use](#) 1 tablet every other day
- [use](#) 2 tablets before bedtime
- [use](#) 5 ml every two hours (max of 10 hours)
- [use](#) 2 pills every Monday, Wednesday, and Friday
- [use](#) Twice Daily
- [use](#) 2 tablets at 8:00 AM
- [use](#) 2 pills, twice daily, every other day
- [use](#) 6 capsules on October 14th
- [use](#) 20 cc on the 1st of each month for the next 3 months
- [use](#) 2 pills between 6:00 AM and 6:00 PM, for the next 4 days
- [use](#) Once daily, for the next 20 days

Use this option for the majority of your scheduling needs.

Using the first option (above), "dictate the hours per day...", we have the opportunity to fill in a single time or up to six times per day that a medication can be given.

Below are the components that best fit your chosen medication scheduling needs. Input the correct information for this schedule. Submit the information to complete the process

Choose a Medication	Enalapril - Vasotec
Quantity of Measure	1
Measurement	tbl
Quantity of Container	1
Medicine Container	tablet

These items will default to what was originally entered.

Please enter the times of the day for this medication. Choose as many as you need and leave the rest blank. Choose them in the order of times to be given (chronological).

Hour of the day	8:00	(24 hour clock)
Hour of the day	20:00	(24 hour clock)
Hour of the day		(24 hour clock)
Hour of the day		(24 hour clock)
Hour of the day		(24 hour clock)
Hour of the day		(24 hour clock)

Currently this is based on a military-like clock. In the near future, times will be represented as AM/PM. If the medication is given at 8:00am and 8:00pm, then put 08:00 in the top box and 20:00 in the second box.

Start Date *	01/2/2002	- <c> +	(Ex.: 01/01/2001)
End Date	01/1/2003	- <c> +	(Ex.: 01/01/2001)
	Submit	Reset	Back

The end date would normally be the last day of the prescription period.



Once you've filled out this screen appropriately, InfoServ DD creates the schedule for you. You'll now be able to go to the "Give Medication" link and record the administration of the medication (or give a reason why it was not given).















The scheduler is then displayed in a monthly view. You will be able to see the detail in the daily view. The weekly view is simply a week cut out of the monthly view.

(See the example below of the monthly view.)

[Display Month](#)
[Display Week](#)
[Display Day](#)
[Search](#)

LEGEND

 - Record Detail
 - Give Med

December 2001		January 2002					February 2002						
1							1 2						
2	3	4	5	6	7	8	3	4	5	6	7	8	9
9	10	11	12	13	14	15	10	11	12	13	14	15	16
16	17	18	19	20	21	22	17	18	19	20	21	22	23
23	24	25	26	27	28	29	24	25	26	27	28		
30	31												
SUN	MON	TUE	WED	THU	FRI	SAT							
		1	2   - Rx	3   - Rx	4   - Rx	5   - Rx							
6   - Rx	7   - Rx	8   - Rx	9   - Rx	10 - Rx	11 - Rx	12 - Rx							
13 - Rx	14 - Rx	15 - Rx	16 - Rx	17 - Rx	18 - Rx	19 - Rx							
20 - Rx	21 - Rx	22 - Rx	23 - Rx	24 - Rx	25 - Rx	26 - Rx							
27 - Rx	28 - Rx	29 - Rx	30 - Rx	31 - Rx									

"Record Detail" refers to the process of viewing MAR records -- which spans of time (usually corresponding to the prescription period) for a medication.

"Give Med" lets the computer do the work by having it figure out whether or not a new MAR should be started or not. Direct care workers should normally use the "Give Med" option and should not worry about the "Record Detail" link.

VII. Outcomes

Outcomes, Actions, Action Status, Implementation Plans, and Progress Notes

A. Outcomes



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 “Detailed List” 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.)

From the Detailed List 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.)

OUTCOMES



(E = Edit D = Delete)

Detailed List

Action	Status	Implementation
E D John wants to keep in touch with his sister...	Add a New Status	Add a New Implementation
E D Weekly Call Setup: Mr. Smith w...	E D Going very well so far...	E D Call Sister Weekly. First cal...
E D Call Counseling: Behavioral Sp...	Add a New Status	Add a New Implementation
E D John became enraged that his s...		

Outcomes and Actions Paper Format Example

OUTCOMES	<i>(Actions marked by an 'X' require responsible party to write an implementation strategy)</i>				
	ACTIONS <i>(What needs to happen? Where will it happen? How often?)</i>	START DATE	RESPONSIBLE PARTY & FUNDING SOURCE <i>(Who will make sure the Action occurs & how will services be funded?)</i>	TARGET END DATE	REVIEW * FREQUENCY <i>(How often or Date by which ISC will review?)</i>
	↓ ↓ ↓ ↓				

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

OUTCOMES

Outcomes

Outcomes Type * Choose the Outcome Type from the pull-down: "ISP Outcome", "Behavioral Outcome", "Outcome".

Effective Date * - <c> + (Ex.: 01/01/2001) Enter in the Effective Date for the Outcome – include the slashes between month/date/year or use the calendar "<c>".

Outcomes * Enter in the Outcome (required). Put key words in the first 20 characters or so as these words will show up on the detailed list to help you choose the right Outcome.

Priority * High Normal Low The priority defaults to "Normal".

Service Plan Service Plans that have been entered into the system are listed here. This is optional and would apply only when you wish to associate an Outcome with a Service Plan.

Complete

"Save" saves the Outcome. "Reset" blanks it out if you're adding, or resets it to the original values on edit.

B. Actions

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 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).
Priority *	<input type="radio"/> High <input checked="" type="radio"/> Normal <input type="radio"/> 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	<input checked="" type="checkbox"/> Check if one is needed with this action	Click within the checkbox if an Implementation Plan is needed for 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)	
<input type="button" value="Save"/> <input type="button" value="Reset"/>		

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

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

C. Status Records

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	<div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> Going very well so far </div>	
Status Date *	<input type="text" value="11/30/2001"/> <input type="button" value="-"/> <input type="button" value="<c>"/> <input type="button" value="+"/> (Ex.: 01/01/2001)	
Status *	<input type="text" value="In Progress"/> <input type="button" value="v"/>	Status choices include: "In Progress", "Completed", "Deferred", "Not Started", and "Waiting on Someone Else".
Next Review	<input type="text" value="12/30/2001"/> <input type="button" value="-"/> <input type="button" value="<c>"/> <input type="button" value="+"/> (Ex.: 01/01/2001)	If you wish to record the "Next Review" date for the Action that this Status record is associated with, then do so here.
<input type="button" value="Save"/> <input type="button" value="Reset"/>		

D. Implementation Strategies/Plans

You may create an implementation strategy/plan for an outcome action if the action has been appropriately marked as such.

OUTCOMES

Implementation

Action	11/30/2001 - 11/30/2001 (Weekly Call Setup: Mr. Smith will talk w)
Strategy	Call Sister Weekly. First call to make sure she has one night a week that she can talk to him. Help John dial and make sure the connection is made. Stay with him as needed during the
Implementation Date *	11/30/2001 - <c> + (Ex.: 01/01/2001)
Documentation	Keep phone bills with long distance charges to his sister.
Complete	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

The first 30 characters of the Action this Implementation Plan/Strategy is associated with appear here.

Click the check box here if the Plan is complete.

E. Progress Notes

OUTCOMES

Progress

Progress *	Called today at noon. They talked for 30 minutes. John was very happy.
Score	10
Progress Date *	11/30/2001 - <c> + (Ex.: 01/01/2001)
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

Progress Notes can be added to each Implementation Plan/Strategy as needed. Add from the "Add Progress" button from the "Detailed List" link or from the links beneath the Implementation Plan screen.

		INDIVIDUAL SUPPORT PLAN OUTCOMES				
_____		_____			_____	
(Date of ISP Meeting)		(Person's Name)			(Effective Date of ISP Meeting)	
OUTCOMES	(Actions marked by an 'X' require responsible party to write an implementation strategy)					
	ACTIONS <small>(What needs to happen? Where will it happen? How often?)</small>		START DATE	RESPONSIBLE PARTY & FUNDING SOURCE <small>(Who will make sure the Action occurs & how will services be funded?)</small>	TARGET END DATE	REVIEW * FREQUENCY <small>(How often or Date by which ISC will review?)</small>
John wants to keep in touch with his sister.						
	Weekly Call Setup: Mr. Smith will talk with John's sister about the best time to schedule a weekly call.	X	11/30/2001	John Smith	11/29/2002	Daily
	Call Counseling:					

We currently have an Outcome report that matches the State of Tennessee's ISP Outcome report. Above is a view of a portion of that report. The "X" denotes that an Implementation Plan is needed for the Action.

VIII. Notes

A. ISP

The ISP, or individual Support Plan, is the primary document of record for the planned care of an individual over the course of a year. It is reviewed annually at re-certification, and is updated and archived. An agent or ISC is the owner of this plan, and it is entered by them or by a direct care worker.

