GROUPWARE TECHNOLOGIES, INC.

Provide[®] Enterprise Care Management Software

Palm Beach HIV/AIDS Care Network CARE User Guide

Provide[®] Enterprise Palm Beach HIV/AIDS Care Network CARE User Guide

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Updated April 23, 2015

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Chapter

Introduction

The Palm Beach County Ryan White Part A programs have migrated from the Florida State run Ryan White Part B CareWare database system to the Provide[®] Enterprise (PE) system. All historical Client and Service data from the CareWare system that was entered by Palm Beach County funded Ryan White Part A providers was migrated to the new PE database.

The system is being utilized to accomplish a number of goals:

- Provide a care management tool to funded agencies that enables them to collect all required data.
- Provide a tool to funded agencies to produce the Annual Ryan White Services Report (RSR) data file which is uploaded directly to HRSA.
- Enable agencies to also document their ARTAS Enrollments and services.
- Enable agencies to also document their HIV Counseling and Testing and Outreach activities.
- Improve the consistency and reliability of the data collected.
- Reduce duplication of services to clients.
- Ensure continuity of care by integrating all potential points of client entry.
- Facilitate improved community planning with more accurate and comprehensive information on the clients being served and the impact of the services being delivered.
- Coordinate care between provider agencies.

Note: The Florida ADAP program is also planning to migrate to the PE system and that should enable us to more tightly integrate eligibility management and enrollment of clients that reside in the Palm Beach County EMA.

This User Guide is organized into sections to help you determine what data you need to enter into Provide[®] Enterprise in order to meet your data collection and reporting requirements.

Navigating Provide Enterprise

Prior to accessing the Provide[®] Enterprise database for the first time, the Provide[®] Enterprise Client Software will need to be installed on your computer. For Installation instructions, please see the Provide[®] Enterprise Installation Guide.

Logging into Provide[®] Enterprise

To launch Provide[®] Enterprise, you will want to double click with your mouse on the Provide[®] Enterprise Client Icon that has been placed on your Desktop during installation (similar to that in the figure below). The Icon is appearance is somewhat transparent.



Also, you may "Pin" the icon to you task bar by right clicking on the icon and clicking on "Pin

to Taskbar." The icon will look similar to this "Pin to Start Menu" by right clicking on the icon and clicking on "Pin to Start Menu." It will then appear on the start menu of your computer and appears similar to



The Log In Screen will appear, similar to that in the figure below:

Login to Provide	e Enterprise	
User Name:	Test User/GTI 👻	ок
Password:		Cancel
Server:	10.50.10.104 🗸	Request Password Reset
Database:	PalmBeach 👻	Show IP Address

Enter the User Name, Password, Server and Database provided by your System

Administrator. Click on the **OK** button to log into the system.

NOTE: After you have logged on for the first time, the User name, Server and Database will be automatically saved on your computer and will be populated in the login dialog box on future logins. You will only need to re-enter your password.

As Provide[®] Enterprise is loading you will notice a window similar to the following on your screen:



As a security measure, Provide[®] Enterprise will automatically lock your account after three consecutive failed logins. If this happens, you will need to contact your Provide[®] Enterprise

Administrator to reset your account or you can click on Request Password Reset and answer security questions to re-set your password.

Request Password Reset

After you have your security questions (see "Setting Your Security Question" section below for detailed direction on establishing your security questions) you can request a password reset when logging-in by clicking on "Request Password Reset."

Login to Provide	e Enterprise	
User Name:	Test User/GTI 🔹	ОК
Password:		Cancel
Server:	10.50.10.104 🗸	Request Password Reset
Database:	PalmBeach	Show IP Address

• After clicking on "Request Password Reset," your security questions will appear for you to answer.

y Security Answ	er		
Ourseling 1	When we we we had a set for the		ОК
Question 1	Where were you when you had your first kiss?	· · ·	Creat
Answer 1			Cancel
Question 2	What was your childhood phone number including area code? (e.g., 000-000-0000)	~	
Answer 2			
Question 3	What is the middle name of your oldest child?	-	
Answer 3			

- After you answer the questions, click on "OK."
- After clicking "OK." You will receive the message below that a password reset request has been sent your email address.

Provide Ente	erprise
Password	reset request has been sent.
	ОК

• You will then receive an email with your new password like below:

iladmin@providecm.net	Today at 2:11 PM 🔺
To Me	
Your password has been reset to:Password123	
When you log in, the system will give you a message 'Login Failed: Reason - Password of the account must be changed.'. Click 'OK' to this message and you will enter a new password two times. After you do this, you will need to close out of the login screen and re-login to Provide Enterprise using your new password.	then be asked to
You will not be allowed to reuse a password until you have changed it to five other values. This is to ensure that you do not keep using the same password.	
Your password must meet the following minimum requirements:	
Not contain significant portions of the user's account name or full name	
Be at least six characters in length	
Contain characters from three of the following four categories:	
English uppercase characters (A through 2)	
Engino nover-case characters (a tinough 2)	
Base Douglis (or anough a)	
Non-aphabetic characters (for example, 1, 5, 7, 70) (bo not use of 1)	

Status Bar

An example of the Status Bar appears below. This is variable for each customer and the user's preferences, security, and the user's customization.

Refill Requests: 0/0 Rx Pending: 0/0 35 New Task Alerts 1 New Database A	ts UIC College of Medicine Peoria - Client Services	Amanda Epping/GTI 10.50.10.103/Ilcaretest
--	---	---

<u>Rx Refill Request</u>: The number of Prescription Refill Requests you have.

<u>Rx Pending</u>: The number of Prescriptions that are pending your authorization.

<u>New Task Alerts</u>: The number of task alerts that you have. (This is based on your selection in your Task Alert View). This will be highlighted red until you view the alerts.

<u>New Database Alerts</u>: The new database alerts for you. This will be highlighted red until you view the database alert.

<u>User Security</u>: This is your current user security. (In the example above: UIC College of Medicine Peoria- Client Services).

<u>User Name:</u> This is your user name when logging into Provide. (In the example above: Test User/GTI).

<u>Database:</u> This is the database you are currently logged into. (In the example above: 10.50.10.104/PalmBeach).

Windows Toolbar

If you do not have a Start-up Action defined when you log into Provide[®] Enterprise for the first time, all you will see is the Windows Toolbar, similar to the following. By clicking on each of the menu choices you will have different choices for configuring, navigating or viewing information. Some of the more important menu choices will be discussed below:

👌 File	Find	View	Actions	Tools	Reports	Windows	Help	← Windows Toolbar
--------	------	------	---------	-------	---------	---------	------	-------------------

File Menu

The File Menu options are outlined below.

Change Password

You can change your password in Provide[®] Enterprise by completing the following steps.

• From your Windows menu choose "File" and then "Change Password" as shown below.



• The following window will appear:



- Type your new password two times.
- Next, click on the button. A message similar to the one in the figure below will appear:

ProvideLibrary
Password change Successful! Restart and login in with new password to continue.
ОК

• Next, click on the _____ button. Your Provide[®] Enterprise software will automatically be closed and you will need to log back in using the new password.

Setting Your Security Question

To set your security questions in Provide, when you are in the system, click on File – Set Security Questions.



• Select security questions and corresponding answers. You also will need to enter your email address.

Security Questions		
Question 1		
Answer 1		Cancel
Question 2	▼	
Answer 2		
Question 3	▼	
Answer 3		
Email Address		

• After the information, click "OK." You may set or re-set your security questions at any time.

Lock

If you wish to lock Provide[®] Enterprise in order to prevent anyone else from accessing your data when you are away from your computer, please follow these steps:

• From your Windows menu choose "File" and then "Lock" as shown below.



• You will notice that Provide[®] Enterprise will immediately be minimized.

🔀 Start 📗 🗋 Provide Enterpise - [Clien...

• Click on the Provide[®] Enterprise Window on your Windows Taskbar (example shown above) and the following window will appear:

Login to Provide Enterprise											
User Name:	Angela Price/GTI	UnLock									
Password:	[]									
Server:	10.50.10.104										
Database:	PalmBeach]									

• Type in your password, and then click on the UnLock button. You will be brought back to the same screen you were on at the time that you locked Provide[®] Enterprise.

Print

Using the File-Print command will print the document you are viewing or the view you have open. You may also select File – Print Preview to view a preview of what has been selected to be printed before actually printing the document.

Exit

Using the File – Exit command will close Provide[®] Enterprise and take you back to your Windows Desktop.

• When you click on the File – Exit command you will see the following window appear on your screen:



Find Menu

The Find Menu in Provide[®] Enterprise is customized for every Provide[®] Enterprise implementation and the list of options can be variable based on the user rights. The "Find Client" below is one example of how a "Find" sort works.

Find Client

You can bring up the Find - Client tool in Provide[®] Enterprise by completing the following steps.

• From your Windows menu choose "Find" and then "Client" as the following shows.

<mark>@</mark> Рі	rovide	e Enter	pise				
File	Find	View	Actions	Tools	Reports	Windows	Help
	Cli	ent					

• A window similar to the one below will appear:

Close 🏦 Search	
Search Criteria	
Name Last	*
Name First	*
SSN	
Gender	*
Ethnicity	
Date of Birth	*
IL PCN	
Ryan White Client ID	*
Agency Assigned Client ID	

- Type in one or more of the search fields and then click on the button. You can enter an asterisk (*) as a wild card to do more general searches. If multiple fields are entered, only those client records that match all of the values will be found.
- After the search is completed, the Client records that match the search criteria are listed and displayed below the search dialog in a view like the one below:



• Simply double click on the record that you wish to view in order to open the desired Client Profile.

View Menu

The View Menu allows you to select a view of records to be displayed. Each Provide[®] Enterprise customer has the ability to define their own views. Any time there is a in

a view, you can expand the sub categories that are defined as a part of that particular view.

Notice what happens in the example below when picking the "Reference" view:

<u></u> Р	🔁 Provide Enterpise													
File	Find	View	Actions	Tools	Reports	Windows	Help							
		Act	ivity 👘	•										
		Clie	ent	•										
		Pro	viders	•										
		Rel	ference	•										
		Rej	porting	•										

The view expands to include a further break down of the Reference category.

👌 File	Find	View	Actions	Т	ols	Reports	Windows	Help	
		Activity							
		Client		•					
		Provider	s	⊧j					
		Reference	:e	•	CA	RE Docur	nentation	•	
					Cli	nical Trial	s	•	
					Co	des		•	
					Dr	ugs		•	
					Fa	ct Sheets		+	
					Te	sts		+	

When you click on "Codes" the view expands to include a further break down of the "Codes" category.

🕑 File 🛛 Finα	l Vi	ew Actions	Tools	Reports Windows Help		
		Activity Client	→ →	CARE Documentation	•	
		Providers	•	Clinical Trials	- F	D : D C I
		Reference	F	Codes	•	Diagnoses By Code
				Drugs	•	DSM IV Axis 4
				Fact Sheets	•	DSM IV Axis 5
				Tests	•	Procedures By Code
			-			Procedures By Type

You now can see that there are five different "Codes" views to choose from. Click on the one that you wish to display. Once the view has opened, you can double click on any record that you wish to open.

Changing/Sorting Views

In Provide[®] Enterprise, you can change how the views are displayed to you. You can sort any views by simply dragging columns depending if you want to view columns in a specific order.

For example, if you want to display a client list by last name it would appear:

3	Provide Enterpri	se - [Client\Clier	nts /	All By Last Name]				-					
S	File Find Vi	ew Actions	Тос	ls Reports Winde	ows Help								
4	Close 😰 🎒	A 🔯 🦸 🖉	0	ireate Activity 🔃 🗋 Vi	iew Activity	0	Create Si	ub Record 🔻	📀 Action 🔻 <u>]</u> Creat	e Report	🕑 View 🔻	Master Actions	•
	Last Name	First Name	MI	Address 1	City	State	Zip	Home Phone	Home Phone Message				
	AAAAAAAAAA	AAAAAAAAAA	А	1120 W. Highway 10	Champaign	IL	60161	708-987-4110	Any				
	DDDDDDDDDD	DDDDDDDDDD	D					312-987-99920					
	EEEEEEEEE	EEEEEEEEE	Е	5556 23rd Ave	Moline	IL	33333	309-974-6541	Any				
	man	person		415 W Fullerton	Chicago	IL .	60614-	(708) 542-4963					
	Smith	Joe	Н	152 Happy Road	Bay City	IL	68921	12154124	Any				
	Tree	Apple		101 Orchard Street	Alpine	IL	60712	(213) 456-1234	Any				

However, if you want to display your client list by first name, you would click on the first name and drag it in front of the last name column. As seen below: (notice the red arrow)

4	Close	2	i 🥕 🧕 🗐	© C	reate Activity	d) Vi	ew Activity	0	Create Si	ub Record 🔻	📀 Action 🔻 🧕 Create Repo	ort 📀 View 🔻	Master Actions
Fi	st Name	me	First Name	MI	Address 1		City	State	Zip	Home Phone	Home Phone Message		
	TAAAAA	AAAAA	AAAAAAAAAA	A A	1120 W. Highwa	y 10	Champaign		60161	708-987-4110	Any		
Г	DDDDD)DDDDI		DD D						312-987-99920			
	EEEEE	EEEEE	EEEEEEEEE	E	5556 23rd Ave		Moline	IL 👘	33333	309-974-6541	Any		
	man		person		415 W Fullerton		Chicago	IL 👘	60614-	(708) 542-4963			
	Smith		Joe	H	152 Happy Road		Bay City	IL 👘	68921	12154124	Any		
	Tree		Apple		101 Orchard Stre	et	Alpine	IL	60712	(213) 456-1234	Any		

The view will then appear with the "First Name" as the first column such as:

4	Close	2 /	A 🗋 🤌	0	ireate Activity 📑 🛛	liew Activity	0	Create S	ub Record 🔻	📀 Action 🔻 🧕 Create	Report 📀 View	v 🔻	O Master Actions	•
	First Na	me	Last Name	M	Address 1	City	State	Zip	Home Phone	Home Phone Message				
	AAAAA	AAAAA	AAAAAAAAA		1120 W. Highway 10	Champaign			708-987-4110	Any				
	DDDDI	DDDDDD	DDDDDDDDDD) D					312-987-99920					
	EEEEE	EEEEE	EEEEEEEE	Е	5556 23rd Ave	Moline	IL	33333	309-974-6541	Any				
	person		man		415 W Fullerton	Chicago	IL	60614-	(708) 542-4963					
	Joe		Smith	Н	152 Happy Road	Bay City	IL	68921	12154124	Any				
	Apple		Tree		101 Orchard Street	Alpine	IL	60712	(213) 456-1234	Any				

You are also able to sort each column simply by clicking on the column:

Close 📓 🎒 🍐	/ 🗋 🏥 🥝	Create Activity	👌 View Activity	0 🕥	Create Si	ub Record 🔻	📀 Action 🔻 <u>]</u> Create	e Report 🛛 🔇	🕽 View 🔻	Master Actions	•
Last Name 🛆 🛛 Fi	irst Name	MI Address 1	City	State	Zip	Home Phone	Home Phone Message				
AAAAAAAAAA A	AAAAAAAA	A 1120 W. Highw	ay 10 Champaign	IL	60161	708-987-4110	Any				
DDDDDDDDDD D	DDDDDDDDDD I	D				312-987-99920					
EEEEEEEE E	EEEEEEEE	E 5556 23rd Ave	Moline	IL 👘	33333	309-974-6541	Any				
man p	erson	415 W Fullerton	Chicago	IL 👘	60614-	(708) 542-4963					
Smith Jo	oe I	H 152 Happy Roa	d Bay City	IL 👘	68921	12154124	Any				
Tree A	pple	101 Orchard Str	eet Alpine	IL I	60712	(213) 456-1234	Any				

A \checkmark will be displayed in the column indicating the direction of the sort. In the example above, the last name is sorted by descending alphabetical order (sort A \rightarrow Z). A \checkmark would indicate ascending order (sort Z \rightarrow A). Clicking one time will give you descending order and clicking twice will give you ascending order.

You can also change the size of your columns by simply dragging the sides of the columns.

∢	Close 📓 🎒 눹	🖺 👶 😃 🍐	ß	📄 🗐 📀 Create A	Activity 🧕	View /	Activity	⊘ Create Sul	o Record 🔻 📀) Action	▼ Q Create Report	⊘ View	•	Master Actions	•
	Last Name	First Name	MI	Address 1	City	State	Zip	Home Phone	Home Phone Mes	ssage					
	AAAAAA	AAAAAA		1120 W. Highway 11	Champaign			708-987-4110	Any						
	DDDDDDDDDD	DDDDDDDDD	D					312-987-99920							
	EEEEEEEE	EEEEEEEEE	Е	5556 23rd Ave	Moline	IL	33333	309-974-6541	Any						
	man	person		415 W Fullerton	Chicago	IL .	60614-	(708) 542-4963							
	Smith	Joe	Н	152 Happy Road	Bay City	IL I	68921	12154124	Any						
	Tree	Apple		101 Orchard Street	Alpine	IL	60712-	(708) 989-9999	Any						

y view that you are attempting to search, you can also group the view by clicking on

on top of the page. After you click on the icon, your screen will appear like the one below. You will see the screen below and "Drag a column header here to group by that column."

101	Provide	enteron	se - iclient/clier		II DV Last Namel	_	_	-	_													
2	File	Find Vi	ew Actions	Tool	s Reports Winde	ows Help																
٩	Close	2 🖨	🤌 📄 🤃) C	eate Activity 📑 Vi	iew Activity (🕑 Creat	e Sub F	Record 🔻 ⊘	Action	🕶] Create Re	port 📀 \	∕iew ▼	⊘ Master	Actions	•						
)rag a colu	ımn head	ler here t	o group b	by that c	column		
	Last Na	ame	First Name	MI	Address 1	City	State	Zip	Home Phone	Home P	hone Message											
	AAAAA	AAAAA	AAAAAAAAA	Α	1120 W. Highway 11	Champaign	IL	60161	708-987-4110	Any												
	DDDDI	DDDDDD	DDDDDDDDDD	D					312-987-99920													
	EEEEE	EEEEE	EEEEEEEEE	Е	5556 23rd Ave	Moline	IL	33333	309-974-6541	Any												
	man		person		415 W Fullerton	Chicago		60614	- (708) 542-4963													
	Smith		Joe	Н	152 Happy Road	Big Foot Prairie	: IL	68921	-	Any												
	Tree		Apple		101 Orchard Street	Beecher City	IL.	60712	 (708) 989-9999 	Any												

Drag the column header to the designated area to group by that view. For example, if you want to group your view by last name, you can drag the column "Last Name" into the box as seen below:

0											_
Close	2 🖨	🤌 🗋 🌔	Create Activity	👌 View Activity	📀 Create S	Sub Re	cord 🔻 📀 A	ction 🔻 🧕 Create Report	🕑 View 🔻	📀 Master Actions 🔻	,
Last Nam	ne /										
Last	Name /	First Name	MI Address 1	City	State	Zip	Home Phone	Home Phone Message			
	AAAA										
■ DDDDDD ■	DDDDD										
∃ EEEEEEE	EEEE										
🗉 man											
∃ Smith											
											/ I

To "Un-Group" your view, drag the column out of the designated area. You can then click on

the on the button again to remove the filtering column header gray box from your view.

These sorting/grouping options are available in all views. When you log-off of Provide, the views will return to their default; therefore, you will need to re-sort your views.

Filtering Views

To filter a view, click on imilar to the one below depending on the view you are currently viewing:

_													
Г	Last Name	First Name	MI	SSN	RW	Birth Date	Gender	ADAP Status	ADAP Expire	Last App Status	Last App Submitted	ADAP	App Status
-								1					

In any of the boxes, you may filter your view. For example, if you would like to view all of your clients that are "Open" to ADAP, you can simply enter "O" in the ADAP Status box. This will filter your view to only see your clients that are open to ADAP. To remove the view filter, simply delete the text you entered (in the example above, delete the "O"). If you do not

want to see the filter bar, click on a to remove the filtering bar from your view.

Adjusting Tab Sizes

You can also change the size of your tabs by simply dragging the side the tab.

File Find View Actions Tools Rep File Find View Actions Tools	ports Windows Help
\P Close \P \Leftarrow \Rightarrow \square \checkmark \oslash \checkmark Ed	it 🌾 Create Activity 🖐 Create \Report 💿 Create Sub Record 🔹 💿 View 💌 💿 Action 👻 💿 Print 💌
Client Profile : person man ()	
Illinois Department of Public Health - H	IV Care Network : Lauren Ruhbeck/parta/Ilcare [12/04/2013]
Profile Dama Davidance Mail Ulawa	hald haven Madial Devile havened Fred Ficker.
Fighte Denio Mesidence Maii Figue	stola income medical benens insulance binon biguinty
SSN	000-00-0001
Legal Last Name *	man
Legal First Name *	person
Legal Middle Initial	
Name Suffix	· · · · · · · · · · · · · · · · · · ·
Eye Color	· · · · · · · · · · · · · · · · · · ·
Also Known As	
Pop-up Alert Message	*
	•
RW Part B Case Mgmt Agency	
RW Part B Case Manager	
Ryan White Client ID	66214
Current Program Status	
Status Change Reason	
Send Client Data to Lab System?	No
Medical Case Management Status	
ADAP Status	
CHIC Status	
Client Notes	
📓 🎒 🤌 🧕 🍓 🗋 Add Client Not	le
Date Due Type Subject Status	

Once you have the tabs the size you would like, you can set the size as your default tab size by clicking on Tools – Set Default Tab Width. This will save your default tab width.



Type Ahead in Views

In any view that you are attempting to search, you can "Type Ahead" to help increase the speed of your searching. These filtering options are available in all views. When you log-off of Provide, the views will return to their default; therefore; you will need to re-sort your views. In the example below, if you were searching for Groupware Technologies, you could start typing "GR" and the choices will start to load for you.

⊘ Set Securtiy	? X
Current Profile	
Greene County Health Department - Client Services	
Greene County Health Department - Client Services	
Groupware Technologies Inc Technical Support	

In any field, you may type ahead to assist in your search. When you are typing ahead on the bottom of the screen you will see what you are typing/searching for example if you were looking for a provider with the first name of Amanda, and typed "Amanda" it will show:

Searching for: AMANDA

on the bottom of the screen and jump to "Amanda" on the

provider list.

Actions Menu

There is one available action here that is used to register a new client in Provide[®] Enterprise.

Register Client

In order to register a client in Provide[®] Enterprise go to the Windows Toolbar, select "Actions" and then "Register Client".

Provide Enterprise - [Provide Enterprise - [Find Client]								
∂ File Find View	Actions Tools Reports	Windows Help							
Close 👫 Search Register Client									

If your current user profile does not allow you to register clients, you will get the following error:

Error	<
Your current user profile does not allow you to register clients	
ОК	

If your current user profile does allow you to register clients, a window similar to the one below will appear on your screen:

Provide Enterprise - [Register Client]								
🖯 File Find View Actions Tools Reports Windows Help								
Close A Close Client								
Register Client								
Register Client								
First Name *								
Middle Initial								
Last Name								
Bith Date								
Gender •								
SSN								
Agency Assigned Client ID								
How was Client Referred to Agency?								
Date of Intake								

NOTE: This screen will be discussed in more detail later in this guide.

Tools Menu

From the Tools Menu, you can set user preferences or refresh design elements.

Set-Security

Provide[®] Enterprise allows for a variety of user preferences to be set. Click on Tools and click on User Security.

Provide Enterprise - [Find Clien	nt]		and the second se	1000
🕘 File Find View	Actions	Tools	Reports	Windows	Help
📢 Close 👫 Search		U	ser Securit	у	

Current Profile

The Current Profile box allows you to select and/or change the User Profile that you wish to enter and/or view information from.

👌 Set Securtiy			? ×
Current Profile			
UIC College of Medicine Peoria - Clie	nt Services		-
Agape Missions - Client Services	nt Services		
	IL OCIVICES		
🖻 📃 🗐			
AOrg	APgm		
Agape Missions	Client Services		
UIC College of Medicine Peoria	Client Services		
UIC College of Medicine Peoria	Client Services		
View Effective Date			
Current			-
		OK	Cancel

To change your current profile, click on the 🔽 and then select the profile.

The Set-Security Dialog Box consists of four different tabs, which will be discussed below.

Current Reporting Scope

The Current Reporting Scope reflects the User Profiles that your System Administrator has defined for you.

Current Reporting Scope		
🔊 🗋 년		
AOrg	APgm	
Agape Missions	Client Services	
UIC College of Medicine Peoria	Client Services	
UIC College of Medicine Peoria	Client Services	

The Current Reporting Scope reflects the User Profiles that your System Administrator has defined for you. To select reporting scopes, click on the scope and a green check mark will placed next to the scope selection.

View Effective Date

The View Effective Date preference allows you to select how you want to view client information, Current records or records as of a particular date range in the past.

To change the View Effective Date, follow these steps:

• Click on the next to the View Effective Date field. Your two choices can be seen in the following figure.

View Effective Date	Current
	Current
Date Format	Past

• If you select "Past", an additional field (seen in the figure below) will appear to allow you to select the date that you wish to view information from.

View	Effect	tive [)ate				
Past							•
Past I	Date						
Friday	, Nov	/emb	er 29,	2013	1		
•	No	oven	ıber,	201	3	Þ	OK Cancel
S	М	Т	W	Т	F	S	
27	28	29	30	31	1	2	
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	19	20	21	22	23	
24	25	26	27	28	29	30	
1	2	3	4	5	6	7	
		Today		Clear]		

Simply click on the appropriate date in the calendar. To scroll between months, click on the
 or
 buttons.

Preferences

Provide[®] Enterprise allows for a variety of user preferences to be set.

Opening the User Preferences Dialog

To open the User Preferences Dialog box in Provide[®] Enterprise, follow the steps below: From the Windows Toolbar (in the figure below), select "Tools" and then "User Preferences".

File	Find	View	Actions	Tools	Reports	Windows	Help	
Close		Search						

This will activate the User Preferences Dialog seen in the figure below:

O User Preferences	a month of the
I Close III Close III III III IIII IIII IIIIIIIIIIIIII	
User Preferences	
General Defaults Common Other	
User Name	Amanda Epping/GTI
Date Format	* MM/dd/yyyy
Date Format Example	01/27/2014
Views Show Grid Lines?	No 👻
Views Show Alternating Colors?	Yes 🔹
Task Alert View	
Task Alert View to Open	

The User Preferences Dialog Box consists of four different tabs, which will be discussed below.

General Tab

The General Tab of the User Preferences consists of the most basic preferences you can define in Provide[®] Enterprise.

Date Format

The Date Format user preference allows you to select the format of all date fields within the Provide[®] Enterprise system.

To change your default Date Format, simply follow these steps:

Single click in the button 🔽 on the date format line and select the date format you wish to use.

Display: View Grid Lines/Alternating Colors

You can to select to view grid lines and alternate colors within the Provide[®] Enterprise system. Select Yes or No for each of these preferences.

Task Alert View

The "Task Alert View" is the view that Provide uses to determine if task alerts should be sent to you. You can select your Task Alerts View. Click on the 🗔 and the below window will be displayed. Click on the 💷 to expand the options under each category.



To select a particular task alert view, double click on the particular view. Double click the Task Alert View to select that view.

Task Alert View to Open

The "Task Alert View To Open" is the task view that will open when you click on the new alert that will be highlighted the color red in your status bar. You can select your Task Alerts View to Open. Click on the 🗔 and the below window will be displayed. Click on the 😐 to expand the options under each category.

Defaults Tab

The Defaults Tab of the User Preferences allows you to define some of the values that will default in various activity records throughout Provide[®] Enterprise. You can define a default Diagnosis, Diagnosis Description, Facility, Provider, Superbill and Appointment Length. These default values are then used to populate fields on Activity records you create. For example, if you set the default Appointment Length to 15 minutes, every time you create an Appointment, the end time will default to15 minutes after the start time. This is variable by customer.

Common Tab

The Common Tab of the User Preferences allows you to define some of the values that will default in various activity records throughout the system. You can define a common list of Diagnosis, Procedures, Providers, Facilities, Medical Groups, Organizations, Drugs and Tests. This is variable by customer.

Other Tab

The Other Tab of the User Preferences allows you to define some additional values that will be assigned to your preferences throughout Provide[®] Enterprise.

User Preferences			
General Defaults Common Other			
Supervisor Administrative Support Soft Deletes Start Up Action	* Show		

- **Supervisor**: This field allows you to define your Supervisor from the Provider's List.
- Administrative Support: This field allows you to define your Administrative Support person from the Provider's list.
- **Show/Hide Soft Deletes**: This field allows you to specify whether or not you want to see deleted records when reviewing a Client Chart.
- **Startup Action**: This field allows you to define what happens automatically when you launch the Provide[®] Enterprise Client. The options are "Find Client", Action "Register Client" or even open a view each time that you start up Provide[®] Enterprise.
- This is variable by customer.

Defining a Startup Action

The Startup Action will be your first view when you first log into Provide. To define a Startup Action, follow the steps below:

• Click on the 🗔 button on the Start-up Action. A window similar to the following will appear:

elect From View	٤
Please select item(s) from the view.	
월 🥔 🤌 💽 행	
Action: Register Client	
Find: Client	
Find: Client Contact	
Find: Codes\ICD9	
Find: Providers\Facility	
Find: Providers\Individual	
View: Activity\(Action Plan Goal Note)	
View: Activity\(Action Plan Goal Step)	
View: Activity\(Action Plan Note)	
View: Activity\(Action Plan Step)	
View: Activity\(ADAP Enrollment Hold)	
View: Activity\(ADAP Letter)	
View: Activity\(ADAP Medication History Adjustment)	
View: Activity (All Diagnosis Records)	
View: Activity \(Allergies)	
View: Activity (CHIC Enrolment Hold)	
View: Activity (Chic Enrollment Programs)	
View: Activity (Client ADAP Enrollment)	
View: Activity (Client ADAP Medication Authorization)	
	OK Cancel

 Scroll up and down the list as necessary and double click on an Action or a View that you wish to have opened each time you launch Provide[®] Enterprise. Click on the "OK" button and the next time you launch the system the setting will be applied.

Refresh

Provide[®] Enterprise allows you to refresh certain design elements without having to log out of the application.

If the System Administrator has made changes to your Data Dictionary, Keywords, Program Profiles, Reports or available Views while you have been logged into Provide[®] Enterprise, you can update them instantly by clicking on the Tools - Refresh menu and selecting one of the options from the list.



After you have made a selection you will see the spinning blue circle icon while the design element is updating. Each time you log into Provide[®] Enterprise these design elements are automatically updated for you.

Reports Menu

From the Reports Menu you can either run a report or manage your report objects. Each of these items is discussed below.

Run

Using the "Run" selection will allow you to run any "Stand Alone" reports that have been added to your system. To do this, follow these steps:

• Select the Reports - Run menu as shown below:

File	Find	View	Actions	Tools	Reports	Windows	Help
4 Class AA Crawk					Rur		

If you have reports that are available to be run as a "Stand Alone" report, they will be displayed in a dialog box similar the one shown below:

Select A Report		
0		
ReportGroup	ReportName	OK
	Client List - Open Clients	Cancel
		Cuncu

OK.

 Simply click on the Report name and then click on the button to run the report.

Windows Menu

Clicking on the Windows Menu will present a few different options for you.

Layout Selection

The "Layout Selection" choice of the Windows Menu, will allow you to select how you wish to view the open windows on your screen.

File	Find	View	Actions	Tools	Reports	Windows Hel	p	
						Layout	•	Cascade
								Tile Vertical
								Tile Horizontal
								Arrange Icons

Cascading Windows

If you select "Cascade" from the Layout Selection menu, all of the windows you have open in Provide[®] Enterprise will be opened, one on top of each other, and you will be able to see the title of each open window at the top of that window. This can be seen in the figure below:



Switching between windows is as simple as clicking on the window you want to view.

Vertically Tiling Windows

If you select "Tile Vertical" from the Layout Selection menu, all of the windows you have open in Provide[®] Enterprise will appear on your screen in a vertical tiled pattern, similar to that in the figure below:

🕗 Provide Enterprise	
File Find View Actions Tools Reports Window Window Tiles	
🛛 Client Profile For Test Client	🔃 Client\Clients All By Last Name 📃 🗖 🔀
	Close 🖛 🗲 Create Activity 🛕 View Activity 🗲 Create Sub Record
	Last Name First Name MI CM Tier Address 1 City Client Test
Client Profile : TestClient () AIDS Foundation of Chicago - Client Services : Jackie Holmes/GTI [03/16/	

Switching between windows is as simple as clicking on the window you want to view.

Horizontally Tiling Windows

If you select "Tile Horizontal" from the Layout Selection menu, all of the windows you have open in Provide[®] Enterprise will appear on your screen in a horizontal tiled pattern, similar to that in the following figure.

=ile	Find Vie	w Actio	ons Tools	Reports	Windows	Help				
đ	Client Pr	ofile F	or Test C	lient						
	iii Close	^{ABC} ↓	: -> @	🔹 🌽 Ed	it 🙀 Cre	ate Activity	😡 Create\Re	port 🛛 🔸 Create	Sub Record	• •
	Client Pro AIDS Fou	ofile : Te Indation	estClient (n of Chica) go-Client 9	Services :	Jackie Holn	nes/GTI (03/16/	2011]		
	Profile [)emo f	Residence	Mail H	ousehold	Income Me	dical Insurance	e Benefits		
	Profile S SSN ↓	ection R	eview Tiles				Review Pro	ofile		^
	Last Na	me		*	Client					
	First Nar	ne		*	Test					
đ	Client\Cl	ients A	II By Las	t Name)					
1	Close	ஷ் 🔸	Create Acti	vity 🛛 💽 🛚	/iew Activity	y 🛛 🔸 Creal	te Sub Record	🝷 🔸 Action	🝷 🔸 View	• 4
	Last Name	First N	lame MI	0	CM Tier	Address 1	City	Stat	e Zip	ŀ
	Client	rest						IL		

Switching between windows is as simple as clicking on the window you want to view.

Viewing Open Windows

The final choice under the Windows Menu is a numbered list of all windows that are open in Provide[®] Enterprise. The window with the check mark by it is the active window.



NOTE: You can select any of the numbered window choices to move to a different window.

Help Menu

From the Help Menu you can find more information regarding the Provide[®] Enterprise version on your machine, direct you the Provide[®] Enterprise support website, and Provide[®] Enterprise email support.



• Clicking on "Help" and then "About" will bring up the following Window:



NOTE: You can see the current version of the Provide[®] Enterprise that is installed on your machine.

- Clicking on "Help" and then "Support Website" will bring the Provide[®] Enterprise website and help documentation.
- Clicking on "Help" and then "Email Support" will link to your email and allow you to email the Provide[®] Enterprise technical support team.

Fields

There are several different types of fields used within the Provide[®] Enterprise system. They will each be described briefly below.

When a field is editable, the text is bold. When not editable it is grayed out. It may be grayed out because you are not in edit mode or because your System Administrator has locked the field.

Pick list

For fields that contain a downward arrow like this, click on the arrow to display the list of preset values from which to choose. You can also type the first letter of a value if known and it will jump to the first keyword that starts with that value. Typing the same letter again will scroll you to the next value that starts with that letter. For example in a State field, typing "i"

will bring up "IA", typing a "i" a second time will bring up "ID" and typing "i" a third time will bring up "IL".

State	IL.	•
County	DE	~
Zip Code	FL GA	
Home Phone	GU	
Home Phone Message Type		
Office Phone	ID	
	IL	$\mathbf{\Sigma}$

Multi-value field

There are some fields similar to the one shown below that allow multiple values to be selected. To check an item on the list, click on the item's name and a check mark will appear to the left of the name. To remove a check mark, click on the name again.

Other Languages Proficient In	✓ American Sign □ Cantoneese	A
	✓ English □ German	•

Required Fields

A red asterisk (*) next to any field signifies that the field is required by Provide[®] Enterprise in order to save the document. Some required fields already have a default value while others are blank by default.

Birth Date		
Current Age	0	
Gender	Male	-
Races - All Identified With	Alaskan Native Asian Required Fields Required Fields	

Date Fields

When you see a date field in Provide[®] Enterprise you can accept the default value, hit the delete or backspace key to remove the current date and type in a different date, or click on the solution which will bring up a calendar window shown below.

4	March, 2011 🕒					
S	М	Т	W	Т	F	S
- 27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	- 7	8	9
	T	oday		Clear		

- Click on the day you wish to select. To move backward ◀ or forward ▶ a month at a time, use the appropriate button.
- You can also change the month by clicking on the name of the current month. This will bring up a list of months. Simply select the month that you wish to navigate to.
- You can change the year that is shown by clicking in the year (on the calendar) and using the up and down arrows (circled in the following figure) to change the year.

2000	•
2006	•

Radio Button

An example of a radio button (\Box) is shown below:



A radio button will allow you to select one or more choices. Simply click on the radio button (^(C)) that corresponds to the choice or choices you wish to select.

Check Box

Some fields in the system have check box fields. To check an item, click on the box to select it.

Current Reporting Scope	
Test Agency A - Care Management	
Test Agency A - Nutrition Support	
Test Agency B - Food Pantry	
Test Agency B - Housing Assistance	•

Field Dialog Control Button

Some fields have lists from which to choose a value. Most of these fields will have a button to click that will activate the list. To select an item in the list, click on the item name. To deselect an item, click on the item name again. Provider fields, Diagnosis fields, Procedure fields, Drug name fields and Test name fields are examples where Field Dialog Control Buttons are used. In some cases you are able to select only a single value and in others you are able to select multiple values. Both types will be discussed below.

Click on the 😐 to expand the options under each category and click on the 亘 to collapse the options under each category.

Provider Field Single Value

There are many fields within Provide[®] Enterprise where you can select a Facility, Individual, Medical Group, Service Organization, Service Program or manually enter a value. You will be able to view your available provider options when you click on the sutton as the following shows.

) Select Provider	ſ			
Provider Type Select	Individual Common	Search Search O Entire Database	Within Results	Search Clear Results
List of Items				
			ОК	Cancel

Provider Type: The choices available for this field are set by your System Administrator in the data dictionary field properties of Provide[®] Enterprise. Generally you will have the ability to choose from a Facility, Individual, Medical Group, Service Organization or Service Program. Both the "Provider Type" and the "Select" group that is chosen will limit your choices in the "Provider Name" view.

Select: By default, this field is set to Common and will display a list of common providers that you have defined in your user preferences. If you have not defined any common providers, the "Provider Name" view will be blank. You may also choose to change this setting to "All" to display all providers that have been defined in Provide[®] Enterprise.

List of Items (Provider Name): This view will be limited by both the "Provider Type" and the "Select" group that is chosen.

Search:

Search		Search
Entire Database	Within Results	Clear Results

You may manually type a provider name such as "Smith" in the search field and then click on the <u>Search</u> button. All of the provider names with the first name or last name of "Smith" will appear. When searching for a word or phrase you can use an asterisk (*) as a wild card. If used at the end of the string like smith*, it will find all values that start with "smith". If used at the front like *smith, it will find all entries that contain "smith" anywhere in the string. You can also use a wild card in the middle like s*h to pull values like "smith" or "seth". You can also search the entire database or just the subset of displayed results.

Clear Results: You can use this button to clear your search results.

Cancel: You can use this button to cancel out of the provider selection screen.

NOTE: Once you have the provider name in the "List of Items" you can select your provider by double clicking on the provider name, by clicking on the provider name once with your mouse and pressing the "Enter" key on your keyboard or by clicking on the provider name once with your mouse and then clicking on the **OK** button.

Provider Field Multi-value

There are places within Provide[®] Enterprise where you can select more than one Facility, Individual, Medical Group, Service Organization, and Service Program or manually enter a value. You will be able to view your available provider options when you click on the button as the following shows.

rovider Type elect	Indiv Com	ridual mon	•	Search	Database	O Within Results	Search Clear Results
ist of Items					Selected	Items	
Last Name	First Name	Phone	Street Address		Provider I	Name	
Lentz Petel Vora Whealon	S S S S	(708) 225-9000	650 Phoenix Center D Mt. Sinai	Add		Remove	Remove

Provider Type: The choices available for this field are set by your System Administrator in the data dictionary field properties of Provide[®] Enterprise. Generally you will have the ability to choose from a Facility, Individual, Medical Group, Service Organization or Service Program. Both the "Provider Type" and the "Select" group that is chosen will limit your choices in the "Provider Name" view.