The ISP is created and amended by a support coordinator assigned to the individual by his Support Coordination Provider. The ISP is to be renewed annually at re-certification. The information in the plan may be updated at any time during the year as deemed necessary. In a manual system, an amendment is created when parts of the ISP need to be updated. This is because the changes to the ISP must be sent out to all parties involved in the care/oversight of the individual. With the advent of this system, the changes can be made to the information with all parties being notified to check for changes in the ISP. This saves time and money spent on copying and mailing ISP amendments.

Individuals who are part of the Remedial Settlement Agreement must have an ISP written and in place within fourteen (14) days of their move from the developmental center to the community. Class members not involved in the Remedial Settlement Agreement must have an ISP written and in place within twenty-one (21) days of their move from the developmental center to the community. Other individuals must have their ISP written and in place within thirty (30) days of their move from the developmental center to the community. The renewal of an ISP must be done by the next re-certification date.

Service providers or independent support coordination organizations use the ISP for the individual as their guide to providing the proper care for the individual. Guardians, family members, advocates and other “circle of support” members involved in the individual’s care, may also receive copies of, or provide input for the ISP.

1. ISP Screen

The ISP Screen serves as the data entry point and guide to navigating through the various parts of the ISP. After the proper section of the ISP is selected, the user may add or edit text to the section. The user may then continue the process through the remaining sections as needed.

The ISP Screen lists the service plans for an individual in reverse chronological order. It also has the

NOTES

[Add New ISP](#)

Current ISPs:

1. Jan 1, 2001 ISP [Edit](#) [Delete](#) [Upload](#) [View](#)

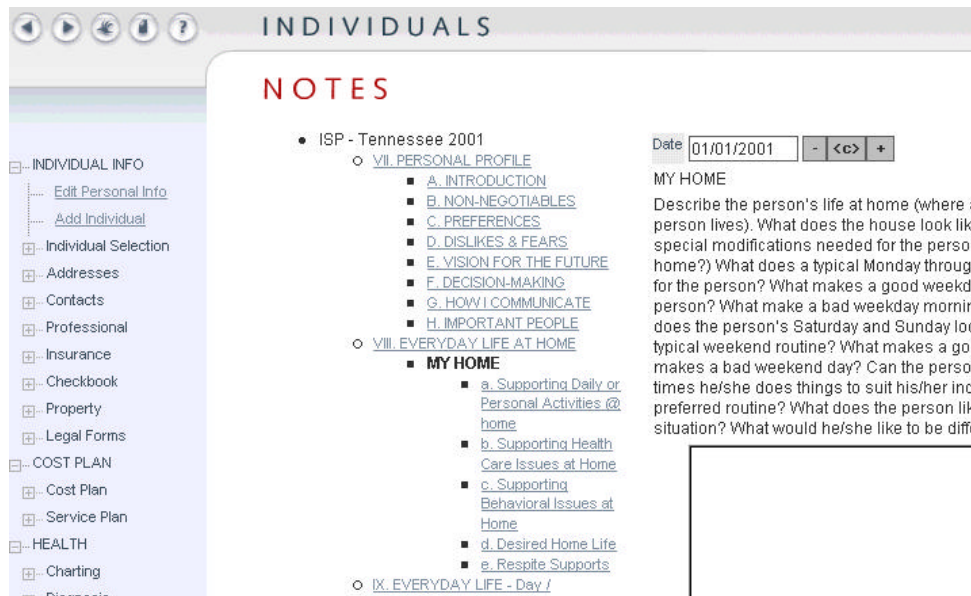
option to “Upload” (or attach) the ISP as a Word document or PDF and allows you to then “View” it thereafter.

Select the ISP by clicking on “Edit”.



2. Part A

After selecting “Edit”, you may scroll down “Part A” of the ISP to see the information associated with the individual. Then you can click on “Part B” in order to add text to the remaining ISP sections.

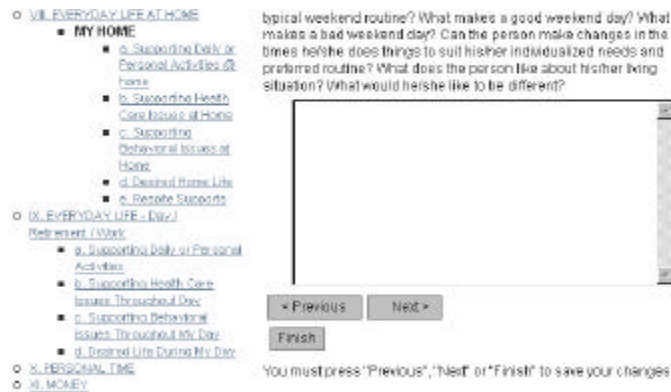


3. Part B

Part B (above) begins with the section called “VII. PERSONAL PROFILE”. If you’re adding this ISP, the most important action to take is to change the date field to the ISP Effective Date. Part B includes the highlighted section “My Home”. To add text to this section, click on the text box and begin typing or

optionally, you may paste (Ctrl-V) text into the section after copying it (Ctrl-C) from a document like Microsoft Word.

Once you've added text to the section, you have the options to go to the previous or next sections or to finish working with the ISP. All three of these buttons will save your information.



4. Security (Security Requirements)

Your System Administrator gives you "rights" to view, edit, and delete the ISP. Please contact your System Administrator for more information on this subject.

5. Links

The ISP retrieves personal information, the individual's contacts and important places (like his nearest emergency room and his residential location). These items are all gathered and displayed on the ISP report.

6. Required Fields

The ISP date, the individual for whom the plan is written, and the employee who enters the ISP are all required fields. The various sections are not required at this time, as it may be necessary to create sections over time (and therefore on different days).

7. Optional Fields

In practice, each section of the ISP should be filled out; however, the system allows the user to enter the various sections over a specified time period because of the amount of work that must be done in order to complete the plan. Reports produced by the system help monitor the status of the ISPs that are due.

B. Daily Notes

Direct care workers will enter daily notes on the activities and condition of individuals in order to comply with regulations and in order to provide required documentation of the individual's care. Case managers will likewise need to compile monthly reports of the individual's care based on the daily notes in a reliable and convenient way.

Daily Notes may be found in the Individuals Section, under Notes. The notes in this section will be specifically related to the individual selected. The Notes section is listed on the left-hand side of the screen and has several uses.

There are four options associated with Daily Notes: Last Week, Search, Add Daily Notes, and Reports.

1. Last Week

If this option is selected, the daily notes for the previous week are displayed.

The Daily notes of the last week will be listed by Date, Type, and Name.

When finished viewing the notes, the user may select cancel to exit the Notes section.

2. Search

-Selection criteria may be entered in the Start Date and End Date field. These fields are initially shown with the current day, month, and year.

-Selection criteria may be entered in just one field, or both fields. The minimum amount of information that must be entered is one date entered in one field, usually the Start Date field.

-The date must be entered in this form: MM/DD/YYYY. (See the Addendum for an explanation of how to use the calendar function.)

-EXAMPLE: If 03/01/2000 is entered into the Start Date field, the Notes entered between that date and the current date will be displayed.

-EXAMPLE: If 03/01/2000 is entered into the Start Date field and 03/31/2000 is entered into the End Date field, a list of the Notes made during March of 2000 will be displayed. They will be listed by Date, Time and Name.

Click on Edit or Delete to the right of the note date in order to modify or delete information contained in that assessment.

Previous, Next or Finish must be selected in order to save modifications.

A user must have the appropriate authorizations to view, edit or delete this information.

3. Add Daily Notes

If you would like to add a daily note to the current individual selected, then choose the Add Daily Notes option. The current date will then be populated on the next screen, and a designated area that will allow the user to enter notes will appear. In order to save the note entered, the finish tab must be selected. To exit this page, the user may choose the "Cancel" button. It is possible to add more than one daily note per day.

4. Reports

-Selection criteria may be entered in the Start Date and End Date field. These fields are initially shown with the current day, month, and year.

-Selection criteria may be entered in just one field, or both fields. The minimum amount of information that must be entered is one date entered in one field, usually the Start Date field.

-The date must be entered in this form: MM/DD/YYYY.

-EXAMPLE: If 03/01/2000 is entered into the Start Date field, the Notes entered between that date and the current date will be displayed.

-EXAMPLE: If 03/01/2000 is entered into the Start Date field and 03/31/2000 is entered into the End Date field, a list of the Notes made during March of 2000 will be displayed.

The notes will be listed along with the name of the individual, their SSN, DOB, and the case number assigned to them.

There is a search again option at the end of the listed notes.