Select: By default, this field is set to Common and will display a list of common providers that you have defined in your user preferences. If you have not defined any, the "Provider Name" view will be blank. You may also choose to change this setting to "All" to display all providers that have been defined in Provide[®] Enterprise.

View By: In looking at the "View By" field above you will see that it is sorting the providers by Name. You could also choose to view providers by "Role" such as Nurse or Social Worker.

List of Items (Provider Name): This view will be limited by both the "Provider Type" and the "Select" group that is chosen.

Manual Entry: This field is used to manually enter a provider that you do not have defined in any of your lists. If this is a provider that will be used more than once, you should notify your Provide[®] Enterprise Administrator so they can add the provider to your list of values.

Search: You may manually type a provider name such as "Smith" in the search field and then click on the <u>Search</u> button. All of the provider names with the first name or last name of "Smith" will appear. When searching for a word or phrase you can use an asterisk (*) as a wild card. If used at the end of the string like smith*, it will find all values that start with "smith". If used at the front like *smith, it will find all entries that contain "smith" anywhere in the string. You can also use a wild card in the
middle like s*h to pull values like "smith" or "seth". You can also search the entire database or just the subset of displayed results.

Clear Results: You can use this button to clear your search results.

Cancel: You can use this button to cancel out of the provider selection screen.

Add Button: Whether adding just one provider or adding multiple providers to your Selected Items list you need to place a check mark to the left of their name as shown in the figure below.

<u>ე</u> ა	elect Indivi	dual						
Provider Type Individual Select Common					Search	Database	Within Results	Search Clear Results
List	of Items					Selected	tems	
	Last Name	First Nan	ne Phone	Street Address		Provider I	Name	
× × ×	Allan Lentz Petel Vora	S S S	(708) 225-9000	650 Phoenix Center D Mt. Sinai				
V	Whealon	S			Add			
< [a ata ali A	"	1	Þ			Deme	
Sel	ectea: 4						Remov	
							ОК	Cancel

Diagnosis Field Single Value

There are several places within Provide[®] Enterprise where you can select a diagnosis. You will be able to view your available diagnosis options when you click on the button as shown below:

elect	All		-	Search				Search
hoose Type	By Description		-	Entire	e Database	Within Re	sults	Clear Results
ist of Items					Selected I	tems		
Description 224 WEEKS OF G 10-19% BODY BRN 10-19% BODY BRN 15T DEG BURN A 1ST DEG BURN A 1ST DEG BURN A 1ST DEG BURN A 1ST DEG BURN B 1ST DEG BURN B 1ST DEG BURN B 1ST DEG BURN B	ESTATION 1 10-19% 3D 3 RD DEG UNSP BDOMN WALL NKLE RM MULT RM UNSPEC XILLA ACK ACK ACK ACK ACK ACK HEAST HEST WALL	Code 765 21 948.10 942.13 945.13 943.19 943.10 943.14 942.14 942.14 942.11 942.12		Add >	Code	Description	Remove	Remove All
The International Classification of Diseases, Ninth Revision, Clinical Modification (ICD-9-CM) is based on the World Health Organization's Ninth Revision, International Classification of Diseases (ICD-9), ICD-9-CM is the official system of assigning codes to diagnoses and procedures associated with hospital utilization in the United States. The ICD-9 is used to code and classify mortality data from death certificates. The ICD-9-CM consists of: a tabular list containing a numerical list of the disease code numbers in tabular form;								

Select Menu: By default this field is set to your "Common" values. You can also choose to see "All" DSM-IV Axis I, II or III diagnosis types. The "Search", "Clear Results", "OK" and "Cancel" buttons work the same way as described in the "Provider Field Single Value" except there is no option for manual entry.

Diagnosis Field Multi-value

There are places within Provide[®] Enterprise where you can select more than one diagnosis record. You will be able to view your available diagnosis options when you click on the button as shown below:

lect	All			- Search			Search
oose Type	By Description			 Entir 	e Databa	se 🔘 Within Results	Clear Results
st of Items					Selecter	d Items	
Description		Code	*		Code	Description	
<24 WEEKS OF	GESTATION	765.21			705.04		
10-19% BODY B	RN 10-19% 3D	948.11			/65.21	<24 WEEKS OF GESTAT	ION
10-19% BODY B	RN 3RD DEG UNSP	948.10			948.10	10-19% BODY BRN 3RD	DEG UNSP
1ST DEG BURN	ABDOMN WALL	942.13					
1ST DEG BURN	ANKLE	945.13		Add >			
1ST DEG BURN	ARM MULT	943.19					
1ST DEG BURN	ARM UNSPEC	943.10					
1ST DEG BURN	AXILLA	943.14					
1ST DEG BURN	BACK	942.14					
1ST DEG BURN	BACK OF HAND	944.16					
1ST DEG BURN	BREAST	942.11					
1ST DEG BURN	CHEST WALL	942.12					
1ST DEG BURN		041.14	-				
						Remove	Remove A
						ОК	Cancel
he International Cla	ssification of Diseases	Ninth Revision,	Clinical I	Modification	(ICD-9-CI	M) is based on the World He	alth 🔺
rganization's Ninth	Revision, International	Classification of	Diseases	(ICD-9). ICI	D-9-CM is	the official system of assign	ing codes to
agnoses and proce	fication	nospital utilizatio	n in the t	United State	s. The ICI	J-9 is used to code and clas	ssiry mortainty
sta nom death cent	licales.						_
he ICD-9-CM consi	sts of:						-
a tabular list con	taining a numerical list	of the disease co	ode numb	pers in tabul	ar form;		
an alphabetical	index to the disease en	tries; and					

Select Menu: By default this field is set to your "Common" values. You can also choose to see "All" diagnosis types. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry.

Procedure Field Single Value

There are fields within Provide[®] Enterprise where you can select a diagnosis. You will be able to view your available diagnosis options when you click on the ... button as the following shows.

la Selec	t Procedure		
Select	Common	Certire Database C Within Results	earch Ir Results
List of I	ems		
Code	Description		
00011	ENDUVAS HEPH ABOU AU ANEUNYS ANESTH LECTROSHOCK ANESTH NECK ORGAN SURGERY ANESTH SURGERY OF BREAST		
•1		1	•
		OK Can	zel
CPT© 2 Nofee : medicin CPT is a	1005 American Medical Association. All Rights Reserved. schedules, basic units, relative values or related listings ar e or dispense medical services. AMA assumes no liability a registered trademark of the American Medical Association	t. are included in CPT. AMA does not directly or indirectly prac y for data contained or not contained herein. on	ice

Select Menu: By default this field is set to your "Common" values. You can also choose to see "All" procedure types. The "Search", "Clear Results", "OK" and "Cancel" buttons work the same way as described in the "Provider Field Single Value" except there is no option for manual entry.

Procedure Field Multi-value

There are places within Provide[®] Enterprise where you can select more than one procedure. You will be able to view your available provider options when you click on the low button as shown below:

🖁 Select F	Procedure				_0
Select	Common	• • Er	ntire Database – O W	ithin Results	Search Clear Results
List of Item 00017 00104 00320 00402	IS Description ENDOVAS REPR ABDO AO ANEURYS ANESTH ELECTROSHOCK ANESTH NECK ORGAN SURGERY ANESTH SURGERY OF BREAST	Add>	Selected Items Code Description 00011 ENDOVAS R 00104 ANESTH ELI 00320 ANESTH NE 00402 ANESTH SU	EPR ABDO AO ECTROSHOCK CK ORGAN SUI RGERY OF BRE	ANEURYS RGERY AST
				Remove	Remove All
				OK	Cancel
CPT© 200 Nofeesch medicine o CPT is are	5 American Medical Association. All Rights Reserved. iedules, basic units, relative values or related listings are r dispense medical services. AMA assumes no liability fo gistered trademark of the American Medical Association	included in r data cont	CPT. AMA does not di ained or not contained l	rectly or indirectl herein.	y practice

Select Menu: By default this field is set to your "Common" values. You can also choose to see "All" procedure types. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry.

Drug Field Single Value

There are fields within Provide[®] Enterprise where you can select a drug name. You will be able to view your available drug names when you click on the 🗔 button as shown below:

Select ¥anta	geRX Drugs		<u>_0×</u>
		-	Caracter 1
Select	Common		Search
		Entire Database C Within Results	<u>Clear Results</u>
List of Items			
Drug Name			
abacavir			
acetaminophen			
menthol topical			
Prolixin			
			_
			_
(
		OK	Cancel
IMPORTANT N	OTICE Every effort has been made to ensure that	he information provided by Cerner Multum, Inc.	('Multum') is 🔺
accurate, up-to-c he time sensitive	pate and complete, but no guarantee is made to that Buiusing this service, you acknowledge and agree	errect. In addition, the drug information contain that your professional duty to the patient in pro	vidina
healthcare servic	ces lies solely with you. You take full responsibility for	r the use of the information provided by the serv	/ice in patient
care and acknow	wledge that the use of the service is in no way inten	led to replace or substitute for your professional	judgment.
muitum does not warn, negligence	assume any responsibility for your actions which ma or any other basis: and	y result in any liability or damages due to malpra	ctice, failure to
nam, nogigenee	s any and badd, and		
Every effort has I	been made to ensure that the information provided t	y Cerner Multum, Inc. ('Multum') is accurate, up	-to-date, and
complete, but no) guarantee is made to that effect. In addition, the d	ug information contained herein may be time se	nsitive.
			-

Select Menu: By default this field is set to your "Common" values. You can also choose to see "All" drug types. The "Search", "Clear Results", "OK" and "Cancel" buttons work the same way as described in the "Provider Field Single Value" except there is no option for manual entry.

Drug Field Multi-value

There are places within Provide[®] Enterprise where you can select more than one drug name. You will be able to view your available provider options when you click on the shown below:

🔡 Select Comm	on Drugs				
Select	Common	•			Search
			Entire	Database 🔿 Within Results	Clear Results
List of Items			[Selected Items	
Drug Name		_		Drug Name	
abacavir				abacavir	
menthol topica	ri al			acetaminophen menthol topical	
Prolixin	-			Prolixin	
			Add > 1		
			~~~		
		-			
	<b>)</b>				
			l	Hemove	e Remove All
				ОК	Cancel
Multum Lexicon End-User Licens	e Agreement				-
1. Introduction					
A. This License A to any other prod or any derivative modifications. A t addressed herein	Agreement (the "License") applies to the Multum fucts or services of Cerner Multum, Inc. ("Multum work under copyright law; i.e., a work containing translation of the Database is included without lim n as "you".	Lexicol ''). A '' g the Da hitation	n databas work base atabase o in the tern	e (the "Database"). This License ed on the Database" means either or a substantial portion of it, either v m "modification". Each end-user/I	does not apply the Database verbatim or with icensee is
1					<b>_</b>

Select Menu: By default, this field is set to your "Common" values. You can also choose to see "All" drug names. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry. Choose Type: This Field allows you to sort drugs by Brand Name, by Drug Name, Brand Name by Therapeutic Class or Drug Name by Therapeutic Class.

# Test Field Single Value

There are fields within Provide[®] Enterprise where you can select a test name. You will be able to view your test names when you click on the shown below:

Select From View				2
Please select an item from the view.				
د <del>ئ</del> ا (				-
Test Name				
Anergy Panel				
Blood And Liver Panel				
Chest X Ray				
Chlamydia Screen				
Floyd				
Gonorrhea Screen				
Hemoglobin				
HIV 1 RNA bDNA				
HIV 1 RNA PCR				
HIV Antibody				
Lab Comment				
Lyme Disease				
p24				
Pap Smear				-
<b> </b>				
	0	к	Cancel	

Select Menu: By default this field is set to your "Common" values.

# Test Field Multi-value

There are places within Provide[®] Enterprise where you can select more than one test name. You will be able to view available provider options when you click on the button as shown below:

Select	All	[	• Finite	e Database 🛛 Within Results	Search Clear Results
List of Items Test Name Anergy Pan Blood And L Chest X Ray Chlamydia S Floyd Gonorrhea S Hemoglobin HIV 1 RNA HIV 1 RNA HIV 1 RNA HIV 1 RNA HIV 1 RNA	el iver Panel j icreen Screen bDNA PCR PCR y h t se		Add>	Selected Items Test Name Anergy Panel Blood And Liver Panel ChestX Ray Chanydis Screen Floyd Gonorrhea Screen Hemoglobin HIV 1 RNA PCB HIV Antibody Lab Comment Lyme Disease	
•		<u>•</u>		Remov	/e Remove A

**Select Menu**: By default, this field is set to your "Common" values. You can also choose to see "All" test names. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry.

#### **Button Bar**

There are many places in Provide[®] Enterprise where you will notice a series of buttons arranged at the top of records and views. Below is an example of a button bar from the Client Profile record:

3	Provide Enterprise - [Client Profile For Joe H. Smith]																
á	) File	Fi	nd Vi	w	Actions	Tools	Reports	Windows	Help								
	Clo	se	AB⊊ (⇔		-	🎤 Edit	: 🦐 Crea	ate Activity	🖐 Create\Report	📀 Create Sub Record	•	⊘ View	•	Action	•	📀 Print	•

The kinds of buttons will vary from record to record. Some of the more common buttons are described in detail below.

#### Print

The print button will allow you to print data from the open record to a Crystal Report template. The output can be set to either display on screen in order to review before printing or it can be automatically sent to the user's default printer. You can select what you would like to print by clinking on the down arrow and selecting your printing choice.

$\bigcirc$	O Print 💌							
-	Client Profile							
-	Date Summary							
	Progress Logs							
	Service History							
-	Medical Provider Data Collection Form							

#### Edit

The <u>Edit</u> button places the record you are viewing into "edit mode." Once in "edit mode" you will be able to change field values and select items from drop down lists.

#### Action

The Action button allows you to select from a list of available actions. These actions differ depending on what you are doing in the Client file. To see each available action click

on the Action and a list of actions will be displayed.

#### Create

Clicking on the Create Activity button will show you a pull down list of all Activity Record types you are able to create.

#### **Document History**

Every time changes are saved to a record in Provide[®] Enterprise, an updated version of the record is created. The buttons allow you to view previous versions of the record you have open in order to see what the record looked like at a particular point in time. You can either pick a date from the drop down list or move backwards one change at a time by clicking the "left arrow".

View Actions	Tool	ls Reports Windows Holp
View Actions		2013/12/18 [Updated By Provide Agent Manager/GTI] - Current
	$\checkmark$	2013/12/18 [Updated By Provide Agent Manager/GTI]
e of 12/19/2012 1		2013/12/17 [Updated By Provide Agent Manager/GTI]
15 01 12/10/2013 1		2013/12/17 [Updated By Provide Agent Manager/GTI]
e : Joe H. Smith Intment of Public		2013/12/16 [Updated By Provide Agent Manager/GTI]
Desidence A		2013/12/16 [Updated By Provide Agent Manager/GTI]
		2013/12/13 [Updated By Provide Agent Manager/GTI]
		2013/12/13 [Updated By Provide Agent Manager/GTI]

When viewing a previous version of the record you will notice that "Historic View as of ..." will be displayed at the top of the record.

Historic View as of 11/13/2013 2:37:12 PM [Update By Test User12]					
Client Profile : Joe H. Smith () Illinois Department of Public Health - HIV Care Network : Test User12	[11/08/2013]				
Profile Demo Residence Mail Household Income Medical Benefits	Insurance Enroll Eligibility				
Click to update Income Data ==>	Update				
Current Employment Status Full Time					
Current Monthly Household Income					

Fields that are highlighted in yellow are fields that are different from the most recent version of the record. You are not allowed to edit a Historic View of the record. To edit the record after referencing a Historic View you will need to switch to the Current view as shown below:

rise - [Client Prof	file Fo	or Joe H. Smith]
View Actions	Too	ls Paparts Mindows Halp
	$\checkmark$	2013/12/18 [Updated By Provide Agent Manager/GTI] - Current
		2013/12/18 [Updated By Provide Agent Manager/GTI]
1		

#### Delete

Provide[®] Enterprise allows you to delete any Client Sub-Records and Activity Records. Only the creator of the original document or their supervisor can delete the document. When a

document is deleted it is not truly deleted from the database. It will remain a permanent part of the client record, but will be "marked" as deleted (similar to putting a line through an incorrect entry in a paper record) and thus, will not be counted in reports. To delete a record, follow these steps:

- Open the Record in question.
- On the Action Bar, you will see the button. Clicking on this button will activate the following dialog box:



- Select the reason you are deleting the chart note and then click on the button. You will be backed out of the note.
- Any time the record is opened in the future, you will see a message similar to that in the following figure at the top of the record:

-

• In small white font, it will state who deleted the records and the date and time the record was deleted.

#### Un-Delete

Once a record has been marked as deleted, you have the ability to "un-delete" the record within Provide[®] Enterprise. Only the creators of the record, their supervisor or System Administrator can "un-delete" a record. To "Un-Delete" a record, follow the steps below:

- Navigate to the particular record in question and open the record. Because the record has been marked as deleted, you will see the button.
- Click on this button to "Un-Delete" the record. The deletion information will be removed, the record will be re-saved and you will be closed out of the record. You will notice after refreshing your screen that the Delete flag has now disappeared from the database views for this document.

#### **Saving Record Changes**

The Close button closes the current record you are viewing.

• If you have changed fields, you will usually be asked if you want to save the changes you have made as shown below.

Save Changes?			<b>×</b>
Do You Want To	Save Changes	s?	
Vec	No	Cancel	Detaile >>
	140	Calicer	

- If you have made changes that you want to save, be sure to select "Yes".
- You could also click on the Details >> button to see a list of all the changes that were made while you were in the record. A sample of what you might see is displayed below:

Save Changes?				<b>×</b>
Do You Want To Yes	Save Chang No	jes?	<< Details	
Field Label	Old Value	New Value		
Legal Middle Initial	Н	F		

- You can choose to save all of the changes that you made or you can delete changes that you do not want by clicking on them individually and hitting the delete key on your keyboard. If you double click on the change you will be taken to the Sub-tab that contains the field that you modified. You can also select "Cancel" to return to the document or "No" when prompted to save your changes, and the record you were in will close.
- Sometimes when you click on the ^{the Close} button to save your changes you will see a box that looks like this:

Save Changes?	×
Note: Changes were confied to this desurrant sizes you concerd it	
Note: Changes were applied to this document since you opened it.	
Do You Want To Save Changes?	
Yes No Cancel << Details	

• This can happen because the Provide[®] Enterprise system does not "lock" records when they are opened by users, so two or more users could be editing the same record at the same time. Here is a scenario where this may occur. First, we assume that two users open the same Client Profile at the same time. One person may make changes to the "Ethnicity" and "Race - Primary Identified" fields in the Client Profile as shown in the example above, and that person saves their changes. A second user may change the "Ethnicity" field and "Citizenship" field, when the second user closes the Client Profile they see the following message:

Save Changes?				×
Note: Changes Do You Want 1	were applied to o Save Change	this document : s?	since you opened it.	
Yes	No	Cancel	<< Details	

• If they click on the <u><< Details</u> button, they would see a screen similar to the one below:

	Save Changes?			×		
	Note: Changes were applied to this document since you opened it. Do You Want To Save Changes? Yes No Cancel << Details					
	Changed By	Field Label	Old Value	New Value		
Current Changes	(	Ethnicity		Hispanic		
Desiring Observe	alou nor worth /ab	Litizenship Race, Rimani Identified	Lillear	United States		
Previous Changes	alex rieuwiitri/gu	nace - Fillinaly Identified	Utriel	Asiari		

The following rules apply to the "Details" display when two users make changes to the same record:

The first user to save their changes will have the changes applied without any warning message.

- The second user to save their changes will see the warning "Note: Changes were applied to this document since you opened it. Do You Want To Save Changes?"
- If both users make changes to the same field, the second user will only see the original value of the field and the changes that they made. The "Changed By" box will be blank.
- If only the first user changed a field (See "Race Primary Identified"), the second user will see both the original value and the new value of that field. The "Changed By" box will show the name of the user who made the change.
- The second user will always see every field they changed and the original value. The "Changed By" box will be blank.
- Any change that is deleted from the "Details" display will result in the original value that is shown in the "Old Value" field being saved.
- If the second user accepts all of the changes and clicks on the "Yes" button, they will update every field they changed and all unique changes that the first user made.
- If the second user selects "No" when prompted "Do You Want to Save Changes?", only the first user's changes will remain.

You can choose to save all of the changes that you or the other person made by clicking on

the Yes button, or you can delete changes that you do not want by clicking on them individually and hitting the delete key on your keyboard. If you double click on the change, you will be taken to the Sub-tab that contains the field that you modified. You can also select "Cancel" to return to the document or "No" when prompted to save your changes, and the record you were in will close.

NOTE: You might also see the "Changes were applied to this document since you opened it" if you make changes to the Client Profile and then edit the Current address record. This happens because whenever you save changes to the "Current Address" record the Provide[®] Enterprise program automatically updates the fields in the Client Profile then as well. This is

accomplished by saving a new version of the Client Profile with the same values as entered on the Current Address record.

#### Save and Create Another

The Save And Create Another Button is available in many of the Activity Records within Provide[®] Enterprise. When you see this button, you can use it to close and save the current document you are in and open a blank record of the same type.

3

# Client Registration/Intake

Intake is the process of collecting information concerning the client and his or her support system, as well as determining program eligibility prior to any services being provided and funded.

# **New Client Registration**

The following procedures should be followed at the time a new client is to be entered in the Provide[®] Enterprise system.

#### **Registration Verification**

Prior to entering the client in the Provide[®] Enterprise database, you should check to make sure that the client has not previously been entered in the database. To verify that the client has not already been registered, follow the steps below.

#### **Find Client**

The "Find Client" function will search the entire database to see if the client has previously been entered in the system and, therefore, has received Ryan White Part B services in the past. To do this, follow the steps below:

• Select the "Find Client" screen in the menu bar.

Provid	le Ente	erprise ·	- [Databas	e Explo	rer]		-	
👌 File	Find	View	Actions	Tools	Reports	Windows	Help	GTI
	(	Client						

• This will activate the "Search" criteria screen, seen in the figure below:

Provide Enterprise - [Find Client]	
∂ File Find View Actions Tools Reports W	/indows Help
Close 📲 🖉 Cose	
Find Client	
Find Client	
First Name	
Middle Initial	
Last Name	
Birth Date	
Current Gender	<b>•</b>
Birth Gender	<b></b>
SSN	
Provide Client ID	
Find Client Results	
2 🔿 堶 👘 🧀 🖄 🥒 🗋	

- Fill out the search criteria as appropriate and click on the <u>A Search</u> button to complete the search. NOTE: You may not want to enter full SSN or names in the appropriate fields, due to possibility of prior data entry errors.
- You can enter an asterisk (*) as a wild card to do more general searches.
- After the search is completed, the client records that match the search criteria are listed and displayed below the search dialog in a view like the one below:

2 🖨 🥜	<u>i</u>							
Name	Name	Name	Gender	Birth	Home	Street Address	City State	Zip
Jane	Doe		Female3/26	/2013	414-555-555			53051

- Simply double click on the record that you wish to view in order to open the desired Client Profile.
- If, after reviewing the Client Profile, you determine that it is not the client that is present at your agency to receive services, you can move onto the next steps and actually register the client in the system.
- If you come to the conclusion that the existing Client Profile is that of the client that is listed, follow the steps listed in the under "Opening an existing client to your Agency".

#### **Client Registration**

If, after searching the database, you determine that the client is NOT in the database, you will want to register the client in the system. To do that, follow the steps below:

• From the Menu Bar, select "Actions ⇒ Register Client".

Provide Enterprise -	[Database Explorer]
쉱 File Find View	Actions Tools Reports Windows Help GTI
	Register Client

O Provide Enterprise - [Register Client]		
File Find View Actions Tools Repor	ts windows Help	
🖣 Close 🛛 🥙 Register Client		
Begister Client		
Pogistor Client		
Register Client Consent		
Anonymous Client?	* No	•
Is Registration initially for EIS Only?	* No	<b>•</b>
Override Duplicate Checking?	* No	<b>•</b>
First Name	* Test	
Middle Initial		
Last Name	* Client	
Birth Date	*	• •
Current Gender	*	•
Birth Gender	*	<b></b>
SSN		
URN	TSCI0101019	
Provide Client ID	33800	
Agency Assigned Client ID		
Primary Language		<b>•</b>
HIV Care Network Referral Source		<b>•</b>
Date Address Effective	* Friday April 24, 2015	
Housing Type	*	<b>•</b>
Street Address 1	*	
Street Address 2		
State	* FL	
County	* Palm Beach	
City	*	
Zip Code	*	
Address - OK to Send Mail?	* No	•
Primary Phone		
Primary Phone Message Type		•
Secondary Phone		
Secondary Phone Message Type		•

#### The "Register Client" screen will appear. The Register screen appears as shown below:

• Fill out the fields as appropriate.

٠

- The "Agency Assigned Client ID" should reflect the ID number that is used at your agency to identify clients. In addition, if your agency uses a formula to assign ID number to your clients, GTI can build the formula into this button (as long as the fields used to compute your ID number are in the Register Client screen). Contact the Provide[®] Help Desk for more information.
  - Once the form is completed, click the Register Client
- button on the button bar.
- At this time, the system will start the duplicate check process to see if this client may already be in the database. The first part of the duplicate checking logic is looking to ensure none of the client records you have access to are possible duplicates of the client you are trying to register.

• If the system believes that this client is already in the system and you have access to that client record, a dialog box similar to the following will appear:

Selector		1.00			×
The Client you ar below. If you see The 'Open' will fa	e trying to re the Client in ail if you do n	gister may already l the list select it and ot have access to th	be in the database. Possi I click 'Open' else click 'Co ne selected Client record.	ble matching Client records ntinue' to proceed with the	are listed new registration.
2 4 / 1					
URN CI6M0707197	Full Name Client , Tes	Gender Date Of Male 1975/07/0	SSN Organization 7 999- UIC College of Me	Program dicine Peori; Client Services	
			Open	Continue	Cancel

- If you believe that one of the clients listed in the duplicate check window is the client you are trying to register, simply place a checkmark register to the client and click the "Open" button to go to that Client Profile rather than registering a duplicate.
- If you click the "Continue" button to try to proceed with registering the client, the system will stop you because it appears you are going to create a duplicate. If there are no existing client records that you have access to that appear to be a duplicate of the client then the second stage of duplicate checking is performed. The system will search for client records in the entire Provide database even those you do not currently have access to that might be a duplicate of the client you are trying to Register. If it finds a possible duplicate, you will see the following message:
- You will see this screen:



If you are sure this is a new client, click the Yes button. The system will route the open client request to PBC and they will register the client for you and release the record to you. If you click "Yes" then an "Open Client Request" record will be generated and sent to PBC for review and processing. If the client does exist in the database and the Verification of Enrollment form is properly signed and scanned in then PBC will release access to the client record to your Agency. If the client does not match an existing client record then PBC will register the client and release the client record to your Agency. If there is a problem with the Verification of Enrollment record or some other data in your "Open Client Request", PBC may reject your Open Client Request. You can track the status of your Open Client Request by going to the view "Client\Open Client Requests."

• If you click on No, the registration process will be canceled.

# Duplicate Checking Logic

The PE system has been configured for Palm Beach to help prevent the possible duplication of client records. This is critical for the County to properly report on "unduplicated" clients for the Ryan White programs and to ensure that care management and coordination between providers is most effective.

When a user attempts to "Register" a client in the PE database the system runs a series of checks to help prevent duplication. First, the system checks to see if the client the user is trying to register matches a client that the user has access to in the system by looking for matches according to the following comparisons:

- Matching Agency Assigned Client ID
- Matching SSN
- Matching Last and First Name
- Matching Last Name and Date of Birth

If there are not any matches to clients that the user has access to then the registration process does a second round of possible duplicate checking against all client records in the database even those client records that the user does not have direct access to. The following duplicate checks are issued:

- Matching Agency Assigned Client ID
- Matching SSN
- Matching Last and First Name
- Matching Last Name and Date of Birth

# Chapter

# **Completing the Client Profile**

This section of the guide will review all of the sections of the client profile.

# **Profile Tab**

The Profile section of the client file shown in the following diagram is where you will find key client information, such as name and date of birth:

🖯 File Find View Actions Tools Reports W	indows Help								
🕻 Close 💝 🛛 🚰 Save 📀 Create 🔻 🧭 View 👻 🧭 Action 👻									
Client Profile : Test Client () Compass - Client Services : Amanda Epping/GTI [04/27/2015]									
Profile Address Alert Demographics Relationshi	Profile Address Alert Demographics Relationships Finances Health Benefits Health RWA Eligibility								
Anonymous Client?	No								
Name Last *	Client								
Name First *	Test								
Name Middle									
Current Gender *	Male 🔹								
Birth Gender	Male 🔹								
SSN									
Birth Date *	Thursday November 26, 1970								
Provide Client ID	801								
URN	11126701								
Status	Status Active -								
EMessaging Setup									
Click to update EMessaging ==>	pdate EMessaging ==> Update								
Okay to send email?	· · · · · · · · · · · · · · · · · · ·								
Email Address									
Okay to send text messages?	<b>*</b>								

Fill in the appropriate fields:

- Legal Last Name Enter the client's legal last name.
- Legal First Name Enter the client's legal First name. I.E. if the client's legal name is William but goes by Bill, please enter William and not Bill.
- Legal Middle Initial Enter the middle initial of the client.
- Name Suffix Enter any suffix the client wants after their name (Jr., Sr., I, II, etc.).

- Also Known As Enter any aliases the client has.
- Current Gender Enter the current gender of the client.
- **Birth Gender** Enter the gender of the client at birth.
- **SSN** Enter the client's.
- EMessaging Setup: To update the client's emessaging information, you

would need to click on Update

The following screen will appear:

Provide Enterprise - [EChange For Test C	ient]	
File Find View Actions Tools	eports Windows Help	
Close 😽 🖌 Submit		
11		
EChange : Test Client () Compass - Client Services : Amanda	Epping/GTI [04/28/2015]	
EChange		
Status	Pending	
Submission Source	Provider	
Current Values		
Okay to Send Email?		
Okay to Send Text Messages?		
New Values		
Okay to Send Email?	* Yes	
Email Address	*	
EMail cc Recipient Address 1		
EMail cc Recipient Address 2		
EMail cc Recipient Address 3		
Okay to Send Text Messages?	* Yes	
Cell Phone Carrier	*	[.
		-

Fill in the appropriate fields:

- Okay to send Email Enter "Yes" or "No"
- Email Address Enter the client's email address and any additional email address that the client would also like copies of the emails sent.
- Okay to Send Test Messages: Enter "Yes" or "No."
- Cell Phone Carrier Select the cell phone carrier.
- Cell Phone with Area Code Enter the client's cell phone

🛷 Submit

After you have entered this information, click on to submit the emessaging update. You cannot save emessaging updates "In Progress." You must "Submit" your changes or close without saving.

# Address Tab

ient Profile : Test Client () ompass - Client Services : Amanda Ep	ping/GTI [04/28/2015]	
rofile Address Alert Demographics R	ationships Finances Health Benefits Health RWA Eligibility	
Click to update Address ==>	Update	
Residence		
Date Effective	Tuesday April 28, 2015	▲ ▼
Housing Type	Stable/Permanent	
Street Address 1	121 Main Street	
Street Address 2		
State	FL	
County	Palm Beach	
City	Bean City	
Zip Code	21212-	
Mailing Address		
OK To Send Mail?	No	
Phone		
Primary Phone		
Primary Phone Message Type		
Secondary Phone		
Secondary Phone Message Type		
Comments		
Comments		

Provide Enterprise - [Address For Test Client]	
⊘ File Find View Actions Tools Reports	Windows Help
🛛 🍕 Close 👋 🛛 📀 Create Scan 🖌 Submit 🔯 (	Open Client Profile
Address : Test Client () Compass - Client Services : Amanda Epping/0	GTI [04/29/2015]
Address Documentation	
Status	* In Progress
Update Type	Interim 🗸
Date Effective	• 04/29/2015
Housing Type	* Stable/Permanent 🔹
Street Address 1	121 Main Street
Street Address 2	
State	FL 🗸
County	Palm Beach
City	Bean City
Zip	21212
Address - OK to Send Mail?	No 🗸
Primary Phone	
Primary Phone Message Type	
Secondary Phone	
Secondary Phone Message Type	

Fill in the appropriate fields:

- Status will be set as In Progress until it is submitted.
- **Update Type –** this will pre-populated for you.
- Housing Status the current housing status of the client.
- Street Address 1 the house number and street name for the client.
- Street Address 2 used to not apartment number, lot number, etc.
- **State** the state of residence for the client.
- **County** the county of residence for the client.
- **City** the city of residence for the client.
- **Zip** the zip code of residence for the client.

On the documentation tab, you will document the proof of residency.

Provide Enterprise - [Address For Test Client]
쉱 File Find View Actions Tools Reports Windows Help
🛛 🖣 Close 👋 🖉 Create Scan 🖌 Submit 🧕 Open Client Profile
Address : Test Client () Compass - Client Services : Amanda Epping/GTI [04/30/2015]
Address Documentation
Is existing documentation sufficient?
Proof of Residency Document(s)
Date         Delete Flag         Type           2015/04/30         N         Proof of Residency

- Is existing documentation sufficient? Select "Yes" or "No." If no, you will need to answer "Why Not?." If you need to create a proof of residency document, click on "Create Scan." Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.
- When the address update is complete, hit the Submit to submit your changes.

## Alert Tab

The Alert section of the client file is where all client alerts a client is located.

ି P	rovide l	Enterprise	- [Client	t Profile For Te	st Client]					
0	File F	ind Viev	v Actio	ons Tools R	eports Wind	ows Hel	р			
∥ ∢	Close	<b>₩</b>	Save	📀 Create 🔻	🕑 View 🔻	Action	•			
	Client I Compa	Profile : T ss - Client	est Clie t Servic	ent() es:Armanda	Epping/GTI ((	04/28/201	15]			
	Profile	Address	Alert	Demographics	Relationships	Finances	Health Benefits	Health	RWA Eligibility	
	Client	Profile Cor	mplete?		No					-
	Рор-и	up Alert Me	ssage							
	Testir	ng Alert								
										-
	Client	Required	Tasks							
	2	a 🗅 🕻	🛅 🌖	🐸 🥜 🙆						
	Date	Due Ty	pe Sul	bject						

Fields:

- **Client Profile Complete** This will auto populate to tell you if the client's profile is complete.
- **Pop-Up Alert Message** If you would like an alert message each time you open the client's profile, you would type the message in this box.
- **Client Required Tasks** The client required task are listed in this section.

#### **Demographics Tab**

The Demographic section of the client file is where all vital demographic information on a client is located.

Dravida Enternaire (Client Brafile For Test Client)	
Ciefe Find View Actions Tools Penarts Windows Holp	
🖣 Close 🛯 🖓 🛛 🙀 Save 📀 Create 🔻 📀 View 💌 📀 Action 💌	
Client Profile : Test Client A	
Compass - Client Services : Amanda Epping/GTI [04/28/2015]	
Profile Address Alert Demographics Relationships Finances Health Be	pefits Health RWA Eligibility
US Utizen?	No
Country of Origin	Angola 🗸 🗸
Races - All Identified With	Alaskan Native
	Asian
	Black or African American
	Native Hawaiian
	White
Physicity	
Haitian?	
Migrant Worker?	Tes V
Sexual Orientation	Yes - In County
Martal Status	
Dimon Language	Manied
Phinary Language	English
Veteran?	Yes
Commercial Sex Worker: Status	Past
Commercial Sex Worker: Date Last Worked	
Crack Cocaine Use: Status	Past 🗸 🗸
Crack Cocaine Use: Date of Last Use	
Injection Drug Use: Status	Never 👻
Incarceration History: Status	▼
Tobacco Use: Status	▼
Comments	

Fill in the appropriate fields:

- US Citizen? Select "Yes" or "No."
- **Country of Origin** Select the country in which the client was born.
- Races All Identified With Select all the races the client identifies with.
- **Ethnicity** Select the appropriate ethnicity.
- Haitian? Select "Yes" or "No."
- Migrant Worker Select the appropriate status.
- Sexual Orientation Select the sexual orientation of the client.
- Marital Status Select the current marital status of the client.
- **Primary Language** Select the client's primary communication language.
- **Veteran** Select "Yes" or "No" if the client has been in the military.
- **Highest Level of Education** Select the highest level of education obtained by the client.
- **Commercial Sex Worker Status** Select the status of the client. If the client is currently or has a history of being a commercial sex worker, you will be prompted to enter the date the client last worked.

- **Crack Cocaine Status** Select the status of the client. If the client is currently or has a history of using crack cocaine, you will be prompted to enter the date the client last used.
- Injection Drug Use Status Select the status of the client. If the client is currently or has a history of injection drug use, you will be prompted to enter the date the client last used.
- Incarceration History Select the status of the client. If the client is currently or has a history of incarceration, you will be prompted to enter the date the client was last released.
- **Tobacco Use** Select the status of the client. If the client previously used tobacco, you will be prompted to enter the date the client last used.

#### **Relationship Tab**

This section of the client profile is view and/or create client service profiles, client service category profiles, and contact records.



Fields:

- **Client Service Profiles** You can view the client's service profiles in this view. You can also create new client service profile records. (Please see the common data entry section of this guide for instructions to create client service profile records).
- Client Service Category Profiles You can view the client's service category profiles in this view. You can also create new client service category profile records. (Please see the common data entry section of this guide for instructions to create client service category profile records).
- **Contacts** You can view the client's contacts in this view. You can also create new contact records. (Please see the common data entry section of this guide for instructions to contract records).

#### **Finances Tab**

The Finances section of the client file is where the client' financial information is located.

Client Profile - Test Client A	
Compass - Client Services : Amanda Epping/GTI [04/28/2015]	
Profile Address Alert Demographics Relationships Finances Health Ben	efits Health RWA Eligibility
Employment Household Income Totals	
Click to update Financial Data ==>	Update
Current Employment Status	
Client Employment Records	
😰 🎒 🛅 鍧 😃 🥕 🧕 🦉 🗋 Add Employment Record	
Deleted Status Employer Date Start Date End Monthly Income	

**Employment Tab:** On the employment Tab, you may update the financial data and/or add employment records.

To Update the Financial data, you must click on **Update**. Summary Tab:

👌 Provide Ent	erprise - [Inco	ome History	For Test	Client]	Sec. and the	-			
🔿 File Find	l View Ac	tions Tool	s Repo	rts Wi	ndows Help				
┥ Close 👋	🖣 Close 🛷 🛛 🗞 Create Scan 🖌 Submit 🔯 Open Client Profile								
Income H Compass	story : Test - Client Serv	Client () ices : Ama	nda Epp	ing/GT	I [04/30/2015]	]			
Summary	Employment	Household	Income	Totals	Documentation				
Status Date Inc Update	ome Effective Type						*	In Progress 04/30/2015 Interim	* *

Fill in the appropriate fields:

- **Status** The status will be "In Progress" until the income record is submitted.
- **Date Income Effective –** Enter the data the income is effective.
- **Update Type –** Will default to the update type.

#### **Employment Tab:**

🕑 Provide Enterprise - [Income History For Test Client]	
⊘ File Find View Actions Tools Reports Windows Help	
📢 Close 👋 🎯 Create Scan 🛷 Submit 🔯 Open Client Profile	
Income History : Test Client () Compass - Client Services : Amanda Epping/GTI [04/30/2015]	
Summary Employment Household Income Totals Documentation	
Current Employment Status	•
Client Employment Records	
😰 🎒 🖺 🗳 🥕 🧕 🙀 🗋 Add Employment Record	
Deleted Status Employer Date Start Date End Monthly Income	

- Current Employment Status Select the employment status.
- **Client Employment Records** The client's employment records can be viewed or created here.
- To Create an Employment Record click on
   Add Employment Record

Close ABC		
Employment : Test Client () Compass - Client Services : Amanda Epping/GTI [04/	/30/2015]	
Employment		
Employment Status	* Current	•
Date Started	* Thursday April 30, 2015	
Employer Name	*	
Monthly Gross Amount	*	
Employeer Sponsored Health Plan Available?	*	•
Employer Address		
Employer City		•
Employer State		
Employer Zip		
Employer Phone		
Employee Title		
Job Description		*
		Ŧ

Fill in the appropriate fields:

- Employment Status Select "Current" or "Past."
- **Date Started –** Enter the date the client started the employment.
- Month Gross Amount Enter the month gross income of the employment.
- Employee Sponsored Health Plan Available? Select "Yes" or "No."
  - If "Yes"
    - Enrolled in Health Plan Select "Yes" or "No."
      - If "No"
        - Why not enrolled Enter the reason they client is not enrolled.
- Employer Address Enter the Employer's Address.
- **Employer City** Enter the Employer's *City*.
- Employer State Enter the Employer's state.
- **Employer Zip** Enter the Employer's zip code.
- **Employer Phone** Enter the Employer's phone number.
- Employee Title Enter the client's job title.
- Job Description Enter the client's job description.

Household Tab:

Provide Enterprise - [Income History For Test Client]	
∂ File Find View Actions Tools Reports Windows Help	
📢 Close 👋 🎯 Create Scan 🛷 Submit 🗋 Open Client Profile	
Income History : Test Client () Compass - Client Services : Amanda Epping/GTI [04/30/2015]	
Summary Employment Household Income Totals Documentation	
Click to recompute Household Size below ==>	Recompute
Household Size - Ryan White	1
Client Household Members	
📓 🚔 🖺 🎒 😃 🥟 🧕 🤑 🗋 Add Household Member	
Deleted Name Relationship Emergency	

This tab will show you the house hold members and the Ryan White Household size.

To add a Household member, click on	-	Add Household Member	
	 _		-

🕑 Provide Enterprise - [Household Member For Test Client]				
∂ File Find View Actions Tools Reports	Windows Help			
Close ABC				
Household Member : Test Client () Compass - Client Services : Amanda Epping	/GTI [04/30/2015]			
Main				
Status	* Active			
First Name	* Example			
Last Name	* Housemember			
Relationship to Client	* Other Relative 🗸			
Okay to Contact?	* Yes 🔻			
Contact Method	Any Message 🗸			
Emergency Contact?	* Yes 👻			
Comments	A			

Fill in the appropriate fields:

- Status Select "Active" or "Inactive."
- First Name Enter the family member's first name.
- Last Name Enter the family member's last name.
- **Relationship to Client** Select the relationship.
- Okay o Contact? Select "Yes" or "No."
  - o If "Yes"
    - **Contact Method** Select the contact method.
- Emergency Contact? Select "Yes" or "No."
- **Comments –** Enter any comments.

- **Employer Phone** Enter the Employer's phone number.
- **Employee Title** Enter the client's job title.
- Job Description Enter the client's job description.
- **Employer City** Enter the Employer's *City*.
- **Employer State** Enter the Employer's state.
- **Employer Zip** Enter the Employer's zip code.
- **Employer Phone** Enter the Employer's phone number.
- **Employee Title** Enter the client's job title.
- Job Description Enter the client's job description.

When the record is completed, click on	Close	. Then you will receive the prompt
below:		

Save Changes?
Do You Want To Save Changes?
Yes No Cancel Details >>

Click on "Yes" to save the changes.

, Provide Enterprise - [Income History For Test Client]
File Find View Actions Tools Reports Windows Help
📢 Close 🗛 🖉 Create Scan 🖌 Submit 🔯 Open Client Profile
Income History : Test Client () Compass - Client Services : Amanda Epping/GTI [04/30/2015]
Summary Employment Household Income Totals Documentation
Click to recompute Household Size below ==> Recompute
Household Size - Ryan White 2
Client Household Members
🗃 🚔 🖺 🥞 😃 🌽 🗋 Ádd Household Member
Deleted         Name         Relationship         Emergency           N         Example Housemember         Other Relative         Yes

After you add household members or complete any updates to the household member records, you will want to recompute the household size. Click on

Recompute

. The Household Size – Ryan White

will then be recomputed.

Income Tab:

The Income Tab will be where you document the client's incomes. Input the total monthly income of the applicant and all legal household members in the respective fields. Any income type listed in all caps is not calculated for MAGI, but is a required field.

File Find View Actions Tools Reports Windows Help	
Close 🤲 🖉 Create Scan 🛷 Submit 📄 Onen Client Profile	
ncome History : Test Client ()	
Compass - Client Services : Amanda Epping/GTI [04/30/2015]	
Summary Employment Household Income Totals Documentation	
Current Monthly Household Income	
Note: Input the total monthly income of applicant and all legal household members in MAGL but is a required field of entry	the respective fields. Any Income type listed in all caps is not calculated for
Wages, salaries, tips, etc. (Form W-2)	*
Taxable interest (1099-INT form)	*
Tax-exempt Interest (Form 1099-INT box 8)	*
Ordinary Dividends (1099-DIV box 1a)	*
Exempt Interest Dividends (Form 1099-INT box 10)	*
Taxable refunds of state/local income taxes	*
Alimony or Other Spousal Support Received	*
Business or Self Employed income/loss (Schedule C or C-EZ)	*
Capital gain/loss (Schedule D)	*
Other gains/losses (Form 4797)	*
IRA distributions - taxable amount	*
Pensions and Annuities	*
Rental real estate, trusts (Schedule E)	*
Farm income/loss (Schedule F)	*
Unemployment Income	*
Social Security Benefits	*
Social Security Disability (SSDI)	*
SUPPLEMENTAL SOCIAL SECURITY INCOME (SSI)	*
Other Client Income (Jury Duty Pay, Gambling Winnings)	*
CHILD SUPPORT, WORKMAN'S COMPENSATION, OR MONETARY GIFT	*

Fill in the appropriate fields with each amount.

*For the fields in blue font:

Wages, salaries, tips, etc: Include the total monthly income that the applicant and any legal household members receive from Wages or Salary's (W-2), tip income, and any disability pension benefits received prior to meeting minimum age requirement.

Pensions and Annuities Definition: Include all income both employer based and Veterans Administration based on pension. Note, do not include disability pension income here when disability pay is received prior to normal pension retirement age.

## Totals Tab:

The totals tab will calculate the monthly gross income and the household poverty level percentage.

Income History : Test Client () Compass - Client Services : Amanda Epping/GTI [04/30/2015]				
Summary Employment Household Income Totals Documentation				
Totals Click to recompute all totals fields below ==>	Recompute			
Household Monthly Gross Income				
Household Poverty Level %				

After you updated the employment, household, and/or income, you will want to recompute the income total. Click on

Recompute

The income totals will be

recomputed.

#### Documentation Tab:

On the documentation tab, you will document the proof of income.

Provide Enterprise - [Income History For Test Client]	
🔿 File Find View Actions Tools Reports Windows Help	
🛛 🖣 Close 🖓 🖉 Create Scan 🛷 Submit 🔯 Open Client Profile	
Income History : Test Client () Compass - Client Services : Amanda Epping/GTI [04/30/2015]	
Summary Employment Household Income Totals Documentation	
Is existing Proof of Income sufficient?	Yes 🗸
Proof of Income Document(s)	
2 🎒 🛅 🎒 😃 🥢 🞑 👭	
Date Delete Flag Type	

 Is existing documentation sufficient? – Select "Yes" or "No." If no, you will need to answer "Why Not?." If you need to create a proof of income document, click on "Create Scan." Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

When the income update is complete, you will want to click on Submit to submit the income update.

# Health Benefits Tab

The health benefits section is where you can document the client's Private and Public Medical Insurance as well as Ryan White, ADAP, and other benefits. By default, each program Status is set to "No Benefits".

Prov	Provide Enterprise - [Client Profile For Test Client]						
⊘ Fil	e Find	View	Actio	ons Tools R	eports Wind	ows He	lp
4 CI	🖣 Close 🛯 🖓 🖓 🖓 Create 🔻 🖉 View 👻 🧭 Action 💌						
Cli Co	Client Profile : Test Client () Compass - Client Services : Amanda Epping/GTI [04/28/2015]						
Pr	rofile Ad	dress	Alert	Demographics	Relationships	Finances	Health Benefits Health RWA Eligibility
F	rivate He	alth Co	/erage	Public Health Co	verage Ryan	White Ot	ther Benefits
	Click to u	update	Health B	enefits ==>			Update
	Primary Status	Insurar	ice				
	Second	lary Insi	Irance				
	Status						No Benefits
	- Dental ( Status	Only Po	licy				
	- Vision C Status	Only Pol	icy				

To update any of the health benefits, you must click on Update You can click on "Update" on any of the benefit tabs to update the health benefits.

#### Summary Tab:

🕖 Provide Enterprise - [Health Benefits For Test Client]							
🔿 File Find View Actions Tools Reports Windows Help							
🛛 🖣 Close 👋 🛛 📀 Create Scan 📀 Check Medicaid Enrollment 🛛 🖋 Su	🖣 Close 👋 🛛 🕲 Create Scan 🕲 Check Medicaid Enrollment 🖌 Submit 🕲 View 👻						
Health Benefits : Test Client () Compass - Client Services : Amanda Epping/GTI [05/01/2015]	Health Benefits : Test Client () Compass - Client Services : Amanda Epping/GTI [05/01/2015]						
Summary Private Health Coverage Public Health Coverage Ryan White	e Other Benefits						
Status	★ In Progress						
Update Type	Interim						
Changes Summary							
	_						
Date Effective	* 05/01/2015						

Fill in the appropriate fields:

- **Status –** This will be default to "In Progress" until the record is submitted.
- Changes Summary This will populate when changes are submitted.
- **Date Effective** Select the date the health benefits are effective.

#### Private Health Coverage Tab:
Provide Enterprise - [Health Benefits For Test Client]	- head
C File Find View Actions Tools Reports Windows	Help
Close 💞 🛛 📀 Create Scan 📀 Check Medicaid Enrollme	nt 🖋 Submit 💿 View ▼
Health Benefits : Test Client () Compass - Client Services : Amanda Epping/GTI [05/0	11/2015]
Summary Private Health Coverage Public Health Coverage	
Status	* Active
Source	*
Carrier Name	*
Policy/Plan Name or Number	•
Subscriber or Member on policy?	*
Member ID	*
Benefits Phone	
Ambulatory Benefits?	*
Mental Health Benefits?	*
Substance Abuse Benefits?	*
Private Prescription Coverage	•
Comments	^ ^ ·
	· ·
Is existing Proof of Primary Private Coverage sufficient?	▼
Private Proof of Coverage Document(s)	
Date Delete Flag Type Program	
Secondary Insurance	
Status	* No Benefits
Dental Only Policy Status	* (u. p r.
Vision Only Boliny	No Benefits
Status	* No Banafite

For each insurance (Primary, secondary, dental, vision), fill out the appropriate fields and scan the proofs of coverage for each.

Public Health Coverage Tab:

👌 Pro	vide Enterprise - [Health Benefits For Test Client]	
∂ Fi	le Find View Actions Tools Reports Windows He	lp
<b>∢</b> c	lose 🛯 🦃 Create Scan 📀 Check Medicaid Enrollment	✓ Submit
He Ca	ealth Benefits : Test Client () ompass - Client Services : Amanda Epping/GTI [05/01/20	115]
S	ummany Private Health Coverage Public Health Coverage Ryan	White Other Benefits
	Medicare	
	Status *	Active
	Medicare Coverage *	<b></b>
	Medicare ID *	
	Comments	A
		*
	Is existing Proof of Medicare Coverage sufficient?	<b></b>
	Medicare Proof of Coverage Document(s)	
	Date Delete Flag Type Program	
	Medicare Part D	
	Status *	Active
	Plan Name *	
	Member ID *	
	Bin # *	
	Benefits Phone *	
	Is existing Proof of Medicare Part D Coverage sufficient?	▼
	Medicare D Proof of Coverage Document(s)	
	2 🗇 🖻 🛱 🜖 🐸 🥓 💽 👭	
	Date Delete Flag Type Program	

For each public health insurance (Medicare, Medicare Part D, Medicare Supplemental, Veterans Benefits, and Medicaid fill out the appropriate fields and scan the proofs of coverage for each.

You will also need to complete a Medicaid Enrollment check. To complete a Medicaid

enrollment check, click on	Check Medicaid Enrollment	. Enter the date the of the
verification and click "OK":		

Service Verification	n Date
05/01/2015	<b>•</b>
ОК	Cancel

#### Ryan White Tab:

👌 Pr	ovide Enterprise - [Health Benefits For Test Client]	
<u> </u>	ile Find View Actions Tools Reports Windows He	lp
•	Close 🦓 🛛 📀 Create Scan 🖌 Submit 📀 View 🔻	
l	lealth Benefits : Test Client () compass - Client Services : Amanda Epping/GTI [05/01/20	15]
	Summary Private Health Coverage Public Health Coverage Ryan	White Other Benefits
	Click to set Status fields below ==>	Set Ryan White Program Statuses
	Part A Premium Support Status	No Benefits
	ADAP Premium Plus Status	No Benefits
	ADAP Medication Assistance Status	No Benefits
	Part A Insurance Support Services Enrollments	
	📓 🎒 🛅 ᆌ 😃 🥕 🧕 🗐 🗋 Request Insurance	Services Enrollment
	Status Date Status Deleted?	
	ADAP Premium Plus Enrollments	
	😰 🎒 🛅 🌖 🐸 🥜 🧕 🏥 🗋 Add ADAP Premiur	n Assistance Enrollment
	Status Date Status Deleted?	
	ADAP Medication Assistance Forollments	
		tian Ansistanan Familyant
	Status Date Status Deleted?	

The client must be actively enrolled in an ACA Exchange primary or Secondary Private Health Insurance Policy to request Insurance Services Enrollment or Enrollment in the ADAP Premium Assistance.

To request an Insurance Services Enrollment, click on Request Insurance Services Enrollment

Provide Enterprise - [Insurance Services Enrollment For Test Client]	
🖯 File Find View Actions Tools Reports Windows Help	
Qose AS Request Enrollment	
Insurance Services Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/01/2015]	
Insurance Services Enrollment Documentation	
Status	Pending
Premium Payer *	
Date Requested	Friday May 01, 2015
Date Submtted	
Program Type *	ACA Insurance
ACA Application ID	
Health Plan Carrier *	Blue Cross Blue Shield of Florida
Plan Name *	BlueSelect Everyday 1443
Member/Subscriber ID *	11
Premium Payment Due *	
Premium Assistance Coverage Start Date	
Premium(s) Overdue At Enrollment?	No
Payee Name *	
Payee Vendor ID	
Payee Street Address 1 *	
Payee Street Address 2	
Payee City *	
Payee State *	·
Payee Zip *	
Payee Phone	
Payee Payment Method *	Check 👻