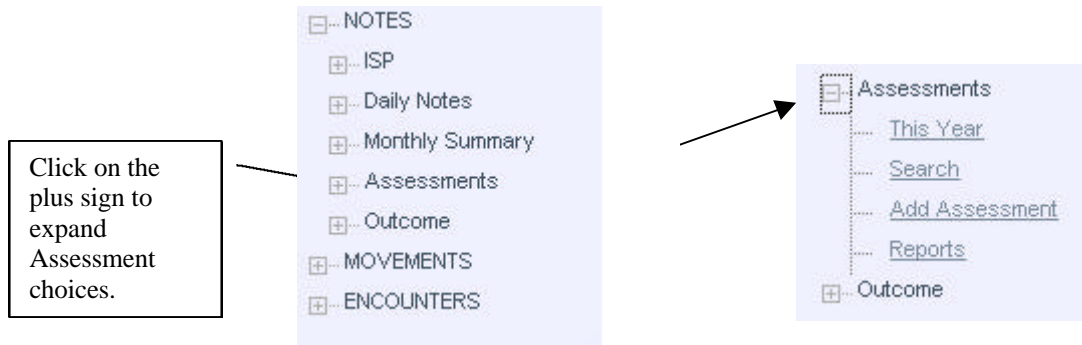
C. Monthly Summary

A Monthly Summary (or “Monthly Review”) is a report that is required by HCFA (CMS) for participants in the HCBS Waiver program. Many states also require the report for state supported individuals. Its purpose is to recap significant events and actions in the life of the Individual. The Monthly Summary currently exists in the system, as a form to fill out – much like many of the Assessment forms. It has a date, which should be the last day of the month of the summary period, as well as different sections to fill in text for. In the future, the Monthly Summary will bring back Daily Notes, Implementation Plan, and Incident details and place the results in the corresponding sections for service providers. For Independent Support Coordination organizations, the Monthly Summary would bring back Support Note and Incident details and place the results in the corresponding sections.

D. Assessments

Options for Assessment are displayed in the menu bar at the left side of the screen. If there is a plus sign to the left on the assessment option, click on the plus sign to view detailed options.

1. An Assessment may be selected in two ways:



- 1) This Year-Displays the list of assessments that occurred in the current calendar year.
- 2) Search-This displays the Assessment Search screen.
 - Selection criteria may be entered in the Start Date and End Date field. These fields are initially shown with the current day, month, and year.
 - Selection criteria may be entered in just one field, or both fields. The minimum amount of information that must be entered is one date entered in one field, usually the Start Date field.
 - The date must be entered in this form: MM/DD/YYYY.
 - EXAMPLE: If 03/01/2000 is entered into the Start Date field, the assessments entered between that date and the current date will be displayed.
 - EXAMPLE: If 03/01/2000 is entered into the Start Date field and 03/31/2000 is entered into the End Date field, a list of the assessments made during March of 2000 will be displayed.

Click on Edit or Delete to the right of the assessment date in order to modify or delete information contained in that assessment.

Previous, Next or Finish must be selected in order to save modifications.

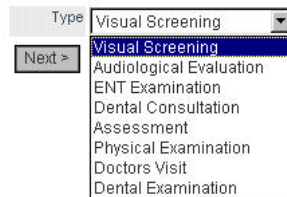
A user must have the appropriate authorizations to view, edit or delete this information.

2. To add an Assessment:

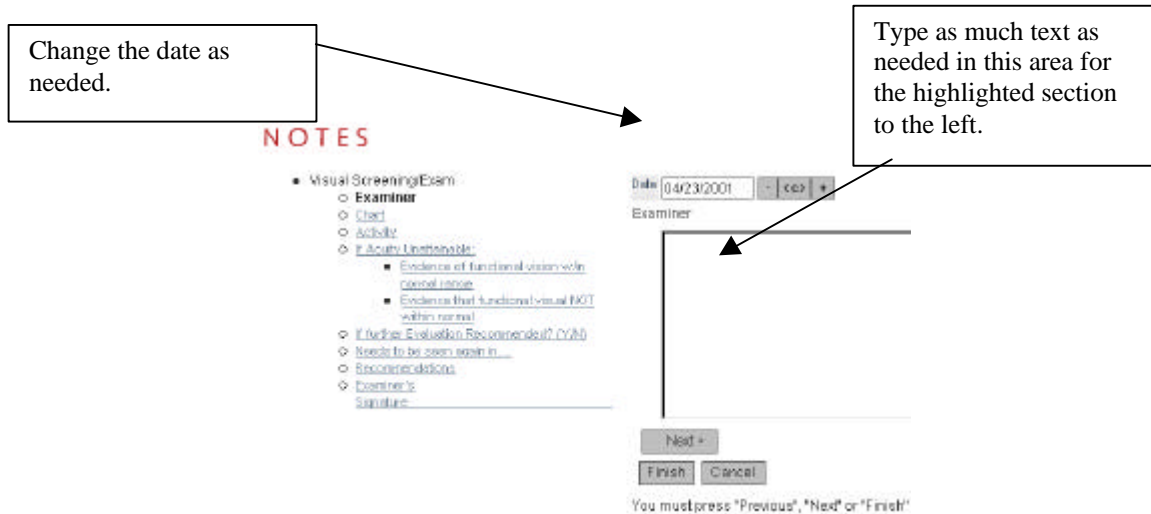
The Add Assessment option is used to enter an assessment. There are four steps required in adding an assessment:

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Choose Assessment Type:



- 1.) First, choose the type of Assessment you wish to Add and click on the “Next” button to continue.
- 2.) The Assessment requirement is met by filling in the date field. The date should be entered in the MM/DD/YYYY format.



-Select “Next” to move to the next option.

-Next or Finish must be selected to save the date entered, Cancel does not save the information.

- 3.) Enter the text associated with the highlighted section of the current Assessment form type you selected. In the example above, the section highlighted is called "Examiner". The user may enter as much information as is necessary.

-Next may be selected to move to the next option.

-Previous will return the user to Assessment.

-Previous, Next or Finish must be selected in order to save the data entered.

Continue entering information in each section, as needed. When you are finished, click “Finish”.

To display this screen, a user must have the appropriate authorization to add an assessment.

3. Assessment Reports:

To generate a report, the user must select the Report option. When this option is selected, the Search for Individual Assessments to Report screen is displayed. The user will then be prompted to enter the date range for assessments created in that range and to identify the single assessment type to print (or leave as-is for all assessment types). It should be noted that the Search and Report options are for the current individual selected.

- Selection criteria may be entered in the Start Date and End Date field. These fields are initially shown with the current day, month, and year.

- Selection criteria may be entered in just one field, or both fields. The minimum amount of information that must be entered is one date entered in one field, usually the Start Date field.

- The date must be entered in this form: MM/DD/YYYY.

- EXAMPLE: If 03/01/2000 is entered into the Start Date field, the assessments entered between that date and the current date will be displayed and a report will be generated.

- EXAMPLE: If 03/01/2000 is entered into the Start Date field and 03/31/2000 is entered into the End Date field, a list of the assessments made during March of 2000 will be displayed and a report will be generated? (A report will be generated with options to export or view.)

IX. Movement

Definition: What is "Movement"? Movement refers to the tracking of an individual's movement from one location/facility to another. The emphasis here is not necessarily on the tracking of a consumer's movement from group home to group home in the community, but rather on their history. Was the consumer ever institutionalized? What was his discharge date and where did he move to? Did the consumer come from an ICF/MR? These movement records can be added here.

1. View Movement

After expanding the "Movement" menu from the Individuals section of the program, click on "View Movement" to see the entries that have been added to the system.

a. Movement: View Movement: Edit

Once you have clicked on "View Movement" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Edit", you will be taken to the movement entry form and the information associated with the entry you chose would be loaded. You may then modify the entries.

Click on "Submit" to save the changes you made, or click on "Cancel" to discard the changes you made.

Fields that must have entries (required fields) include:

- Movement Type (or Category)
- Moved From
- Moved To
- Transaction date

b. Movement: View Movement: Delete

Once you have clicked on "View Movement" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Delete", you will be taken to a screen that asks you if you are sure that you would like to delete the transaction. Answer "Yes" to verify the deletion, or "No" to discontinue to delete process (and keep the transaction).

2. Add Movement

Once you have expanded the "Movement" menu, you will see the menu option "Add Movement". Click on it to add another movement transaction for the individual. You will be taken to a blank movement entry form. You may then modify the entries.

Click on "Submit" to save the changes you made, or click on "Cancel" to discard the changes you made.

Fields that must have entries (required fields) include:

- Movement Type (or Category)
- Moved From
- Moved To
- Transaction date

3. Edit Movement

To edit a movement record, select edit and modify the information provided on the Movement form. (Your system administrator must have given you the access rights to perform an edit.)

4. Delete Movement

To delete a movement record, select the “Delete” link to the right of the movement record shown from the “View Movement” menu option. (Your system administrator must have given you the access rights to perform a deletion.)

1. Movement Report

Leave all entries blank to see all movement transactions associated with the individual. Otherwise, you may filter the report output by Movement Type and by Date Entered.

Once the report displays, you may click on your browser’s “Print” button if you wish to print it to your printer. Click on the “Back” button to go back to the movement menu.

X. Encounters

Definition: Encounters include the recording of doctor visits, Pre-Admission Evaluation dates, certification or re-certification dates, admission into the Waiver program and other important encounters with professionals. Paperwork and/or charts generated by professionals or entities outside the realm of users of InfoServ DD may be "attached" to the encounter record by scanning it into the system directly from our on-line scanning solution. Files created in Microsoft Word, Excel, or in other programs may also be uploaded (and attached) to an encounter record as well.