Payment MEMO Line Type *	Client Name - Member ID 🔹
Premium Amount *	
Premium Amount - Support Portion	
Payment Cycle *	·

- **Status** This will be default to "Pending" until you click on "Request Enrollment".
- Fill out each field and review the documentation on the "Documentation tab."
- When the form is complete, click on

To add an ADAP Premium Assistance Enrollment, click on Add ADAP Premium Assistance Enrollment

Provide Enterprise - [ADAP Premium Assistance Enrollment For Test Clie	nt]
C File Find View Actions Tools Reports Windows Help	
Close 🖓 🛛 📀 View 🔻	
ADAP Premium Assistance Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/05/2015]	
ADAP Premium Assistance Enrollment Documentation	
Status	Enrollment Requested
Date Requested	* Tuesday May 05, 2015
Health Plan Carrier	* Blue Cross Blue Shield of Florida
Plan Name	* Blue Select Everyday 1443
Member/Subscriber ID	* 11
Premium Assistance Coverage Start Date	*
Premium Amount	
Premium Amount - Support Portion	*
Payment Cycle	*

- Status This will be default to "Enrollment Requested."
- Fill out each field and review the documentation on the "Documentation tab."
- When the form is complete, click on Close. Then you will receive the prompt below:

ave Changes?
Do You Want To Save Changes?
Yes No Cancel Details >>

• Click on "Yes" to save the changes.

To add an ADAP Medication Assistance Enrollment, click on Add ADAP Premium Assistance Enrollment

Provide Enterprise - [ADAP Medication Assistance Enrollment For Test Cli	ient]
근 File Find View Actions Tools Reports Windows Help	
Glose Apple App	
ADAP Medication Assistance Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/05/2015]	
ADAP Medication Assistance Enrollment	
Status	Enrollment Requested
Date Requested	* Tuesday May 05, 2015
Health Plan Carrier	* Blue Cross Blue Shield of Florida
Plan Name	* BlueSelect Everyday 1443
Member/Subscriber ID	* 11

on

- Status This will be default to "Enrollment Requested."
- Fill out each field. Most of the fields will auto-populate with the information that you have already entered into Provide. Review the documentation on the "Documentation tab."
- When the form is complete, click on When the record is completed, click ٠

Close . Then you will receive the prompt below: Save Changes? 83 Do You Want To Save Changes? Yes No Details >> Cancel

Click on "Yes" to save the changes. •

#### Other Benefits Tab:

lose 👋 🛛 📀 Create Scan 📀 Check Medicaid Enrollment 🛛 🗸	'Submit 📀 View 👻	
ealth Benefits : Test Client () ompass - Client Services : Amanda Epping/GTI [05/06/2015]	1	
Summary   Private Health Coverage   Public Health Coverage   Ryan Wh	ite Other Benefits	
Supplemental Nutritional Assistance (SNAP)?	* Yes	
SNAP Recertification Date		
SNAP Monthly Benefit Amount	* \$0.00	
HCD Coordinated Care Program		
PAC Waiver		_
Community Action Program (CAP)		_
Low Income Home Energy Assistance Program (LIHEAP)		_
Women, Infants and Children (WIC)		_
Targeted Outreach for Pregnant Women (TOPWA)		_
Children's Medical Services (CMS)		_
ADA Paratransit (TOPS)		_
Other Health Benefits Comments		
Benefit Enrollment Tracking Records		
🖉 🎒 🖺 🎒 🎽 🥓 🌈 🧕 🏭 🗋 Add Benefit Enrollment	t Tracking Record	_
Date Program Name Status Deleted?		
Prescription Assistance Program Enrollment Records		
🗃 🚔 🖹 🙈 👑 🥒 🗟 🛍 🗋 Add PAP Enrollment		

- Supplemental Nutritional Assistance (SNAP)? Select "Yes" or "No."
  - o If "Yes"
    - **SNAP Recertification Date** Enter the date.
    - SNAP Monthly Benefit Amount Enter the SNAP Monthly Benefit Amount.
- HCD Coordination Care Program Select "Yes" or "No."
- PAC Waiver Select "Yes" or "No."
- Community Action Program (CAP) Select "Yes" or "No."
- Low Income Home Energy Assistance Program (LIHEAP) Select "Yes" or "No."
- Women, Infants, and Children (WIC) Select "Yes" or "No."
- Targeted Outreach for Pregnant Women (TOPWA Select "Yes" or "No."
- Children's Medical Services (CMS) Select "Yes" or "No."

- ADA Paratransit (TOPS) Select "Yes" or "No."
- Other Health Benefits Comments: Enter any comments.

To add a Benefit Enrollment Tacking Record, click on Add Benefit Enrollment Tracking Record

- Status Select the status.
- Fill out each field. Different fields will appear depending on the status and the program name. On the documentation tab, create any necessary scans. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.
- When the form is complete, click on Close. Then you will receive the prompt below:

Save Changes?			
Do You Wa	ant To Save Cha	inges?	
Yes	No	Cancel	Details >>

• Click on "Yes" to save the changes.

To add a Benefit Enrollment Tacking Record Note, click on Add Note

) Provide Enterprise - [Benefit Enr	ollment Tracking Note For Test Cl	ient]	
⊘ File Find View Actions	Tools Reports Windows Hel	p	
Close 🍄			
Benefit Enrollment Tracking Compass - Client Services :	Vote : Test Client () Amanda Epping/GTI [05/06/20]	15]	
Benefit Enrollment Tracking Note			
Note Date		* 05/06/2015	
Subject		*	
Comments			
			*

Type in the subject of the note and the note.

• When the note is complete, click on Close. Then you will receive the prompt below:

Save Changes?	×
Do You Want To Save Changes?	
Yes No Cancel Details >>	

• Click on "Yes" to save the changes.

When the benefit enrollment tracking record is completed, click on Submit to submit your changes.

# Health Tab:

Provide E	Provide Enterprise - [Client Profile For Test Client]								
Close	45    €	Save	⊘ Create ▼	⊘ View ▼	Action	<u>▼</u>			
Client F Compa	Client Profile : Test Client () Compass - Client Services : Amanda Epping/GTI [04/28/2015]								
Profile	Address	Alert	Demographics	Relationships	Finances	Health Benefi	s Health	RWA Eligibility	
Curre Risk I	nt HIV Dise Factor(s)	ase Stag	je				] Hemophil ] Heterose: ] Injection ( ] Men who ] Perinatal ( ] Receipt ( ] Risk not r	a/coagulation disorder ual contact drug user (IDU) have sex with men (MSM) transmission f transfusion of blood/blood components/tissue eported or identified	
Antire	troviral The	rapy						•	
Reas	on not on H	IAART						•	
Com	nenis							* *	

- **Current Disease Stage** Click the button to select the client's current stage of HIV. Note, once set to AIDS it cannot be set back to HIV+.
- Date HIV Diagnosed The estimated date the client was diagnosed with HIV.
- **Date AIDS Diagnosed** The estimated date the client was diagnosed with AIDS. This field only appears if the Current Disease Stage is set to "AIDS".
- Identified Risk Factor(s) Select all possible sources of transmission of HIV to the client.
- Antiretroviral Therapy Select the client's current antiretroviral therapy.
- **Date Antiretroviral Therapy Started** If the client is taking at least one ARV medication this date field appears asking for the estimated date of when the client started ARV therapy.
- **Reason not on HAART** If the client is not on HAART (three or more ARV's) this field appears asking why the client is not on the HAART regimen.
- **Comments** Add any necessary comments.

# RWA Eligibility Tab:

rofile Address Alert Demographics Relationships Finances Healt	th Benefits Health RWA Eligibility	
Status Warning: Eligibility for this Client is about to expire.		
Date Eligibility Expires	Wednesday May 27, 2015	
Last Change Reason	New Client Registration	
Service Category Settings		
Medical Case Management	Yes	
Non Medical Case Management	No	
Ambulatory Outpatient Medical Care	No	
Oral Health Care	No	
AIDS Pharmaceutical Assistance	No	
Insurance Support Services	No	
Mental Health Services	No	
Substance Abuse Residential	No	
Home Community-based Health Services	No	
Food Bank	No	
Legal Services	No	
Outreach Services	No	
Early Intervention Services	Yes	
Medical Transportation	No	
History		
Client Eligibility History		
🗃 🎒 🛅 🔞 😃 🥒 🔃 🏭		
Date Effective Delete MCM CM Med Oral Rx MH S/	AR HHC FB Leg Out EIS Tran EFA House	
201E/04/20 N. Vee Ne Ne Ne Ne Ne Ne	o No No No Yes No No No	

The RWA Eligibility Tab will provide a summary the client's RW eligibility and the client's RW eligibility history. Any client Ryan White eligibility overrides will also be noted on this tab.

# **Update Client**

When you create an update to your client, the client's information will be updated overnight in PE. However, if you need to update the information immediately for the client (For example, if you want to see the client in your client list or want to complete an address update, you will need to click on the arrow next to the action button and select Update Client.

Action 💌
Delete Client
Check Medicaid Enrollment
Change Client ID
Check For Completeness
Set URN Suffix
Update Client

This will complete the update of your client immediately. Otherwise, the updates will process in the system overnight. The "Update Client" button does all of the following and does a nightly agent on all the client records.

a. Pulls data from most recent Approved Address, Income History and Health Benefits records.

b. Pulls most recent Eligibility History record data.

c. Pulls Enrollment status data.

d. Pulls "misc" Client Profile fields from Client's eligibility assessment.

# **Creating Scans**

To Create Scans:

• Clink on the Create Scan button on top of the screen.

can : Joe Smith () IC College of Medicine Peoria - Clien	Services : Test User12 [11/11/2013]	
Scanned Document		
Document Date	* Monday November 11, 2013	
Document Type	*	
Attachment Type	* Image	•
Images		
🚔 Scan 🖉 Attach 📕 Save As		

- **Document Date** this will automatically populate with the date you are creating the scan. However, you can change the date by clicking in the box.
- **Document Type** Click on the **and** select the document type from the dropdown list.
- Scan Click on the Scan to scan the document directly from your scanner.
- Attach Click on the Attach to attach the document that you saved on your computer.

Save - Click on the Save to save the attachment or click on the Save And Create Another to save the scan and to

create another.

# Chapter

# **Eligibility Assessments**

Eligibility Assessments are completed to determine program eligibility prior to any services being provided and funded. Only individuals who have an Open Client Service Category Profile with a Service Category of Eligibility Assessment will be able to create an Eligibility Assessment. If you do not have an open client service category for eligibility assessment and attempt to create and eligibility assessment, you will receive the following error message:



Please see instruction on opening the client service category under the "Common Data Entry" Chapter.

#### Creating an Eligibility Assessment

• To create an eligibility assessment, click on "Create" and select "Eligibility Assessment."



To create an Eligibility Assessment, click on "Create" and select "Eligibility Assessment."

The Eligibility Assessment will then display.

# Main Tab

The main section of the eligibility assessment shown below is where you will find key client information, such as name and date of birth:

se 🖤 🛛 📺 Save in Pr	ogress 🛷 Ch	eckin Save and	Close	Complete	🌍 Create Scan	🕑 Create Test I	Result 💿 Vi
jibility Assessment : Te	st Client ()	C (00 (00 1 C)					
mpass - Client Services	: CM Test [U	5/22/2015]			_		
ain Demographics Add	ress Finances	Health Benefits	Health	Progress Logs	•		
Assessment Status							
Ryan White Client ID			1477				
Source		[	Provider			-	
Checked Out?		[	Yes				
Checked Out By			CM Test				
Checked Out Date			05/22/20	)15		<b>•</b> •	
Status		*	In Progres	SS			
Assessment ID		*	2029				
Comments						*	
						_	
Applicant Identification							
Legal First Name		*	Test				
Legal Middle Initial		-					
Legal Last Name		*	Client				
Name Suffix							
Also Known As		-					
Date of Birth		*	11/26/19	)70		÷ •	
Social Security #		-	111-11-11	111			
Current Gender		*	Male			•	
Gender at Birth		*	Male			-	
HIV Care Network Consent							
Is existing documentation su	fficient?	(				-	
Authorization To Release	-						
HIV Care Network Consent	Document(s)						
2 🗇 🥓 💁 👯							
Date Delete Flag	Туре						
2015/04/28 N	HIV Care Net	work Consent					

If any information has been added to the client profile, these will be pulled into the Eligibility Assessment automatically.

- **Ryan White Client ID** This will auto-populate with the Client's Ryan White ID.
- Source This will auto-populate as "Provider."
- **Checked Out**? This will default to "Yes" when you are working on the assessment.
- Checked Out By This will default to your name.
- **Checked Out Date** This will default to the date you started the assessment.
- Status This will default to "In Progress" until it is "Completed."
- Assessment ID This will default to the Assessment ID.
- **Comments** Add any comments that is needed.
- Legal Last Name Enter the client's legal last name.
- Legal Middle Initial Enter the middle initial of the client
- Legal First Name Enter the client's legal First name. I.E. if the client's legal name is William but goes by Bill, please enter William and not Bill.
- Name Suffix Enter any suffix the client wants after their name (Jr., Sr., I, II, etc.).
- Also Known As Enter any aliases the client has.
- **Date of Birth** Enter the client's date of birth.
- **Social Security #** Enter the client's social security number.
- **Current Gender** Enter the current gender of the client.
- **Birth Gender** Enter the gender of the client at birth.
- **HIV Care Network Consent** If needed click on "Create Scan." Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

# Demographics Tab

The Demographic section of the client file is where all vital demographic information on a client is located.

Pro	ovide Enterprise - [Eligibility Assessment For Test Clien	t]
Э г	ile Find View Actions Tools Reports Windo	ws Help
<ul> <li>E</li> </ul>	Close 🛯 🎼 Gave in Progress 🕜 Checkin Save ar	id Close
C	ompass - Client Services : CM Test [05/22/2015]	
	Main Demographics Address Finances Health Benef	ts Health Progress Logs
	Demographics	
	Race - Check all that apply	<ul> <li>Aaskan Native</li> <li>American Indian</li> <li>Asian</li> <li>Black or African American</li> <li>Native Hawaiian</li> <li>Pacific Islander</li> <li>White</li> </ul>
	Ethnicity	Non-Hispanic Latino/a
	Haitian?	Yes
	Migrant Worker?	Yes - In County
	Veteran?	Yes
	Marital Status	Single
	US Citizen?	Yes 🗸
	Country of Origin	Belgium 👻
	Sexual Orientation a	Bisexual
	Primary Language	English 🔻
	Highest Level of Education	8th Grade or Less
	Commercial Sex Worker: Status	Current 👻
	Commercial Sex Worker: Date Last Worked	04/01/2013
	Crack Cocaine Use: Status	Past 👻
	Crack Cocaine Use: Date of Last Use	04/01/2010
	Injection Drug Use: Status	Past 🔹
	Injection Drug Use: Date of Last Use	04/01/2008
	Incarceration History: Status	Past 🔹
	Incarceration History: Date Last Released	• 04/01/2009
	Tobacco Use: Status	Current

- Races All Identified With Select all the races the client identifies with.
- **Ethnicity** Select the appropriate ethnicity.
- Haitian? Select "Yes" or "No."
- Migrant Worker Select the appropriate status
- **Veteran** Select "Yes" or "No" if the client has been in the military.
- Marital Status Select the current marital status of the client.
- US Citizen? Select "Yes" or "No."
- **Country of Origin** Select the country in which the client was born.
- **Primary Language** Select the client's primary communication language.
- **Highest Level of Education** Select the highest level of education obtained by the client.
- **Commercial Sex Worker Status** Select the status of the client. If the client is currently or has a history of being a commercial sex worker, you will be prompted to enter the date the client last worked.

- **Crack Cocaine Status** Select the status of the client. If the client is currently or has a history of using crack cocaine, you will be prompted to enter the date the client last used.
- Injection Drug Use Status Select the status of the client. If the client is currently or has a history of injection drug use, you will be prompted to enter the date the client last used.
- Incarceration History Select the status of the client. If the client is currently or has a history of incarceration, you will be prompted to enter the date the client was last released.
- **Tobacco Use** Select the status of the client. If the client previously used tobacco, you will be prompted to enter the date the client last used.
- Pregnancy Record If a pregnancy record needs to be added, click on

Provide Enterprise - [Pregnancy Fo	or Client Test]
尺 File Find View Actions To	ools Reports Windows Help
Close ABC	
Pregnancy : Client Test () Compass - Client Services : Cl	M Test [05/13/2015]
Pregnancy	
Status	* Active
Estimated Conception Date	*
EDC - Estimated Date of	
When Entered Prenatal Care	*
Antiretrovirals prescribed?	*

- **Status** Select the status of the pregnancy.
- Estimated Conception Date Enter the estimated date of conception.
- EDC Estimated date of Confinement (Due Date) Enter the estimated due date.
- When Entered Prenatal Care Select the time when client entered prenatal care.
- Antiretroviral prescribed? Select "Yes" or "No."
  - o If "Yes,"

Add Pregnancy Record

- Week When Antiretroviral Started Enter the week the antiretroviral was started.
- Antiretroviral Names Select the Antiretroviral names.

• When completed, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return Eligibility assessment.

### Address Tab

The Address section of the client file is where the address and phone numbers are documented along with the proof of residency.

) Pro	Provide Enterprise - [Eligibility Assessment For Test Client]									
ට Fi	le Find View Actions Tools Reports Window	ws Help								
<b>ا</b> (	lose 🛯 🖓 🛛 😭 Save in Progress 🛛 🛷 Checkin Save an	d Close 🖌 Complete 📀 Create Scan 📀 Create Test Result	📀 View 🔻							
B	Bigibility Assessment : Test Client () Compass - Client Services : CM Test [05/22/2015]									
N	Aain Demographics Address Finances Health Benefit	ts Health Progress Logs								
	Residence									
	Housing Type *	Stable/Permanent								
	Street Address *	100 Main Street								
	Apt / Lot / Floor									
	State *	FL 🔻								
	County *	Palm Beach								
	City *	Bean City .								
	Zip Code *	21212								
	Do you consent to receiving mail?	No 🔻								
	Primary Phone Number *	(111) 111-1111								
	Primary Phone Message Type *	-								
	Secondary Phone Number									
	Secondary Phone Message Type	<b></b>								
	Proof of Residency									
	Is existing documentation sufficient?	▼								
	Proof of Residency Document(s)									
	2 🔿 🤌 🔔 🏥									
	Date Delete Flag Type									
	2015/04/30 N Proof of Residency									

- Housing Status Enter the current housing status of the client.
- Street Address Enter the house number and street name for the client.
- **Apt/Lot/Floor** Enter this field if appropriate.
- State Select the state of residence for the client.
- **County** Select the county of residence for the client.
- **Zip** Enter the zip code of residence for the client.
- Does the client consent to receiving mail? Select "Yes" or "No."
  - If "Yes,"

- Enter the mailing address of the client.
- **Primary Phone Number** Enter the client's primary phone number.
- **Primary Phone Message Type** Select the type of message that may be left for the client.
- Secondary Phone Number Enter the client's secondary phone number.
- Secondary Phone Message Type Select the type of message that may be left for the client.
- Proof of Residency If needed click on "Create Scan." Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

#### Finances Tab

The Finances section of the client file is where the client' financial information is located.

**Employment Tab:** On the employment Tab, you may update the financial data and/or add employment records.

۹ (	Close 😽	Progress Save in Progress	s 🛷 Cheo	ckin Save and C	lose	🖋 Complete	📀 Create Scan	📀 Create Test F	Result (	🕑 View 🔻
E	ligibility Ass ompass - Cl	essment : Test Cl ient Services : C	ient () M Test [05/	22/2015]						
	Main Demo	ographics Address	Finances	lealth Benefits	Health	Progress Logs				
	Employment	Household Incom	e Totals D	ocumentation						
	Current Emp	ployment Status			*	Under 35 hours	per week	•		
	Client Emplo	oyment Records								
	2 🖨 🍐	🎤 <u>i</u> 👰 👘 Ad	d Employment	Record						
	Deleted	Status Employer	Date Start	Date End	Month	nly Income				
	N	Current Big Frank	s 2015/04/30	)		\$1,500.00				

- Current Employment Status Select the employment status.
- **Client Employment Records** The client's employment records can be viewed or created here.
- To Create an Employment Record click on
   Add Employment Record

Close ABC		
Employment : Test Client () Compass - Client Services : Amanda Epping/GTI [04/	/30/2015]	
Employment		
Employment Status	* Current	•
Date Started	* Thursday April 30, 2015	
Employer Name	*	
Monthly Gross Amount	*	
Employeer Sponsored Health Plan Available?	*	•
Employer Address		
Employer City		•
Employer State		
Employer Zip		
Employer Phone		
Employee Title		
Job Description		*
		Ŧ

- Employment Status Select "Current" or "Past."
- **Date Started –** Enter the date the client started the employment.
- Month Gross Amount Enter the month gross income of the employment.
- Employee Sponsored Health Plan Available? Select "Yes" or "No."
  - If "Yes"
    - Enrolled in Health Plan Select "Yes" or "No."
      - If "No"
        - Why not enrolled Enter the reason they client is not enrolled.
- Employer Address Enter the Employer's Address.
- **Employer City** Enter the Employer's *City*.
- Employer State Enter the Employer's state.
- **Employer Zip** Enter the Employer's zip code.
- **Employer Phone** Enter the Employer's phone number.
- Employee Title Enter the client's job title.
- Job Description Enter the client's job description.

Household Tab:

Provide Enterprise - [Eligibility Assessment For Test Client]	
근 File Find View Actions Tools Reports Windows Help	
📢 Close 👋 🕼 Save in Progress 🛷 Checkin Save and Close 🛷 Complete 📀 Create Scan 📀 Create Te	est Result 💿 View 🔻
Eligibility Assessment : Test Client () Compass - Client Services : CM Test [05/22/2015]	
Main Demographics Address Finances Health Benefits Health Progress Logs	_
Employment Household Income Totals Documentation	
Click to recompute Household Size below ==> Recompute	
Household Size - Ryan White * 2	
Client Household Members	
😰 🌧 🥟 🧕 🗐 🗋 Add Household Member	
Deleted Name Relationship Emergency	
N Example Housemember   Other Relative   Yes	

This tab will show you the house hold members and the Ryan White Household size. To add a Household member, click on Add Household Member.

🕘 Provide Enterprise - [Household Member For Test	Client]
⊘ File Find View Actions Tools Reports	Windows Help
Close ABC	
Household Member : Test Client () Compass - Client Services : Amanda Epping/	GTI [04/30/2015]
Main	
Status	* Active
First Name	* Example
Last Name	* Housemember
Relationship to Client	* Other Relative
Okay to Contact?	* Yes 🔻
Contact Method	Any Message 🔹
Emergency Contact?	* Yes 🔻
Comments	

- Status Select "Active" or "Inactive."
- First Name Enter the family member's first name.
- Last Name Enter the family member's last name.
- **Relationship to Client** Select the relationship.
- Okay o Contact? Select "Yes" or "No."
  - o If "Yes"
    - **Contact Method** Select the contact method.
- Emergency Contact? Select "Yes" or "No."
- **Comments –** Enter any comments.

When the record is completed, click on Close. Then you will receive the prompt below:



#### Click on "Yes" to save the changes.

O Provide Enterprise - [Income History For Test Client]	
🔿 File Find View Actions Tools Reports Windows Help	
Create Scan 🖌 Submit 🔯 Open Client Profile	
Income History : Test Client () Compass - Client Services : Amanda Epping/GTI [04/30/2015]	
Summary Employment Household Income Totals Documentation	
Click to recompute Household Size below ==>	Recompute
Household Size - Ryan White	2
Client Household Members	
🖻 🎒 🖺 🎁 🤞 🐸 🎤 🧕 🦂 🖓 🗋 Add Household Member	
Deleted         Name         Relationship         Emergency           N         Example Housemember         Other Relative         Yes	

After you add household members or complete any updates to the household member records, you will want to recompute the household size. Click on

Recompute

. The Household Size – Ryan White

will then be recomputed.

#### Income Tab:

The Income Tab will be where you document the client's incomes. Input the total monthly income of the applicant and all legal household members in the respective fields. Any income type listed in all caps is not calculated for MAGI, but is a required field.

Provide Enterprise - [Eligibility Assessment For Test Client]					
🖯 File Find View Actions Tools Reports Windows	Help	)			
📢 Close 👋 🛛 🕞 Save in Progress 🛛 🖋 Checkin Save and Clo	se	🛷 Complete	📀 Create Scan	© Create Test Result	🕑 View 🔻
Eligibility Assessment : Test Client () Compass - Client Services : CM Test [05/22/2015]					
Main Demographics Address Finances Health Benefits	lealth	Progress Logs	]		
Employment Household Income Totals Documentation			1		
Correct Meethballe seebald because					
Note: Input the total monthly income of applicant and all legal ho	useh	old members in th	e respective fields.	Any	
Income type listed in all caps is not calculated for MAGI, but is a	requi	red field of entry.			
Wages, salaries, tips, etc. (Form W-2)	*	\$1,500.00			
Taxable interest (1099-INT form)	*	\$0.00			
Tax-exempt Interest (Form 1099-INT box 8)	*	\$0.00			
Ordinary Dividends (1099-DIV box 1a)	*	\$0.00			
Exempt Interest Dividends (Form 1099-INT box 10)	*	\$0.00			
Taxable refunds of state/local income taxes	*	\$0.00			
Alimony or Other Spousal Support Received	*	\$0.00			
Business or Self Employed income/loss (Schedule C or C-EZ)	*	\$0.00			
Capital gain/loss (Schedule D)	*	\$0.00			
Other gains/losses (Form 4797)	*	\$0.00			
IRA distributions - taxable amount	*	\$0.00			
Pensions and Annuities	*	\$0.00			
Rental real estate, trusts (Schedule E)	*	\$0.00			
Farm income/loss (Schedule F)	*	\$0.00			
Unemployment Income	*	\$0.00			
Social Security Benefits	*	\$0.00			
Social Security Disability (SSDI)	*	\$0.00			
SUPPLEMENTAL SOCIAL SECURITY INCOME (SSI)	*	\$0.00			
Other Client Income (Jury Duty Pay, Gambling Winnings)	*	\$0.00			
CHILD SUPPORT, WORKMAN'S COMPENSATION, OR MONETARY GIFT	*	\$0.00			

Fill in the appropriate fields with each amount.

#### *For the fields in blue font:

Wages, salaries, tips, etc: Include the total monthly income that the applicant and any legal household members receive from Wages or Salary's (W-2), tip income, and any disability pension benefits received prior to meeting minimum age requirement.

Pensions and Annuities Definition: Include all income both employer based and Veterans Administration based on pension. Note, do not include disability pension income here when disability pay is received prior to normal pension retirement age.

#### Totals Tab:

The totals tab will calculate the monthly gross income and the household poverty level percentage.

91	Provide	Enterprise - [Eligibility Assess	ment For Test Clien	t]				
0	File	Find View Actions Tools	Reports Windo	ws Help	)			
<	Close	🍄 🛛 💼 Save in Progress	🛷 Checkin Save ar	nd Close	🛷 Complete	📀 Create Scan	📀 Create Test Result	🕑 View 🔻
	Eligibi Compa	lity Assessment : Test Client ass - Client Services : CM Te	0 est [05/22/2015]					
	Main	Demographics Address Fina	ances Health Benef	its Health	Progress Logs			
	Empl	oyment Household Income T	otals Documentation	n				
	Te Te	otals						
	Cli	ck to recompute all totals fields bel	ow ==>			Recompute		
	Ho	usehold Monthly Income		*	\$1,500.00			
	Ho	ousehold Poverty Level %		*	113			

After you updated the employment, household, and/or income, you will want to recompute the income total. Click on

	Recompute	. The income totals will be
recomputed		

recomputed.

#### **Documentation Tab:**

On the documentation tab, you will document the proof of income.

• If you need to create a proof of income document, click on "Create Scan." Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

# **Health Benefits Tab**

The health benefits section is where you can document the client's Private and Public Medical Insurance as well as Ryan White, ADAP, and other benefits. By default, each program Status is set to "No Benefits".

O Provide Enterprise - [Client Profile For Test Client]						
∂ File Find View Actions Tools Reports Windows He	lp					
🖣 Close 🦇 🛛 😭 Save 📀 Create 🔻 📀 View 🔻 📀 Action	🖣 Close 🛷 🛛 🔂 Save 📀 Create 🔻 📀 View 👻 📀 Action 👻					
Client Profile : Test Client () Compass - Client Services : Amanda Epping/GTI [04/28/2015]						
Profile Address Alert Demographics Relationships Finances	Health Benefits Health RWA Eligibility					
Private Health Coverage Public Health Coverage Ryan White O	ther Benefits					
Click to update Health Benefits ==> Update Primary Insurance Cickury						
Secondary Insurance Status No Benefite						
Dental Only Policy Status						
Vision Only Policy Status	· · · · · · · · · · · · · · · · · · ·					

To update any of the health benefits, you must click on Update To update any of the benefit tabs to update the health benefits.

#### Summary Tab:

Provide Enterprise - [Health Benefits For Test Client]					
🔿 File Find View Actions Tools Reports Windows Help					
Close ^{A⊕} Ocreate Scan      Ocreate Medicaid Enrollment      ✓ Submit      Over      ✓     View					
Health Benefits : Test Client () Compass - Client Services : Amanda Epping/GTI [05/01/2015]					
Summary Private Health Coverage Public Health Coverage Ryan White (	Other Benefits				
Status	★ In Progress				
Update Type	Interim v				
Changes Summary					
Date Effective	<ul> <li>◆ 05/01/2015</li> </ul>				

Fill in the appropriate fields:

- **Status –** This will be default to "In Progress" until the record is submitted.
- Changes Summary This will populate when changes are submitted.
- **Date Effective –** Select the date the health benefits are effective.

Private Health Coverage Tab:

Provide Enterprise - [Health Benefits For Test Client]	
O File Find View Actions Tools Reports Windows	Help
	nt 🛷 Submit 📀 View 🔻
Hankle Danafita - Tant Clinat O	
Compass - Client Services : Amanda Epping/GTI [05/0	1/2015]
Summary Private Health Coverage Public Health Coverage	Rvan White Other Renefits
Primary Insurance Status	* A-ti
Source	*
Carrier Name	*
Policy/Plan Name or Number	*
Subscriber or Member on policy?	*
Member ID	•
Benefits Phone	* ( ) .
Ambulatory Benefits?	*
Mental Health Benefits?	*
Substance Abuse Benefits?	*
Private Prescription Coverage	*
Comments	
Is existing Proof of Primary Private Coverage sufficient?	
Private Proof of Coverage Document(s)	· · · · · · · · · · · · · · · · · · ·
Date Delete Flag Type Program	
Secondary Insurance	
Status	* No Benefits
Dental Only Policy	
Status	▼ No Benefits ▼
Vision Only Policy	•
Judius	No Benefits

For each insurance (Primary, secondary, dental, vision), fill out the appropriate fields and scan the proofs of coverage for each.

Public Health Coverage Tab:

Provide Enterprise - [Eligibility Assessme	nt For Test Client]	
File Find View Actions Tools	Reports Windows Help	
🌒 Close 🛛 🍯 🛛 🕞 Save in Progress 🛛 🛷	° Checkin Save and Close  ✔ Complete  ⊘ Create Scan  ⊘ Create Test Result	📀 View 🔻
Eligibility Assessment : Test Client () Compass - Client Services : CM Test	[05/22/2015]	
Main Demographics Address Finance	es Health Benefits Health Progress Logs	
Private Health Coverage Public Health C	Coverage Ryan White Other Benefits	
Medicare		
Status	* Active	
Medicare Coverage	*	
Medicare ID	*	
Commente		
Comments	· · · · · · · · · · · · · · · · · · ·	
	· · · · · · · · · · · · · · · · · · ·	
Is existing Proof of Medicare Coverage	▼	
Medicare Proof of Coverage Document	(9)	
	~	
Date Delete Flag Type Progra	am	
Medicare Part D Statue	* [1	
Status	No Benefits	
Medicare Supplemental		
Status	* No Benefits	
Veterans Benefits		
Status	* Active	
VA Medical ID	121213	
Mediicaid		
Date Last Verification Completed		
Medicaid Coverage?		

For each public health insurance (Medicare, Medicare Part D, Medicare Supplemental, Veterans Benefits, and Medicaid fill out the appropriate fields and scan the proofs of coverage for each.

You will also need to complete a Medicaid Enrollment check. To complete a Medicaid enrollment check, click on Check Medicaid Enrollment. Enter the date of the verification and click "OK":

👌 Service Verifi	cation Date
05/01/2015	
ОК	Cancel

#### Ryan White Tab:

Provide Enterprise - [Eligibility Assessment For Test Client]	
📿 File Find View Actions Tools Reports Windows Help	
📢 Close 🦓 🛛 🔂 Save in Progress 🛷 Checkin Save and Close 🛷 Complete 📀 Create Scan 📀 Create T	est Result 🛛 📀 View 🔻
Eligibility Assessment : Test Client () Compass - Client Services : CM Test [05/22/2015]	]
Main Demographics Address Finances Health Benefits Health Progress Logs	
Private Health Coverage Public Health Coverage Ryan White Other Benefits	
Click to set Status fields below ==> Set Ryan White Program Statuses	
Part A Premium Support Status * No Benefits ~	
ADAP Premium Plus Status * No Benefits ~	
ADAP Medication Assistance Status * No Benefits ~	J .
Part A Insurance Support Services Enrollments	_
😰 🎒 🥟 🧕 🤠 🗋 Request Insurance Services Enrollment	
Status Date Status Deleted?	
ADAP Premium Plus Enrollments	
📓 🎒 🤌 🧕 🍓 🗋 Add ADAP Premium Assistance Enrollment	
Status Date         Status         Deleted?           2015/05/05         Enrollment Requested         N	
ADAP Medication Assistance Enrollments	
🔊 🚑 🎤 🗟 🗟 🗋 Add ADAP Medication Assistance Enrollment	
Status Date Status Deleted 2	
2015/05/05 Enrollment Requested N	

The client must be actively enrolled in an ACA Exchange primary or Secondary Private Health Insurance Policy to request Insurance Services Enrollment or Enrollment in the ADAP Premium Assistance.

To request an Insurance Services Enrollment, click on Request Insurance Services Enrollment

Provide Enterprise - [Insurance Services Enrollment For Test Client]	
File Find View Actions Tools Reports Windows Help	
Quese	
Insurance Services Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/01/2015]	
Insurance Services Enrollment Documentation	
Status	Pending
Premium Payer	*
Date Requested	Friday May 01, 2015
Date Submtted	
Program Type	* ACA Insurance 🗸
ACA Application ID	
Health Plan Carrier	* Blue Cross Blue Shield of Florida
Plan Name	<ul> <li>BlueSelect Everyday 1443</li> </ul>
Member/Subscriber ID	* 11
Premium Payment Due	*
Premium Assistance Coverage Start Date	*
Premium(s) Overdue At Enrollment?	* No 🔻
Payee Name	*
Payee Vendor ID	
Payee Street Address 1	*
Payee Street Address 2	
Payee City	*
Payee State	*
Payee Zip	*
Payee Phone	
Payee Payment Method	* Check 👻
Payment MEMO Line Type	* Client Name - Member ID 🔹
Premium Amount	*
Premium Amount - Support Portion	*
Payment Cycle	*

- **Status** This will be default to "Pending" until you click on "Request Enrollment".
- Fill out each field and review the documentation on the "Documentation tab."
- When the form is complete, click on

# k on Request Enrollment

#### Other Benefits Tab:

Provide Enterprise - [Eligibility Assessment For Test Cl	lient]	
근 File Find View Actions Tools Reports Win	ndows Help	
📢 Close 🧳 🛛 🕞 Save in Progress 🛛 🛷 Checkin Save	e and Close 🛛 🛷 Complete 🛛 Create Scan 💿 Create Test Result (	🔊 View 🔻
Eligibility Assessment : Test Client () Compass - Client Services : CM Test [05/22/201	15]	
Main Demographics Address Finances Health Be	enefits Health Progress Logs	
Private Health Coverage Public Health Coverage Rya	an White Other Benefits	
Supplemental Nutritional Assistance (SNAP)?	* No.	
HCD Coordinated Care Program?	*	
PAC Waiver?	*	
Community Action Program (CAP)?	*	
Low Income Home Energy Assistance Program (LIHEAP)?	*	
Women, Infants and Children (WIC)?	*	
Targeted Outreach for Pregnant Women (TOPWA)?	*	
Children's Medical Services (CMS)?	*	
ADA Paratransit (TOPS)?	*	
Palm Tran?	*	
Prescription Assistance Program Enrollment Records		
🖻 🍰 🥟 🧕 🖟 🗋 Add PAP Enrollment		
Status Program Drug Name Start End D	Deleted?	
Other Health Benefits Comments		
	A	
	<u>v</u>	

- Supplemental Nutritional Assistance (SNAP)? Select "Yes" or "No."
  - If "Yes"
    - **SNAP Recertification Date** Enter the date.
    - SNAP Monthly Benefit Amount Enter the SNAP Monthly Benefit Amount.
- HCD Coordination Care Program Select "Yes" or "No."
- PAC Waiver Select "Yes" or "No."
- Community Action Program (CAP) Select "Yes" or "No."
- Low Income Home Energy Assistance Program (LIHEAP) Select "Yes" or "No."
- Women, Infants, and Children (WIC) Select "Yes" or "No."
- Targeted Outreach for Pregnant Women (TOPWA) Select "Yes" or "No."
- Children's Medical Services (CMS) Select "Yes" or "No."
- ADA Paratransit (TOPS) Select "Yes" or "No."

Palm Tran – Select "Yes" or "No." •

Enrollment click on

- Other Health Benefits Comments Enter any comments.
- Prescription Assistance Program Enrollment Records To Add a PAP Add PAP Enrollment

Prov	vide Enterprise - [PAP Enrollment	For Client Test]
📿 Fil	e Find View Actions Tool	s Reports Windows Help
🖣 a	ose 🛯 🖓 Save And Create A	nother 🛛 🛷 Find Application
PA Co	P Enrollment : Client Test () mpass - Client Services : CM 1	Fest [05/13/2015]
Б	nrollment	
	Status	* Applied
	Phamaceutical Company	*
	Program Name	*
	Enrolled Drug	*
	Drug D Code	
	Date Applied	*
	Provider Assisting with Application	* CM Test

Fill in the appropriate fields.

- Status Select the status.
- Pharmaceutical Company Select the company
- Program Name, Enrolled Drug, and Drug D Code These will • automatically populate when selecting the pharmaceutical company.
- **Date Applied –** Enter the date applied/denied/enrolled/terminated. •
- Close . Then you will receive When the record is completed, click on • the prompt below:

Save Changes?
Do You Want To Save Changes?
Yes No Cancel Details >>

• Click on "Yes" to save the changes.

# Health Tab:

ovide Enterprise - [Eligibility Assessment For Your Name]	
ile Find View Actions Tools Reports Windows Help	
Close 👋 🕞 Save in Progress 🛷 Checkin Save and Close 🖋 C	omplete 📀 Create Scan 💿 Create Test Result 💿 View 💌
Bigibility Assessment : Your Name () Compass - Client Services : Amanda Epping/GTI [06/03/2015]	
Main Demographics Address Finances Health Benefits Health Prog	jress Logs
HIV Status Stage of Disease	* AIDS
Date HIV Diagnosed	* Monday June 03, 2002
Identified Risk Factor(s)	<ul> <li>Hemophilia/coagulation disorder</li> <li>Heterosexual contact</li> <li>Injection drug user (IDU)</li> <li>Men who have sex with men (MSM)</li> <li>Perinatal transmission</li> <li>Receipt of transfusion of blood/blood components/tissue</li> <li>Risk not reported or identified</li> </ul>
Antiretroviral Therapy	* HAART
Date Antiretroviral Therapy Started	* 05/07/2003
HIV Verification Is existing HIV Verification documentation sufficient?	
HIV Verification	L
2 🔿 🖹 🌖 🐸 🎤 💁 🗐	
Date Delete Flag Type	
Key Lab Results Is existing Lab documentation sufficient?	
CD4 and Viral Loads	
😰 🚔 🖺 🎒 🐸 🎤 🧕 🏥 🗋 Add Test Result	
Test Date Status Result	

- **Current Disease Stage** Click the button to select the client's current stage of HIV. Note, once set to AIDS it cannot be set back to HIV+.
- Date HIV Diagnosed The estimated date the client was diagnosed with HIV.
- **Date AIDS Diagnosed** The estimated date the client was diagnosed with AIDS. This field only appears if the Current Disease Stage is set to "AIDS".
- Identified Risk Factor(s) Select all possible sources of transmission of HIV to the client.
- Antiretroviral Therapy Select the client's current antiretroviral therapy.
- **Date Antiretroviral Therapy Started** If the client is taking at least one ARV medication this date field appears asking for the estimated date of when the client started ARV therapy.

- **Reason not on HAART** If the client is not on HAART (three or more ARV's) this field appears asking why the client is not on the HAART regimen.
- Is Existing HIV Verification Documentation Sufficient? Select "Yes" or "No." If you need to create a verification, click on "Create Scan." Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.
- Is Existing Lab Documentation Sufficient? Select "Yes" or "No."

Provide Enterprise - [Test Resu File Find View Actions	It For Client Test] Tools Reports Windows Help	
Close 😽 🛛 🕅 Save And Ci	reate Another	
Test Result : Client Test () Compass - Client Services :	: CM Test [05/13/2015]	
Test Result Attachments		
Test Name	*	
Test Date	* 05/13/2015	
Test Result Status	* Final	-
Test Result Modifier	* =	-
Test Facility		
Test Completed By		
Entry Mode	Manual	Ŧ
Test Result Comments	<u></u>	

Fill in the appropriate fields: (depending on the test, different fields will appear).

- **Test Name** Click the 🗔 button to select the test name.
- **Test Date:** The date will default to the date you are entering the result, but you can change the date as needed.
- **Test Result Status:** Select correction, final, preliminary, not available, not required, pending, or clinically indicated.
- Test Result Numeric Value: Enter the numeric value.
- **Test Result Modifier:** Equal (=), greater than (>), less than (<), less than or equal to(<=) or greater than or equal to (>=).
- Test Result Unit of Measure: Unit of measure will automatically populate.
- **Reference Range:** Enter the reference range.

- Test Result Source: Select the source of the test result by click on the 🔽.
- **Test Facility:** Select the testing facility (in the same manner you selected the test name).
- **Test Completed By:** Select who the testing was completed by facility (in the same manner you selected the test name).
- Normalcy Status: Select the normalcy status by click on the .
- Entry Mode: If you are entering the results, this will default to manual.
- Test Result Comments: Add any comments to test results as need.
- Attachments: Create the attachment/scan. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.
- If you click on , it will then prompt you to save or not to save the test

record. If you want to add another test record, click on

### Progress Log Tab:

The Progress log tab will be where you can enter your eligibility assessment progress logs.

) Provide Enterprise - [Eligibility Assessment For Test Client]	
∂ File Find View Actions Tools Reports Windows Help	
🖣 Close 👋 🛛 🛱 Save in Progress 🛷 Checkin Save and Close 🛷 Complete 📀 Create Scan 📀 Create Test	Result 📀 View 🔻
Eligibility Assessment : Test Client () Compass - Client Services : CM Test [05/22/2015]	
Main Demographics Address Finances Health Benefits Health Progress Logs	
Associated Progress Logs	
2 🔿 🥓 🗋 🗐	
Status Deleted Date Agency Provider Contact Category Description	

To add an eligibility assessment Progress log, click on Add Progress Log

Provide Enterprise - [Progress Log For Client Tes File Find View Actions Tools Reports	Windows Help	
Close 🖓 🖌 🗸 Complete 📀 Get Sample Te	xt 💕 Link to Client Profile 🏾 🎒 Print	
Progress Log : Client Test () Compass - Client Services : CM Test [05/13	3/2015]	
Summary Appointments Labs Referrals		
Status	* In Progress	~
Provider	* CM Test	
Date	* 05/13/2015	÷-
Start Time	* 3:46 PM	•
Minutes	*	
Contact Category	*	
Contact Type		
Funding Source	*	-
Brief Description	*	*
		-
Full Description		

- Status It will default to "In-Progress" until the progress log is completed.
- **Provider** Select the provider name from the list by clicking on the . Double click on the provider name. The funding source will automatically populate.
- Date Enter the date.
- Start Time Enter the start time.
- **Minutes** Record the minutes.
- **Contact Category** Select the contact category.
- **Contact Type and Funding Source** These will auto populate based on the contact category selected.
- **Brief Description** Enter a brief description.
- **Full Description** Write your full note.
- Appointments, labs, and referrals These can be created on each of the corresponding tabs of the progress logs. Please see the "Common Data Entry" Section of this manual for instructions.

When the progress log is complete, click on Complete . You will be prompted if you want to save your changes, click on "Yes."

When you are done with your eligibility assessment, you will want to click on

Complete

. If you are missing anything in your assessment, Provide will notify you
which fields are currently missing.



If you are missing CD4 or Viral loads on the initial assessment, you will receive the warning below:

Eligibility Assessment Warning
Medical - Missing a CD4 Count Test Result. Medical - Missing a HIV 1 Viral Load or HIV 1 Viral Load Log10 Test Result
ОК

You will be able to continue with the completion of the initial eligibility assessment without these entered.

When completing the eligibility assessment, you will receive the completion alert below:



To proceed, click on "Yes." To stop the submission, click on "No." The eligibility assessment is then completed. You can see the completed eligibility assessment in "View – Eligibility Assessment."

Prov	vide En	terprise - [	View Eligibi	lity Assess	sment For Clier	nt Test]		
Fil	e Fin	d View	Actions	Fools Re	ports Windo	ws Help		
<ul> <li>a</li> </ul>	ose 🐴	BC						
Vie	iew Eligibility Assessment : Client Test () iompass - Client Services : CM Test (05/14/2015)							
	iigibiiity /	Assessment						
	Client E	ligibility Asse	essment Reco	ords				
	2 🔒	i 🥜 🗋	ŧ.					
[	Date	Deleted	Status	Source	Submitted By	Checked Out?	Checked Out By	
			Completed	Provider		No		
	Eligibility	Assessmer	nt Progress L	ogs				
	2 🔒	i 🥜 🗋	1					
[	Status	Deleter	d Date	Agen	cy Provider	Contact Categor	/ Description	
	Comple	ete N	2015/05/	13 Comp	bass CM Test	Eligibility Asses	sment Testing	

### Eligibility Determination/Background:

A completed Eligibility Assessment establishes Service Category level eligibility for the client and is good for six months. If during the six month period a client has his/her Address, Income or Health Benefits change, the client eligibility settings may be modified but the renewal date for recertification will remain the same.

Note: Palm Beach County decided that because the updates to Address, Income and Health Benefits could impact eligibility these changes can only be made by Eligibility staff.

The logic used to calculate the eligibility is as follows:

- When a client is initially registered their eligibility is set to "No" for all Service Categories except EIS and non-Medical Case Management which are set to "Yes". These setting are good for up to 29 days during which time it is expected that the Client will have an Eligibility Assessment completed.
- 2) Note, a client is always considered eligible for Eligibility Determination activities.
- 3) Whenever a client's Eligibility expires, their Eligibility settings are automatically adjusted to "No" for all Service Categories.

When an Eligibility Assessment is completed it calculates a client's Service Category Level Eligibility according to the following rules:

- 1) Initially the system assumes that the client is not eligible for any services.
- 2) If the client resides in Palm Beach County in the State of Florida then the client is assumed to eligible for EIS and Outreach services (although Outreach is not currently Part A funded in Palm Beach) and may be eligible for other categories.
- 3) If the client has a medical diagnosis of "AIDS", "HIV Positive Not AIDS" or "HIV Positive AIDS Status Unknown" and their household income is less than or equal to 400% of the Federal Poverty Level (FPL), the client is eligible for the following services:
  - a. Medical Case Management
  - b. Non Medical Case Management
  - c. Adherence Services (although not currently Part A funded in Palm Beach)
  - d. Legal Services
  - e. Housing Services
  - f. Emergency Financial Assistance
- 4) If the client's Household Income is less than or equal to 150% of FPL, the client is also eligible for the following services:
  - a. Food Bank
  - b. Medical Transportation
- 5) By default, clients that meet the criteria of 2 and 3 above are assumed to be eligible for:
  - a. Home Health
  - b. Insurance Support Services (Premium and Copy/Deductible services)
  - c. Local Prescription Assistance (Medications assistance thru the Palm Beach County Health Care District)
  - d. Medical Care
  - e. Oral Health Care
  - f. Oral Health Care Specialty (Not a current Part A service category)
  - g. Mental Health

- h. Substance Abuse Outpatient (although not currently Part A funded in Palm Beach)
- i. Substance Abuse Residential