1. View Encounters

After expanding the "Encounter" menu from the Individuals section of the program, click on "View Encounter" to see the entries that have been added to the system.

a. Encounter: View Encounter: Edit

Once you have clicked on "View Encounter" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Edit", you will be taken to the encounter entry form and the information associated with the entry you chose would be loaded. You may then modify the entries.

Click on "Submit" to save the changes you made, or click on "Cancel" to discard the changes you made.

Fields that must have entries (required fields) include:

- Encounter Type (or Category)
- Professional
- Transaction date

An optional process that can be associated with an encounter includes scanning original documents by clicking on the "Scan" button on the encounter screen. The document is automatically compressed and associated with the encounter record and can be viewed or printed. Other options are available as well including rotating the image, changing the contrast of the image and more.

b. Encounter: View Encounter: Delete

Once you have clicked on "View Encounter" and entries appear, you will see that each entry has an "Edit" and possibly a "Delete" option to the right of the entry. By clicking on "Delete", you will be taken to a screen that asks you if you are sure that you would like to delete the transaction. Answer "Yes" to verify the deletion, or "No" to discontinue to delete process (and keep the transaction).

c. Encounter: View Encounter: Scan Encounter Documentation

Once you have clicked on "View Encounter" and entries appear, you will see that each entry has a "Scan" option to the right of the entry. By clicking on "Scan", you will be taken to a screen that allows you to scan in a document or documents that you wish to associate with the encounter. *See the Scanning function in the Addendum for additional information on how to scan.*

d. Encounter: View Encounter: View Scanned Image

If the encounters listed have had a document or documents scanned into the system, the "View" option becomes available so that you may view what is on file. *See the Scanning function in the Addendum for additional information on how to scan.*

2. Add Encounter

Once you have expanded the “Encounter” menu, you will see the menu option “Add Encounter”. Click on it to add another encounter transaction for the individual. You will be taken to a blank encounter entry form. You may then modify the entries.

Click on “Submit” to save the changes you made, or click on “Cancel” to discard the changes you made.

Fields that must have entries (required fields) include:

- Encounter Type (or Category)
- Professional
- Transaction date

3. Edit Encounter

Click on “Edit Encounter” to change the contents of an encounter record already added to the system. You are then presented with a screen that allows you to search for the encounter you wish to edit. By leaving the choices blank and clicking on “Submit” you will see all encounters associated with the individual. To refine your search, simply add a date range or a specific encounter category to search for. Click on the “Edit” link to the right of the encounter shown that you wish to edit. You may change the information on the encounter record and save it by clicking on “Save” (or “Submit”).

4. Delete Encounter

Click on “Delete Encounter” to delete an encounter record already added to the system. You are then presented with a screen that allows you to search for the encounter you wish to delete. By leaving the choices blank and clicking on “Submit” you will see all encounters associated with the individual. To refine your search, simply add a date range or a specific encounter category to search for. Click on the “Delete” link to the right of the encounter shown that you wish to delete. If your system administrator has given you the rights to delete an encounter, the record will be deleted.

5. Encounter Report

Leave all entries blank to see all encounter transactions associated with the individual. Otherwise, you may filter the report output by Encounter Type and by Date Entered.

Once the report displays, you may click on your browser’s “Print” button if you wish to print it to your printer. Click on the “Back” button to go back to the encounter menu.

XI. Financial

A. Monthly (or Periodic) Billing

1. Create Monthly Billing

Once your cost plans have been authorized (if applicable), these authorized cost plans are ready to create a “batch” of billing records which we will bill to the State. Therefore, this option should be run at the same time that the state processes their billing (normally the 15th of the month). It is imperative that your cost plans match the cost plans on file at the State in order for this process to work.

2. Unpaid Billing Records

This option allows you to view previously created billing records that have been marked as “Unpaid”.

3. Closed Billing Cycles

You have the option of searching through closed (prior) billing batches. When doing so, you will no longer be able to add any additional adjustments to it and are simply reviewing old records.

4. Enter Actual Amounts

Enter actual units of service given for each individual’s billing through this option. You may also edit the payment status of “Paid”, “Unpaid”, and “Rebill” through this screen. In the near future, the Attendance record will feed this mechanism.

5. Close Billing Cycle

You have the option of closing a prior billing batch. When doing so, you will no longer be able to add any additional adjustments to it. Therefore, you would not normally close out a billing cycle until you are certain that no further activity will ever be posted against that billing period – usually something you’re not sure of for at least ninety days, but more likely after twelve months.

6. Delete Billing Cycle

This option is only available if a billing cycle has not been closed and has had no entries made. You would do this only if you mistimed the creation of a billing cycle and needed to re-do it.

B. Adjustments

1. Add Adjustment

Adjustments must be made in the system because of the potential for errors – either by your organization or by the State. This mechanism allows you to add or subtract units of service given for a specific period for a specific cost plan. The cost plan **MUST** exist in the system in order to add an adjustment for it. The cost plan does **NOT** have to be authorized though.

2. Edit Adjustment

After an adjustment has been added, you may edit it.

C. COA (Chart of Accounts Export File Creation)

Your PHS consultant will help you set up your export file. Please consult with PHS for this service.

D. Billing Definitions

Actual Units – this is the field used to record the actual number of units of service that were provided during the **month** by a service provider for a specific service for an individual. In practice, an individual would normally have a residential, day, and transportation service, along with other possibilities. Each of these services would be represented in a format similar to the cost plan screen. This screen would also include the actual units field to be entered by the users. Users will be at all of the sites within an agency. The actuals screen should allow the user (with appropriate permissions) to “filter” out just the actual records from his site, or to see all actual records from his agency.

Creating Actual Unit billing records – in order to record the actual units of service, a process for creating the actual unit billing records should occur. Billing is normally done on a monthly basis as a “batch”. What we do is create these billing records based on the authorized cost plans that have a day or days between the cost plan start and end dates that fall within the billing process period start and end date. The creation of actual unit billing records normally occurs to the end of the 15th day of each month for the cost plan records that are marked as authorized for the prior month. The first step in the creation of actual unit billing records is to allow the user should be prompted with a “Billing Period” date prompt equal to the last day of the prior month. Once the actual units entry is done, all of the records in the batch will be automatically marked as Paid. All records marked as “Re-bill” and **not** marked “Paid” from prior periods will also be automatically marked as Paid.

Billing Period – the billing period is normally the first through the last day of the prior month.

Invoice date / Payment date – the date that the invoice is paid. Normally, this date will be on the first day of the month after the creation of actual billing records from the prior month. This date becomes important because an invoice can pay for the records from the billing period as well as re-bills from prior billing periods.

Re-Bills – not all actual unit records will be paid by the state. Some records are not paid because the individual’s re-certification date or other necessary information is invalid (or out of compliance). These actual unit records will be unmarked as “Paid?” during the “Re-bill” process. The user could also mark the record as a “Re-bill” if the information was corrected and it still qualifies for payment. These records marked as re-bills will retain the actual units entered during the billing period that it was created in, but these may be corrected/overwritten if needed.

Billing Calendar – the billing calendar could be considered a “child” process of the actual unit entry process. The billing calendar records units on a **daily** basis and totals them for the month in order to provide the appropriate monthly total to its corresponding actual unit record. Only services that are marked in the service table as “billing_calendar = Y” (a Boolean/bit/logical field) should have billing calendar entries created for them. A billing calendar report should be created per person from this information.

Re-billing / Un-Marking as Paid Process – when an invoice is presented to the service provider, an accompanying “Agency Exception Report” (or list of unpaids) will also be provided to the service provider. These unpaid actuals and re-bills represent transactions from prior periods (that are already stored in our payment table). An accounting clerk from the main service provider office will be in charge of **unmarking** these records as “Paid” and marking them as “Re-bill” if necessary. The user makes this determination.

Monthly Max – a monthly max determines the maximum that the state will pay. If the user enters an actual unit of 120 units on a record that has a monthly max of 90, then we should carry the 90 units times the rate over to the payment table as the amount to be paid.

Service Code – this is just another name for a cost center.

Estimated Period Cost – the estimated period cost is calculated based on maximum units times the rate per month for the entire date range represented in the start and end dates in a cost plan. This calculation must also pro-rate partial months of service based on the number of days served. The algorithms to perform this are found below.

Cost Plan Rules –

- There can be multiple services on a person's Cost Plan.
- There can only be one service per service group on a Cost Plan per time period. In other words, the person should have only one residential service going on 1/25/2001. The person could have the residential cost plan running for 1/1/2001 to 1/25/2001 at site X123 and a Cost Plan record for 1/26/2001 through 6/30/2001 for site X321. Of course, if the person changed to a site not part of this agency on the 26th, then this agency wouldn't even see that record (unless they were given rights as an alternate owner).
- If the service is linked to the blank service group record, then the group rule is relaxed. In other words, you could have 100 Cost Plan records running simultaneously if their service group is in the blank group.

XII. Employees

A. Employee Management

1. Add Employee

Once you have expanded the “Employee Mgmt” menu from the Employees section of the program, you will see the menu option “Add Employee”. Click on it to add another Employee. You will be taken to a blank Employee entry form. You may then modify the entries. Note that the User name and Password fields are present on an employee add, but are not present on an employee edit. The user name and password may be edited by choosing the “Edit User Name” option to the right of the employees listed in a “Display All” or a “Search” as long as the employee/user logged in has permissions to edit employee permissions (or is editing his own record).

Click on “Next” to save the changes you made, or click on “Cancel” to discard the changes you made. You are then presented with a screen which allows you to “Give Specific Permissions” or else end the add session by clicking on “Done”.

Give Specific Permissions

If you choose to “Give Specific Permissions” to an employee, what you are doing is opting to adjust the permissions for this specific employee because his/her exact security needs cannot be met within the User Group permissions that he/she is a member of. In other words, you have already entered the employee in a user group, and this user group already has a standard set of permissions to the different parts of the system; however you are choosing to modify this set for this employee only. It could be that the employee is in the “Direct Care Worker” user group, but you also want to give them access to “Maintenance: Contacts” (which they do not normally have access to as a direct care group member).

Fields that must have entries (**required fields**) include:

- First Name
- Last Name
- Social Security Number
- Gender
- Race
- User Name
- Password
- Site
- User Group
- Employee Number
- PIN (Personal Identification Number)
- Address 1
- City
- State
- Zip
- Phone 1

The following fields are being added to the Employee section. Please prepare by gathering this information and having it ready to enter into the system:

a) ----General-----

- Title
- Position
- Department (Pull-Down)

EMPLOYEES HOME

Employees Accessed in Last 2 weeks

Employee	Edit	Edit Username	Delete	Training	History
Allen, Donna (111-11-1111)	[Edit]	[Edit Username]	[Delete]	[Training]	[History]

Primary Language Spoken (Pull-Down)
U.S. Citizen? (Yes/No)

b) ----Pre-Employment----

Reference Checks Done? (Yes/No)
Ref. Check Explanation: (Description)
Background Checks Done? (Yes/No)
Background Check Explanation: (Description)
Drug Test Date (Date)
Drug Test Positive? (Yes/No/Inconclusive)
Verification of Education Requirements: (Yes, No, Waived)
Verification of Education Explanation: (Description)
Education Level (Pull-down: "High School Diploma", "Associates Degree", "Undergraduate Degree", "Masters Degree", "PHD", X, Y, Z)
Education Certifications (Description)
F-endorsement? (Yes/No)
Hire Date (Date)
Full Time Date (Date)
Shift (Pull-down)
Status (Pull-down) (Multiple Uses, depending on State and Agency)

c) -----Health-----

TB Skin Test Date (Date)
TB Skin Test Expiration Date (Date)
Agree to have Hepatitis Vaccine? (Yes/No)
Hep B First Shot Date (Date)
Hep B Second Shot Date (Date)
Hep B Third Shot Date (Date)
Disability Supports Needed (Does employee need special equipment: describe.)
Other Health 1 (Description)
Other Health 2 (Description)

d) -----Benefits-----

Insurance Single Coverage? (Yes/No)
Insurance Family Coverage? (Yes/No)
Health Insurance Company (Description)
Life Insurance? (Yes/No)
Life Insurance Company (Description)
Long Term Disability? (Yes/No)
Long Term Disability Company (Description)
Property (Description)
(What company property, other than auto keys, does the employee have use of ?)
Other Benefits 1 (Description)
Other Benefits 2 (Description)

e) -----Driving-----

Valid State Driver's License?	(Yes / No)
Driver's License #	
Driver's License Expiration Date	(Date)
Auto Insurance?	(Yes / No)
Auto Insurance Expiration Date	(Date)
Auto Insurance Company	(Description)
Gas Card Number:	(Description)
Gas Card Expiration Date:	(Date & Time)
Have Keys?	(Yes/No)

f) -----Post Employment----

Termination Date:	(Date & Time)
Termination Explanation:	(Description)
Eligible for Rehire?	(Yes/No)
Eligible for Rehire Comments:	(Description)
Returned All Property?	(Yes/No)
Returned Property Comments	(Description)

2. Display All

Click "Display All" to list every employee from your organization.

3. Employee Search

Click "Employee Search" in order to search for an employee or employees by name. You may fill in an entire name or any part of a single name (i.e. First name: "J" or "Jim").

4. Edit Employee

Once you have clicked on "Display All" or have executed the "Search" command, you will see "Edit", "Edit User Name", and "Delete" options to the right of each employee name. Click on "Edit" to change the contents of an Employee record already added to the system. You are then presented with a screen that allows you to search for the Employee you wish to edit.

5. Delete Employee

Once you have clicked on "Display All" or have executed the "Search" command, you will see "Edit", "Edit User Name", and "Delete" options to the right of each employee name. Click on "Delete" to delete an Employee record already added to the system. If your system administrator has given you the rights to delete an Employee, the record will be deleted.

6. Employee Report

Leave all entries blank to see all Employees in your organization. Otherwise, you may filter the report output by a number of different fields (or any combination of them).

Once the report displays, you may click on your browser's "Print" button if you wish to print it to your printer. Click on the "Back" button to go back to the Employee menu.

B. Permissions Management

Edit User Group

Once you have expanded the "Permissions Management" menu from the Employees section of the program, you will see the "Edit User Groups" option. Click on "Edit User Groups" and you will see a pull-

down that, when clicked, will give you a list of all the different user group types in the system. Find the user group you wish to edit and click on it and click on the “Edit” button below it. The permissions for each section of the program are listed for that user group. If you are sure you wish to edit these permissions, scroll down the screen until you find the button “Edit Permissions” and click on it. Modify the pull-down(s) to the right of the module listings and scroll down the screen to find the “OK” button. Click on “OK” to save the changes and the user group’s standard set of permissions will have been changed.

C. General Reports

Employee Report

Once you have expanded the “General Reports” menu from the Employees section of the program, you will see the employee report selections that are available from this part of the program. Click on the report you wish to see and filter for specific items or leave them blank to see all employees. Click on your browser’s “Print” button to print it.

XIII. Maintenance

A. Contacts

1. Add Contact

Once you have expanded the “Contacts” menu from the Maintenance section of the program, you will see the menu option “Add Contact”. If you are sure the contact is not already in the system, click on it to add a new Contact. (If you are not sure, then choose “Edit Contact” to search for the contact by name.) You will be taken to a contact entry form. Enter the information and save it.

2. Edit Contact

Once you have expanded the “Contacts” menu from the Maintenance section of the program, you will see the menu option “Edit Contact”. Click on it to edit an existing Contact. You will be taken to a contact search form. Enter a name (either first or last) for the contact and click on “Search”. If you see the contact to edit, click on “Edit” and modify the information and save it.

3. Delete Contact

Once you have expanded the “Contacts” menu from the Maintenance section of the program, you will see the menu option “Delete Contact”. Click on it to delete an existing Contact. You will be taken to a contact search form. Enter a name (either first or last) for the contact and click on “Search”. If you see the contact to edit, click on “Delete” and **the contact will be deleted if he/she is not currently linked to an individual.**

B. Professionals

1. Add Professional

Once you have expanded the “Professionals” menu from the Maintenance section of the program, you will see the menu option “Add Professional”. If you are sure the professional is not already in the system, click on it to add a new Professional. (If you are not sure, then choose “Edit Professional” to search for the Professional by name.) You will be taken to a Professional entry form. Enter the information and save it.

2. Edit Professional

Once you have expanded the “Professionals” menu from the Maintenance section of the program, you will see the menu option “Edit Professional”. Click on it to edit an existing Professional. You will be taken to a Professional search form. Enter a name (either first or last) for the Professional and click on “Search”. If you see the Professional to edit, click on “Edit” and modify the information and save it.

3. Delete Professional

Once you have expanded the “Professionals” menu from the Maintenance section of the program, you will see the menu option “Delete Professional”. Click on it to delete an existing Professional. You will be taken to a Professional search form. Enter a name (either first or last) for the Professional and click on “Search”. If you see the Professional to edit, click on “Delete” and **the Professional will be deleted if he/she is not currently linked to an individual.**

C. Insurance

1. Add (Insurance) Company

Once you have expanded the “Insurance Companies” menu from the Maintenance section of the program, you will see the menu option “Add Company”. If you are sure the Insurance Company is not already in the system, click on it to add a new Insurance Company. (If you are not sure, then choose “Edit Company” to search for the Insurance Company by name.) You will be taken to a Insurance Company entry form. Enter the information and save it.

2. Edit (Insurance) Company

Once you have expanded the “Insurance Companies” menu from the Maintenance section of the program, you will see the menu option “Edit Company”. Click on it to edit an existing Insurance Company. You will be taken to a Insurance Company search form. Enter the name for the Insurance Company and click on “Search”. If you see the Insurance Company to edit, click on “Edit” and modify the information and save it.

3. Delete (Insurance) Company

Once you have expanded the “Insurance Companies” menu from the Maintenance section of the program, you will see the menu option “Delete Company”. Click on it to delete an existing Insurance Company. You will be taken to a Insurance Company search form. Enter a name (either first or last) for the Insurance Company and click on “Search”. If you see the Insurance Company to edit, click on “Delete” and the Insurance Company will be deleted if he/she is not currently linked to an individual.