- 6) A series of checks are done for data points that may make the client ineligible for services in some of the categories listed in 5 above.
  - a. If the Client has Private Insurance in a Status of "Active" or "Cobra" then the following sub checks are completed:
    - i. The client is not eligible for Home Health Care.
    - ii. If the Private Insurance has "Ambulatory Coverage" then the Client is not eligible for Medical Care.
    - iii. If the Private Insurance has "Mental Health Coverage" then the Client is not eligible for Mental Health Care.
    - iv. If the Private Insurance has "Substance Abuse Coverage" then the Client is not eligible for Substance Abuse (Residential or Outpatient).
    - v. If the Private Insurance has "Pharmacy Coverage" then the Client is not eligible for Local Pharmacy Assistance.
  - b. If the client has Dental Insurance in a Status of "Active" or "Cobra" then the client is *not* eligible for Oral Care or Specialty Oral Care.
  - c. If the client has Medicare then the client is *not* eligible for Medical Care.
  - d. If the client has Medicare Prescription coverage then the client is *not* eligible for Local Pharmacy Assistance.
  - e. If the client is enrolled in the Health Care District Coordinated Care Program and has "Option 1" or "Option 2" then the client is *not* eligible for the following services:
    - i. Home Health Care
    - ii. Medical Care
    - iii. Mental Health
    - iv. Substance Abuse Outpatient
    - v. Substance Abuse Residential
    - vi. Prescription
  - f. If the client is enrolled in the Health Care District Coordinated Care Program and has "Option 2" then the client is *not* eligible Oral Care or Specialty Oral Care.

# Chapter

# Common Data Entry

Provide Enterprise has a variety of forms that are used to enable providers to capture their interaction with clients, the services they provide, and key data required to help manage the care and support of client and meet data reporting requirements and outcome measures.

### **Opening Existing Clients to your Agency**

If the client had previously been registered in Provide[®] Enterprise and served by another agency, you will need to create a Client Service Profile to document that the Client is now being served by your agency.

To do this, follow the steps below:

- First, navigate into the Client Profile (via "Find Client" or one of the "Views" of Client information.
- On the "Relationships Tab"

) Provide Enterprise - [Client Profile For Test Client]					
File Find View Actions Tools Reports Windows Help					
$\P \text{ Close } \stackrel{\text{\tiny deg}}{\Rightarrow} \rightleftharpoons \Rightarrow \square \checkmark \not \text{P Edit } \oslash \text{ Create } \checkmark \oslash \text{ View } \checkmark \oslash \text{ Action } \checkmark$					
Client Profile : Test Client () Palm Beach County - HIV Care Network : Amanda Epping/GTI [04/28/2015]					
Profile Address Alert Demographics Relationships Finances Health Benefits Health RWA Eligibility					
Client Service Profiles					
🔊 🍰 🥟 🧕 🏭 🗋 New Client Service Profile Record					
Status         Effective         Deleted         Agency Client ID         Agency         Program           Open         2015/04/28         N         Compass         Client Services					
Client Service Category Profiles					
😰 🎒 🥕 🧕 🏚 🗋 New Client Service Category Profile Record					
Status Effective Deleted Agency Service Category Assigned Provider					
Client Provider Relationship Records					
😰 🎒 🥟 🧕 🌐 Add Provider Relationship Record					
Status Provider Relationship					
Contacts					
😰 🎒 🥕 🗋 🏥 Add Contact Record					
Deleted Contact Name Relationship Emergency					

• If you do not see your agency listed, click the New Client Service Profile Record button to open the Client Service Profile, seen below.

Agency As	signed Client	ID					
Status				Open	Open		
Status Effe	ctive			05/12/201	15	÷	
Status Rea	ison			New Client			
Last Servic	e Date (auto	set nightly)					
Client Servi	ice Profile His	story Records					
2 🖨 🖉	🏓 🧕 🥍						
Date	Deleted	Field	New Value	Change Reason	Change By		
2015/05/12	2 N	CSPStatus	Open	New Client	Amanda Epping/GTI		
Client Seni	ice Category	Profile Record	e				
Client Servi	ice Category	Profile Record	ls				

• Once done, click on the Close button to save your changes and back out of the record.

### **Opening Existing Clients to your Service Category**

If the client had previously been registered in Provide[®] Enterprise and served by another agency or by other programs at your agency, you will need to create a Client Service Category Profile to document that the Client is now being served by your agency and service category. NOTE: If the client has previously been served by your Service Category, follow the steps below under "Re-Opening Existing Clients to Your Service Category."

To do this, follow the steps below:

- First, navigate into the Client Profile (via "Find Client" or one of the "Views" of Client information.
- In the Profile Section "Relationships Tab"

Agency Assigned Client	ID					
Status			Open	Open		
Status Errective			05/12/20	15	-	
Status Reason			New Client	t		
Last Service Date (auto	set nightly)				÷	
Client Service Profile His	tory Records					
2 🗇 🥜 🗋 🏥						
Date Deleted	Field	New Value	Change Reason	Change By		
2015/05/12 N	CSPStatus	Open	New Client	Amanda Epping/GTI		
Client Service Category	Profile Records					

- If you do not see your agency listed, follow the steps in the previous section to "Open Existing Clients to your Agency."
- Click on New Client Service Category Profile Record to add the new service category.

Provide Enterprice (Client Service Category Profile Fo	r Cliant Tastl				
File Find View Actions Tools Reports Win	dows Help				
Close Area					
Client Service Category Profile : Client Test () Compass - Client Services : CM Test [05/12/2015	5]				
Main					
Status	Open				
Service Category	*				
Assigned Provider					
Status Effective	05/12/2015	÷.			
Status Reason	New Client				
Last Service Date (auto set nightly)		÷ •			
Client Service Category Profile History Records	Client Service Category Profile History Records				
2 🎒 🥓 🔔 🏥					
Date Deleted Status Change Reason Chan	ge By				

Fill out the fields as appropriate:

- Service Category: Select the category of service that you wish to open the client to.
- Assigned Provider: Select the assigned provider.
- **Status Effective/Status Reason:** These will automatically be computed.
- Client Service Category Profile History Records: This window will track each change to the Service Profile History Status records over time. This will automatically occur when changes are made to these records.
- Once done, click on the Close button to save your changes and back out of the record. Click the Close button again to back out of the Client Service Profile.

### Re-Opening Existing Clients to Your Service Category

If the client had previously been registered in Provide[®] Enterprise and served by your agency and service category, you will need to re-open the client to your service category (if they are closed). Please note that if the client was closed to your agency, you will need to re-open the client to your agency as well. See the steps above under "Re-Opening a Client to Your Agency."

To do this, follow the steps below:

- First, Navigate into the Client Profile (via "Find Client" or one of the "Views" of Client information.
- In the Profile Section "Relationships Tab"



• Double click on the "Client Service Profile" for your agency. It will open on your screen and will look similar to that in the figure below.

🕗 Pro	Provide Enterprise - [Client Service Category Profile For Client Test]						
0 F	ile Find V	/iew Act	ions To	ols Reports Wi	indow	vs Help	
C	Client Service Category Profile : Client Test () Compass - Client Services : CM Test [05/12/2015]						
	Main						_
	Status					Closed	
	Service Category					Eligibility Assessment	
	Assigned Provider					CM Test	
	Status Effective 05/12/2015				05/12/2015		
	Status Reason					Unknown	
	Last Service Date (auto set nightly)						
	Client Service	e Category	Profile Histo	ory Records			
	2 🎒 🥖	b 🗋 🗐					
	Date	Deleted	Status	Change Reason	Cha	nge By	
	2015/05/12	N	Open	New Client	CM	Test	
	2015/05/12	IN	Closed	Unknown	СМ	lest	
							1

• Click the button to open the service category profile.

Dialog Client Service Cat	egory Profile Open	
Dialog Client Service Categor	ry Profile Open	ОК
Reason for Open	* Unknown	Cancel
Date Open Effective	• 05/12/2015	

Fill out the fields as appropriate:

- Reason for Open: Select the reason client is open.
- **Date Open effective:** Enter the date that this change should be effective from.
- Once done, click on the ok button to save your changes.
- Next, click the button to save your changes and back out of the record.
- Click the description of the Client Service Profile.

### Closing to Your Service Profile Record

* Only supervisors can close service profile records.

To close a client to your service category, follow the steps below:

- First, navigate into the Client Profile (via "Find Client" or one of the "Views" of Client information.
- On the "Relationships Tab"

V Provide Enterprise - [Client Service Profile For Test Client]	Provide Enterprise - [Client Service Profile For Test Client]					
C File Find View Actions Tools Reports Windows Help	) File Find View Actions Tools Reports Windows Help					
$ \hline \hline$						
Client Service Profile : Test Client () Compass - Client Services : Amanda Epping/GTI [04/28/2015]						
Main						
Agency Assigned Client ID						
Status	Open 👻					
Status Effective	Tuesday April 28, 2015					
Status Reason	New Client					
Last Service Date (auto set nightly)	֥					
Client Service Profile History Records						
2 🗇 🖕 🛱 👶 🐸 🥒 🕢 🐗						
Date Deleted Field New Value Change Reason Change	By					
2015/04/28 N CSPStatus Open New Client Amanda Epping/GTI						
Client Service Category Profile Records						
📓 🎒 🖺 🎒 🐸 🥒 🧕 🗐 🗋 New Client Service Category Pr	ofile Record					
Status Effective Deleted Agency Service Category Assigned	Provider					
Open 2015/05/28 N Compass Eligibility Assessment CM Test						

Click the Close button to close the service category profile. Enter the reason for close and the date effective. Then, click "Ok."

### Changing the Provider of the Client Service Category Profile Record

To close a client to your service category, follow the steps below:

- First, navigate into the Client Profile (via "Find Client" or one of the "Views" of Client information.
- On the "Relationships Tab"
- Open the Service Category you need to change the Provider.

Close       Image Provider         Close       Image Provider         Client Service Category Profile : Test Client ()						
Compass - Client Services : CM Test [05/28/2015]						
Status	Open					
Service Category	Eligibility Assessment     CM Test					
Assigned Provider						
Status Effective	Thursday May 28, 2015	<b>.</b>				
Status Reason	New Client					
Last Service Date (auto set nightly)		-				
Client Service Category Profile History Records						
2 🔿 눰 🛱 🜖 🐸 🥕 💽 👯						
Date Deleted Status Change Reason Change By						
2015/05/28 N Open New Client CM Test						

Click on Change Provider. Enter the new relationship start date and select the newly assigned provider. Then, click on "Ok."

### Closing to Client Service Category Profile Record

To close a client to your service category, follow the steps below:

- First, navigate into the Client Profile (via "Find Client" or one of the "Views" of Client information.
- On the "Relationships Tab"
- Open the Service Category you need to close.

∂ File Find View Actions Tools Reports Windows Help					
4 Close     A [*] [*] Close     A [*] Close     Close					
Client Service Category Profile : Test Client () Compass - Client Services : CM Test [05/28/2015]					
Main					
Status	Open v				
Service Category *	Eligibility Assessment				
Assigned Provider	CM Test				
Status Effective Thursday May 28, 2015					
Status Reason	New Client				
Last Service Date (auto set nightly)					
Client Service Category Profile History Records					
2 🖨 🖻 😚 👶 🖉 🌽					
Date Deleted Status Change Reason Change By					
2015/05/28 N Open New Client CM Test					

Click on Close. Then select the reason for closure and the close effective date. Then, click "Ok."

### Provider Relationship Record

These records will automatically be created when creating the service category profile. However, they can also be created in the relationship tab of the client profile.

O Provide Enterprise - [Client Profile For Test Client]						
🔿 File Find View Actions Tools Reports Windows Help						
$\P \text{ Close } \stackrel{\text{\tiny AU}}{=} \implies \square \checkmark \not \text{ Edit } \oslash \text{ Create } \checkmark \oslash \text{ View } \checkmark \oslash \text{ Action } \checkmark$						
Client Profile : Test Client () Palm Beach County - HIV Care Network : Amanda Epping/GTI [04/28/2015]						
Profile Address Aert Demographics Relationships Finances Health Benefits Health RWA Bigibility						
Client Service Profiles						
😰 🎒 🥕 🧕 🗐 🗋 New Client Service Profile Record						
Status         Effective         Deleted         Agency Client ID         Agency Program           Open         2015/04/28         N         Compass. Client Services						
Client Service Category Profiles						
😰 🎒 🤌 🧕 🏥 🗋 New Client Service Category Profile Record						
Status Effective Deleted Agency Service Category Assigned Provider						
Client Provider Relationship Records						
Add Provider Relationship Record						
Status Provider Relationship						
Contacts						
2 🗇 🥓 🗋 禎道 🛄 Add Contact Record						
Deleted Contact Name Relationship Emergency						

• Double click on "Add Provider Relationship Record." It will open on your screen and will look similar to that in the figure below:

Provide Enterprise - [Provider Relat	ionship For Test Client]			
🖯 File Find View Actions To	ols Reports Windows Help			
Close 😽	Close ABC			
Provider Relationship : Test Clic Compass - Client Services : CN	Provider Relationship : Test Client () Compass - Client Services : CM Test [05/28/2015]			
Provider Relationship				
Status	* Active			
Provider Name	*			
Provider Relationship	*			
Provider Relationship Start Date	* 05/28/2015			

- **Provider Name-** Select the provider name.
- **Provider Relationship** Select the provider relationship.
- Provider Relationship Start Date Enter the start date.

To make a Provider "Inactive" open the provider record and select "Inactive" and enter an "End Date."

When note is completed, click on Close and the "Yes" to save your changes.

### Appointment

This form is used to document scheduled, kept and missed appointments. Normally it is primarily used to track AOMC appointments but can be sued to track other types as well. The PE system automatically will generate AOMC Appointment records if a client has a Medical or Lab Procedure record recorded by a provider on a given date and no appointment exists. It is also useful to record scheduled and missed appointments and these can either be entered manually or can be uploaded from a providers EHR data system.

To create an appointment, under create click on "Appointment."



🕑 Provide Enterprise - [Appointment For Test Client]				
🕗 File Find View Actions Tools Reports Windows Help				
Appointment : Test Client () Compass - Client Services :	Appointment : Test Client () Compass - Client Services : CM Test [05/18/2015]			
Appointment	Appointment			
Status	* Scheduled 🗸			
Туре	*			
Provider Agency	*			
Appointment With				
Appointment Date	* 05/18/2015			

- **Status** Select the status of the appointment.
- **Type** Select the type of appointment.
- **Provider Agency S**elect the provider name from the list by clicking on the or type in the agency.
- Appointment With Select the provider name from the list by clicking on the or type in the agency.
- Appointment Date Enter the appointment date.

### Services Provided

This form is used to capture when a service is provided to a Client. Typical examples are Bus Passes and Food Vouchers. Service provided records are used to track services only when a more detailed or specific record type would not be appropriate – e.g. a Procedure or Progress Log.

To create a service provided, under create click on "Service Provided."

Create 🔽 📀 View 👻 📀 Action 🕚	
Appointment	
Eligibility Assessment	
Eligibility Override	
Letter	
Payment Request	
Progress Log	
Provider Note	
Referral	
Report	
Required Action	
Scan Document	
Service Provided	
Test Result	
Tobacco Use Assessment	

Provide Enterprise - [Service Provided For Test Client]			
∂ File Find View Actions Tools	Reports Windows Help		
Close △ Complete      Complete      Complete      Client Profile     Close			
Service Provided : Test Client () Compass - Client Services : CM Test [05/18/2015]			
Service Provided Support Documentation	Service Provided Support Documentation		
Status *	Pending		
Provider *	CM Test		
Service Date *	05/18/2015		
Service Category *			
Service Provided *			
Funding Source *	<b></b>		
Units of Service			
Unit of Measure	<b></b>		
Unit Cost of Service			
Total Cost of Service	\$0.00		
Bus Pass Voucher ID *			
Comments			
	Ψ.		

*Depending on the service provided, the date entry fields will vary.

- Status Select the status of the service provided.
- **Provider** Select the type of appointment.
- Service Date Select the service date from the list by clicking on the
- Service Category Select the service Category

- Service Provided, Funding Source, Units of Service, Unit of Measure These will populate based on the selected service category.
- Unit cost of Service Enter the unit cost of service.
- Total Cost of Service This will be computed and automatically populate.
- Buss Pass Voucher ID Enter the bus pass voucher ID.
- **Comments** Enter any comments needed.
- Support Documentation Tab Scan/attach any necessary support documentation. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

*** For Food Bank Vouchers, the County has set a \$50 monthly limit.

### Referral

This form is used when you want to document the referral of a client to another agency. Referrals can be "Internal" (to another agency within the HIV Care Network or another department or group within an agency) or "External" (to an agency or provider outside the HIV Care Network). When an "Internal" Referral is created if the agency that the Referral if being made to does not currently have access to the client record the Referral submission will automatically generate an Informed Consent to release the client to the referred to agency for 30 days. This will give them time to work the referral and if appropriate Open a Client Service Profile which will keep the client chart open to the agency until the "HIV Care Network Consent" expires (in 3 years) or they close their Client Service Profile.

To create a referral, under create click on "Referral."



Provide Enterprise - [Referral For Test Client]			
🕗 File Find View Actions Too	ls Reports Windows Help		
Close ABC			
Referral : Test Client () Compass - Client Services : CM	Referral : Test Client () Compass - Client Services : CM Test [05/19/2015]		
Referral			
Referral Status	* Open		
Referring Person	* CM Test		
Referral Date	* 05/19/2015		
Referred Type	* Internal 🗸		
Referred To	*		
Referred for Service Type	*		
Referred To Assignee			
Referred for Service Description	A		
	_		
Date Check Back	* 06/19/2015		

- **Status** Select the status of the referral.
- **Referring Person** This will default to you or you can select the referring person.
- **Referral Date –** Enter the referral date.
- **Referred Type –** Select if it is an "External" or "Internal" referral.
- **Referred To –** Select the agency the client is being referred.
- **Referred for Service Type –** Select the service type.
- **Referred to Assignee** If referred to assignee, select the assignee.
- **Referred for Service Description –** Enter the description of the service.
- Date Check Back Enter the date to check back on the referral.

When a referral is completed, the agency receiving the referral will receive an email regarding the referral. Referrals can also be viewed by the receiving Agency in "View- Referrals- To my Agency Unacknowledged. The referrals then can be "Acknowledged" by the receiving agency (by clicking on the "Acknowledge" button) which will inform the referring provider that they referral has been received.

### Specialty Referrals

To create a specialty referral, under create click on "Specialty Referral."



Provide Enterprise - [Specialty Care Referral For Test Client] File Find View Actions Tools Reports Windows Help		
Close ABS		
Specialty Care Referral : Test Client () Compass - Client Services : CM Test [05/27/2	015]	
Specialty Care Referral Attachments		
Status	* Pending	
Requesting Provider	* CM Test	
Appointment Date	* 05/27/2015	÷-
Specialty Service Type	*	
Specialty Provider Type	*	
Specialty Provider	*	
Payer Organization	*	
Payer Program	*	
Service Category	*	-
FundingSource	*	
Total Cost of Service	\$0.00	
Assignee		
Procedures		
🖻 🎒 🥜 🧕 🏥 Add Procedure		
Status Deleted End Date Code Procedure Cost Description		

- Status This will default to "Pending" until it is "Submitted."
- **Referring Provider** This will default to you or you can select the referring person.

- Appointment Date Enter the appointment date.
- **Specialty Service Type –** Select the specialty service type.
- Specialty Provider Type Select the specialty provider type.
- Payer Organization Select the payer organization.
- Payer Program Select the payer program.
- **Payer Organization** Select the payer organization.
- Funding Source Select the funding source.
- Assignee Select the assignee.
- **Referred for Service Description –** Enter the description of the service.

After filling out the record, click on the Submit button to submit the specialty care referral.

### **Payment Request**

This form can be used to request that a payment be made on behalf of a Client. A Provide User can submit a Payment Request within their agency or to another agency. For example, a Medical Case Manager at one agency may submit a Payment Request to another agency for a service that the MCM agency does not offer.

To create a service provided, under create click on "Payment Request."



	and the second se		
Provide Enterprise - [Payment Request For Test Client]			
⊘ File Find View Actions Tools Reports Windows Help			
4 Close 🥙 🖌 Submit 🖂 Link to Client Profile			
Payment Request : Test Client ()	Payment Request : Test Client ()		
Compass - Client Services : CM Test [05/19/2015	j		
Payment Vendor Attachments			
Status	*		
Demostice Presiden			
Requesting Provider	* CM Test		
Payment Service Date	* 05/19/2015		
Payer Organization	*		
Payer Program	*		
Service Category	*		
Service Provided	*		
FundingSource	*		
Units of Service	*		
Unit of Measure	*		
Unit Cost of Service	*		
Total Cost of Service	\$0.00		
Assignee			

- Status This will default to "Pending" until it is submitted.
- **Requesting Provider** This will default to you or you can select the referring person.
- **Payment Service Date** Enter the service date.
- Payer Organization Select the payer organization
- Service Category, Service Provided, Funding Source, Unites of Service, Unit of Measure These will all populate when payer organization is selected.
- Unit cost of Service Enter the unit cost
- **Total Cost of Service** This will be computed and automatically populate.
- Assignee If an assignee, select the assignee.

Vendor Tab:

┥ Close 🛛 👋 🛛 🖋 Submit 🛛 🚰 Link to Client Profile			
Payment Request : Test Client () Compass - Client Services : CM Test [05/19/2015]			
Payment Vendor Attachments			
Vendor Name			
Vendor Address 1			
Vendor Address 2			
Vendor State			
Vendor County	Palm Beach .		
Vendor City	West Palm Beach		
Vendor Zip			
Vendor Phone	<u> </u>		
Comments			
Patient Account No			
Vendor Invoice ID			

On the Vendor tab of the payment request, enter any of the necessary vendor information. On the attachment tab, scan/attach any necessary support documentation. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

### Letter

This form is designed to make it easy to write a Letter to a Client or one of their Providers, print it, and retain the text of the letter in Provide.

To create a letter, under create click on "Letter."



Provide Enterprise - [Letter For Test Client]				
0	🕗 File Find View Actions Tools Reports Windows Help			
►	Close [™]			
	Compass - Client S	0 ervices : CM Test [05/22/2015]		
	Letter			
	Get Provider Address	Get Provider Address		
	Subject *			
	Date *	05/22/2015		
	Address	Test Client		
	Salutation	Dear Test Client,		
	Body			
	Closing	Sincerely,		
	Sender Name	CM Test		
	Postscript			

You can address a Letter to a Client or a Provider. Use the "Click to Select Provider and Get Address" button to select a Provider you wish to address the letter to. Use the "Get Client Address" button on the button bar of the form to populate the address from the Client Profile Mailing Address fields. Both buttons populate the address and dalutation fields. The body of the letter can be typed or it may be helpful to use sample text (described below).

### Using Get Sample Text

If there are letters that are commonly sent to your Clients, you can store them so that they are easily accessible and will not need to be re-written.

To use the sample text, follow the steps below:

- Click on the Get Sample Text button. A dialog box will appear.
- Single click on the sample text you wish to utilize.
- Click on the OK button.
- You will then see the text copied into the "Body" of the Letter.

### Provider Note

This form is designed to allow one Provider serving a client to place a Note in the client's chart that is addressed to another provider serving the client. The Provider Note will

appear in the "Activity\Tasks" views and the "Client Tasks" view on the Alert tab of the Client Profile.



To create a Provide Note, under create click on "Provider Note."

File Find View Actions I	Tools Reports Windows Help	
Close 💞 🛷 Send		
Provider Note : Test Client ()	W T-++ (0E/22/2015)	
Compass - Client Services : C	.M Test [05/22/2015]	
Provider Note		
Status	* In Progress	
Provider Originating the Note	* CM Test	-
Who Provider Note is for	* Amanda Epping/GTI	
	*	
Subject of Note		
Subject of Note		
Subject of Note		

Fill in the appropriate fields:

- **Status –** This will default to "Pending" until it is "sent".
- **Provider Originating the Note** This will default to you or you can select the provider.
- Who Provider Note is For Select the provider the note is intended for.
- **Subject of Note –** Enter the subject of the note.
- **Provider Note Text** Enter the note.

When note is completed, click on solution and the "Yes" to save your changes.

### Eligibility Override:

This form is used to request that the County authorize a client to be eligible for a given category or services for a given time period even though the client may have been flagged as not eligible by the most recent Eligibility Assessment, Income, Address, or Health Benefits update. For example, a client may have Primary Health Insurance that includes Mental Health Counseling benefits so the client may not be eligible Mental Health Services. However, if the client has exceeded their health plan annual visit cap, the Eligibility Override could be used to authorize a provider to provide additional Counseling sessions.

To create an Eligibility Override, under create click on "Eligibility Override."



Provide Enterprise - [Eligibility Over	rride For Test Client]			
📿 File Find View Actions Too	ols Reports Windows Help			
Close 🖓 🖌 Vibrait				
Eligibility Override : Test Client Compass - Client Services : CM	Eligibility Override : Test Client () Compass - Client Services : CM Test [05/22/2015]			
Eligibility Override				
Status	* Pending v			
Eligibility Setting	*			
Service Category	*			
Date Start	*			
Date End	*			
Override Request Reason	A 			
Support Doc Attachment Type Images	[mage 🔹			
🖉 Attach 🛛 🚽 Save As				

- Status This will default to "Pending" until it is "Submitted."
- Eligibility Setting Select the eligibility setting.
- Service Category Select the service category.
- Date Start Enter the start date.
- **Date End** Enter the end date.
- **Override Request Reason-** Enter the override request reason.

On the attachment section, scan/attach any necessary support documentation. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

When note is completed, click on Submit and the "Yes" to save your changes.

### **Required Action:**

This form is used to document when a specific action should be taken on behalf or with a client. Many Required Action documents are automatically generated in client charts by the PE system. For example, clinical triggers will generate a Required Action when a client had a CD4 Count below 200 altering the medical provider that the client should be evaluated for PC Prophylaxis and Medical Case Management triggers will generate a Required Action when a Open Medical Case Management Client has not had a Face to Face encounter in more than 30 days. A provider can also manually create a Required Action document in a Client chart to help remind them of some task that they need to address with a Client.



To create a Required Action under create click on "Required Action."

🕘 Provide Enterprise - [Required Action For Test Client]				
🔿 File Find View Actions Tool	s Reports Windows Help			
Close ABC				
Required Action : Test Client () Compass - Client Services : CM 1	Test [05/22/2015]			
Required Action				
Required Action	*			
Service Category	*			
Assignee Name(s)	* CM Test			
Date Due	* 05/22/2015			
Source of Required Action	Manual			
Required Action Notes				
	<b>T</b>			

- **Required Action** Enter the name of the required action.
- Service Category Select the service category.
- Assignee Name Select the assignee's name.
- **Due Date** Enter the due date.
- **Source of Required Action** This will default to manual if a user is creating the required action.
- **Required Action Notes-** Enter the corresponding notes.

When note is completed, click on does and the "Yes" to save your changes.

### Pregnancy:

This form is used to track each pregnancy of a Client. Each Pregnancy should be documented as it may impact the client's eligibility for some services. Pregnancy records can be created within an Eligibility Assessment and from the Views of "Case

Management Summary" and "Medical Summary." From any of these areas, you would

click on

) Provide Enterprise - [Pregnancy F	or Client Test]
∂ File Find View Actions T	ools Reports Windows Help
Close 🎸	
Pregnancy : Client Test () Compass - Client Services : C	M Test [05/13/2015]
Pregnancy	
Status	* Active
Estimated Conception Date	*
EDC - Estimated Date of	
When Entered Prenatal Care	*
Antiretrovirals prescribed?	*

Fill in the appropriate fields:

- **Status** Select the status of the pregnancy.
- Estimated Conception Date Enter the estimated date of conception.
- EDC Estimated date of Confinement (Due Date) Enter the estimated due date.
- When Entered Prenatal Care Select the time when client entered prenatal care.
- Antiretroviral prescribed? Select "Yes" or "No."

- If "Yes,"
  - Week When Antiretroviral Started Enter the week the antiretroviral was started.
  - Antiretroviral Names Select the Antiretroviral names.
- When completed, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes.

### Creating Scans:

• To Create Scans:

Clink on the Create Scan button on top of the screen.

Close 🧇 😭 Save 📓 Save And Create A	nother	
Scan : Joe Smith () UIC College of Medicine Peoria - Clien	t Services : Test User12 [11/11/2013]	
Scanned Document		
Document Date	* Monday November 11, 2013	
Document Type	*	
Attachment Type	* Image 🗸 🗸	
Images		
🚔 Scan 🖉 Attach 层 Save As		

Fill in the appropriate fields:

- **Document Date:** this will automatically populate with the date you are creating the scan. However, you can change the date by clicking in the box.
- **Document Type:** Click on the **and** select the document type from the dropdown list.
- **Scan:** Click on the Scan to scan the document directly from your scanner.
- Attach: Click on the Attach to attach the document that you saved on your computer.
- Save: Click on the Save to save the attachment or click on the

Save And Create Another to save the scan and to create another.

### Audit Trail:

If you go to View – Audit Trial

0	View 🔽 📀 Action 👻	
C	Audit Trail	
	Activity	
	Address History	
	Administrative Notes	
	Case Management Summary	
	Client Charges	
	Early Intervention Services	
	Eligibility Assessments	
	EMessages	
	ESetup	

You can see a list of all users who accessed the client's file along with the date and time the user accessed the client's profile.

View Access Audit Tr Compass - Client Serv	ail : Test Client () vices : Amanda Epping/G]
View Access Audit Trail	]
Client Access Audit Tr	ail
2 4 🖻 🛱 🤞	) 🐸 🥒 🛕 🗐
Audit Date	User Name
2015-05-29 09:52:03	Amanda Epping/GTI
2015-05-29 09:51:20	Amanda Epping/GTI
2015-05-29 09:50:37	CM Test
2015-05-29 09:49:19	Amanda Epping/GTI
2015-05-29 09:41:12	Amanda Epping/GTI
2015-05-29 09:40:14	Amanda Epping/GTI
2015-05-29 09:15:48	Keith Gray/GTI
2015-05-29 09:15:29	Keith Gray/GTI
2015-05-29 08:29:18	Amanda Epping/GTI
2015-05-29 07:43:18	Amanda Epping/GTI
2015-05-28 15:37:01	CM Test
2015-05-28 10:36:43	Amanda Epping/GTI
2015-05-28 10:32:01	Amanda Epping/GTI
2015-05-28 10:16:16	CM Test
2015-05-28 08:55:39	Amanda Epping/GTI

# Chapter

# Legal Service Providers

Legal service providers in Provide will be able to document legal matters, legal notes, and referrals.

You will need to create a Client Service Profile for Legal Matter to document any legal activity for the client. Please see the common data entry section of this guide for instruction on opening clients to your service category.

From the client Profile, you will select "Legal Summary" from the "View." See screenshot below.



From the client Profile, you will select "Legal Summary" from the "View."

Prov	vide Ente	erprise -	[View Legal A	ctivity Fo	r Clien	t Test]		
Fil	e Find	View	Actions T	ools Re	ports	Windows	н	lelp
a	ose 🗳	-						
_								
Vie	ew Lega gal Aid	al Activity of Palm	y : Client Te Beach Coun	st (12121 ty - Clien	) t Serv	ices : Leg	jal '	Test [05/14/2015]
Vi	ew Legal	Activity						
	Legal Ma	itters						
	2 🖨	<i>»</i> ]	di 🗋 Ada	l Legal Mat	ter			
	Status	Delete	Date Open	File ID	Pract	ice Area		
	Open	N	2015/05/14		Supp	ort		
l	Legal Ma	tter Notes	•					
-	2 🖨	<i>»</i> ]						
[	Status	Delet	ted Date	Des	cription	1		
	In Progre	ess N	2015/05	i/14 test				
	Referrals							
	2 🖨	<i>P</i> 🗋	🏥 📄 Add	Referral				
[	Status	Deleted	Date Ag	ency R	eferred	By Refer	rral	Туре

### Entering Legal Matter:

To Add a "Legal Matter," click on Add Legal Matter

<mark>∂ P</mark> r	ovide Enterprise - [Legal Matter Fo	or C	ient Test] Renorts Windows Help
◀	Close 🛛 🖓 🕞 Save	_	
l	Legal Matter : Client Test (12121 Legal Aid of Palm Beach County	) - a	ient Services : Legal Test [05/14/2015]
	Main		
	Status		Open 🗸
	Date Open		05/14/2015
	File ID		
	Brief Description		×
			-
	Practice Area	*	Public Utilities 🔹
	Case ID		
	Venue		· · · · · · · · · · · · · · · · · · ·
	Judge		
	Funding Source	*	Ryan White Part A 🔹
	Legal Matter Notes		
	🔊 🎒 🥓 💁 👯		
	Status Deleted Date Descr	ipti	n

Fill in the appropriate fields:

• Status - Select that status "Open" or "Close."

- Date Enter the date Open or Close.
- File ID Enter file ID
- **Brief Description** Enter the brief description of the legal matter.

_

- **Practice Area** Select the practice area.
- Case ID Enter the Case ID.
- Venue Select the Venue.
- Judge Select the Judges.
- Funding Source Select the funding source.

To "Save" the legal matter, click on	📄 Save	or on	Close	and then on	"Yes" to
save your changes.					

____

### Legal Matter Notes:

To Add a "Legal Matter Note," double click on the "Legal Matter."

Legal Matter : Client Test (12121)         Legal Aid of Palm Beach County - Client Services : Legal Test [05/14/2015]         Main         Status       Open         Date Open       05/14/2015         File ID       05/14/2015         Brief Description       Image: Client Services : Legal Test [05/14/2015]         Practice Area       Support         Case ID       Image: Client Services : Legal Matter Notes         Image: Client Services : Legal Matter Notes       Image: Client Services : Client Services : Legal Matter Notes         Image: Client Services : Legal Matter Notes       Image: Client Services : Client Services : Legal Matter Notes         Image: Client Services : Client Services : Legal Matter Notes       Image: Client Services :	Close Are Save	Reports Windows Help
Main         Status       Open         Date Open       05/14/2015         Bief Description       Image: Case ID         Practice Area       * Support         Case ID       Image: Case ID         Venue       Image: Case ID         Judge       Image: Case ID         Funding Source       * Ryan White Part A         Image: Case ID       Image: Case ID         Venue       Image: Case ID         Judge       Image: Case ID         Status       Deleted       Date         Deleted       Date       Description         In Progress N       2015/05/14       test	Legal Matter : Client Test (12121) Legal Aid of Palm Beach County - Cli	ient Services : Legal Test [05/14/2015]
Status Open   Date Open 05/14/2015   File ID   Brief Description   Practice Area   Practice Area   Case ID   Venue   Judge   Funding Source   Ryan White Part A     Image: Case ID   Venue   Judge   Funding Source   Ryan White Part A   Image: Case ID   Image: Case ID   Venue   Judge   Funding Source   Image: Case ID   I	Main	
Date Open       05/14/2015         File ID       Image: Construction of the second secon	Status	Open 🔻
File ID   Brief Description   Practice Area   Case ID   Venue   Judge   Funding Source   Funding Source   Kater Notes     Image: Comparison of the part of the p	Date Open	05/14/2015
Brief Description         Practice Area         Support         Case ID         Venue         Judge         Funding Source         Ryan White Part A         Legal Matter Notes         Image: Status         Deleted       Date         Description         In Progress N         2015/05/14	File ID	
Practice Area Case ID Venue Judge Funding Source Equal Matter Notes Progress N 2015/05/14 test	Brief Description	A
Practice Area       *       Support         Case ID       Venue       Venue         Judge       •       •         Funding Source       *       Ryan White Part A       •         Legal Matter Notes       •       •       •         Image: Status       Deleted       Date       Description         In Progress       N       2015/05/14       test		-
Case ID Venue Judge Funding Source Legal Matter Notes	Practice Area *	Support 👻
Venue Judge Funding Source Egal Matter Notes	Case ID	
Judge     Image: Constraint of the second seco	Venue	•
Funding source     Figure White Part A       Legal Matter Notes       Image: Status       Deleted       Date       Description       In Progress N       2015/05/14	Judge	
Image: Market Holds         Image: Market Holds         Image: Market Holds         Status       Deleted         Date       Description         In Progress       N         2015/05/14       test	Legal Matter Notes	Ryan White Part A 🔹
Status         Deleted         Date         Description           In Progress         N         2015/05/14         test	Add Note	
	Status         Deleted         Date         D           In Progress         N         2015/05/14         tate	Description est

Provide Enterprise - [Legal Note For Client Test]	-
∂ File Find View Actions Tools Reports	Windows Help
Legal Note : Client Test (12121) Legal Aid of Palm Beach County - Client Servi	ices : Legal Test [05/14/2015]
Summary Appointments Labs Referrals	
Status	★ In Progress 👻
Provider	* Legal Test
Date	* 05/14/2015
Units of Service (Hours)	*
Funding Source	Ryan White Part A
Brief Description	*
Full Description	· · · · · · · · · · · · · · · · · · ·

- Status: Select that status "In Progress" or "Complete."
- **Provider:** This will default to your name, but you can choose a different provider in needed.
- Date: Enter the date.
- Unit of Service (Hours): Enter the service hours
- **Funding Source** The funding source will default to the legal matter funding source.
- **Brief Description** Enter the brief description.
- Full Description Enter the full description.

If the note is complete, change the status to "Complete." To "Save" the legal matter,

click on Close and then on "Yes" to save your changes.

You may also add an appointment, lab results, or referrals from the note on the corresponding tabs. To add appointment, labs, or referrals please refer to the common date entry section of the manual.

# Chapter

## Medical Case Management Providers

This chapter will include instructions on documentation that is specific to medical case managers. Medical case managers may also need to reference the previous chapter outlining common date entry.

In the client profile, medical case managers will often use the view of "Case Management Summary."



In the Case Management Summary, a medical case manager can create or view client assessment, actions plans, progress logs, services provided, payment request, medical appointments, test results, and referrals.

### Progress Log:

This form is designed to capture the date and time and number of minutes that a provider spent working with or on behalf of a Client. Notes of the encounter/effort should be documented.

To create a progress log, it can be created under "Create" then click on "Progress Log" or from the "Case Management Summary"

Close 💝 🖌 🗸 Complete 📀 Get Sample To	ext 💣 Link to Client Profile 🏾 🚔 Print
Progress Log : Test Client () Compass - Client Services : CM Test [05/2	26/2015]
Summary Appointments Labs Referrals	
Status	* In Progress
Provider	* CM Test
Date	* 05/26/2015
Start Time	* 9:22 AM
Minutes	*
Contact Category	*
Contact Type	
Funding Source	*
Brief Description	*
Full Description	

- Status The status will be "In Progress" until the note is marked "Complete."
- Provider This will default to your name, but you can choose a different provider in needed.
- Date Enter the date.
- **Start Time** -Enter the start time.
- Minutes Enter the minutes spent.
- **Contact Category** Select the contact category.
- Contact Type and Funding Source This will auto populate bases on the contact category that you select.
- Brief Description Enter the brief description.
- Full Description Enter the full description.
- You may also add an appointment, lab results, or referrals from the note on the corresponding tabs.
- Goals Addressed On this tab, you can select the goals that were address by clicking on the 🔲 and select the goals that were address.

If the progress log is complete, click on Complete. To "Save" the note in progress, click on Close

and then on "Yes" to save your changes.
## Client Assessment:

This form is optional for now but the expectation is eventually it will be required. When completed, the Client Assessment can auto generate Action Plan Goals based on the needs of the client identified

From the "Case Management Summary" view, click on Add Client Assessment to add the assessment.

#### Status Tab:

🕜 Pr	) Provide Enterprise - [Client Assessment For Test Client]										
0	File Find	Viev	v Actions 1	Tools Reports	Window	s He	elp				
◀											
	Client Asse Compass -	essme Client	nt:Test Clier Services: (	nt () CM Test [05/26	/2015]						
ſ	Status Me	edical	Other Core Ser	vices Support Se	ervices R	sk	Quality of Life	Domestic Violen	ce Summary		
	Assessme	ent Stat	us			In Pro	gress			-	

**Assessment Status -** This will be "In Progress" until the assessment is marked "Completed."

#### Medical Tab:

Provide Enterprise - IClient Assessment For Test Client	
C File Find View Actions Tools Reports Windo	ws Help
Close 🗸 I Cose Total Close Answers Complet	ed
Compass - Client Services : CM Test [05/26/2015]	
Status Medical Other Core Services Support Services	Risk Quality of Life Domestic Violence Summary
Overall Health	·
Physician treating HIV?	·
Primary Care Physician	
HIV Care Physician	
CD4 and Viral Load in past 6 months	No
CD4 Count and Viral Load Test Results	
😰 🎒 🥟 🗋 🏮 🗋 Add Test Result	
Test Date Result	
Taking medication as prescribed?	•
Concerns about being prescribed HIV medications?	·
Current Drug Protocol	
🔊 🎒 🥕 🧕 🏟 🗋 Add Drug	
Date Started Drug Name Strength Measure Ro	ute
Doctor appointment attended in the last six months?	·
Recent Medical Appointments	
😰 🎒 🥜 🧕 🏺 🗋 Add Appointment	
Date Deleted Status Provider	

Fill in the appropriate fields:

- **Overall Health** Select the overall health of the client.
- **Physician Treating HIV** In this field, select whether or not the client has a physician treating their HIV.
- **Primary Care Physician** Select the client's Primary Care Physician. This can be done by clicking on the 🗔 button to search for the Physician.
- **HIV Care Physician** Enter who the client's HIV Care Physician is. This can be done by clicking on the 🗔 button to search for the Physician. This may be the same as the primary care physician.
- **CD4 and Viral Load in Past 6 Months** Select whether or not the client has had both a CD4 and Viral Load test completed in the last 6 months.
- Taking Medication as Prescribed Select "Yes" or "No."
- Concerns about being prescribed HIV medications: Select the level of concerns.
- **Doctor appointment attended in the last six months**: Select the level of appointments attended.

## CD4 Count and Viral Load Test Results

This window will show any CD4 and/or Viral Load test results that have been entered for this client. You can also enter test results from this screen. To add a Test Result simply

click on the Add Test Result button. A screen will appear similar to the one shown below:

👌 Provide Enterprise - [Test Result	For Test Client]								
∂ File Find View Actions 1	ools Reports Windows Help								
Test Result : Test Client () Compass - Client Services : C	CM Test [05/26/2015]								
Test Result Attachments									
Test Name	•								
Test Date	* 05/26/2015								
Test Result Status	* Final 🔻								
Test Result Modifier	* =								
Test Facility									
Test Completed By									
Entry Mode	Manual								
Test Result Comments	Test Result Comments								

- **Test Name:** In this field simply enter the Test Name. This can be found by clicking on the 🗔 button and searching in the appropriate fields.
- **Test Date:** Enter the date the test was completed.
- **Test Result Status:** Enter the status of the test result. Typically this will be "Final".
- Test Result: Enter or select the result.
- **Test Result Modifier:** For most results, you will set this to "=", except in the case of HIV Viral Loads that are undetectable. In these situations, the Modifier would be set to "<" and the "Rest Result" would be set to the lowest number of copies used by the physician.
- **Test Facility:** In this field enter the Test Facility where the Testing was conducted. Simply click on the 🗔 button to search for the facility.
- **Test Completed By:** In this field enter who the Test was Completed By. Simply click on the 🗔 button to search for the person who completed the test.
- **Test Results Comments** In this field enter any additional comments on the Test Results.
- Attachment Tab Scan or attach the test results. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

To Save the Test Result click on the Close button. A screen will appear asking you if you would like to Save Your Changes. Click "Yes" to save your changes.

# Current Drug Protocol

This window will show any Drug records that have been entered for this client. You can also enter drug records from this screen.

To add a drug click on the Add Drug button. A screen will appear similar to the one shown below:

) Provide Enterprise - [Drug For Test C	lient]
🖯 File Find View Actions Tool	s Reports Windows Help
Close 💞 🛛 🕅 Save And Create A	nother
Drug : Test Client () Compass - Client Services : CM	Fest [05/26/2015]
Drug	
Drug Status	* Active
Date Started	* 05/26/2015
Drug Name	*
Drug Name Generic	
Strength	
Route	•
Dosage Form	•
Frequency	•
Instructions	A
Drug Comments	
	· · · · · · · · · · · · · · · · · · ·