D. Pull-Down Mgmt

1. View Groups

Click on the Pull-Down Mgmt menu of the Maintenance section of the system and click on the “View Groups” option. Notice that multiple pages (3 or more) of pull-down groups exist and you are now on page 1. These groups are in alphabetical order. Some groups are “*Child*” groups. This means that they are called upon depending upon the “*Parent*” group that is chosen by the user. Examples of child groups include the “Medical Condition”, “Medical Supplies”, and “Medical Devices” groups which are children of the “Charting” parent group. The diagnosis section also has parent/child groupings.

Please contact Practical Health Systems, Inc. through the Help Desk screen or through email or phone before adding a new pull-down group or a new pull-down item to an existing group.

E. Agency Management

1. View Agency

Click on the Agency Mgmt menu of the Maintenance section of the system and click on the “View Agency” option. Your organization’s information will be available to edit. At the bottom of the screen will be a “Next” button which will take you to a screen to manage your sites. From it you can add a new site or edit or delete an existing site. To edit or delete a site you must first highlight the site name by clicking on it. Then you may click on the “Edit” or “Delete” buttons. If you change the name of a site, all of the employees and individuals linked to the site will continue to be linked to it – so don’t worry! It is important, though, that the State selected be the proper State since a number of things are associated with the State you are in.

2. Agency Sites

Click on the Agency Mgmt menu of the Maintenance section of the system and click on the “Agency Sites” option. You can add a new site or edit or delete an existing site. To edit or delete a site you must first highlight the site name by clicking on it. Then you may click on the “Edit” or “Delete” buttons. If you change the name of a site, all of the employees and individuals linked to the site will continue to be linked to it – so don’t worry! It is important, though, that the State selected be the proper State since a number of things are associated with the State you are in.

F. Alternate Agency Management

1. Set up Alternate Agency

Click on the Alternate Agency Management menu from the Maintenance section of the system. Choose the “Set Up Alt. Agency” option if you wish to allow another organization to have access to one or more individuals in your system. You will then be able to choose an individual to allow an alternate agency to see. Click on the pull-down of individuals and begin typing the last name of the individual and the system will search for a match. Move up or down with your up or down arrow keys or by using your mouse and click on the individual you are searching for. Next, select the agency (that exists in the system) to which you are granting the rights to see this individual’s information. Then you will set up the permissions for each user group that the alternate agency might have.

2. Edit Alternate Permissions

Click on the Alternate Agency Management menu from the Maintenance section of the system. Choose the “Edit Alt. Permissions” option if you wish to change an alternate organization’s permissions to the different areas of the system that you have given them access to. Select the user group of the alternate agency that you wish the edit/modify and change the permissions and save.

G. General Reports

Click on the General Reports menu from the Maintenance section of the system. Choose the report you wish to view or print. Accept the blank entries to see all information, or fill in specific information to report for and click on “Submit”. You may use your browser’s “Print” button to print the report to the printer. Many reports now have the much-requested option of allowing you to export the report to Microsoft Excel. You must first click on the report to run. Some reports then have “filtering” options whereby you can limit the amount of information by filling in date ranges or by selecting items from pull-down selections. You then would click on the “Submit” button to view the report on screen. At this point, you should see a link above the report headings saying to “Click here for MS Excel Report”. This creates the output as an Excel spreadsheet and places the output your browser. If you want to keep a copy of the report or sort it via Excel’s “Data” menu, then you could click on your browser’s “File” and “Save As” options to save the file where you want it.

Here is an example of a General Report:



The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu includes options like 'Contacts Mgmt', 'Professionals Mgmt', 'Insurance Companies', 'Pull Down Mgmt', 'Agency Mgmt', 'Alt Agency Mgmt', and 'General Reports'. Under 'General Reports', there are sub-options such as 'Checking Entries', 'Client Report', 'Research Report', 'Encounters Report', 'Insurance Report', 'Inventory Report', 'Medication Alert', 'Movement Report', 'Professional Report', and 'Services Report'. The main content area is titled 'REPORTS' and displays a 'Client Movement Report'. Above the table is a link: 'Click here for MS Excel Report'. The table has columns: 'AgencyID', 'Name', 'Birthdate', 'Type', 'Movement Date', 'To Location', and 'From Location'. One row is visible with the following data: AgencyID: 111, Name: Doc, John, Albert, Birthdate: 12/01/1950, Type: Admit to Waiver, Movement Date: 12/01/1995, To Location: ABC Agency - Over Residential, From Location: Arlington Develop Center.

AgencyID	Name	Birthdate	Type	Movement Date	To Location	From Location
111	Doc, John, Albert	12/01/1950	Admit to Waiver	12/01/1995	ABC Agency - Over Residential	Arlington Develop Center

H. Batch Checking

Keeping track of bills for a Group Home can be a chore. So we've automated the process for you through our "Batch Checking" module. Utility bills, grocery bills, phone bills and other expenses *may* be divided up per each individual in a group home. If a house manager spends \$500 per month on groceries, then we divide the grocery bill by the number of people in the home for the month. This particular expense might include normally (for example) 2 employees along with 3 individuals. Therefore, each individual would need to pay for \$100 worth of groceries out of their checking accounts. All utility expenses would be divided only among the individuals.

So we've added a batch entry form under the "Financial" heading and the "General Reports" sub-heading. Its first field will be a pull-down of all the sites at your agency. You must choose a site. Then, all individuals defaulted to that site are listed and marked as being part of the expense equation. Then, we add expense records associated with this invoice. Each expense record has an expense category chosen from an Expense Category pull-down (in "Maintenance"). Each category has a lookup table associated with it that tells us whether employees are to be included in the calculation. Once that is determined, you enter the total expense amount. It is possible that an individual may not be able to participate in paying any of his bills; therefore, you may mark (or unmark) whether or not each individual is to be included in the calculations.

Category	Amount	Employees	Individuals	Joe Smith (Individual's Charge)
Utilities	\$120	0	3	\$40.00
Phone	\$100	0	3	\$33.33
Groceries	\$500	2	3	<u>\$100.00</u>
				\$173.33

Note: One individual must pay \$33.34 on the grocery bill because of rounding.

An invoice per individual reflecting the above breakdown is created. The invoice number is incremented automatically for the agency while allowing for the invoice number to be overwritten manually. Each amount is carried over as a debit into the checking module after the "Post Batch" option is clicked.

MAINTENANCE

BATCH CHECKING

Step 1: Select a Site - A list of clients at a given site will be returned.

Site: Note: Selecting a new site will reset all checking values

Step 2: Add Expense Records

Category: Amount:

Billed So Far: **Expense Record** **Amount**

Step 3: Modify Payees and Update Records

Checkboxes indicate whether to include individual in checking calculations

Number of Employees at Site: 19

Number of Clients at Site: 7

test boy John Doe Sally Doe
 test man person one Person Three

If a check exists beside the individual's name, then that individual will be included in the calculation to split up this particular expense. If you want to exclude an individual from the calculation, simply click on the checkbox and the checkmark will go away. Once you're satisfied that all checkboxes are appropriately marked for this expense category, click on "Update Records" so the computer knows to use those individuals in the calculation.

If the number of employees at the home figure into the calculation, then you will be allowed to edit the "Number of Employees at Site" field, in case it is not accurate. The system figures up the number of employees associated with a particular site by checking their employee record to see what their default site is. Therefore, you should first make sure that all employee records have been set up with their appropriate default sites.

If an expense category does not exist in the "Add Expense Record" category pull-down, please contact jfleeman@practicalhealthsystems.com via email to request an additional category.

Once you've filled out the total amount of the expense, click on "Add Expense Record". Repeat the steps above for the next expense until all expenses for this batch have been added.

After you've added the first expense record, you receive an option to complete the batch (below). To do so, change the Transaction Date for the batch or leave as today's date, add a note if you'd like, and click on

Step 4: Select Transaction Date, Include Note, and Process Batch

Transaction Date: * - <c> +

Note:

"Process Batch". The note that you type will go into the note for each Personal Checking transaction that is created for each individual. Invoices per individual and for the entire home may then be printed (or re-printed in the future).

I. Action Log (or Audit Trail)

The Action Log (usually referred to as an Audit Trail) module is a powerful management tool that will help you establish when information was added, changed, or deleted in your system and by whom.

Click on the Action Log menu from the Maintenance section of the system. Click on “Search Log” in order to see information that has been added, edited, or deleted in the system. Accept the blank entries to see all information, or fill in specific information to filter by. For example, you may want to see all the things that employee “John Doe” has done in the system in the last two weeks. To see this, simply change the employee pull-down from “All” to “Doe, John” and change the start date to today’s date minus 14 days and the end date to today’s date and then click on “Search”. You may print the report by clicking your browser’s “Print” button.