Fill out the fields as appropriate:

- Drug Status Enter the Drug Status either Active or Inactive.
- **Drug Started** In this field enter the date when the drug was started.
- **Drug Name** Enter the name of the drug in this field. This can be found by simply clicking on the button and searching in the appropriate fields for the name.
- **Drug Name Generic** This will be automatically filled out after you select the "Drug Name" above.
- **Strength** Enter the strength of the drug in this field.
- **Route** Enter the Route.
- **Dosage Form** Enter the Dosage Form.
- **Frequency** Select the frequency.
- Instructions In this field enter instructions on how to take the drug.
- Drug Comments Document any other comments related to this drug.

To save the record, click on the Close button. A screen will appear asking you if you would like to Save Your Changes. Simply click Yes to save the record.

#### **Recent Medical Appointments**

This window will show all existing Medical appointment records. To add an

Appointment, simply click on the Add Appointment button. A screen will appear similar to the one shown below:

Provide Enterprise - [Appointment For Test Client]										
⊘ File Find View Actions T	Fools Reports Windows Help									
Close 🎸 🛛 🖓 Save And Crea										
Appointment : Test Client () Compass - Client Services : C	CM Test [05/26/2015]									
Appointment										
Status	* Scheduled									
Туре	* Medical Care 🗸									
Provider Agency	*									
Appointment With										
Appointment Date	* 05/26/2015									

Fill out the fields as appropriate:

- **Status** In this field enter whether the Status is Scheduled, Kept, Missed, or Rescheduled.
- **Type** Select the appointment type
- **Provider Agency** Select the agency the appointment is scheduled with.
- **Appointment With** In this field enter who the Appointment is with. Simply click on the button to search for the appropriate answer.
- **Appointment Date** Enter the Appointment Date in this field.

To save the Appointment, click on the Close button. A screen will appear asking you if you would like to Save Your Changes. Simply click Yes to save your changes.

#### **Other Core Services Tab:**

🕑 Provide Enterprise - [Client Assessment For Test Client]										
∂ File Find View Actions Tools Reports Windows Help										
Close										
Client Assessment : Test Client () Compass - Client Services : CM Test [05/26/2015]										
Status Medical Other Core Services Support Services	Risk Quality of Life Domestic Violence Summary									
Mental health concerns?	*									
Taking medications as prescribed?	*									
Depression	*									
Drug or alcohol use and/or abuse	*									
Dental Needs	*									
Dental visit in past year?	*									
Eating habits over the last month	*									
Need for Nutritional Counseling?	*									
Vision Needs	*									

NOTE: All fields marked with a red (*) are required. Fill out the fields as appropriate:

- **Mental Health Concerns** In this field enter if the client has any Mental Health Concerns.
- **Taking Medications as Prescribed** In this field enter if the client is taking medications as prescribed.
- **Depression** Select the client's self-identified level of depressive feelings.
- **Drug or Alcohol Use and/or Abuse** -Document if the client has any Drug or Alcohol use and/or abuse.
- **Dental Needs** Select whether or not the client has any dental needs.
- **Dental Visits in Past Year** -Enter if the client has had a dental appointment in the past year.
- Eating Habits Over the Last Month Enter the client's eating habits over the last month.
- **Need for Nutritional Counseling** Select whether or not the client has a need for nutritional innervation.
- Vision Needs Document if the client has vision needs or not.

#### Support Services Tab:



- Housing, Mortgage, Utility, and/or Emergency Financial Assistance Needed Document whether or not the client needs financial or housing related assistance.
- Support Group Needed Document if the client needs a support group.
- Legal Needs Document the client's need for legal services.
- Food Bank/Home Delivered Meal Needs Select the client's need of food bank or home delivered meals.
- **Rehabilitation/Job/Education Needs** Document the client's need for rehabilitation or vocational services.
- Transportation Needs Document if the client has any Transportation Needs.

#### **Risk Tab:**



Fill out the fields as appropriate:

- Knowledge of HIV Document the client's understanding of HIV Disease.
- Knowledge of HIV Medications and how they affect HIV Enter the client's understanding of HIV Medications and how they affect HIV.
- **Risk Assessment completed in last six months** Document whether or not the client has had a risk assessment completed in the last six months.
- **Diagnosis of STD in last 12 months** Document if the client has received a diagnosis of an STD in the last year.
- **Partner Notification assistance needed** Enter if the client needs assistance with partner notification services.

#### Quality of Life Tab:

🕑 Provide Enterprise - [Client Assessment For Test Client]											
∂ File Find View Actions Tools Reports Wind	lows Help										
Close 👋 🛛 🕞 Save in Progress 🛷 Answers Comp											
Client Assessment : Test Client () Compass - Client Services : CM Test [05/26/2015	]										
Status Medical Other Core Services Support Services	Risk Quality of Life Domestic Violence Summary										
Managing monthly bills	*										
Cultural factors?	*										
Linguistic factors?	*										
Adaptive Equipment Needed?											
Needs Assist with ADL's?											
Any Religious or Spiritual affiliations?	*										

Fill out the fields as appropriate:

• **Managing Monthly Bills** - Enter if the client is able to manage their monthly bills without assistance.

- **Cultural Factors** Document whether or not the client has cultural factors that may impact their care.
- **Culture Identified With** This field will only show if "Cultural Factors" is set to "Cultural barriers to accessing services". Enter information related to the culture the client identifies with.
- Linguistic Factor Document whether or not the client has linguistic factors that may impact their care.
- **Needs Interpreter** This field only shows if "Linguistic Factors" is set to "Language barriers to accessing services." Select whether the client needs an interpreter when obtaining care.
- Which to you prefer to write? This field only shows if "Linguistic Factors" is set to "Language barriers to accessing services." Document the language in which the client prefers to write.
- Which do you prefer to read? This field only shows if "Linguistic Factors" is set to "Language barriers to accessing services". Document the language in which the client prefers to write.
- Adaptive Equipment Needed Document the client's need for adaptive equipment.
- **Needs Assist with ADL** Select whether or not the client needs assistance completing their activities of daily living.
- Any Religious or Spiritual affiliations? Select whether or not the client any religious or spiritual affiliations.

#### Domestic Violence Tab:

0 P	Provide Enterprise - [Client Assessment For Test Client]									
0	File Find View Actions Tools Reports Windows Help									
◀	Close 📲 📴 Save in Progress 🖌 Answers Completed									
	Client Assessment : Test Client () Compass - Client Services : CM Test [05/26/2015]									
	Status Medical Other Core Services Support Services Risk Quality of Life Domestic Violence Summary									
	Fear of ham regarding disclosure of HIV status     *       Domestic violence or abuse in current relationship     *       Perpetrates violence toward partner, child, others     *									

- Fear of harm regarding disclosure of HIV status Document whether or not the client fears actual harm when disclosing their HIV status.
- **Domestic Violence or Abuse in Current Relationship** Select if the client is currently in a violent or abusive relationship.
- **Perpetrates Violence Toward Partner, Child, Others** Document if the client is a perpetrator of violence.

#### Summary Tab:

O P	rovide	Enterprise	- [Client	Assessmen	t For Test Client]			Second Street			
0	∂ File Find View Actions Tools Reports Windows Help										
∥ ∢	Close ^{AS} Close ^{AS} Close      Save in Progress      ✓ Answers Completed     Close     A     Save in Progress     ✓ Answers Completed     Close     A     Save in Progress     ✓ Answers     Completed     Save in Progress     Save in										
	Client Compa	Assessme ss - Clien	ent:Test tService	Client () s: CM Te	est [05/26/2015]						
,	Status	Medical	Other Co	re Services	Support Services	Risk	Quality of Lif	e Domestic Violence	Summary		
	Case	Managem	ent Action	Plans							
	2	3 🎤	<u>i</u> (								
	Date	Opened	Status	Deleted	Case Manager	Date Las	t Review				

This will provide you a summary of actions plans.

#### **Answers Completed:**

After answering ALL questions in the Client Assessment, you must document that you have done so. This is done by clicking the Answers Completed button. Once this is done, you will not be allowed to edit the Client Assessment.

#### Get Relevant Areas of Concern:

The Get Relevant Areas of Concern button can be used to evaluate the client assessment for areas that may be of concern for the client and case manager. Click this button to find the areas based on assessment answers, appear to be of concern for the client. This will place the values in the appropriate field on the Summary Tab of your Client Assessment. See the figure below:

4	Close	ABC	æ	Þ	-	🗙 De	lete	🛷 Select	Areas of	Concern to Addre	SS		
	Client Assessment : Test Client () Compass - Client Services : CM Test [05/26/2015]												
	Status	Med	ical	Other	Core Se	ervices	Supp	ort Service	s Risk	Quality of Life	Domestic Violence	Summary	
	Relev	vant Av	reas o	f Cond	cem								
	Continue good oral health care habits. Continue to provide supportive HIV education. Discuss mental health services available and provide immediate referral for mental health. Follow up at next assessment on notification of partners. Health status will be monitored by MCM and client will contact MCM with any medical heeds or concerns. Identify needs to develop individualized financial budget.								4 11 >				
	Selec	ted Ar	reas of	f Cond	em		-		_				
	The American Antice Direct												
	Date	Open	ed	Statu	s Del	leted	Case	Manager	Date La	st Review			

#### Select Areas of Concern

Once your assessment has been evaluated for the "Areas of concern" relevant for your client, you can select which areas will be addressed as part of the client's plan of care.

To select the "Areas of Concern" simply click on the *Select Areas of Concern to Address* button. A screen will appear similar to the one shown below:

Areas of concern	x
Select areas of concern that you and the client choose to work on as part of their plan of care	
Continue good oral health care habits.	
Continue to provide supportive HIV education.	
Discuss mental health services available and provide immediate referral for mental health	
Follow up at next assessment on notification of partners.	
Health status will be monitored by MCM and client will contact MCM with any medical new	
ldentify needs to develop individualized financial budget.	
Maintain relationship with physician treating HIV and encourage attendance at all schedu	
Monitor mental health due to current Mental Health treatment.	
Needs HIV education.	
Needs HIV medication and treatment adherence education.	
Provide assistance maintaining health habits and treatment adherence support	
OK Cancel	

Select the "areas of concern" that will be addressed with the client. Simply click in the box to the left of the fields that apply and then select the OK button. The Summary Tab screen will now appear similar to the one shown below:

#### Selected Areas of Concern



#### Create/Update Action Plan

Once you have selected the areas of concern, you can create or update the action plan.

Simply click on the Create/Update Action Plan button. A screen will appear similar to the one shown below:



If the client is a new client that does not have an existing Action Plan, one will be created. Action Plan Goals will be created for each of the "Areas of Concern" selected above.

If the client has an existing Action Plan, but does not have goals for the "Areas of Concern" selected above, new goals will be created. If they currently have existing goals of the same type, no change to the Action Plan or Action Plan Goals will be made. NOTE: Each goal needs to be "Edited" to update and include further detail, including the "Target Resolution Date" and the specific Interventions for that goal.

When the client assessme	ent is completed, you will want to click on	Completed
	👌 Enter the Complete Date: 🛛 💌 📉	
	05/26/2015 ○ ▼ OK Cancel	

Enter the completion date. The client assessment will then be completed.

## **Action Plans:**

The Action Plan is used to document the Plan of Care for your client. It contains the specific goals that the client and Case Manager will work towards while the client is being case managed. To create an Action Plan (or to view the existing Action Plan), follow these steps: From the "Case Management Summary" view, click on the second tab "Actions Plans." Then, click on Add Action Plan to add an action plan.

## Summary Tab:

Provide Enterprise - [Action Plan For Test Client]				
File Find View Actions Tools Reports Windows Help				
Action Plan : Test Client () Compass - Client Services : CM Test [05/26/2015]				
Summary Goals Notes				
Action Plan Status	Open 👻			
Case Manager/Counselor	CM Test			
Action Plan Type	Medical Case Management 🗸 🗸			
Funding Source *				
Date Opened	05/26/2015			
Life Area(s) With Identified Deficiency				
Date entered case management *	÷ •			
Did you provide information on * available services and eligibility criteria?				
Is Client in Medical Care? *				

Fill out the fields as appropriate:

- Action Plan Status This will be "Open" or "Closed" (when action plan is closed).
- **Case Manager/Counselor** This will default you, but another provider can be selected.
- Funding Source Select the funding source.
- Date Open Select the date the action plan was opened.
- Action Plan Type This will default to your action plan type.
- Life Areas With Identified Deficiency Select the life area or areas in which the client is experiencing difficulties.
- **Date Entered case management:** Enter the date the client entered Case Management services.
- Did you provide information on available services and eligibility criteria? -Select "Yes" or "No."
- Is Client in Medical Care: Select whether or not the client is receiving medical care.

#### Goals Tab:

	in : Tes	ction Plan : Test Client ()			
ompass - Client Services : CM Test [05/26/2015]					
Summary	Goals	Notes			
Goals					
	A L	) .58 <i>(</i> )	Add Manual (	Gaal 🖉 Add Tamalata Gaal	
	<i></i>	j 48 🕑 /	Huu Mariual (	doal 🔮 Add Template doal	
Status	Date	Category	Life Area	Goal	
0				Follow up at next assessment on notification of partners.	
Open				Maintain relationship with physician treating HIV and encourage attendar	
Open				THE SECOND FOR THE SECOND SECONDO SECOND SECOND SECOND SECOND SECOND SECOND SECOND SECOND SEC	
Open Open Open				Monitor mental health due to current Mental Health treatment.	
Open Open Open Open				Monitor mental health due to current Mental Health treatment. Needs HIV education.	
Open Open Open Open				Monitor mental health due to current Mental Health treatment. Needs HIV education. Needs HIV medication and treatment adherence education	

The list of goals will be listed on the "Goals" tab. You can create additional manual or template goals.

## Adding Manual Goals to an Action Plan:

Provide[®] Enterprise allows you to create "Manual" Goals to associate with a client's Action Plan. Manual Goals are ones that you and the client develop to work on together. These are different from the "Template" Goals which will be developed by a workgroup of Case Management providers and will be available for all Case Managers to add to their Action Plans (the workgroup is working on this in the near future). To create a "Manual" Goal, follow these steps:

• While in the Action Plan, click the Add Manual Goal button. The Action Plan Goal form, similar to that below, will appear on your screen. You will notice that the Action Plan Goal contains two tabs: Summary and Notes.

## Summary Tab of Plan Goal:

🖯 Pr	ovide Enterprise - [Action Plan Go	Goal For Test Client]	
0	File Find View Actions Too	ools Reports Windows Help	
•	Close 👫 🛛 🕅 Save And Create /	te Another 🛛 🛷 Close Action Plan Goal 🏻 🚑 Print Goal	
4	Action Plan Goal : Test Client () Compass - Client Services : CM	0 M Test [05/26/2015]	
	Summary Notes		
	Goal Status	* Open	-
	Goal Type	* Manual	
	Goal Category	*	
	Goal Life Area	*	
	Goal Statement	*	A
			-
	Interventions		
			-
	Date Goal Established	* 05/26/2015	<u> </u>
	Target Resolution Date	*	÷ •
	Provider Assigned	CM Test	

- Goal Status Automatically set to "Open"
- Goal Type Automatically set to "Manual".
- **Goal Category** Select the category that matches the goal that you are adding to the Action Plan (Access, Adherence or Retention).
- Goal Life Area Select the life area that this goal most closely relates to.
- **Goal Statement** Enter a brief summary describing the goal.
- Interventions Type in the specific interventions that will be followed in working towards meeting this goal.

- **Date Goal Established** Defaults to the current date, but can be changed if you developed the plan with the client on a previous date.
- Target Resolution Date Enter the date that you hope to have resolved the goal by.
- **Provider Assigned** Defaults to your name.

Notes Tab:

Provide En	nterprise - [Action Plan Goal For Test Client]	
File Fin	nd View Actions Tools Reports Windows Help	
Close '	🦈 🛛 🖹 Save And Create Another 🛛 🖋 Close Action Plan Goal 🚑 Print Goal	
Action P Compass	'lan Goal : Test Client () s - Client Services : CM Test [05/26/2015]	
Summary	/ Notes	
Genera	al Action Plan Goal Notes	
		-
		-
Action	Plan Goal Note(s)	
2 4	🗿 🥒 🗟 🚳 🛇 Add Note	
Date	By Progress	
Action	Plan Helated Progress Logs	
26	→ // Q 4	
Date		

**General Action Plan Goal Notes** - Enter any notes related to this goal that you wish. **Action Plan Goal Notes** - This window allows you to create specific notes related to this goal at the time the goal is opened, when a goal is closed or when you want to document

Add Note

Progress towards the goal. To enter an Action Plan Goal Notes, simply click the button. The form will appear on your screen. Fill out the fields as appropriate, including the "Review Date", "Current Progress" and the appropriate "Notes."

Action Plan Related Progress Logs: This window will show all Progress Logs that have had this specific goal linked to it.

- After filling out all appropriate fields, you can save this record and return to the Action Plan by clicking on the Close button and saying Yes to the "Want to Save Your Changes" message.
- If creating more than one "Manual" Goal, you can click on the

Save And Create Another button. This will save and close the current record and bring up a brand new Action Plan Goal record for you to fill out.

## Adding Template Goals to an Action Plan:

Provide[®] Enterprise allows your community to create "Template" Goals to associate with a client's Action Plan. These are suggested goals that can be integrated into a client's Action Plan. Basically, when you add a Template Goal to your Action Plan, you do not need to rewrite many of the fields within the Action Plan Goal, as they will be automatically filled-in based on the information within the Template Goal. Currently, the Case Management Workgroup is working on creating these goals for Broward County Case Managers to use. They will be available in the near future. To add a "Template" Goal, follow these steps:

• While in the Action Plan, click the Add Template Goal button. The template selector will open, similar to that in the figure below:

elect From View					ĺ
Please select item(s) from the view.					
2 🗇 🖣 🛱 🚳 🐸 🥕 [	d 🗐 📼	•			
Life Area	Category	Name			
HIV Disease Progression					
HIV Disease Progressio	on Access	Sample Goal			
			ОК	Cancel	
					9

- Click on I next to the applicable Life Areas to expand the view and show the Categories of goals that are available to be selected. Click on the next to the "name" of the goal that you wish to add to your Action Plan and click on the OK button.
- The goal will be added to your Action Plan. Clicking the Refresh button (2) will refresh the embedded view of the goals and you will see the "Template" Goal appear.
- If you wish to edit the goal, simply double click on the goal, click the *edit* button and make any necessary changes.

#### Notes Tab:

• The Notes tab of the Action Plan holds information related to the overall General Action Plan, as well as Action Plan Progress Notes related to the plan. Simply type any general notes in the "General Action Plan Notes" section.

#### Action Plan Progress Notes:

• Action Plan Progress Notes are meant to be used to document progress towards meeting the goals that make up the Action Plan.

• To create an Action Plan Progress Note, simply click on the Add Note button. The Action Plan Progress Note, similar to that in the figure below will appear:

Provide Enterprise - [Action Plan Pro	gress For Test Client]
🔿 File Find View Actions Tool	ls Reports Windows Help
Close All	
Action Plan Progress : Test Client Compass - Client Services : CM	t () Test [05/26/2015]
Action Plan Progress	
Review Date	* 05/26/2015
Reviewed By	* CM Test
Current Progress	*
Notes	A
	*

Fill out the fields as appropriate:

- **Review Date** Enter the Date of the Review of the plan.
- **Reviewed By** This field will default to your name.
- **Current Progress** Select the reason this note is being entered.
- **Notes:** Enter any notes related to this Action Plan Progress Note, such as why the goal is being opened, closed or specific progress has been made towards meeting the goal.

#### **Completing the Action Plan:**

Once you have added applicable goals to your Action Plan, it is important to mark the plan as Completed with the client. Changing the status of the Action Plan is important because it will be used in reporting and auditing. To Complete the Action Plan, follow the steps below:

• From within the Action Plan, click on the Van Development Completed button on the Action bar. A dialog box similar to that in the figure below will appear:

Enter the Action Plan	Develo 💌
05/26/2015	
ОК	Cancel

 Enter or Select the Date that the Action Plan was completed with your client and click on the OK button. The Action Plan will refresh, with the "Action Plan Status" changing to "Completed" and the "Date Completed" and "Completed By" fields being populated (seen in the figure below):

Provide Enterprise - [Action Plan For Test Client]				
∂ File Find View Actions Tools	Reports Windows Help			
Close Altrian Close Action Plan Contraction Plan				
Action Plan : Test Client () Compass - Client Services : CM Test	Action Plan : Test Client () Compass - Client Services : CM Test [05/26/2015]			
Summary Goals Notes				
Action Plan Status	Completed			
Case Manager/Counselor	CM Test			
Action Plan Type	Medical Case Management 🔹			
Funding Source *	Ryan White MAI			
Date Opened	05/26/2015			
Date Completed	05/27/2015			
Completed By	CM Test			
Life Area(s) With Identified Deficiency	Child Care/Support Functional Assessment HIV Disease Progression Legal Medications			
Date entered case management *	05/26/2015			
Did you provide information on available services and eligibility criteria?	Yes			
Is Client in Medical Care? *	Yes 🔹			

## **Reviewing the Action Plan:**

Once the Action Plan has been marked as Completed, you will be available to "Review" the Action Plan at any time. Marking the Action Plan as Reviewed is certifying that you have reviewed the plan with your client and made any adjustments and updates necessary. To mark the Action Plan as Reviewed, follow the steps below:

• From within the Action Plan, click on the **Reviewed** button on the Action bar. A dialog box similar to that in the figure below will appear:

Enter the Review	Date:
05/27/2015	•
ОК	Cancel

 Enter or Select the Date that the Action Plan was reviewed with your client and click on the OK button. The Action Plan will refresh with the "Action Plan Status" changing to "Reviewed" and the "Last CM Review Date" and "Last CM Reviewed By" fields being populated (seen in the figure below):

g Provide Enterprise - [Action Plan For Test Client]			
C File Find View Actions Tools Reports	Nindows Help		
Close 🖉 🖌 Reviewed 🖌 Supervisor Review	Gose ☆ Average Averag		
Action Plan : Test Client () Compass - Client Services : CM Test [05/26/2015]			
Summary Goals Notes			
Action Plan Status	Reviewed		
Case Manager/Counselor	CM Test		
Action Plan Type	Medical Case Management v		
Funding Source	Ryan White MAI		
Date Opened	Tuesday May 26, 2015		
Date Completed	Wednesday May 27, 2015		
Completed By	CM Test		
Last Review Date	Wednesday May 27, 2015		
Last Reviewed By	Amanda Epping/GTI		
Life Area(s) With Identified Deficiency	Child Care/Support		
Date entered case management	Tuesday May 26, 2015		
Did you provide information on available services and eligibility criteria?	Yes 🔻		
Is Client in Medical Care?	Yes		

## Supervisor Review of the Action Plan:

Once the Action Plan has been marked as Completed, the Supervisor will be available to document their review of the Action Plan. To mark the Action Plan as having been reviewed by the supervisor, follow the steps below:

• From within the Action Plan, click on the Supervisor Review button on the Action bar. A dialog box similar to that in the figure below will appear:

Enter the Supervise	or Review 💌
05/27/2015	<b>•</b>
ОК	Cancel

Enter or Select the Date that the Supervisor reviewed the Action Plan and click on the OK button. The Action Plan will refresh and the "Last Supervisor Review Date" and "Last Supervisor Reviewed By" fields being populated (seen in the figure below):

Provide Enterprise - [Action Plan For Test Client]				
Close	File     Find     View     Actions     Tools     Reports     Windows     Help       I Close     Image: Action Plan			
Action Plan : Test Client () Compass - Client Services : CM Test [05/26/2 Summary Goals Notes	2015]			
Action Plan Status Case Manager/Counselor Action Plan Type Funding Source Date Opened Date Completed Completed By Last Review Date Last Reviewed By Last Supervisor Review Date	Reviewed        CM Test        Medical Case Management        Fyran White MAI        Tuesday May 26, 2015        Wednesday May 27, 2015			
Last Supervisor Review By Life Area(s) With Identified Deficiency	Amanda Epping/GTI Ohd Cze/Support Functional Assessment HIV Disease Progression Legal Medications			
Date entered case management Did you provide information on available services and eligibility criteria? Is Client in Medical Care?	* Tuesday May 26, 2015			

NOTE: Only users set up with Supervisory level access will be able to see and use the "Supervisor Review" button.

## Closing the Action Plan:

The Action Plan should only be closed when the client is being discharged from your service and/or if the client is being transferred to another agency. To close the Action Plan, follow the steps below:

• From within the Action Plan, click on the Close Action Plan button on the Action bar. If you have not yet closed your Action Plan Goals, a dialog box similar to that in the figure below will appear:



- If this occurs, click on the OK button to return to the Action Plan.
- Double click on each Open Action Plan Goal.
- Click on the <u>Edit</u> button.
- Click on the Close Action Plan Goal button. The goal will be closed and three additional fields will appear:
  - Actual Resolution Date: Enter the date the goal is being closed.
  - **Outcome Measure:** Enter the reason the goal is being closed.

- **Outcome Comments:** Enter any comments relative to why the goal is being closed.
- Once all Open Action Plan Goals have been Closed, click on the Close Action Plan button on the Action bar.
- Two additional fields will appear:
  - **Date Closed:** Enter the date the Action Plan is being closed.
  - **Reason Closed:** Enter the reason that the Action Plan is being closed.

mmary Goals Notes		
Action Plan Status	Closed	*
Case Manager/Counselor	CM Test	
Action Plan Type	Medical Case Management	<b>*</b>
Funding Source	* Ryan White MAI	<b>•</b>
Date Opened	05/26/2015	
Date Completed	05/27/2015	÷ •
Completed By	CM Test	
Date Closed	*	
Reason Closed	*	
Close Comments/Discharge Pla		*

save your changes. Click on the Yes button to save your changes and return to the View Case Management Activity form.

## Updating the Action Plan:

Any time you need to update the Action Plan, double click on the action plan and click on "Edit."

## Printing the Action Plan:

To print the Action Plan, simply click on the Print Justice State State

# Benefit Enrollment Tracking:

This form is used to track efforts made by Medical Case Managers to help Clients get enrolled in other benefit programs.

To create or update a benefit enrollment tracking record, go to the Client Profile, on the

Health Benefits – Other Benefits tab and click on Add Benefit Enrollment Tracking Record

) Provide Enterprise - [Benefit Enrollment Tracking For Test Client]							
∂ File Find View Actions Tools Reports W	indows Help						
📢 Close 👋 🛛 🥕 Edit 💕 Link to Client Profile 🛛 🍜 Create Scan Document							
Benefit Enrollment Tracking : Test Client () Compass - Client Services : CM Test [05/26/2015]							
Benefit Enrollment Tracking Documentation							
Status	* Assigned for Tracking						
Source	Manual Entry 👻						
Program Name	*						
Date Flagged for Screening	* 05/26/2015						
Date Assigned for Tracking	* 05/26/2015						
Assigned Agency	* Compass 🗸						
Assigned Provider	* CM Test						
Notes							
😰 🎒 🥟 🛕 🍕 📄 Add Note							
Deleted Date Created By Subject							

- Status Select the status.
- **Source** This will default to manual entry.
- **Program Name** Select the program name.
- Date Flagged for Screening Enter the date the client was flagged for screening.
- Date Assigned for Tracking Enter the date the client was assigned for tracking.
- Assigned Agency Select the assigned agency
- Assigned Provider Select the assigned provider.
- Next Client Follow-up date Enter a follow-up date.
- Is Client Marketplace Eligible? Select "Yes," "No," "Unknown."
- Add Note You can add a benefit enrollment tracking note by clicking on
   Add Note

ି P	rovide	e Enterpris	se - [Benefit I	Enrollmen	t Tracking	Note For T	est Client]			
0	File	Find Vi	ew Actions	Tools	Reports	Windows	Help			
◀	Close	ABC								
	Benef Comp	fit Enrolln ass - Clie	nent Trackin ent Services	g Note : : CM Te	Test Clier st [05/26	nt () /2015]				
	Bene	fit Enrollme	nt Tracking No	ote						
	Not	e Date				* 🚺	5/26/2015			<b></b>
	Sub	oject				*				
	Con	nments								
										*

Fill out the fields as appropriate:

- Note Date Enter the date of the note.
- **Subject** Enter the subject.
- Comments Enter the text of the note.
   After filling out all appropriate fields, you can save the note and return to the benefit enrollment tracking by clicking on the Close button and saying Yes to the "Want to Save Your Changes" message.

## Payment Request:

This form can be used to request that a payment be made on behalf of a Client. A Provide User can submit a Payment Request within their agency or to another agency. For example, a Medical Case Manager at one agency may submit a Payment Request to another agency for a service that the MCM agency does not offer.

To create a service provided, under create click on "Payment Request."

Provide Enterprise - [Payment Request For Test Client]								
∂ File Find View Actions Tools Reports Win	File Find View Actions Tools Reports Windows Help							
Payment Request : Test Client () Compass - Client Services : CM Test [05/19/2015	Payment Request : Test Client () Compass - Client Services : CM Test [05/19/2015]							
Payment Vendor Attachments								
Status	* Pending v							
Requesting Provider	* CM Test							
Payment Service Date	* 05/19/2015							
Payer Organization	*							
Payer Program	*							
Service Category	*							
Service Provided	*							
FundingSource	*							
Units of Service	*							
Unit of Measure	*							
Unit Cost of Service	*							
Total Cost of Service	\$0.00							
Assignee								

Fill in the appropriate fields:

- **Status –** This will default to "Pending" until it is submitted.
- **Requesting Provider** This will default to you or you can select the referring person.
- **Payment Service Date** Enter the service date.
- Payer Organization Select the payer organization
- Service Category, Service Provided, Funding Source, Unites of Service, Unit of Measure These will all populate when payer organization is selected.
- Unit cost of Service Enter the unit cost
- **Total Cost of Service** This will be computed and automatically populate.
- Assignee If an assignee, select the assignee.

# Ambulatory Outpatient Medical Case Management Providers

This chapter outlines the tasks that need to be completed by Ambulatory Outpatient Medical Case Management Providers in Provide[®] Enterprise to meet all billing and reporting requirements. Over time, the data elements outlined in this Chapter must also be kept current as things change for the client.

# Client Profile

Within the Client Profile, it is important to keep all information updated as the client's life situation changes.

# Medical Summary

Much of the data related to the client's Medical Care can be found in the Medical Summary

To navigate to the Medical Summary, follow the steps below:

• Navigate to the Client Profile. Once in the Profile, select the "View" button and then choose "Medical Summary".



• A form similar to that in the figure below will open:

ovide Enterprise - [View Medical Summary For Test Client]				
File Find View Actions Tools Reports Windows Help				
Close App CD4 and Viral Loads				
/iew Medical Summary : Test Client () Compass - Client Services : CM Test [05/27/2015]				
Condition Services Medical Appointments Medications Test Results Vaccinations Care Notes Referrals				
Recent Diagnosis (Within the last 12 months)				
😰 🎒 🥜 🗋 🧯 🗋 Add Diagnosis				
Date Diagnosed Code Diagnosis Name				
Medical Problems				
😰 🎒 🥟 🧕 🏚 🚹 Add Medical Problem Record				
Deleted Status Problem Date Started Date Ended				
TB Assessments				
2 🦪 🥜 🗋 📋 Add TB Assessment Record				
Date Assessed Clinically Indicated Action				
Treatments				
🗃 🚑 🥒 👌 🏭 🗋 Add Treatment Record				
Status Type Started Ended Reason Ended				

- The Medical Summary contains eight tabs of information, described below:
  - **Condition** The Condition tab collects information related to the client's diagnosis, medical problems, treatment and annual TB Assessments.
  - Services This tab holds information regarding services provided to the client, including Care Actions, Service Provided, and Procedure records. Care Actions and Services Provided can be created from this tab.
  - **Medical Appointments** This tab list all medical appointments the client has in Provide and an appointment can be added on this tab.
  - Medications The Medications tab holds information on the client's current drug protocol as well as prescriptions the client may have had filled and allergy records. Drug, Prescription, and Allergy records can be created from this tab.
  - Test Results This tab displays all labs the client has had completed, including CD-4 and Viral Load counts. You can also create an individual Test Result or a Lab Panel from this tab.

- **Pregnancies** This tab contains information related to when a client is pregnant. All pregnancies must be documented.
- **Vaccinations -** The vaccinations tab contains information regarding the client's vaccination for Hepatitis A, B, HPV, Influenza and Pneumonia.
- **Care Notes** This section will show Medical Case Management, Peer Counseling, and Outreach related Progress Logs.
- Referrals The Referrals tab of the Case Management Summary displays any referrals made for the client and also allows for creation of a Referral record. Special care referrals are also displayed and created on this tab,

# Diagnosis

Diagnosis records are used to track medical diagnoses a client may have received. To create a Diagnosis record, follow the steps below:

• From within the Medical Summary, Conditions Tab, click on the Add Diagnosis button. The Diagnosis record, similar to that in the figure below, will open:

) Provide Enterprise - [Diagnosis For T	est Client]
🔿 File Find View Actions Tool	s Reports Windows Help
Close 🍄 🛛 🛪 Save And Create A	nother
Diagnosis : Test Client () Compass - Client Services : CM	Fest [05/27/2015]
Diagnosis	
Diagnosis Status	* Active
Date Diagnosed	* 05/27/2015
Diagnosis Code	*
Diagnosis Description	
DSM-IV Severity	
Diagnosed By	
Comments	A
	v

- Diagnosis Status Select whether this diagnosis is Active or Inactive.
- **Date Diagnosed** Enter the date the client was diagnosed with this condition.
- **Diagnosis End Date** This field will only show if the "Diagnosis Status" is set to "Inactive." Enter the date the client no longer had an active diagnosis.
- **Diagnosis Code/Description** Select the diagnosis code. This will fill in both the Diagnosis Code and the Diagnosis Description fields.
- **DSM-IV Severity** Select the severity.
- **Diagnosed By** Enter the name of the provider who diagnosed the client with this condition.
- **Comments** Add any needed comments

• After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the View Medical Summary form.

## Medical Problem

Medical problem records are used to track the client's medical problems using either generalized problem names or SNOMED problem list codes. To create a Medical Problem record, follow the steps below:

From within the Medical Summary, Condition Tab, click on the

figure below, will open

0 P	rovide Ent	erprise -	[Medical P	roblem	For Test C	lient]	-					
0	File Fine	d View	Actions	Tools	Reports	Windows	s He	elp				
◀	Close 🐧	5										
	Medical F Compass	roblem : - Client	: Test Clier Services :	nt () CM Te	st [05/27	/2015]						
	Medical P	roblem										
	Problem	Class		•							•	-
	Status					* [	Active	;				
	Date Sta	art				*	05/27	/2015			+ -	-

Fill out the fields as appropriate:

- **Problem Class** Select the problem class.
- **Problem Name** Select the problem name.
- **Snomed Code** Select the snomed code.
- Date Start Enter the start date of the medical problem.
- End Date Enter the end date of the medical problem.
- After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the View Medical Summary form.

## TB Assessment

This is documented within the TB Assessment record. To create a TB Assessment record, follow the steps below:

• From within the Medical Summary, Conditions Tab, click on the

Add TB Assessment Record button. The record, similar to that in the figure below, will



NOTE: Many of the fields shown in the figure will be hidden until certain fields are filled out (i.e. PPD Status, PPD Result, etc.).

- Date Assessed Enter the date the client's TB status was assessed.
- **Clinically Indicated Action** Select the action that was clinically indicated for this client.
- **PPD Reaction Size/PPD Result** These fields will show only if the "PPD Status" is set to "Completed". Enter the reaction size and/or the result of the client's PPD skin test.
- Chest X Ray Status This field will only show if the "PPD Result" is set to "Positive" or "Indeterminate." Enter the status of the client's Chest X-Ray.
- **TB Type** This field will only show if the "Chest X Ray Status" is set to "Completed." Enter the type of Tuberculosis indicated by the client's Chest X-Ray.
- **TB Treatment Started/TB Treatment Ended** These fields will only show if the "PPD Treatment" is set to "Started" or "Completed". Enter the applicable dates in these fields.
- **Treating Provider** This field will only show if the "PPD Treatment" is set to "Started" or "Completed". Enter the provider who is treating the client for tuberculosis.
- After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the View Medical Summary form.

NOTE: Only 1 TB Assessment Record should be created annually. As a client moves through the screening and treatment process, you can update the existing TB Assessment record as needed.

# Treatment Record

This form is used to track when a client undergoes treatment for (or documents when it is determined that treatment is not clinically indicated) for key conditions that are monitored and reported on for HIV Care. Conditions are listed below:

- Chlamydia
- CMV
- Gonorrhea
- Hepatitis A
- Hepatitis B
- Hepatitis C
- Herpes
- HPV
- MAC Prophylaxis
- PCP Prophylaxis
- Syphilis
- Toxo Prophylaxis

Documentation of treatment for these conditions is done within the Treatment record. To create a Treatment record, follow the steps below:

• From within the Medical Summary, Conditions Tab, click on the

Add Treatment Record button. The record, similar to that in the figure below, will open:

Provide Enterprise - [Treatment ]	For Test Client]	Research W. Latt. Soc. Society 11						
⊘ File Find View Actions	Tools Reports Windows Help							
Close ABC Save And Create Another								
Treatment : Test Client () Compass - Client Services : ( Treatment	Treatment : Test Client () Compass - Client Services : CM Test [05/27/2015] Treatment							
Treatment Status Treatment Type Date Treatment Started	* Active * 05/27/2015	▼ ▼ ▼						

- **Treatment Status** Select whether or not the client is currently being treated for this condition.
- **Treatment Type -** Select the condition the client is receiving treatment for.

- **Date Treatment Started** Enter the date the client started treatment for this condition.
- **Date Treatment Ended** This field will only show if the "Treatment Status" is set to "Active". Enter the date the client's treatment for this condition ended.
- After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

# **Care Action**

This form is used to capture some specific clinical activities that are not typically captured as data points like in CPT-4 or HCPCS encoded Procedures. If a provider does capture them as Procedure records in their EMR with "custom" codes and can export them from the EMR and upload them to PE, the PE system can be set to recognize these codes and auto generate the Care Action records. These interventions may or may not have been provided by your agency, but need to be documented when they occur. They include:

- Adherence Counseling
- Dental Treatment Plan
- HIV Risk Counseling
- Mental Health Evaluation
- Oral Health Education
- Oral Health Exam
- Oral Health History
- Substance Abuse Evaluation

To create a Care Action, follow the steps below:

• From within the Medical Summary, Services Tab, click on the Add Care Action button. The record, similar to that in the figure below, will open:

Provide Enterprise - [Care Action For Test Client]							
∂ File Find View Actions Tools Reports Wind	ows Help						
Care Action : Test Client () Compass - Client Services : CM Test [05/27/2015]							
Care Action							
Service Category	Ambulatory Outpatient Medical Care						
Provider	* CM Test						
Care Action	* Adherence Counseling						

Fill out the fields as appropriate:

• Service Category - This will default to your service category

- **Provider** Enter the name of the provider that provided these interventions.
- **Care Action(s)** Select the interventions that were provided to the client.
- After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

## Service Provided:

 From within the Medical Summary, Service Tab, click on the Add Service Provided button. The record, similar to that in the figure below, will open:

0.								
	rovide Enterprise - [Service Provide	d For Test Client						
0	File Find View Actions Too	ls Reports Windows Help						
	🕼 Close 📲 🖌 Complete 🛛 🚰 Link to Client Profile							
[	Service Provided : Test Client ()							
l	Compass - Client Services : CM	Test [05/18/2015]						
	Service Provided Support Document	tation						
	Status	* Pending						
	Provider	* CM Test						
	Service Date	* 05/18/2015						
	Service Category	*						
	Service Provided	*						
	Funding Source	*						
	Units of Service							
	Unit of Measure	▼						
	Unit Cost of Service							
	Total Cost of Service	\$0.00						
	Bus Pass Voucher ID	*						
	Comments	A						
		~						

Fill in the appropriate fields:

*Depending on the service provided, the date entry fields will vary.

- **Status** Select the status of the service provided.
- **Provider** Select the type of appointment.
- Service Date Select the service date from the list by clicking on the
- Service Category Select the service Category
- Service Provided, Funding Source, Units of Service, Unit of Measure These will populate based on the selected service category.
- Unit cost of Service Enter the unit cost of service.
- **Total Cost of Service** This will be computed and automatically populate.
- Buss Pass Voucher ID Enter the bus pass voucher ID.
- **Comments –** Enter any comments needed.

• Support Documentation Tab – Scan/attach any necessary support documentation. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

## Procedure

This form is used to track the provision of Ambulatory Outpatient Medical Care, Lab Services and Oral Health Care services at the CPT-4, D-Code level, or "Local Codes." Most procedure records are loaded via Imports from the EHR.

A nightly agent in the Provide system automatically creates medical appointment, vaccine, and care actions from procedure records as follows:

- Medical Appointment Records are created for any client has a medical procedure or lab service on a given date where there is not already a medical appointment record for the provider agency.
- Vaccine records are created for any client where the procedure code has been mapped to a specific vaccine in the Provide code set library.
- Care Action records are created for any client where the procedure code (local code) has been mapped to a specific care action in the Provide code set library.

From within the Medical Summary, Service Tab, click on the Add Procedure button. The record, similar to that in the figure below, will open:

Provide Enterprise - [Procedure For Test Client]
File Find View Actions Tools Reports Windows Help
Procedure : Test Client () Compass - Client Services : CM Test [05/27/2015]
Procedure
Status * Completed ~
Date Completed * 05/27/2015
Funding Source * Ryan White Part A
Procedure Code *
Service Category *
Procedure Description
Place of Service
Facility
Provider
Cost of Procedure

- Status This will default to "Completed."
- **Date Completed –** Enter the date completed.

- Funding Source Select the funding source.
- **Procedure Code** Select the Procedure Code for the procedure being documented. Clicking on the button will activate the Procedure field selection dialog.
- Service Category and Procedure Description These will auto populate based on the selection of the procedure code.
- Place of Service Select the location of the procedure.
- **Facility** Select the facility of the procedure.
- **Provider** Enter the provider that performed the procedure.
- **Cost of Procedure –** Enter the cost of the procedure.

## Appointment

This form is used to document scheduled, kept and missed appointments. Normally it is primarily used to track AOMC appointments but can be used to track other types as well. The PE system automatically will generate AOMC Appointment records if a client has a Medical or Lab Procedure record recorded by a provider on a given date and no appointment exists. It is also useful to record scheduled and missed appointments and these can either be entered manually or can be uploaded from a providers EHR data system.

From within the Medical Summary, Medical Appointment Tab, click on the ddd Appointment button. The record, similar to that in the figure below, will open:

J P	O Provide Enterprise - [Appointment For Test Client]						
0	🔾 File Find View Actions Tools Reports Windows Help						
◀							
	Appointment : Test Client () Compass - Client Services : CN	Test [05/18/2015]					