The screenshot shows the 'Search Action Logs' interface. At the top, there is a 'MAINTENANCE' header and 'ACTION LOGS' in red. Below that is the title 'Search Action Logs'. The form contains several fields: 'Employee' (dropdown menu), 'Action Item' (dropdown menu), 'Action Type' (dropdown menu), 'Individual' (dropdown menu), 'Start Date' (text input with navigation buttons), and 'End Date' (text input with navigation buttons). A 'Search' button is located below the date fields. Four callout boxes provide explanations: 1. 'Employee': 'You may view work done by a single employee or by all employees.' 2. 'Action Item': 'Action Items are the names of the many different areas of the application (i.e. “Cost Plans”).' 3. 'Action Type': 'The Action Type is the specific action taken on the information. Was an “Add”, Edit”, or “Delete” done?' 4. 'Individual': 'You may view work done to the record of a single individual or work done to all individuals (that you have access to).'

XIV. Incident and Investigation Tracking

From the “Individuals” option, find the “INCIDENT/INVESTIG.” option and click on the “Incident Case” link beneath it. (See below)

NOTE: Because of the way agencies work with individuals’ incident and investigation records, you do not need to search for a specific individual prior to selecting the “Incident Case” option. All individuals’ incident and investigation records are available from this module.

The screenshot shows the 'INDIVIDUALS HOME' page in the Practical Health Systems interface. The left sidebar contains a tree view with the following items: INDIVIDUAL INFO (with sub-links: Edit Personal Info, Add Individual), INCIDENT/INVESTIG. (with sub-link: Incident Case), Individual Selection (with sub-links: Last 2 Weeks, Entire Site, Entire Agency, Search, List Alternates), Addresses, Contacts, and Professional. The main content area has a heading 'INDIVIDUALS HOME' and a paragraph: 'Select an individual to manage. You can do this by searching using any of the fields below, or by browsing through the list in the left toolbar.' Below this is the 'Individual Search' section with input fields for 'First Name', 'Last Name', and 'Nickname', and a 'Search' button. The right sidebar, titled 'QUICK FACT', displays 'AUG 29, 2001 PM', 'GED IN: N SMITH', and 'NCY: Agency'. Two callout boxes are present: one pointing to the 'Incident Case' link in the sidebar with the text 'Click on “Incident Case” to enter into the Incident and Investigation Module...', and another pointing to the 'Search' button with the text 'Click on the “Incident Case” option to access your agency’s Incident records.'

“Add Incident” – this link has now been added so that direct care workers may add incidents into the system while not necessarily having any rights to view or report on the incidents as a whole. It appears under the “Incident Case” link (shown above).

Once “Incident Case” is selected, the above screen appears.

Home
Client Incident

Incident Reports

- [Type of Incident \(Graph\)](#)
- [Injury Severity \(Graph\)](#)
- [Location of Incident \(Graph\)](#)
- [Incident by Type of Incident](#)
- [Type of Incident by Person](#)
- [Incident Description by Person](#)
- [Injury Severity by Person](#)
- [High-Risk 1 Month](#)
- [High-Risk 3 Months](#)
- [High-Risk 12 Months](#)
- [High-Risk/Serious Injury 1 Month](#)
- [High-Risk/Serious Injury 3 Months](#)
- [High-Risk/Serious Injury 12 Months](#)

Get Client Incidents where...

Incident Case ID	Begins With	<input type="text"/>
Incident Reference ID	Begins With	<input type="text"/>
Investigation Reference ID	Begins With	<input type="text"/>
Client Last Name	Begins With	<input type="text"/>
Client First Name	Begins With	<input type="text"/>
Agency Reporting	Begins With	<input type="text"/>
Responsible Agency	Begins With	<input type="text"/>
Support Coordination Agency of Person	Begins With	<input type="text"/>
Type of Incident	Begins With	<input type="text"/>
Incident Was (Discovery)	Begins With	<input type="text"/>
Injury	Begins With	<input type="text"/>
Where Incident Occurred	Begins With	<input type="text"/>

Incident “Home” takes you back to InfoServ DD’s starting page – “Welcome to a New Workplace”.

“Client Incident” is gives you the choices you see above. From the above screen you could simply click on the “Search” button in order to get a list of all incidents that have been recorded for your agency in the system. You could optionally search on a specific incident type, injury description, client last name by filling in the blank beside the information you’re looking for. For example, if you want to see incidents for all clients whose last name starts with the letter “S”, you would type an “S” to the right of the “Begins With” pull-down to the right of “Client Last Name”. You would then click on “Search”.

“Incident Reports” – The remaining options are the names of the various Incident and Investigation reports that are available in the system. Simply click on one of the report names to view the report. You can then print the report by clicking on the report viewer’s printer button/icon. (Active customers are given special access to reports. If you are not able to view these reports, please contact Practical Health Systems, Inc.)

Adding an Incident – To add a new incident, click on “Client Incident” if the screen above is not already loaded. Then click on any plus sign “+” that appears to the right of a name – IF one appears. If this is the first incident that your agency has ever added, then scroll down the screen above and click on the “Add” button below the “Maintenance” heading on the above page.

Editing an Incident – To edit an incident that already exists, click on “Client Incident” if the screen above is not already loaded. Then click on the pencil icon to the right of the incident you wish to edit.

Deleting an Incident -- To delete an incident that already exists, click on “Client Incident” if the screen above is not already loaded. Then click on the minus “-“ sign icon to the right of the incident you wish to delete.

Viewing an Incident -- T o view an incident that already exists, click on “Client Incident” if the screen above is not already loaded. Then click on the eye icon to the right of the incident you wish to view.

Emailing an Incident Form – To email an incident form, view an incident (by clicking on the eye icon to the right of the incident you have searched for, and then go to the bottom of the incident information and fill in the appropriate “To” email address and “From” email address and then click on the “Send” button.

XV. Employee Training

To record a training course taken by an employee, go to the "Employees" section and "Display All" or do an employee search. Notice the "Training" link to the right of each employee name. In order to add an employee course, find the employee that you're looking for and click on the training link corresponding to his name.

EMPLOYEES HOME

Display All Employees

All Agency Employees

Page 1 of 2 [Next >](#)

Employee	Edit	Edit Username	Delete	Training
Allen, Donna (111-11-1111)	[Edit]	[Edit Username]	[Delete]	[Training]
Beiler, Lucia (111-11-1111)	[Edit]	[Edit Username]	[Delete]	[Training]

To add a course taken, click on the training link to the right of the employee to add it to.

If I click on the first employee's "Training" link, I see the following example page.

EMPLOYEE TRAINING

Allen, Donna .

- » [Click here to add a newly taken Training/Course.](#)
- » [Click here to determine required Training/Course.](#)

Code	Course/Training	Grade	Date Taken	Valid Until	Remark	Edit	Delete
INCIDENT	Incident Tracking	0	12/28/2001		Attended	[Edit]	[Delete]

- » [Click here to add a newly taken Training/Course.](#)
- » [Click here to determine required Training/Course.](#)

Simply click here to record a new course taken.

This link will be available soon.

This employee has one training course already added. You may edit or delete this record as long as you have rights to do so. (Contact your System Administrator in order to receive the appropriate rights.)

Asterisked (*) fields are required.

Employee Name	Allen, Donna .	
Course/Training	Incident Tracking - INCIDENT ▼	
Date Taken	12/28/2001	(e.g. 01/03/2002)
Valid Until		(e.g. 01/03/2002)
Grade	0	% (Enter zero (0) for non-graded Courses/Training)
Grade Remark	<input checked="" type="radio"/> Attended <input type="radio"/> Completed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Passed <input type="radio"/> Pending	
Place Taken		(150 characters)
Instructor Name(s)		(Separate name with comma - 150 characters)

UPDATE Record

The screen above is used to add or edit the training course you wish to track for the employee. Fields marked with an asterisk are required. The Place Taken is a free-form text field that allows the name of a place up to 150 characters long.

Note: State courses names (like those appearing in the "Course/Training" pull-down above) are added by PHS or by the State. Your System Administrator may add courses specific to your organization under the "Maintenance", "Pull-Down" section by editing the "Courses" pull-down type.

From the “Employees” section, click on the “Employee Training” option in order to see the screen below. This link allows you to “filter out” lists of training taken. All employees’ training records are available from this module.

Practical Health SYSTEMS

Employee Training

Get Employee Training where...

Home
Courses/Training
Employee Training

Employee SS No. Begins With
EmployeeNo Begins With
Employee First Name Begins With
Employee Last Name Begins With
Employee Middle Name Begins With
Course Code Begins With
Course/Seminar Begins With
Sort Order Employee Name

Search

Maintenance

Course Taken Key

Add View Edit Delete

Employee “Home” takes you back to InfoServ DD’s starting page – “Welcome to a New Workplace”.

“Courses/Training” are the actual courses that are available to take.

“Employee Training” is where you record an actual training course taken by an employee.

“Employee Training Scheduling” is where you schedule a course in the future for an employee.

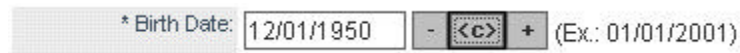
“Employee Training Reports” will appear below the above options. You would simply click on the report title/name in order to view it. Once the report viewer appears, you will see a printer icon that would optionally print the report to your printer.

XVI. Addendum

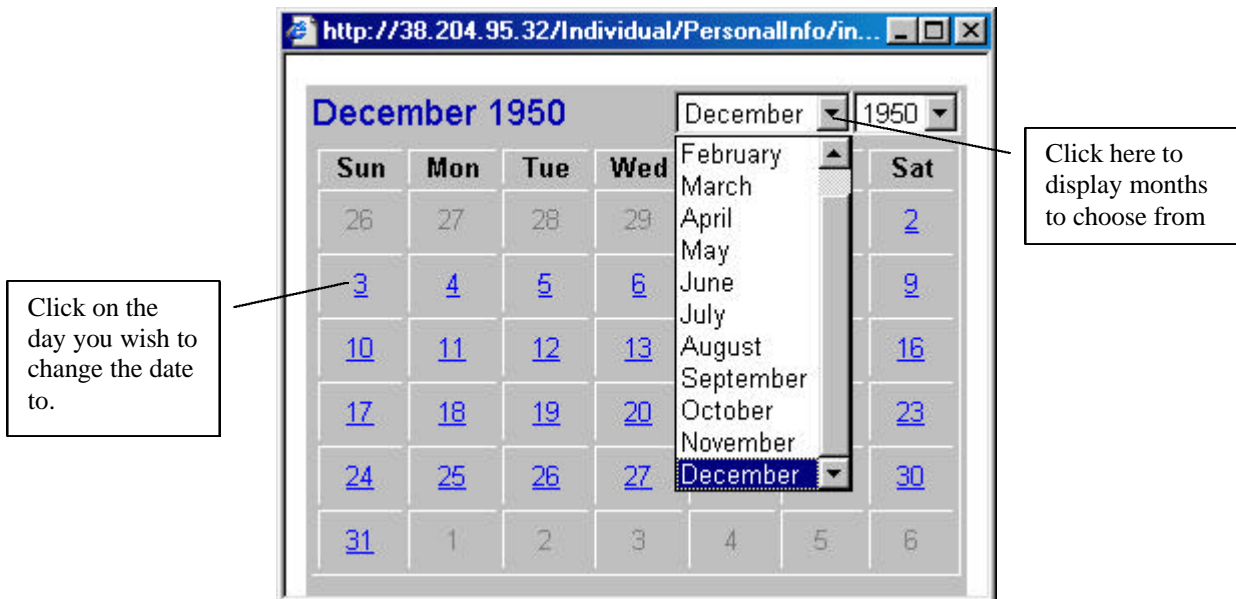
A. Calendar

The Calendar feature is a visual aide available to the user in various situations where a date is needed. It displays a desired month in traditional calendar form. This feature is located to the right of the date field(s), shown in a series of three squares. Initially, the Start Date field will always contain the current date. The contents of End Date field will vary depending upon the section selected.

“< c >”



The box in the center contains the characters “<C>”. When this is selected, the current month is shown in a separate screen. This screen can be minimized, enlarged, or closed by choosing the minus button (minimize), the box (enlarge), or the x (close).



In the left-hand corner of the calendar screen, the month and the year are displayed. Beside these are drop-down menus, which allow the user to select different months, or an alternate year. By making a change in this box, the new month and/or year will be displayed.

The user will notice that each day in the selected month is displayed. If the user selects a day by clicking on it once, that date will instantly be entered into the date field on the original screen and the calendar screen will immediately disappear.

“-“

The box to the right of the calendar button, containing the minus sign, subtracts days in increments of one.

“+”

The box to the left of the calendar button, containing the plus sign, increases the day in increments of one.

B. Procedures for Activating CallWave Internet Answering Machine Software

CallWave is software that allows your organization to receive phone messages on your computer at the same time that you are on the Internet via a dial up phone line. This software is an option for your organization that can save you the cost of an extra phone line at your group homes. All incoming calls are forwarded to a toll-free number and then are delivered to your PC as a recording that can be played back with the click of the mouse. Your PC must have a sound card and speakers attached in order to hear the playback of the messages.

- 1.) CallWave requires that you activate call forwarding on the phone line that will be used for the dial up Internet access. If you do not already have call forwarding activated for your dial line you must request the phone company to activate this service. This will cost between \$1.10 and \$2.00 per month per line.
- 2.) To activate call forwarding dial *72, then 1-877-786-6638. After the call is answered hang up and your calls are now forwarded. All calls coming into your facility will now be played on your PC using the CallWave software. If you are not at the PC when a call comes in, you will see the CallWave Logo, CW, flashing in the CallWave pop-up box displayed on your PC. Click the play button and the voice message will be played for you. Clicking the delete button will of course delete any messages on your Internet answering machine.
- 3.) Once call forwarding has been activated it is now ok to dial into InfoServ DD and input any notes that you may have with the knowledge that incoming phone calls will be answered and will be available for you to play back on your computer.
- 4.) In order to deactivate call forwarding you must logout of InfoServ DD, disconnect the dial-up connection for the Internet, activate the telephone and be sure you have dial tone. Now dial *73 and call forwarding is now turned off. You should be able to receive incoming phone calls.

EFax is a similar product that is available for receiving faxes on-line via email without you having to close your Internet connection. It is available at <http://www.efax.com>. You may also want to try <http://www.Ureach.com>. CallWave is available at <http://www.callwave.com>. The product "Net2Phone" also has a phone answering function in addition to its ability to allow users to place long distance phone calls over the web (for free or at a lower cost). There is also a hardware device available that works similarly to CallWave. Please contact us for details.

C. Scanning Documents

InfoServ DD includes the ability to scan paper documents into their proper categories per individual, per employee, or at an agency level.

In the example below, the Encounters are listed with the options "Scan" and "View".

You would simply click on the “Scan” link in order to proceed to the scanning screen (below).

ENCOUNTERS

Ten most recent individual encounters:

Date	Type	Professional	Options
01/01/2001	Certification Date	Joe Test, M.D.	Edit Delete Scan View
12/01/1996	Waiver Admit (Enroll) Date	Joe Test, M.D.	Edit Delete Scan View
11/15/1996	PAE Date	Joe Test, M.D.	Edit Delete Scan View

QUICK FACTS

SEP 19, 2001
1:57 PM

LOGGED IN:
JOHN SMITH

AGENCY:
ABC Agency

INDIVIDUAL:
John Doe
NO: 1

INDIVIDUAL INFO

- Edit Personal Info
- Add Individual

INCIDENT/INVESTIG.

- Incident Case
- Individual Selection
- Addresses
- Contacts
- Professional
- Insurance
- Checkbook

After you have clicked on the “Scan” button, the following screen appears:

ENCOUNTERS

QUICK FACTS

SEP 25, 2001
4:06 PM

LOGGED IN:
JOHN SMITH

AGENCY:
ABC Agency

INDIVIDUAL:
John Doe
NO: 1

INDIVIDUAL INFO

- Edit Personal Info
- Add Individual

INCIDENT/INVESTIG.

- Incident Case
- Individual Selection
- Addresses
- Contacts
- Professional
- Insurance
- Checkbook
- Property
- Legal Forms

Toolbar: 100%

Grid area: A large grid representing the scanning area.

The purple book icon on the right-hand corner of the scanning screen will provide you with help on how to

ActiveScan: Help -- Web Page Dialog

- Allows you to select a scanner.
- Starts up the scan.
- Zooms out the current image.
- Zooms in the current image.
- Zooms the image back to 100 percent.

Tip: You can either click the zoom buttons to zoom by half, or hold them down to zoom smoothly.

- Allows you to select an area of the image.
- Allows you to move the display around by dragging on the image.
- Crops the image to the current selection.
- Allows you to resample the image to a certain percent.
- Saves the image to the server.

work with the scanning function.

For most purposes, you will:

- Place the document face down on your scanner.
- Click on the icon/picture of the scanner.
- Wait for your own scanning software to activate and scan the image. (The image should appear.)
- Click on the diskette icon to save the image.
- Name it something applicable.

That’s all there is to it! There are options available whereby you can crop (cut) the images, rotate the image, zoom in and out, and more.

D. Other Administrative Functions

Currently, Practical Health Systems, Inc. (or your State administrator if your state has overall administrative rights) has a “Super User” administrative status in order to handle several system-wide tasks.

These tasks include:

- Setting up your agency and first system administrator
- Changing the content (links, news, forums, etc.) that are available on the site’s home page
- Managing new forms used by everyone in the state
- Managing the pull-down choices used throughout the application on a state (or national level – PHS only) level
- Assigning overall statewide default permissions for user groups (and creating user group names)
- Assigning new overall system administrators
- Managing the State’s services and service groups database
- Changing the primary agency of an individual from one agency to another
- Assigning overall default rights for ISC’s
- Help text is also created and assigned through this administrative module.

HELPDESK

Select edit or delete next to the item you wish to work with.

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App Section	Method	State	Title	
helpdesk		Tennessee	Help Desk	Edit Delete
Individual	Outcomes	Tennessee	Outcomes	Edit Delete
individual/charting	addCharting	Tennessee	Individuals: Add Chart	Edit Delete
individual/charting	chartingReport	Tennessee	Individuals: Charting Report	Edit Delete
individual/charting	deleteCharting	Tennessee	Individuals: Delete Chart	Edit Delete

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