	Appointment						
	Status	* Scheduled 🗸					
	Туре	*					
	Provider Agency	*					
	Appointment With						
	Appointment Date	* 05/18/2015					

Fill in the appropriate fields:

- **Status** Select the status of the appointment.
- **Type** Select the type of appointment.
- Provider Agency Select the provider name from the list by clicking on the 🗔

- Appointment With Select the provider name from the list by clicking on the 🗔
- **Appointment Date** Enter the appointment date.

## Drug

Optional form used to track a client's medication protocol.

To document a client's medication protocol, create a "Drug" record for each medication a client is taking.

From within the Medical Summary, Medication Tab, click on the Add Drug button. The record, similar to that in the figure below, will open:

Provide Enterprise - [Drug For Test Clie	nt]
🔿 File Find View Actions Tools	Reports Windows Help
Close 🍄 🛛 🕈 Save And Create Ano	ther
Drug : Test Client () Compass - Client Services : CM Te	st [05/27/2015]
Drug	
Drug Status *	Active
Date Started *	05/27/2015
Drug Name 🔹	
Drug Name Generic	
Strength	
Route	<b></b>
Dosage Form	
Frequency	
Instructions	
Drug Comments	
	<u>^</u>
	<b>•</b>

- **Status** This field will default to "Active" to indicate that the client is actively taking this medication.
- **Date Started** Enter the date the client started taking this medication.
- **Date Ended** This field will only show if the "Status" is set to "Inactive," meaning that the client is no longer taking this medication. Enter the date the client stopped taking this medication.
- **Drug Name** Click on the ... button to activate the Drug selection dialog.
- Drug Name Generic/Drug Code/Strength/Route/Dosage Form These will all be filled out automatically after selecting the Medication, Strength, Route and Dosage Form from the drug selection dialog.

- **Frequency** Select the frequency of which the client is prescribed to take this medication.
- Instructions Enter any necessary instructions related to this medication.
- Reason Ended This field will only show if the "Status" is set to "Inactive", meaning that the client is no longer taking this medication. Simply select the reason the client stopped taking the medication.
- **Comments** Enter any comments related to the medication.
- After filling out the record, click on the 
   Close button. You will be prompted to save your changes. Click on the 
   Yes button to save your changes and return to the View Case Management Activity form.

## Prescription

This form is used to track each Prescription.

From within the Medical Summary, Medications Tab, click on the Add Prescription button. The record, similar to that in the figure below, will open:

File Find View Actions Tools Reports Windows Help     Gose      Im Save And Create Another      Ink to Client Profile
Close 🛷 📓 Save And Create Another 💕 Link to Client Profile
Prescription : Test Client () Compass - Client Services : CM Test [05/27/2015]
Prescription
Status * Filed
Funding Source * Rvan White Part A
Date Prescribed
Date Filled * 05/27/2015
Refill?
Drug Name *
Drug Name Generic
Strength
Route
Dosage Form
Frequency
Instructions
Quantity Prescribed
# Days Supplied
Prescribed By
Phamacy
Dispensed By
Prescription ID
Coordination of Benefits *
Charge Class *
Prescription Price
Dispensing Fee
Copay Amount
Prescription Comments

Fill out the fields as appropriate:

- **Status** The Status field defaults to "Filled," "Dispense" can also be selected.
- Funding Source Select the funding source.
- **Date Filled** Enter the date the prescription was filled.
- **Refill** Select whether or not this was a refill.
- Drug Name/Drug Name Generic/Strength/Route/Dosage Form/Drug Code NDC/Drug Code - These fields will automatically be computed based on the drug, dosage, and NDC codes selected by clicking on the 🛄 button.
- **Frequency** Enter the frequency this medication is prescribed for.
- Instructions Enter any necessary instructions related to this medication.
- **Quantity Prescribed** Enter the quantity prescribed.
- **# of Days Prescribed** Enter the number of days medications were prescribed for.
- **Prescription End Date** Enter the end date of the prescription.
- **Number of Refills Authorized** Enter the number of refills authorized by the prescribing physician.
- **Prescribed By** Select the provider who prescribed this medication.
- **Pharmacy** Select the pharmacy that filled this prescription.
- **Dispensed By** Enter the name of the provider who dispensed this medication.
- **Prescription ID** If appropriate, enter the identification number for this prescription.
- Lot ID If appropriate, enter the Lot # for this prescription.
- **Prescription Price** Enter the price of this prescription.
- **Dispensing Fee** Enter the dispensing fee associated with this prescription, if applicable.
- **CoPay Amount** Enter the amount of the copay paid by the client, if appropriate.
- **Prescription Comments** Enter any comments related to this prescription.
- After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

# Allergy

Optional for used to document a Client's allergies.

From within the Medical Summary, Medications Tab, click on the Add Allergy Record button. The record, similar to that in the figure below, will open:
Provide Enterprise - [Allergy For Test Client]				
File Find View Actions Tool	; Reports Windows Help			
Close ABC				
Allergy : Test Client () Compass - Client Services : CM	est [05/27/2015]			
Allergy				
Allergy Type	* [Medication 🔹			
Drug Name	*			
Drug Name Generic				
Diagnosed By				
Treatment Status				
Allergic Reactions				
Comments	A			

Fill out the fields as appropriate:

- Allergy Type Select the allergy type.
- **Drug Name –** Select the drug name.
- **Drug Name Generic** This will auto populate based on the drug name selected.
- Treatment Status Select the treatment status.
- Allergic Reactions Enter the allergic reactions.
- **Comments** Enter any additional comments.
- After filling out the record, click on the declose button. You will be prompted

to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

#### Test Results

The Test Results Tab of the "Medical Summary" shows information related to specific medical tests a client has been given, including CD-4, Viral Load, STI and OI screening tests. At a minimum, each the following Tests need to be documented when a client has them performed:

- CD-4 Count
- Viral Load
- Syphilis Screening
- Hepatitis B Screening
- Hepatitis C Screening
- PAP Smear
- Other STI Screenings

#### Adding a Test Result

From within the Medical Summary, Test Results Tab, click on the Add Test Result button. The record, similar to that in the figure below, will open:

> Provide Enterprise - [Test Result For Test Client] File Find View Actions Tools Reports Windows Help Test Result : Test Client () Compass - Client Services : CM Test [05/27/2015] Test Result Attachments Test Name * * 05/27/2015 Test Date ÷ • * Final Test Result Status • Test Result Modifier -Test Facility Test Completed By Entry Mode Manual Test Result Comments

Select the "Test Results" Tab, seen in the figure below:

- **Test Name** Select the name of the medical test you are documenting by clicking on the ... button.
- **Test Date** Enter the date the test was performed.
- **Test Result Status** Enter the status of the result.
- **Test Result Modifier** Select the modifier for this lab. For the most part, this will be = for medical tests (with the exception of tests such as a Viral Load, where a result may come back as < 50 copies/ml).
- **Test Facility** Enter the facility where the lab was completed by clicking on the ... button.
- **Test Completed By** Enter the provider who completed the test by clicking on the button.
- Entry Mode This will default to "Manual."
- **Test Result Comments** Enter any necessary comments related to this specific test.
- Attachment Tab Scan/attach any necessary test result documentation.
   Directions on how to "Create a Scan" can be found at the end of chapter
   3 or at the end of chapter 5 in this manual.

• After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

#### Adding a Lab Panel

To document a series of Test Results performed on the same date by the same provider, create a "Lab Panel." To do this, follow the steps below:

Click the Add Lab Panel button to activate the Lab Panel record, similar to that in the figure below:

Provide Enterprise - [Lab Panel For Test Client]					
∂ File Find View Actions Tools Report	s Windows Help				
Close April In Save And Create Another					
Lab Panel : Test Client () Compass - Client Services : CM Test [05/27/2015]					
Lab Panel					
Lab Panel Name *					
Lab Panel Completion Date * 05/27/	2015				
Lab Panel Completion Time * 2:24 PI	4				
Lab Panel Status	•				
Lab Panel Test Facility					
Ordering Provider					
Lab Panel Test Completed By					
Comments					
Tests					
10313					
TestName	Status Mod TestResult				

- Lab Panel Name Select the name of the Lab Panel you wish to document by clicking on the 🗔 button.
- Lab Panel Completion Date Enter the date this panel was completed.
- Lab Panel Status Enter the status of the lab panel.
- Lab Panel Test Facility Enter the facility where the lab panel was completed by clicking on the 🛄 button.
- Lab Panel Test Completed By Enter the provider who completed the lab panel by clicking on the ... button.
- **Tests: Test Name/Status/Modifier/Test Result** For each medical lab included in this panel, enter the Status, Modifier, and Result in the appropriate rows and columns.

After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

#### Vaccine

This form is used to capture the administration of a vaccine or the documentation of a "not clinically indicated" decision made by a physician. These records can auto generated from CPT-4 or HCPCS encoded procedure records but when done this way are typically limited to the generation of Vaccine records where the provider actually administered it. Historical records of Vaccines are typically captured in an EHR not in Procedure records so in those cases the clinical provider would have to enter these historical records manually in Provide.

From within the Medical Summary, Vaccination Tab, click on the Add Vaccination button. The record, similar to that in the figure below, will open

Provide Enterprise - [Vaccine For Test Client]				
Ә File Find View Actions Tools Reports Windov	vs Help			
Close 💞 Save And Create Another				
Vaccine : Test Client () Compass - Client Services : CM Test [05/27/2015]				
Vaccination				
Vaccine Status *	Administered			
Vaccine Name *	Hepatitis B - Booster 🔹			
Date Administered, Refused or Determined NA *	05/27/2015			
Administered By	CM Test			
Vaccine Type				
Vaccine Reactions				
	-			
Vaccine Manufacturer	▼			
Vaccine Lot Number				
Vaccine Expiration Date	••			

- Vaccinated Status? Select that status.
- Vaccine Name Select the vaccine name.
- Date Administered, Refused, or Determined NA? Enter the date.
- Administered By Enter who administered the vaccine.
- Vaccine Type Select the vaccine type.
- Vaccine Manufacturer Select the manufacturer.
- Vaccine Lot Number Enter the vaccine lot number.
- Vaccine Expiration Date Enter the vaccine's expiration date.
- Date Vaccinated for HPV This field will only show if "Vaccinated for HPV" is set to "Yes". Enter the date of the HPV vaccine.

- Date Last Influenza Enter the date of the last Influenza Vaccination.
- **Date Last Pneumococcal** Enter the date of the last Pneumococcal Vaccination.

After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

### Specialty Referrals

From within the Medical Summary, Referrals Tab, click on the Add Specialty Care Referral button. The record, similar to that in the figure below, will open:

Provide Enterprise - [Specialty Care Referral For Test Client]				
File Find View Actions Tools Reports Windows Help				
Close  Submit  Link to Client Profile Specialty Care Referral : Test Client 0				
Compass - Client Services : CM Test [05/2]	7/2015]			
Specialty Care Referral Attachments				
Status	* Pending	~		
Requesting Provider	* CM Test			
Appointment Date	* 05/27/2015	* •		
Specialty Service Type	*	•		
Specialty Provider Type	*	•		
Specialty Provider	*			
Payer Organization	*			
Payer Program	*			
Service Category	*	~		
FundingSource	*	T		
Total Cost of Service	\$0.00			
Assignee				
Procedures				
😰 🎒 🥜 🧕 🏚 Add Procedure				
Status Deleted End Date Code Procedure Cost Description				

Fill in the appropriate fields:

- Status This will default to "Pending" until it is "Submitted."
- **Referring Provider** This will default to you or you can select the referring person.
- Appointment Date Enter the appointment date.
- **Specialty Service Type –** Select the specialty service type.
- **Specialty Provider Type –** Select the specialty provider type.

- Payer Organization Select the payer organization.
- Payer Program Select the payer program.
- **Payer Organization** Select the payer organization.
- Funding Source Select the funding source.
- Assignee Select the assignee.
- **Referred for Service Description –** Enter the description of the service.

After filling out the record, click on the Submit button to submit the specialty care referral.

#### Referrals

From within the Medical Summary, Referrals Tab, click on the Add Referral button. The record, similar to that in the figure below, will open:

Provide Enterprise - [Referral For Test Client]				
∂ File Find View Actions Tools	Reports Windows Help			
Close AB				
Referral : Test Client () Compass - Client Services : CM Test [05/19/2015]				
Referral				
Referral Status *	Open 🗸			
Referring Person *	CM Test			
Referral Date *	05/19/2015			
Referred Type *	Internal 🗸			
Referred To *				
Referred for Service Type *				
Referred To Assignee				
Referred for Service Description	A			
Date Check Back *	06/19/2015			

Fill in the appropriate fields:

- **Status** Select the status of the referral.
- **Referring Person** This will default to you or you can select the referring person.
- **Referral Date** Enter the referral date.
- Referred Type Select if it is an "External" or "Internal" referral.
- **Referred To –** Select the agency the client is being referred.

- **Referred for Service Type –** Select the service type.
- **Referred to Assignee –** If referred to assignee, select the assignee.
- **Referred for Service Description –** Enter the description of the service.
- Date Check Back Enter the date to check back on the referral.

After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

# Chapter 100

# Oral Health Care Provider

This chapter outlines the tasks that need to be completed by Ambulatory Outpatient Medical Case Management Providers in Provide[®] Enterprise to meet all billing and reporting requirements. Over time, the data elements outlined in this Chapter must also be kept current as things change for the client.

# Oral Health Care Summary

Much of the data related to the client's Medical Care can be found in the Medical Summary.

To navigate to the Medical Summary, follow the steps below:

Navigate to the Client Profile. Once in the Profile, select the "View" button and then choose "Oral Health Care".



A form similar to that in the figure below will open:

Provide Enterprise - [View Oral Health Activity For Test Client]	
⊘ File Find View Actions Tools Reports Windows Help	
View Oral Health Activity : Test Client () Compass - Client Services : CM Test [05/27/2015]	
Procedures Test Results	
Dental Procedures	
😰 🎒 🥟 🧕 🏥 Add Procedure	
Deleted Date Code Description	
Care Actions	
😰 🎒 🥜 🗋 🏥 Add Care Action	
Date Action Provider	

The Oral Health Activity form procedures, care actions, and test results can be viewed and created.

#### Procedures:

From within the Oral Health Summary, click in the Procedure Tab. Click on the

Add Procedure button. The Procedure record, similar to that in the figure below, will open:

O P	Provide Enterprise - [Procedure For Test Client]				
0	File Find View Actions Tools Reports Windows Help				
4	Close ABC Save And Create	Another 🛛 🗃 Link to Client Profile			
	Procedure : Test Client () Compass - Client Services : CM	Test [05/27/2015]			
	Procedure				
	Status	* Completed			
	Date Completed	* 05/27/2015	<b>.</b>		
	Funding Source	* Ryan White Part A	▼		
	Procedure Code	*			
	Service Category	*	-		
	Procedure Description				
	Place of Service		<b>-</b>		
	Facility				
	Provider				
	Cost of Procedure				

- Status This will default to "Completed."
- Date Completed Enter the date this procedure was completed.
- **Procedure Code** Select the Procedure Code.
- Service Category and Procedure Description This will auto populate based on the selected procedure code.
- Facility Select the facility that the procedure was performed at.
- **Provider** Enter the provider that performed this procedure.
- **Cost of Procedure –** Enter the cost of the procedure.
- After filling out the record, click on the 
   Close button. You will be prompted to save your changes. Click on the 
   Yes button to save your changes and return to the Oral Health Activity form.

#### Care Action:

From within the Oral Health Summary, click in the Procedure Tab. Click on the

Add Care Action button. The care action record, similar to that in the figure below, will

open:

Provide Enterprise - [Care Action For Test Client]					
Ә File Find View Actions Tools Reports Wind	lows Help				
Close ABS					
Care Action : Test Client () Compass - Client Services : CM Test [05/27/2015]					
Service Category Provider Care Action	Oral Health Care   CM Test  Oral Health Education				

- Service Category This will default to your service category
- **Provider** Enter the name of the provider that provided these interventions.
- **Care Action(s)** Select the interventions that were provided to the client.
- After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Oral Health Activity form.

## Adding a Test Result:

From within Oral Health Activity, Test Results Tab, click on the Add Test Result button. The record, similar to that in the figure below, will open:

Select the "Test Results" Tab, seen in the figure below:

Provide Enterprise - [Test Result For Test Client]					
∂ File Find View Actions To	ols Reports Windows Help				
Close 🍄 Save And Create					
Test Result : Test Client () Compass - Client Services : CM	Test Result : Test Client () Compass - Client Services : CM Test [05/27/2015]				
Test Result Attachments					
Test Name	•				
Test Date	* 05/27/2015				
Test Result Status	* Final 👻				
Test Result Modifier	* =				
Test Facility					
Test Completed By					
Entry Mode	Manual				
Test Result Comments					

- **Test Name** Select the name of the medical test you are documenting by clicking on the ... button.
- Test Date Enter the date the test was performed.
- Test Result Status Enter the status of the result.
- **Test Result Modifier** Select the modifier for this lab. For the most part, this will be = for medical tests (with the exception of tests such as a Viral Load, where a result may come back as < 50 copies/ml).
- **Test Facility** Enter the facility where the lab was completed by clicking on the ... button.
- **Test Completed By** Enter the provider who completed the test by clicking on the button.
- Entry Mode This will default to "Manual."
- **Test Result Comments** Enter any necessary comments related to this specific test.
- Attachment Tab Scan/attach any necessary test result documentation. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.

• After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Medical Summary form.

## Adding a Lab Panel:

To document a series of Test Results performed on the same date by the same provider, create a "Lab Panel". To do this, follow the steps below:

Click the Add Lab Panel button to activate the Lab Panel record, similar to that in the figure below:

Provide Enterprise - [Lab Panel For Test Client]					
∂ File Find View Actions Tools	Reports Windows Help				
Lab Panel : Test Client () Compass - Client Services : CM Test [05/27/2015]					
Lab Panel					
Lab Panel Name					
Lab Panel Completion Date	05/27/2015	▲ ▼			
Lab Panel Completion Time	2:24 PM	▲ ▼			
Lab Panel Status	Final	•			
Lab Panel Test Facility					
Ordering Provider					
Lab Panel Test Completed By					
Comments					
Tests	L				
TestName	Status Mod TestResul	t			

- Lab Panel Name Select the name of the Lab Panel you wish to document by clicking on the 🗔 button.
- Lab Panel Completion Date Enter the date this panel was completed.
- Lab Panel Status Enter the status of the lab panel.
- Lab Panel Test Facility Enter the facility where the lab panel was completed by clicking on the ... button.
- Lab Panel Test Completed By Enter the provider who completed the lab panel by clicking on the ... button.
- Tests :Test Name/Status/Modifier/Test Result For each medical lab included in this panel, enter the Status, Modifier, and Result in the appropriate rows and columns.

• After filling out the record, click on the Close button. You will be prompted to save your changes. Click on the Yes button to save your changes and return to the Oral Health Activity form.

# Chapter

# Non-Medical Case Management, Nurse Care Coordinators, and Peer Mentors

# Client Profile

Within the Client Profile, it is important to keep all information updated as the client's life situation changes.

# Progress Log

This form is designed to capture the date and time and number of minutes that a provider spent working with or on behalf of a Client. Notes of the encounter/effort should be documented.

To create a Progress log, within the client profile, click on "Create" and then on "Progress Log."



Provide Enterprise - [Progress Log For Test Client]				
근 File Find View Actions Tools Reports Windows Help				
📢 Close 👋 🛛 🖋 Complete 📀 Get Sample Text 🔂 Link to Client Profile 🎒 Print				
Progress Log : Test Client () Compass - Client Services : CM Test [05/26/2015]				
Summary Appointments Labs Referrals				
Status	In Progress			
Provider	* CM Test			
Date	* 05/26/2015			
Start Time	* 9:22 AM			
Minutes	*			
Contact Category	*			
Contact Type				
Funding Source	•			
Brief Description	*			
Full Description				

Fill in the appropriate fields:

- Status The status will be "In Progress" until the note is marked "Complete."
- **Provider** This will default to your name, but you can choose a different provider in needed.
- Date Enter the date.
- **Start Time** Enter the start time.
- Minutes Enter the minutes spent.
- **Contact Category** Select the contact category.
- **Contact Type and Funding Source** This will auto populate bases on the contact category that you select.
- Brief Description Enter the brief description.
- Full Description Enter the full description.
- You may also add an appointment, lab results, or referrals from the note on the corresponding tabs.
- **Goals Addressed** On this tab, you can select the goals that were address by clicking on the 🗔 and select the goals that were address.

If the note is complete, click on Complete. To "Save" the note in progress, click on

and then on "Yes" to save your changes.

# Chapter

# Insurance Support Service Providers

## Overview

Insurance Support Services service category support both the payment of Insurance Premiums on selected ACA Policies but also assists clients in paying their copay and deductible charges. This chapter is designed for the County contracted provider that will be issuing these payments.

The system supports the Premium Payment process with the following feature:

- Insurance Services Enrollment: This record is used to document the plan and premium payment details of a client, submit it to the County for approval to enroll the client in Part A premium support, and then track the period of enrollment.
- Premium Payment: This record is used to track the issuance of premium payments for enrolled Clients.
- Premium Payment Batch: This record is used to collect a group of approved Premium Payment records into a batch, generate a batch payment file that can be imported into the providers accounting system, and then a "Voucher Detail File" can be imported back into the Premium Payment Batch record to automatically update the Premium Payment records (set the Status to "Paid", the Voucher ID and Voucher Date).

The PE system supports the Copay/Deductible Payment process with the following features:

- Payment Request: This is a new record can be used by any Part A provider to document and submit a request for payment of a copay or copay/deductible charge on behalf of a qualifying client. The Payment Request is reviewed and can be approved or rejected by the county.
- Payment Request Batch: This record is used to collect a group of approved Payment Request records into a batch, generate a batch payment file that can be imported into the providers accounting system, and then a "Voucher Detail File" can be imported back into the Premium Payment Batch record to automatically

update the Payment Request records (set the Status to "Paid", the Voucher ID and Voucher Date).

All of the records that are used to manage the program can now be found under a new set of views under the heading of "Benefits Management".

The rest of this manual details the above features.

### Insurance Services Enrollment

The Insurance Services Enrollment record can be created by any provider that is using the PE system or can be directly entered by the county. The most comment way currently that these records are created and submitted to the county is by clicking the "Request Insurance Services Enrollment" button on a Health Benefits – Ryan White Tab associated with a Client that has just enrolled in one of the qualifying plans under the ACA and they qualify for premium assistance thru Part A as shown below.

h Pro	ovide Enternris	e - IClient Profile For	Test Client]	has a second sec	
O F	File Find View Artions Tools Rends Windows Help				
٩ (	I cose				
C	Client Profile : Test Client () Compass - Client Services : Amanda Epping/GTI (04/28/2015)				
5	Profile Address Alert Demographics Relationships Finances Health Benefits Health RWA Eligibility				
- fi	Private Health C	Coverage Public Health	n Coverage Ryan White C	Other Benefits	
Ľ	Obels to see dot	- Uselik Decelar	-		
	Click to updat	e nealth benefits ==>		Update	
	Part A Premiur	m Support Status		No Benefits 👻	
	ADAP Premiur	m Plus Status		No Benefits	
	ADAP Medica	tion Assistance Status		No Benefits	
	Part A Insuran	ice Support Services En	rollments		
	2 🗇 🖣	🖺 🍪 🐸 🎤 🛛	👔 🌐 📄 Request Insuranc	nce Services Enrollment	
	Status Date	Status Deleted?			
	ADAP Premium Assistance Frontiments				
	Status Date Status Deleted? 2015/05/05 Eprollment Requested N				
	ADAP Medication Assistance Enrollments				
	2 🗿 🖣	🖺 🍪 🌽 🖸	) 🖞 📄 Add ADAP Medic	dication Assistance Enrollment	
	Status Date	Status	Deleted?		
	2015/05/05	Enrollment Requested	d N		

Provide Enterprise - [Insurance Services Enrollment For Test Client]							
🔾 File Find View Actions Tools Reports Windows Help							
↓ Close [*] ✓ Request Enrollment [©] Create [*] [©] View [*]	🛿 Close 🛷 🛛 🛷 Request Enrollment 🛛 © Create 🔻 🥥 View 👻						
Insurance Services Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/28/2015]	Insurance Services Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/28/2015]						
Insurance Services Enrollment Documentation							
Status	Pending						
Premium Payer	* Compass						
Date Requested	Thursday May 28, 2015						
Date Submtted							
Program Type	* ACA Insurance 🗸						
ACA Application ID							
Health Plan Carrier	* Aetna .						
Plan Name	* Aetoa Classic 3500 PD						
Member/Subscriber ID	* 11						
Premium Payment Due	*						
Grace Period (# Days)	*						
Premium Assistance Coverage Start Date	*						
Premium(s) Overdue At Enrollment?	* No 🔻						
Payee Name	*						
Payee Vendor ID							
Payee Street Address 1	*						
Payee Street Address 2							
Payee City	*						
Payee State	*						
Payee Zip	*						
Payee Phone							
Payee Payment Method	* Check 🔹						
Payment MEMO Line Type	* Client Name - Member ID 🔹						
Premium Amount	*						
Premium Amount - Support Portion	*						
Payment Cycle	*						

Fill in the appropriate fields:

- Status The status will be "Pending" until the note is marked "Requested."
- **Premium Payer** This will default to your agency, but you can choose a different agency if needed.
- Date Requested Enter the date.
- **Date Submitted** This will auto populate when it has been submitted.
- Health Plan Carrier, Plan Name, Member/Subscriber ID These fields will populate with the information from the client's profile.
- **Premium Payment Due** Enter the date by when the next (first) premium payment is due. This should normally be set to the current system date as you normally want payments to go out ASAP to ensure coverage is initiated as quickly as possible.
- **Premium Assistance Coverage Start Date** This is normally set to the first of the month of the first month of coverage that the Client is eligible to have their coverage start on.
- **Premium(s) Overdue at Enrollment?** This Yes/No flag field is used to document if the client is already behind one or more premium payments on their policy. If Yes, additional fields will ask for the Overdue Amount, Months, and if authorized the

number of months and amount that the program will pay for the client. Note, at this time this feature is not used in Palm Beach.

- **Payee Name** Click the UI button to select the Payee which will populate the rest of the Payee and Payment Method fields puling from the selected Vendor record. Note, see below for instructions on setting up new Vendors.
- **Premium Amount** Enter the Premium Amount that will be due at each payment cycle the premium amount less any tax credit the client is eligible to receive.
- **Premium Amount Support Portion** Enter the amount of the Premium Payment that the Part A program will be covering. Currently, the County rule is that if the Client is enrolled the Part A Program covers the entire Client portion of the premium (less tax credits).
- **Payment Cycle** Select the premium payment cycle. For most clients this will be "Monthly".
- **Contact Type and Funding Source:** This will auto populate bases on the contact category that you select.
- **Brief Description** Enter the brief description.
- **Full Description** Enter the full description.
- You may also add an appointment, lab results, or referrals from the note on the corresponding tabs.
- Goals Addressed On this tab, you can select the goals that were address by clicking on the 
  and select the goals that were address.

Once filled in, go to the "Documentation" tab and you should see in the embedded view any Scan document records that are "Proof of Insurance", "Insurance Premium Statements" or "ACA Enrollment Documentation" that are associated with the Client. Review these can documents to ensure that the information in the Insurance Services Enrollment record match up to them. If everything is valid, click the "Submit to County" button. This will place the record in a queue for the County to review and either approve or reject the enrollment.

Once the request is complete, click on **Request Enrollment**.

Designated users will then review the requested enrollment and submit those to the County, by clicking on Submit to County.

You can find a listing of the Insurance Services Enrollment records under one of the views shown below:

á	👌 Provide Enterprise - [Client\Clients All By Last Name]						
(	🔿 File Find 🔽 Actions Tools Reports Windows Help Agency						
	Close 👔		Activity				
	Benefits Management		•	Insurance Services Enrollments	•	All By Status	
	Last Name Client Billing		•	Payment Request Batches	•	Currently Enrolled	
Client			Budget Management	•	Payment Requests Approved to Pay		Enrollment Requested
H	Client Client		•	Payment Requests Submitted		Submitted to County	

Open the view "Benefits Management\Insurance Services Enrollments\Enrollment Requested" to see records that have been submitted to the county for processing. Open one of the records and they will display as shown below:

Insurance Services Enrollment Documentation		
Status	Enrollment Requested	
Premium Assistance Provider	Part A	
Date Requested	12/12/2014	<b>.</b>
Program Type	ACA Insurance	~
ACA Application ID		
Health Plan Carrier	<ul> <li>Blue Cross Blue Shield of Florida</li> </ul>	-
Plan Name	<ul> <li>BlueSelect Everyday 1443</li> </ul>	
Member/Subscriber ID	* 7657576	
Premium Payment Due	* 12/12/2014	÷.
Premium Assistance Coverage Start Date	* 01/01/2015	
Premium(s) Overdue At Enrollment?	* No	
Payee Name	*	
Payee Vendor ID		
Payee Street Address 1	*	
Payee Street Address 2		
Payee City	•	
Payee State	*	
Payee Zip	* .	
Payee Phone	() ·	
Payee Payment Method	* Check	
Payment MEMO Line Type	Client Name - Member ID	
Premium Amount	*	
Premium Amount - Support Portion	*	
Payment Cycle	*	
	· · · · · · · · · · · · · · · · · · ·	

If the County approves the enrollment, the Status is set to "Enrolled" and at this point County can begin to issue Premium Payments. You can see all Enrolled clients in the view "Benefits Management\Insurance Services Enrollments\Currently Enrolled" as shown below:

┥ Close	2	i 🖻 🛱	6	) 😃	<i>[</i>	<u>)</u>	
Last N	lame	First Name		MI	Progra	m Type	Date Enrolled
Client		John		Q	ACA In	isurance	2015/01/16
Lover	a	Kale			ACA In	isurance	2014/12/12

🖣 Close 🛛 🛃 🗧	9 🖻 🛱 剑	😃 🥜 🖸	<b>H</b>			
Date Due	RW Client ID	Last Name	First Name	MI	Program Type	Vendor ID
2015/01/01		Client	John	Q	ACA Insurance	12345
2015/01/01		Lovera	Kale		ACA Insurance	192

Open each Insurance Services Enrollment record from this second view when you are ready to start entering Premium Payments.

#### **Premium Payment**

From within the Insurance Services Enrollment record you will be able to click on the "Create\Premium Payment" button as shown below:

	Delete 🛷 Terminate 🛛 📀 Change	▼ 📀 Create 🔽 📀 View 👻					
Insurance Services Enrollment :	Insurance Services Enrollment : John Q. Client (CBJHCI0414641)						
BCHCS - Intake : Paul Casper/G	ATI [01/16/2015]	Scan Document					
Insurance Services Enrollment Prem	ium Payments Notes Documentation	Vendor					
Status	Enrolled	*					
Premium Assistance Provider	Part A						
Date Requested	01/16/2015	÷.					
Date Submtted	01/16/2015						
Date Enrolled	01/16/2015						
Program Type	* ACA Insurance	*					

A new Premium Payment record will be opened as shown below:

Provide Enterprise - [Premium Payment For Keith Gray]				
쉱 File Find View Actions Tools Reports Windows Help				
4 Close 💞 🕞 Save and Close 🖋 Status Payment Approved to Pay	📀 View 🔻			
Premium Payment : Keith Gray (CO44567) Compass - Client Services : Amanda Epping/GTI [05/29/2015]				
Premium Payment Notes				
Status	Pending	-		
FundingSource	* Ryan White Part A	•		
Payment Type	Premium	~		
Program Type	ACA Insurance	-		
Premium Coverage From Date	* Monday June 01, 2015	* <b>*</b>		
Premium Coverage To Date	* Tuesday June 30, 2015	÷ •		
Premium Coverage Comments		A		
Number of Months	1			
Premium Amount	\$400.00			
Premium Amount - Client Portion	\$26.00			
Premium Amount - Support Portion	\$374.00			
Payee Name	UnitedHealthCare of Florida			
Client Portion Status	Pending	-		
Comments		*		
		~		

All of the fields will automatically be filled in other than the two comments fields which can be used to enter some specific documentation related to the individual premium payment record. If the record appears correctly filled in and your comments have been entered as desired, click the "Status Payment Approved to Pay" button.

The PE system will automatically set the payment amount and coverage period for the payment. If the first payment is being issued after the 15 of the month for the next month, it recommend that you consider entering a second Premium Payment for the next month right away as the system would remind you to issue that payment as of the first of the next month anyway. This will prove to be more efficient.

#### **Premium Payment Batch**

The Premium Payment Batch record is used to group one or more Premium Payment records into an extract file that will be fed into the BRPC Accounting system to generate the Premium Payments.

Open the view "Benefits Management\Premium Batch Batches\All by Status" and click on the "Create Premium Payment Batch" button as displayed below:



A new Premium Payment Batch record will be created as shown below:

Provide Enterprise - [Premium Payment Batch]	
🔿 File Find View Actions Tools Reports Windows Help	
🔹 Close 🛷 🛛 🥒 Approve to Pay 🎒 View Summary	
Premium Payment Batch	
Premium Payment Batch	
Status	In Progress
Vendor Specific?	No
Excluded Vendors - Click button to select	
	A
Total Batch Amount	
Valid Batch Record Count	
Batch Amount Paid	
Paid Batch Record Count	
Linked Premium Payments	
😰 🎒 🖹 🏥 🌖 🐸 🥒 🧕 🤴 🗋 Scan for Approved to Pay Payr	nents
Del Status Vendor Name Premium From Date Premium To Date	Premium Amount Support Premium Amount Payment Method Payee Me
( III	•
🖉 Attach 🔚 Save As 🞲 Launch	

Fill in the form as desired:

- **Vendor Specific** This Yes/No field can be set to "yes" if you want to only have payments to a specific payee (Carrier).
- **Excluded Vendors**. This field appears if the "Vendor Specific" field is set to "No". You can use the UI button to select one or more Vendors (Carriers) to be excluded from the Batch.

Once the above fields are set, click on the "Scan for Approved to Pay Payments" button. This will search the database and for all Premium Payment records in a status of "Approved to Pay" that are not already linked to another batch and that meet the criteria selected above will be "linked" to this Batch record and display in the embedded view. It will calculate the number of payments that are in the batch and the grand total of al payments in the batch and set those fields on the form long with the name of the person that clicked the "Approved to Pay" button and the date when it was done.

You can now manually review the list of Payments in the view or click the "View Summary" button at the top to generate a report listing the Premium Payments in the Batch.

When you are confident that the Batch is correct and you wish to extract the Payment records to feed your accounting system, click the "Approved to Pay" button at the top of the form. This will generate a Batch file and automatically attach it within the Batch record as shown below:

Date Approved To Pay Approved To Pay By		01/18/2015		÷.		
		Bret Ballinger/GTI	Bret Ballinger/GTI			
Total Batch Amount		\$553.00	\$553.00			
Valid Batch Record Cou	nt	2				
Batch Amount Paid						
Paid Batch Record Cour	nt					
Linked Premium Paymen	its					
2 4 4 🛱 👌	🐸 🥟 <u>]</u> 🗐					
Del Status	Vendor Name	Premium From Date	Premium To Date	Premium Ar		
Approved to Pay	Blue Cross & Blue Shield of Fl	2015/01/01	2015/01/31			
Approved to Pay	Test	2015/02/01	2015/02/28			
	111					
File Attachments						
🖉 Attach  层 Save A	🗤 🕎 Launch					
PremiumPaymentBatchFile_20150118201232.txt						

Click once on the file attachment and then on the "Save As" to save a copy of the fill to your local system or a network drive from where you will be importing the file into your accounting system.

Once the batch file has been imported and processed in your accounting system you will need to generate a "Voucher Detail" file containing a row for every Premium Payment that was imported and paid with the original transaction ID, Payment Date and Payment ID that can then be imported. To do this, click the "Import Voucher Details" button on the Batch record and enter the file name of the import file. The Status of all records in the voucher detail file will update the associated Premium Payment records Status to "Paid" and set the Paid Date and Payment ID fields. Assuming all Premium Payments in the Batch were paid, you will then be able to click the "Paid" button on the Batch record.

### Vendor

The Vendor record is where you can document detailed information on each Payee (Carrier or Health Care Provider) that your agency will issue payments to. You can create a Vendor record from one of the "Providers\Vendors\" views or from the "Create\Vendor" button within the Premium Payment record or the Payment Request record.

File Find View Actions Tools Reports W	ndows Help	-
Close ABC		_
Vendor		_
Vendor		
A		
Agency	Compass	
Vendor Status	* Active	
Vendor Name	* UnitedHealthCare of Florida	
Vendor ID	*	
Vendor Taxpayer ID		
Vendor Type	Insurance Carrier	
Address Line 1	* 1445 W. Wayward	
Address Line 2		
County	Palm Beach	
City	* West Palm Beach	
State	* FL	
Zip (+4) Code	* 33333-3333	_
Phone	( ) :	_
Second Phone		-
Fax		_
Email Address		_
Contact Name		
Payment Method	Choole	_
Payment MEMO Line Type	Client News Marker ID	_
Notes		1

A new Vendor record will appear as shown below:

Fill in the fields and save the record. Some key fields are outlined below:

- **Vendor Type** Select "Insurance Carrier" for Premium payees and "Medical Provider" for any Payment Request payees.
- **Payment Method** Select how you want to normally pay this Vendor (Check, ACH or Credit Card). If you select ACH you will be required to also fill in the Vendor FRD ABA and Vendor DDA Number.
- **Payment MEMO Line Type** Select how the payee wants the Memo line constructed on each Payment.

The advantage of setting up the Vendor is that once it is established, as you "link" each Insurance Services Enrollment or Payment Request to a Vendor these data elements will automatically be inherited so you don't have to recheck and potentially have payments generated with memo line or payment types incorrectly specified.

Note: When in the Insurance Services Enrollment record if you click the "Create\Vendor" button a Vendor record will be created and it will be pre-populated with data from the Insurance Services Enrollment This way, you can always first click the Vendor Name UI button to search or an existing Vendor if it is found you can select it and the data from that Vendor setup will be inherited into the Enrollment. However, if not found, you can collect all of the Vendor data on the Enrollment and then click the "Create\Vendor" button and create a new Vendor from the data collected and entered.

# Chapter 13

# Early Intervention Service Providers

## EIS Episode of Care

This form is used to document each attempt to engage a client into Care that is newly positive or fell out of care. An Episode occurs over a period of time and includes multiple contacts with the client attempting to re-engage the Client in Care.

To create an EIS Episode of Care, within the client profile, click on "Create" and then on "EIS Episode of Care."



#### EIS Episode of Care Tab

🖣 Close 👋 🛛 🔂 Save							
EIS Episode of Care : A C () Compass - Client Services : Amanda Epping/GTI [06/08/2015]	EIS Episode of Care : A C () Compass - Client Services : Amanda Epping/GTI [06/08/2015]						
EIS Episode of Care Client Information Contacts							
Care Episode Status	* Open 👻						
Туре	*						
Outreach Location							
Date Opened	* Monday June 08, 2015						
Referral Source	*						
Referred to Medical Case Mgmt?							
Referred to Medical Care?							
Health Education Given	Adherence						
	Other						
	Risk Reduction						
	Safe Sex						

- Care Episode Status Select "Open" or "Closed."
- **Type** Select the type.
- **Outreach Location** Enter the location.
- Date Opened Enter the date.
- **Referral Source** Select the referral source.
- Referred to Medical Case Management? Select "Yes" or "No."
  - If "Yes"
    - Linked to Medical Case Mgmt? Select "Yes" or "No."
      - If "Yes"
        - Date First MC Mgmt Appointment Enter the date.
- Referred to Medical Care Agency? Select "Yes" or "No."
  - If "Yes"
    - Linked to Medical Case Agency- Select "Yes" or "No."
      - If "Yes"
        - Date First Medical Care Appointment Enter the date.
- Heath Education Given Select the health education that was given.

Client Information Tab:

🖣 Close 🛛 🍟 🛛 😭 Save 🖌 Link to Client Profile			
EIS Episode of Care : A C () Compass - Client Services : Amanda Epping/GTI [05/28/2015]			
EIS Episode of Care Client Information Contacts			
Name First			
Name Last			
Also Known As			
Current Gender	*		
Okay to send email?	•		
Primary Phone Message Type	•		
Races - All Identified With	Alaskan Native     American Indian     Aaian     Black or African American     Native Hawaiian     Pacific Islander     White		
Ethnicity	*		
Haitian?	•		
Sexual Orientation			

Fill out the fields as appropriate. Only fields with the red * are required.

#### Contacts Tab:

Provide Enterprise - [EIS Episode of Care For A C]
∂ File Find View Actions Tools Reports Windows Help
Close 🖓 🛛 🔂 Save 🖌 Link to Client Profile
EIS Episode of Care : A C () Compass - Client Services : Amanda Epping/GTI [05/28/2015]
EIS Episode of Care Client Information Contacts
Progress Logs
😰 🗁 📬 🎁 🐸 🥟 🧕 🤑 📄 Add Progress Log
Date Status Deleted Provider Description

### Progress Log

This form is designed to capture the date and time and number of minutes that a provider spent working with or on behalf of a Client. Notes of the encounter/effort should be documented.

To add a progress log, click on Add Progress Log

⊖ Provide Enterprise - [Progress Log For A C]		
∂ File Find View Actions Tools Reports Windows H	elp	
Close △     Complete      Get Sample Text      Get Link to C     Complete     Complete	Client Profile 🛛 🚑 Print	
Progress Log : A C () Compass - Client Services : Amanda Epping/GTI [05/28/2	015]	
Summary		
Status	* In Progress	
Provider	* Amanda Epping	
Date	<ul> <li>Thursday May 28, 2015</li> </ul>	÷ •
Start Time	* 9:12 AM	
Minutes	*	
Contact Category	*	
Contact Type		
Funding Source	*	
Brief Description	*	
		-
Full Description		

Fill in the appropriate fields:

- Status The status will be "In Progress" until the note is marked "Complete."
- **Provider** This will default to your name, but you can choose a different provider in needed.
- **Date** Enter the date.
- **Start Time** Enter the start time.
- Minutes Enter the minutes spent.

- **Contact Category** Select the contact category.
- **Contact Type and Funding Source** This will auto populate bases on the contact category that you select.
- Brief Description Enter the brief description.
- Full Description Enter the full description.

If the note is complete, click on Complete. To "Save" the note in progress, click on

and then on "Yes" to save your changes.

#### EIS Outreach

This form is used to document when group based anonymous outreach activities are conducted. These services are not billable to Ryan White Part A.



#### Summary Tab:

· · · · · · · · · · · · · · · · · · ·		
Provide Enterprise - [EIS Outreach For A C]		
∂ File Find View Actions Tools Reports Windows Help		
Close 📲		
EIS Outreach : A C () Compass - Client Services : Amanda Epping/GTI [05/28/2015]		
Summary Clients Client Risk		
Status	* In Progress	~
Provider	* Amanda Epping	
Date	* Thursday May 28, 2015	• •
Minutes	*	
Contact Category	Outreach	-
Outreach Type	*	•
Funding Source	RWA - PBC	~
Brief Description	*	A
		~
Full Description		

Fill in the appropriate fields:

- Status The status will be "In Progress" until the note is marked "Complete."
- **Provider** This will default to your name, but you can choose a different provider in needed.
- Date Enter the date.
- **Minutes** Enter the minutes spent.

- **Contact Category** Select the contact category.
- **Contact Type and Funding Source** This will auto populate bases on the contact category that you select.
- **Brief Description** Enter the brief description.
- **Full Description** Enter the full description.

#### Client Tab:

ose 😽 💿 Save 🛷 Complete	
S Outreach : EIS Anonymous ()	10/20161
Impass - Citerit Services - Amanda Epping/G11 [06/	10/2015]
Client Gender	
Male	
remaie	
Transgender - FTM	
Iransgender - Unspectied	
lotal	0
Client Ethnicity	
Hispanic or Latino	
Not Hispanic or Latino	
Total	0
Client Race	
American Indian or Alaska Native	
Asian	
Black or African American	
Native Hawaiian or Other Pacific Islander	
White	
Multiracial	
Total	0
Haitian	
Haitian Total	
Client Age	
Under 13	
13 - 18	
19 - 24	
25 - 34	
35 - 44	
45 and Over	
Total	0

Fill in the appropriate fields.

Enter the number of clients for each gender, ethnicity, race, and age category.

Client Risk Tab:

Provide Enterprise - [EIS Outreach For A C]	
∂ File Find View Actions Tools Reports Windows Help	
EIS Outreach : A C () Compass - Client Services : Amanda Epping/GTI [05/28/2015]	
Summary Clients Client Risk	
Primary Risk Category MSM	
IDU	
MSM/IDU	
Sex with Transgender	
Heterosexual Contact	
Total	0
HIV Status	1-
Positive	
Negative	
Unknown	
lotal	0

Fill in the appropriate fields.

Enter the number of clients for each primary risk category.

To "Save" the record, click on Close and then on "Yes" to save your changes. To "Complete" the record, click on Complete.

# EIS Testing Encounter

This for is used to document confidential HIV testing encounters. Up to three tests can be captured for a given Client on a given Encounter. These services are not billable to Ryan White Part A.



Client Tab:

Provide Enterprise - [EIS Testing Encounter For EIS Anonymous]	
C File Find View Actions Tools Reports Windows Help	
Close ABC V Testing Complete	
EIS Testing Encounter : EIS Anonymous () Compass - Client Services : Amanda Epping/GTI [06/10/2015]	
Client Risk Tests	
Status	* Testing In Progress
Session Start Date	* 06/10/2015
Session End Date	* Wednesday June 10, 2015
Testing Event Code	* 10011
Testing Provider Name	*
Testing Provider ID	
Site Name	*
Year of Birth	*
Races - All Identified With	* 🔲 Alaskan Native
	American Indian
	Riack or African American
	Native Hawaiian
	Pacific Islander
	White
Ethnicity	*
Haitian?	*
State of Residence	* FL 👻
County of Residence	* Palm Beach .
City of Residence	*
Zip Code	*

Fill in the appropriate fields:

- Status The status will be "In Progress" until "Testing Complete" is marked.
- **Provider** This will default to your name, but you can choose a different provider in needed.
- Session Start Date Enter the date.
- Session End Date Enter the date
- **Testing Event Code** The code will auto-populate.
- **Testing Provider Name –** Select the provider.
- **Testing Provider ID-** This will auto-populate.
- Site Name Select the site name.
- Year of Birth Enter the year of birth.
- Races Select all the races client identifies as.
- **Ethnicity** Select the ethnicity
- Haitian? Select "Yes" or "No."
- State of Residence Select the state.
- **County of Residence** Select the county.
- **City of Residence** Select the city.

• **Zip Code** – Enter the zip code.

#### Risk Tab:

e Find View Actions Tools Reports Wind	lows Help	
ose Ally Vesting Complete		
S Testing Encounter : EIS Anonymous ()		
mpass - Client Services : Amanda Epping/GTI [(	06/10/2015]	
ient Risk Tests		
Previous HIV Test?		* Nee
Previous HIV Test Result?		*
Estimated Previous HIV Test Date		*
Risk Assessment		
Risk Factors Assessed?		Client was asked and risk was identified
In the past 12 months, did the client engage in any of the	following:	
Vaginal or Anal Sex with Male?		*
Vaginal or Anal Sex with Female?		*
Vaginal or Anal Sex with MTF?		*
Vaginal or Anal Sex with FTM?		*
Additional Risk Factors:		
Used injection drugs?		*
Diagnosed with STD/STI (Not HIV)?		*
Sex with anonymous partner?		*
Sex with partner met on Internet?		*
Sex with person of unknown HIV status?		*
Sex with person who exchanges sex for drugs/money?		*
Exchange sex for drugs/money/or something they need?		*

Fill in the appropriate fields:

- Previous HIV Test? Select "Yes" or "No."
- Previous HIV Test Result Select the result
- Estimated Previous HIV Test Date Enter the date.
- **Risk Factors Assessed ?** Select the response. If "Client was asked and risk was identified" is selected, several risk factor questions will populate. If you answer "Yes" to some of the risk factors, additional field will populate. Fill in the appropriate fields.

#### Test Tab:

Cita Find View Actions Tools Penette Windows Hele	
S File Find View Actions Tools Reports Windows Help	
EIS Testing Encounter : EIS Anonymous () Compass - Client Services : Amanda Epping/GTI [06/10/2015]	
Client Risk Tests	
Test Election Confidential	•
Test 1	
Test Name	
Test Result * Negative	¥
Result Provided to Client? * Yes	· · · · · · · · · · · · · · · · · · ·
Date Result Provided *	•
Follow-up Test Requested/Suggested?	•
Test 2	
Test Name *	
Test Result * Unsatisfactory	
Result Provided to Client? * Yes	•
Date Result Provided *	
Follow-up Test Requested/Suggested?	
Test 3 Sample Date	÷-
Test Name *	
Test Result *	•

Fill in the appropriate fields:

- Test Election Select "Confidential," "Anonymous," or "Declined."
- Test 1:
  - Sample Date- Enter the sample date.
  - Test Name Select the test name.
  - Test Result Select the test result.
  - Results Provided to Client Select "Yes" or "No."
  - Date Results Provided Enter the date.
  - Follow-up Test Requested/Suggested Select "Yes" or "No."

This information will need to be entered for each test sample.

When testing is complete, click on Vesting Complete . Then, you will need to click on

Encounter Complete again to mark the encounter complete.



# Specialty Care

After "Specialty Care" referrals are entered, Specialty Care users will need to review the referrals. Special care referrals can will be in "View – Activity

-	📀 View 🔽 📀 Action 💌
-	Audit Trail
2	Activity
	Address History
	Administrative Notes

A screen similar to below will appear:

0	File	: Fi	nd	View	/ A	ction	ns .	Tool	s F	Repo	rts	Windo	WS	Help			
•	Clo	se															
2	8	þ		<del>d</del>	2	Þ		€₿	0	9							
		Form	1				Dele	ted	Su	mmai	ry						
🖃 Sp	peci	alty C	are l	Refer	ral												
		Spec	ialty	Care	Refe	erral				Spec	cialty	Medica	al Car	e - Infectiou	s Disea	se Speci	ialist -
		Spec	ialty	Care	Refe	erral			÷ -	Spec	cialty	Medica	al Car	e - Infectiou	s Disea	se Speci	ialist -

Double click on the special care referral to open the record.

# Authorizing Specialty Care Referrals

To authorize a specialty care referral, open the referral as outlines above.

pecialty Care Referral		
Ontoine .		
Deferred Trans	Submitted	
Percenting Access	Initial Consult	
Persuanting Provider	Compass	
Associate and Data	Lee Godgluck	
Appointment Date	<ul> <li>Friday May 29, 2015</li> </ul>	
Date Submitted	Friday May 29, 2015	
Specialty Service Type	Infectious Disease Specialist	
Specialty Provider Type	* Provider	
Specialty Provider	<ul> <li>Kitunga P Kiminyo, MD</li> </ul>	
Payer Organization	Treasure Coast Health Council	
Payer Program	<ul> <li>Client Services</li> </ul>	
Service Category	<ul> <li>Specialty Medical Care</li> </ul>	
FundingSource	<ul> <li>Ryan White Part A</li> </ul>	
Assignee	Kathie Brannen	
Procedures		
🖻 🎒 🛅 🎒 😃 🥕 🗋 🗐 Add F	rocedure Code	
Status Deleted End Date Code Max Bill	Rate Description	
	allo boonpilon	
Claims		
🖻 🚑 🐂 🗂 剑 🐸 🥒 🗋 🗐 😘 😘		

To authorize the specialty care referral, click on Authorized. After it is "Authorized" a claim can created. See below for the instruction on created a claim.

# **Rejecting Specialty Care Referrals**

To reject a specialty care referral, open the referral as outlines above.

Status Referral Type Requesting Agency Requesting Provider	Submitted     Initial Consult     Compass     Lee Godgluck	
Referral Type Requesting Agency Requesting Provider	Initial Consult     Compass     Lee Godgluck	
Requesting Agency Requesting Provider Lanointment Pate	Compass     Lee Godgluck	
Requesting Provider	* Lee Godgluck	
Appointment Date	-	
ppointment bate	* Friday May 29, 2015	
Date Submitted	Friday May 29, 2015	
Specialty Service Type	Infectious Disease Specialist	
Specialty Provider Type	* Provider	
Specialty Provider	* Kitunga P Kiminyo, MD	
Payer Organization	* Treasure Coast Health Council	
Payer Program	* Client Services	
Service Category	Specialty Medical Care	
undingSource	* Ryan White Part A	
Assignee	Kathie Brannen	
Procedures		
🖻 🎒 🖺 🎒 😃 🥕 🧕 🤃 🗋 Add Procedure Code		
Status Deleted End Date Code Max Bill Rate Description		
To authorize the specialty care referral, click on enter a referral rejected reason.

Reject Reason	X
Why was the Referral Rejected?	OK Cancel

Then, click on "OK" and the referral will be rejected.

# Adding a claim to the Specialty Care

To add a claim after the specialty care referral has been authorized, click on "Add Claim."

Thomas enterprise Topeciary care hereinan or Angela Ar Anacison]	
J File Find View Actions Tools Reports Windows Help	
🖣 Close 🖤 🖨 👄 📄 🗙 Delete 📝 Link to Client Profile	
Specialty Care Referral : Angela A. Anderson () Treasure Coast Health Council - Client Services : Amanda Eppir	ng/GTI [05/29/2015]
Specialty Care Referral	
Status	* Rejected
Referral Type	* Initial Consult
Requesting Agency	* Treasure Coast Health Council
Requesting Provider	* Amanda Epping
Appointment Date	* Thursday June 04, 2015
Date Submitted	Friday May 29, 2015
Date Rejected	Friday May 29, 2015
Reject Reason	test
Specialty Service Type	* Infectious Disease Specialist
Specialty Provider Type	* Provider
Specialty Provider	<ul> <li>Olayemi Osiyemi, MD</li> </ul>
Payer Organization	* Treasure Coast Health Council
Payer Program	* Client Services
Service Category	* Specialty Medical Care
FundingSource	* Ryan White Part A
Assignee	Kathie Brannen
Procedures	
🔊 🎒 🛅 🎒 🐸 🥟 🧕 🤴 🗋 Add Procedure Code	
Status Deleted End Date Code Max Bill Rate Description	
Claims	
🖻 🚔 🖺 🚳 🐸 🥕 🗋 🗐 👝 🕞 🗋 Add Claim	
Data Cintus Devides	

The claim will then appear as shown below:

Provide Enterprise - [Claim For Angela A. Anders	on]	
File Find View Actions Tools Reports	Windows Help	
Treasure Coast Health Council - Client Service	ces : Amanda Epping/GTI [05/29/2015]	
Claim		
Claim Status	Pending	
Claim ID		
Claim Date	* Friday May 29, 2015	
Specialty Service Type	*	
Specialty Provider Type	*	
Specialty Provider	*	
Claim Detail		
📓 🖨 🖺 🦚 🖄 🤌 🗋 🖏 Add Claim Detail		

Fill in the appropriate fields:

- Claim Status Select "Pending," "Processed," or "Rejected."
- Claim Date Select the claim date.
- Specialty Service Type Select the specialty type
- Specialty Provider Type Select the specialty provider type
- Specialty Provider Select the specialty provider.

To "Save" the record, click on Close and then on "Yes" to save your changes.

# Adding claim details to the Specialty Care

To add a claim detail to a claim, click on "Add Claim."

Provide Enterprise - [Claim For Wendy Walker]	
🔿 File Find View Actions Tools Reports Windows Help	
Close A ^{ac} ← ⇒ □ ▼ X Delete ✓ Approved ✓ Rejected	
Claim : Wendy Walker () Treasure Coast Health Council - Client Services : Amanda Epping/GTI	[06/03/2015]
Claim	
Claim Status	Pending
Claim ID	Wedeeder Lee 02 2015
Cashirky Cashira Tree	Wednesday June 03, 2015
Specialty Service Type	Cardiologist
Specialty Provider Type *	Provider
Specialty Provider *	Jean Foucauld
Claim Detail	
😰 🚔 🛍 🎁 🍏 🐸 🥒 🧕 🏥 🚺 Add Claim Detail	
Status Date Of Service POS Service Code Modifier Max Allowe	d Amount Billed Amount Authorized To Pay Amount

rovide Enterprise - [Claim Detail For Wendy Walker]		
File Find View Actions Tools Reports Windows He	elp	
Close 📲 🖌 Approved 🖌 Rejected		
Claim Detail : Wendy Walker () Treasure Coast Health Council - Client Services : Amanda	Epping/GTI [06/03/2015]	
Claim Detail		
Status	* Pendina	
Claim ID		
Claim Date	Wednesday June 03, 2015	÷.
Service Date	*	
Place of Service	*	
Service Code (CPT, HCPCS, Revenue)	*	
Service Description	*	
Service Modifier		
Service Units	*	
Max Allowed Unit Rate	*	
Max Allowed Amount	* \$0.00	
Billed Amount	*	
Approved to Pay Amount	*	
Notes		
		A

Fill in the appropriate fields:

- Service Date Enter the service date.
- Place of Service Select the place of service.
- Service Code Select the service code.
- Service Description Enter the service description.
- Service Modifier Select the service modifier.
- **Service Units** Enter the service units.
- Max Allowed Unit Rate and Max Allowed Amount This will automatically compute.
- Billed Amount Enter the billed amount.
- Approved to Pay Amount Enter the approved to pay amount.

To "Save" the record, click on Close and then on "Yes" to save your changes.



# **ARTAS Case Managers**

## **ARTAS Enrollment**

To create an ARTAS Enrollment, within the client profile, click on "Create" and then on "ARTAS Enrollment."



Provide Enterprise - [ARTAS Enrollment For A C]		
∂ File Find View Actions Tools Reports	Windows Help	
Close 👋 🛛 📀 Save 💕 Link to Client Profile	🔹 Close 🛯 🖉 Save 😼 Link to Client Profile	
ARTAS Enrollment : A C () Compass - Client Services : Amanda Epping	/GTI [05/28/2015]	
Main Activity	<u> </u>	
Status	* Admitted	
Intake Date	* Thursday May 28, 2015	
Admission Date	* Thursday May 28, 2015	
ARTAS Case Manager	* Amanda Epping	
Target Population(s)	Woman         Children         Men who have sex with men         Homeless         Gay lesbian and bisexual youth         Gay lesbian and bisexual adults         Incarcerated persons         Parolees         All Adolescents         Runaway street youth         Drug User	

Fill in the appropriate fields:

- Status It will default to "Admitted" but can change to "Discharge."
- Intake Date Enter the intake date.
- Admission Date Enter the admission date.

- **Discharge Date** Enter the discharge date.
- **ARTAS Case Manger** This will default to the user's name, but a different provider can be selected.
- **Target Population** Select the target populations by placing a check mark the corresponding boxes.

#### Activity Tab:

Provide Enterprise - [ARTAS Enrollment For A C]
🔿 File Find View Actions Tools Reports Windows Help
Close 👋 🖉 Save 🔂 Link to Client Profile
ARTAS Enrollment : A C () Compass - Client Services : Amanda Epping/GTI [05/28/2015]
Main Activity
Progress Logs
🖻 🎒 🖺 🗯 🥠 🖉 🌽 🗋 Add Progress Log
Status Deleted Date Count Provider Description

## Progress Log

This form is designed to capture the date and time and number of minutes that a provider spent working with or on behalf of a Client. Notes of the encounter/effort should be documented.

To add a progress log, click on Add Progress Log

P	Provide Enterprise - [Progress Log For Client Test]		
3	File Find View Actions Tools Reports Win	dows Help	
4	Close 🖓 🖉 🗸 Complete 📀 Get Sample Text 👔	🊰 Link to Client Profile 🛛 🚑 Print	
	Progress Log : Client Test () Compass - Client Services : CM Test [05/13/201!	5]	
	Summary Appointments Labs Referrals		
	Status	* In Progress	
	Provider	* CM Test	
	Date	* 05/13/2015	
	Start Time	* 3:46 PM	
	Minutes	*	
	Contact Category	*	
	Contact Type		
	Funding Source	*	
	Brief Description	*	
	Full Description		

Fill in the appropriate fields:

• **Status** - It will default to "In-Progress" until the progress log is completed.

- **Provider** Select the provider name from the list by clicking on the . Double click on the provider name. The funding source will automatically populate.
- **Date** Enter the date.
- **Start Time** Enter the start time.
- **Minutes** Record the minutes.
- **Contact Category** Select the contact category.
- **Contact Type and Funding Source** These will auto populate based on the contact category selected.
- **Brief Description** Enter a brief description.
- Full Description Write your full note.
- **Appointments, labs, and referrals** These can be created on each of the corresponding tabs of the progress logs.

When the enrollment is complete, click on "Save." You will be prompted if you want to save your changes, click on "Yes."

^{Chapter}

# Mental Health Providers

At this time, mental health providers in Provide will only be entering Services Provided which is outlines below. In the future, Mental Health Providers will be able to document additional information including psychosocial evaluations, mental health assessments, and mental health actions plans.

*To enter a mental health service provided, you must have a client service category profile for mental health. Please refer to chapter 5 of this guide for the steps to create a client service category.

# Services Provided

This form is used to capture when a service is provided to a Client. Service provided records are used to track services only when a more detailed or specific record type would not be appropriate – e.g. a Procedure or Progress Log.

To create a service provided, under create click on "Service Provided."

Create 🔻 📀 View 🔻 📀 Action	
Appointment	
Eligibility Assessment	
Eligibility Override	
Letter	
Payment Request	
Progress Log	
Provider Note	
Referral	
Report	
Required Action	
Scan Document	
Service Provided	
Test Result	
Tobacco Use Assessment	

O Provide Enterprise - [Service Provided For Test Client]				
○ File Find View Actions Tools	Reports Windows Help			
📗 🖣 Close 🤷 🛛 🖋 Complete 🛛 💕 Link t	↓ Close Apple Complete			
Service Provided : Test Client () Compass - Client Services : CM Test	Service Provided : Test Client () Compass - Client Services : CM Test [05/18/2015]			
Service Provided Support Documentation	n			
Status *	Pending			
Provider *	CM Test			
Service Date *	05/18/2015			
Service Category *				
Service Provided *				
Funding Source *				
Units of Service				
Unit of Measure				
Unit Cost of Service				
Total Cost of Service	\$0.00			
Bus Pass Voucher ID *				
Comments	A			
	Ψ.			

Fill in the appropriate fields:

*Depending on the service provided, the date entry fields will vary.

- Status Select the status of the service provided.
- **Provider** Select the type of appointment.
- Service Date Select the service date from the list by clicking on the
- Service Category Select the service Category

- Service Provided, Funding Source, Units of Service, Unit of Measure These will populate based on the selected service category.
- Unit cost of Service Enter the unit cost of service.
- **Total Cost of Service** This will be computed and automatically populate.
- Buss Pass Voucher ID Enter the bus pass voucher ID.
- **Comments** Enter any comments needed.
- Support Documentation Tab Scan/attach any necessary support documentation. Directions on how to "Create a Scan" can be found at the end of chapter 3 or at the end of chapter 5 in this manual.



# Florida Department of Health

## ADAP Premium Assistance Enrollment

To add an ADAP Premium Assistance En	rollment, click on Add ADAP Premium Assistance Enrollment
Provide Enterprise - [ADAP Premium Assistance Enrollment For Tes	st Client]
∂ File Find View Actions Tools Reports Windows Help	)
Close 🖓 🛛 🖉 View 🔻	
ADAP Premium Assistance Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/05/201	5]
ADAP Premium Assistance Enrollment Documentation	
Status	Enrollment Requested
Date Requested	* Tuesday May 05, 2015
Health Plan Carrier	* Blue Cross Blue Shield of Florida
Plan Name	BlueSelect Everyday 1443
Member/Subscriber ID	* 11
Premium Assistance Coverage Start Date	*
Premium Amount	*
Premium Amount - Support Portion	*
Payment Cycle	• •

Fill in the appropriate fields.

- Status This will be default to "Enrollment Requested."
- Fill out each field and review the documentation on the "Documentation tab."
- When the form is complete, click on When the record is completed, click
  - on Close. Then you will receive the prompt below:

Save Changes?	×
Do You Want T	o Save Changes?
Yes	No Cancel Details >>

• Click on "Yes" to save the changes.

## ADAP Medication Assistance Enrollment

To add an ADAP Medication Assistance Enrollment, click on Add ADAP Premium Assistance Enrollment

Provide Enterprise - [ADAP Medication Assistance Enrollment For Test Clien	1]						
Ә File Find View Actions Tools Reports Windows Help							
Glose ABS							
ADAP Medication Assistance Enrollment : Test Client () Compass - Client Services : Amanda Epping/GTI [05/05/2015]							
ADAP Medication Assistance Enrollment Documentation							
Status	Enrollment Requested						
Date Requested	Tuesday May 05, 2015						
Health Plan Carrier	Blue Cross Blue Shield of Florida						
Plan Name *	BlueSelect Everyday 1443						
Member/Subscriber ID	11						

Fill in the appropriate fields.

- Status This will be default to "Enrollment Requested."
- Fill out each field. Most of the fields will auto-populate with the information that you have already entered into Provide. Review the documentation on the "Documentation tab."
- When the form is complete, click on When the record is completed, click

on Close . Then you will receive the prompt below:

Save Changes?	x
Do You Want To Save Changes?	
Yes No Cancel Details >>	

• Click on "Yes" to save the changes.

Chapter 18

# Imports

You can import Client Records, Client Sub Records and Activity Records into Provide[®] Enterprise.

There are a number of common characteristics that you must keep in mind when preparing to import records into the system.

- All input files need to be formatted as an ASCII delimited text files with the first record (header) containing the Provide[®] field names.
- GTI recommends using "tab" for the field delimiter as input files may contain commas or semicolons.
- GTI does not support the import of rich text fields.
- All dates must be in MM/DD/YYYY format
- Imports require a unique file for each table. For example, data fields for the client profile cannot be imported at the same time as data fields for an allergy record. You must do two separate imports.
- Additionally, each record must have a separate row in the input file. For example, you cannot have three vaccinations in one row. A separate record would be needed for each vaccination.
- All records have a certain number of required fields that are needed in order to save a record. Within Provide[®] Enterprise these fields are marked with a red asterisk. When importing, however, the only time all required fields are necessary is when doing the initial client import. Though you may be able to import records without including all required fields, it is always better to include them. Not importing all required fields may cause errors when editing the record at a later date.
- All imports generate error files.
- In order for Client Sub-Records and Activity Records to be imported, the record's Client Key ("Client ID", "Client Name", "HealthPlan + Member ID" or "SSN") must match an existing Client Key of a Client Service Profile that fits the user's (Importer's) User Profile.
- In order for Client Sub-Records and Activity Records to be imported, the Client Profile or a backup Client Profile must be released to the record's Organization-Program.

#### Importing a File

To import into Provide, Click on "File – Import."

File	Find	View	Actions	Tools	Repo			
	Chang	e Passv	vord					
	Import							
	Print P	review.						
	Print							
	Set Se	curity C	Questions					
	Lock			Ctr	l+L			
	Exit							

#### The following screen will appear:

Provide Enterprise - [Import]	
∂ File Find View Actions Tools Reports Windows Help	
🖣 Close 📓 Get Fields 🛷 Test 🎯 Import 🙀 Submit Import	
Import Type	Standard 🗸
Record Type	Client Profile
Client Key	Client Service Profile:CSPClientID
Actions on Client Key Match Found	Update 🗸
Actions on No Client Match Found	Create
Field Delimiter	Tab
Multi-value Delimiter	~~ 🗸
Input File	C:\Users\Amanda Epping\Desktop\Clients 1import.bd
Run Script for Computed Fields	Yes 🔹
Run Document Pre Save Script	Yes 🗸
Run Lookups to Reference Databases	Yes 🔹
Reference Record Required	Yes 🔹
Import Fields	
Field AllowedValue Type	

Import Type: Select Standard or Custom

<u>Record Type:</u> Select the record type you wish to import.

<u>Client Key:</u> Select the client key that is based on the record type.

<u>Multi-Value Delimiter:</u> Select comma, tab, semicolon, colon, or ~~.

Input File: Click on the 🛄 and select the file you are importing.

<u>Run Script for Computer Fields:</u> Select "Yes" or "No." Within the Data Dictionary, there are a number

of fields that are computed automatically within Provide[®] Enterprise. Examples of computed fields include the "ACreateDate" (the date a document is created in the system) and the Selector Description (the description of each document that shows in the database views). If you wish to automatically compute these fields at the time of import, simply leave this field set to "Yes". If you wish to actually include the computed fields in your import file, select "No" and make sure that you include all of the computed fields in your import file.

<u>Run Document Pre Save Script:</u> Select "Yes" or "No." There are a few documents in Provide[®] Enterprise that have an associated "Pre Save Script", meaning that prior to saving the document completely; a script is activated to perform a specific function. For example, when creating a Client Service Profile, there is a Pre Save Script in effect to create a Client Service Profile History record. If you want the system to automatically run these Pre Save scripts at the time of import, simply leave the field set to "Yes". If you do not want to run the Pre Save scripts, set the field to "No".

<u>Run Lookups to Reference Databases:</u> Select "Yes" or "No." For selected Activity imports, the system

has the ability to lookup information in the Reference databases to ensure that data in the import file matches information in the Reference Databases. For example, if you are importing Procedure records, Provide[®] Enterprise can look to the Code Sets Database to ensure that the CPT Codes you are importing are valid. If you want the system to automatically Run lookups to the Reference Databases, leave this field set to "Yes". If not, change the field to "No". NOTE: It is recommended that you use the lookups to the Reference Databases to ensure data quality.

Reference Record Required: Select "Yes" or "No."

😰 Get Fields

. The fields there are giong

After you enter the information above, click on to be imported are then indicated under "Import Fields."

3 Pro	ovide Enterpris	e - (importj				
<mark>∂ </mark> F	ile Find Vi	ew Actions	Tools Repo	orts Windows Help		
🖣 🕻	Close 🛛 😰 Get	Fields 🗹 Te	est 😥 Impor	it 🛛 🗟 Submit Import		
Import	Туре				Standard 🗸	
Recor	d Type				Client Profile 🗸	
Client	Key				Client Service Profile:CSPClientID	
Action	Actions on Client Key Match Found				Update 🗸	
Action	Actions on No Client Match Found				Create	
Field [	ield Delimiter				Tab	
Multi-v	Multi-value Delimiter				~~ •	
Input i	File				C:\Users\Amanda Epping\Desktop\Clients 1import.bt	
Run S	Run Script for Computed Fields				Yes	
Run D	Run Document Pre Save Script				Yes	
Run L	ookups to Refe	rence Database	s		Yes	
Refer	ence Record Re	quired			Ves 🔹	
Impo	rt Fields					
	Field	AllowedValue	Туре			
•	CSPClientID	Text	Single			
	CSPStatus	Text	Single			
	SCPClientLa	Text	Single			
	SCPClientFir	Text	Single			
	SCPClientMI	Text	Single			
	SCPDateOfBi	Date	Single			
	SCPGender	Text	Single			
	SCPAddrDat	Date	Single			
	SCPStreetAd	Text	Single			
	SCPCity	Text	Single			
	SCPState	Text	Single			
	SCPZip	Text	Single			
	SCPClientHo	Text	Single			
*						
_						

Then, click on **Test** to complete a test of your import. The results will then appear as seen below:



When you are satisfied with your results, you have two options to complete your import. If you

click on <a>Import</a>, the import will be completed immediately in the system. If you click on <a>Submit Import</a>, the import will be completed in the system overnight.

#### Monitoring Imports

After imports have been run, the import log contains the original import file as well as an error file (listing any errors that occurred during the Import Process), and an error records file (a file containing the records that caused errors during the initial import.) The Error Records file can be used to import corrections once they have been made (either in the file itself or the matching client files in Provide[®] Enterprise. It is important to monitor the import logs, especially if the system is automatically importing data from another system.

To view the Import Logs, navigate to the "Imports" Views, under "View\Activity\Import Log..."



You will see all Import Logs that have been created in the system, similar to that in the figure below:

Provide	e Enterpris	e - [Activity\Ir	mport Log\By Ager	ncy]		ALC: NAMES OF TAXABLE	and the Constant Con-	
⊘ File	Find Vi	ew Actions	Tools Reports	Windows He	elp			
Close	2 🎒	🖻 🛱 🌖	😃 🤌 🞑 🗐	0 0				
	Agency	Import Form	Date	User	Num Documents	Error Count	Import Count Status	Delete
Compas	s							
Contr	act User S	etup						
	Compass	Contract User	Setup 2015/05/18	Keith Gray/GTI	54	0	54 Completed	N
	Compass	Contract User	Setup 2015/05/18	Keith Gray/GTI	9	8	1 Completed	N
	Compass	Contract User	Setup 2015/05/18	Keith Gray/GTI	54	13	41 Completed	N
	Compass	Contract User	Setup 2015/05/18	Keith Gray/GTI	9	0	9 Completed	N

Click on the 🖻 next to a given category in the view to expand that section. Once the section is expanded, you can double click on the actual import log to open the log file. When the file opens, it will look similar to that in the figure below.

Provide Enterprise - [Mass Import]						
∂ File Find View Actions Tools Reports V	Nindows Help					
Close     All     Cose     All     Cose     All     Cose     All     Cose     All     Cose     Cose						
Mass Import						
Mass Import						
Mass Form Type	Contract User Setup					
Import Type	Mass Reference Import					
Status	Completed					
Delim	Tab 🔻					
MultiDelim	~~					
PrimaryKey						
PrimaryKeyMatch	Update					
PrimaryKeyNoMatch	Bypass					
SecondaryKey	None					
SecondaryKeyMatch	Bypass					
SecondaryKeyNoMatch	Create					
RunCompute	Yes					
RunEvents	Yes					
RunLookup	Yes					
Run Ref Required	Yes					
Record Count	9					
Error Count	0					
Record Import Count	9					
Record Update Count						
Import Files	🖉 Attach 📙 Save As 🔯 Launch					
	Compass Ready for Import bd					

Note: In the screenshot above, the first Import file is the original file that was imported into Provide Enterprise.

The "Import File Error" file is the file that lists out each error that resulted from the import. The "Import File Error Records" is the file containing all of the records that generated errors. If you "Launch" the Import File Error file, you will see messages defining what the specific errors were, seen in the figure below:

<u> </u>	mportFi	leError - N	lotepad										x
File	Edit	Format	View	Help									
Re	cord	Row		Error Type		Error Descri	ption	Result	<b>Client Key</b>	Record	Key		-
1		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
2		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
3		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
4		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
5		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
8		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
9		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
10		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
11		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
12		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
13		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
14		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
15		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
16		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
17		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
18		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
19		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
20		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
21		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
22		ERR	OR	Could not find	client t	hat matches	s the Key	for record	number	Activity	will	not be i	n
													-
													d

The most common error is "Could not find client that matches the Key for record number...". This indicates that Provide Enterprise was unable to find a client using the key identified in your import file. Typically, this means that the client may have an incorrect URN. To fix this, you will need to find out who the client is from your EMR system. Once you have figured out who the client is, you can navigate to that client's profile in Provide Enterprise (using one of the Views of clients or using the Find\Client function). Once in the Client Profile, you can see the Client Service Profiles on the bottom of the "Profile – General" tab, seen in the screenshot below:

Provide Enterprise - [Client Profile For Test Client]						
∂ File Find View Actions Tools	Reports Windows Help					
Close AB⊊ ← ⇒ □ ▼	© Create ▼ © View ▼ © Action ▼					
Client Profile : Test Client () Compass - Client Services : Amanda	a Epping/GTI [04/28/2015]					
Profile Address Alert Demographic	s Relationships Finances Health Benefits Health RWA Eligibility					
Anonymous Client?	No					
Name Last *	Client					
Name First *	Test					
Name Middle						
Name Suffix						
Also Known As						
Current Gender *	Male					
Birth Gender	Male					
SSN	111-11-1111					
Birth Date *	11/26/1970					
Provide Client ID	1477					
URN	TSCI1126701					
Status	Active					
EMessaging Setup						
Okay to send email?	No					
Cell Phase Carrier	Yes					
Cell Phone Camer	AT&T					
Ceil Phone With Area Code	222-222-2222					

NOTE: Possibly the URN is incorrect on the import and it need to match the client's URN in their profile. If the URN is then corrected on the import, this client will then be able to have services imported.

After fixing all appropriate errors, simply re-import the Import File Error Records by following the steps at the beginning of this guide.

Contact the Provide Help Desk (<u>provide.help@grouptech.com</u>) should you receive other errors during the import process.

# Chapter 19

# Reports and Reporting in Provide

# Reports Menu

From the Reports Menu you can either run a report or manage your report objects. Each of these items is discussed below.

#### Run

Using the "Run" selection will allow you to run any "Stand Alone" reports that have been added to your system. To do this, follow these steps:

• Select the Reports - Run menu as shown below:

C Provide Enterprise									
File	Find	View	Actions	Tools	Reports	Windows	Help	Agency	
					Run				

• If you have reports that are available to be run as a "Stand Alone" report, they will be displayed in a dialog box similar the one shown below:

керопьгоир	ReportName		OK
zxcv	ACCESS Application Detail with Current Medicaid Status	=	
ZXCV	ACCESS Application Outcomes		Cancel
ZXCV	ACCESS Application Summary	L.	
ZXCV	Action Plan Goals Closed By Client		
ZXCV	Action Plan Goals Expiring in Date Range		
ZXCV	Action Plan Goals Open - TargetResolution in Date Range		
ZXCV	Action Plan Goals Past Due by Client		
	Action Plan Summary		
	Action Plan Summary - Closed in Date Range		
	Action Plan Summary - Multi Program		
	Action Plan Summary - Opened in Date Range		
	Active Case Manager, ID Physician, Primary Care Physician and Facility by Client - Served Clients		
	Active Case Manager, ID Physician, Primary Care Physician by Client - Open Clients		
	Active Clients with Eligibility Expiring in the Next 45 Days with Contact Detail		
	Active Clients With Most Recent Activity Date		
	Active Clients With No Activity in Selective # of Days		
	Activity Agency Detail by Provider By Client		
	Activity by Provider by URN by Date		
	Activity Detail by Client		
	Activity Detail by Client URN - Multi Program		
	A storie Destril bu Clines Multi Denenne		

• Simply click on the Report name and then click on the button to run the report.

Depending on the report, you may need to select your parameters. For example, you may need to enter the dates of the report or select values from a list. To select a value simple click on the Ito move the field to your "Selected Values."

Enter Parameter Values	
Enter End Date:	End Date
	ē
Select the Service Category(s) to include:	Service Category
Enter ServiceCategory: Available Values: Admin: 3rd Ave Admin Bldg Flood Insurance Admin: 3rd Ave Admin Bldg Uawn Maintenance Admin: 3rd Ave Admin Bldg Water Admin: 3rd Ave Admin office Electricity Admin: 3rd Ave Admin office Pest Control Admin: 3rd Ave Admin Office Pest Control Service	Selected Values:
Select the Status of Ledger Entries to Include:	Ledger Status
Enter Status: Available Values: Billed Paid Paid As Billed Pending Rejected	Selected Values:
,	Remove Remove All
	OK Cancel

- Depending on the report, you may need to select your parameters. For example, you may need to enter the dates of the report or select values from a list. To select a value simple click on the Ito move the field to your "Selected Values."
- After you have your parameters entered or selected, click or un the report.
- ***It is important to note that depending on the data and the date range, it could take time for the report to generate.

#### **Template Reports**

Reports including the HHS Outcomes, In Care Campaign, and the RSR are ran from templates in Provide.

# Creating a New Report Template

To create a new template report, you will need to go to "View – Reporting – Report Templates – By Title or By Type"

View Actions Tools Report	s Wi			
Activity	+			
Administration	>			
Benefits Management	+			
Clients	+			
Contract Management	+			
Lab Import	+			
Providers	+			
Reference	→ [		_	
Reporting	•	Report Templates		By Title
System Administration	•			Ву Туре

From that view, click on "Create Template" and select the template you want to create.



The report template, similar to that in the figure below, will open on your screen:

Provide Enterprise - [HHS Outcomes]	
🔿 File Find View Actions Tools Reports W	/indows Help
Close 💞 🛛 📀 Generate 🔻	
HHS Outcomes	
HHS Outcomes	
Title	HHS Outcomes
Service Category *	Ambulatory Outpatient Medical Care 🔹
Last Run By	Amanda Epping/GTI
Last Run Date	Thursday May 28, 2015
Provider(s)	
Reporting Thru Date	

Each template report will be slightly different. For the one above, you would need to select the providers and enter a thru date. Then, you would click on "Generate" and select what report you would like to generate.

0	Generate 💌
	Outcomes Report
	Client Level Report
	Client Level Report with Names
	WICY Outcomes Report
	WICY Client Report
	WICY Client Report with Names

#### Editing and Running a Saved Report Template

Once you have saved a Report Template, it is easy to access it at a later date so that you can re-run it for the same date period or for a new date period without having to set up a new report template.

• From within Provide[®] Enterprise open one of the Reporting Views, using the navigation from the Windows Toolbar (*View – Reporting – Report Template...*), similar to that seen in the figure below:

File	Find	View	Actions	Tools	Reports	Windows	Help	Agency		
			Activity Billing Budget Ma Client Contract M Grant Man Inventory Lab Import Manageme Providers Reference	inageme lanagen agemen : :	ent nent t	> > > > > > > > > > > > > > > > > > >				
			Secure			<ul> <li>GIC</li> <li>Rei</li> </ul>	oort Ter	ipns mplates	-	All By Agency
			System Ad	ministra	tion	•				All By Title
									_	All By Type
										By Title
										Ву Туре

• A view, similar to that seen below, will open on your screen:

Provide	e Clo	ise ise -	[Repo	rting	g\Re	port	Tem	plate	es∖By Tit	le]		
⊘ File	Find	View	Actio	ons	То	ols	Rep	orts	Winde	ows	Help	
Close	2	<i>6</i> q	1	6	*	Þ			📀 Cre	eate Te	emplate	•
Title				T	уре		Last	Run	By	Las	st Run D	ate
Paln	n Bea	ch Coun	ty - RSF	₹ R	SR 2	2014	Paul	Cas	per/GTI		4/24/20	)15

• Find the template that you want to run and double click on the template. It will open up on your screen and will look similar to that in the figure below.

Provide Enterprise - [RSR 2014]	-								
🖯 File Find View Actions Tools Reports V	Vindows Help								
RSR 2014									
Settings Data Sources									
Use this template for 2014 and later RSRs.									
Last Run By	Paul Casper/GTI								
Last Run Date	Friday April 24, 2015	÷ •							
Title	Palm Beach County - RSR								
Technical Contact Name *	Test								
Technical Contact EMail *	Test@Test.Com								
Technical Contact Phone *	555,555,5555								
Technical Contact Phone Ext									
Provider(s)	Palm Beach County - HIV Care Network								
		^							
		-							
Client Level Output File *	C:\RSR.txt								
RSR Output File *	C:\RSR.xml								
Start Date	Thursday January 01, 2015	÷ •							
End Date	Thursday December 31, 2015	• •							

- Click on the <u>Edit</u> button to edit the report template. Enter the Agency(s) you want to run the report, and change any other applicable fields, such as the Start and End Dates.
- After you have filled out all applicable fields, "Generate" or "Compile Client Data" etc depending on the report you are running
- After you are done working with this report template, simply click on the Close button. A message similar to the one below will open.

Save	Changes?			X
, I	Want To Save `	Your Changes?		
	Yes	No	Cancel	
				J

• Click on the Yes button if you wish to save the template. Saving the template will ensure that you can re-run the export at a later date, making only the necessary changes in the date range of the report, without having to setup a new template.

Chapter 20

# **Contract Management**

# Contract User Profile Setup

In order for a PE User to be able to access any Client or Service data associated with a given Contract the User must have a "User Profile" associated with the Contract. These are created from the view "Contract Management\Setup Requests\User Profiles."Then, click on "Contract User Profile Set-Up Request. The User Profile Setup form appears as follows:

O Provide Enterprise - [Contract User Profile Setup]	Contract Management (for Lock Compatibility Man). Must
∂ File Find View Actions Tools Reports	Windows Help
Close 🖓 🖌 🗸 Close	
Contract User Profile Setup	
Contract User Profile Setup Documentation	
Status	Pending 🗸
Requested By	Amanda Epping/GTI
Requested By Email Address	
Request Type	•
Agency Name *	
Program Name	<b>•</b>
Provide Enterprise User Name	•

Fill in the form. The combination of the fields Agency and Program Name define the Contract that you are requesting that the User be granted access to Client and Service data for.

When all filled in, click the "Submit" button. If the setup request passes all edit checks it is placed in a queue for Contract Administrators to review and Approve if appropriate. You can return to the view "Contract Management\Setup Requests\User Profile" as shown below to check on the status of your request:



Open the submitted record and click ether the "Approve" or "Reject". Once approved, they will go into a Queue for the PE Administrators (GTI staff) to "Process". Once Processed the User Profile will have been created and the User will then have access to the records associated with the Contract.

# Contract User Setup

In order for a PE User to be granted access to the PE system at all they must have a valid User account. The Contract User Setup form is used to request the setup of a new user to the PE system, to request the replacement of an existing user with a new one (staffing change) or to request the deletion of an existing user. To create a new Contract User Setup, open the view "Contract Management\Setup Requests\User" as shown below.



Click the "Contract User Setup Request" button and the form will open as shown below.

🔿 Provide Enterprise - [	Contract User Set	up]		Contract Management Star Look Compatibility Management
∂ File Find View	Actions Tools	Reports	Windows Help	
🛛 🌗 Close 🖓 🔤 🛷 Si	ubmit			
Contract User Setu	P			
Contract User Setup	Documentation			
Status Requested By Requested By Emai Request Type Agency Name Provide User? Part A User? Provider Role Comments	I Address		<ul> <li>Pending</li> <li>Amanda Epping/GTI amanda@gti.com</li> <li>Y</li> <li>Y</li> <li></li> </ul>	

Select the Request Type (Add User, Delete Users, Replace User). Each option presents different fields to be filled in on the form. If the setup request passes all edit checks it is

placed in a queue for Contract Administrators to review and Approve if appropriate. Open the view "Contract Management\Setup Requests\User" as shown below:



Open the submitted record and click ether the "Approve" or "Reject". Once approved, they will go into a Queue for the PE Administrators (GTI staff) to "Process". The User Name and initial password for the new User will be emailed to the email address that was entered as the "Requested by Email Address" on the Contract User Setup record.

# Contract User Roles Change Request

To change a user's roles within Provide, open the view "Contract Management\Setup Requests\User Role Change."

Provide	e Ente	rprise -	Cont	tract	Mana	agen	nent	\Seti	up Requests	s\Us	ser Roles Change]	
⊘ File	Find	View	Act	ions	Тос	ols	Rep	orts	Windows	H	Help	
Close	2	ð Þ		ി	<u>''</u>	Þ				) C	Contract User Roles Ch	nange Request
S	tatus	Requ	ested	l By	Α	geno	су			l	Jser Name	
Pending												
Submitte	ed											

Click on "Contract User Roles Change Request." A form similar to the one below will appear:

🕑 Provide Enterprise - [Contract User Roles Change	
∂ File Find View Actions Tools Reports	Windows Help
Close 📲 🖌 Close	
Contract User Roles Change	
Contract User Roles Change Documentation	
Status	* Pending 🗸
Requested By	* Amanda Epping/GTI
Requested By Email Address	amanda@gti.com
Agency Name	*
Provide Enterprise User Name	*
Current Roles	A
New Roles	*
Explain reason for Role change request.	
	<b>v</b>

Fill in the appropriate fields:

- Status It will default to "Pending" until it has been submitted.
- Agency Name Select the agency name.

- Provide Enterprise User Name Select the user's name.
- **Current Roles –** This will populate with the user's current roles.
- New Roles Click on the . The list of roles will populate. Select the additional roles or remove other roles if needed.
- Explain reason for Role change request Enter the reason for the role changes.

After the form is completed, click on "Submit"

#### Contract

The Contract record defines the funds allocated to your agency to provide a defined set of services over a given time period. A "Line Item" budget is required and once defined and approved by the State, you are limited by the PE system to billing the State under the Contract to the specific budget limits defined at a Line Item level. To see a list of your Contracts, open the view "Contract Management\Contracts\By Status" as shown below:

Provid	Provide Enterprise - [Contract Management\Contracts\All By Status]											
⊘ File	Find V	iew	Action	is T	ools	Rep	orts	Window	/S	Help		
Close	2 🖨	P ₀	🖺 🁌	) ()	Þ			0		Create Contract		
	Status	A	gency							Start Date	End Date	Amount
In Progr	ess											
🗉 Open												

An "Open" Contract is one that the state has set up and is ready for you to enter the Line Item budget. The Contract budget must be set and the Contract Submitted to the State for review/approval before you can begin to generate and submit reimbursement requests. To set the Contract budget, open the Contract record.

The Contract budget is defined by setting projected units or amounts on the individual Line Items. You can open each Line Item on that Funding Source individually to set the Amount or Budgeted Units. All the Line Items on the Contract can be seen by selecting the Line Items tab on the Contract as shown below.

	lose 🌾   ← → 🔔 ▼   🕲 Create Document 🖌 Submit to State											
ontract												
ain Funding Sources Une items Contract Documents												
All Contract Funding Source Line Items												
2 🗇 🖣 🛱 👌	😃 🤌 🧕 🏭 🗋 Set Unit Counts	Set Budget Am	ounts									
Category	Name	Funding Source	FFS	Admin	Planning	Core	Bulk	Set Unit Rate	Unit Rate	Budgeted Units	Amount	Target Pop
Contractual Services	Blood Draw	CDC	Yes					Yes	\$10.00		\$0.00	Non Targeted
	Counseling Testing and Referral - HCV	GRE	Yes	No	No	No	No	Yes	\$1.00	0	\$0.00	Non Targeted
Contractual Services	control of the second s											
Contractual Services Contractual Services	Counseling Testing and Referral - HIV	GRF	Yes	No	No	No	No	Yes	\$1.00	0	\$0.00	Non Targeted
Contractual Services Contractual Services Contractual Services	Counseling Testing and Referral - HIV Counseling Testing and Referral - HIV	GRF GRF	Yes Yes	No No	No No	No No	No No	Yes Yes	\$1.00 \$10.00	0	\$0.00 \$0.00	Non Targeted HIV+ Adult Hispanic MSM
Contractual Services Contractual Services Contractual Services Contractual Services	Counseling Testing and Referral - HIV Counseling Testing and Referral - HIV Counseling Testing and Referral - HIV	GRF GRF GRF	Yes Yes Yes	No No No	No No No	No No No	No No No	Yes Yes Yes	\$1.00 \$10.00 \$10.00	0 0 0	\$0.00 \$0.00 \$0.00	Non Targeted HIV+ Adult Hispanic MSM HIV+ Adult Non-Hispanic Black
Contractual Services Contractual Services Contractual Services Contractual Services Contractual Services	Counseling Testing and Referral - HIV Counseling Testing and Referral - HIV Counseling Testing and Referral - HIV Counseling Testing and Referral - Syphilis	GRF GRF GRF GRF	Yes Yes Yes Yes	No No No	No No No	No No No	No No No	Yes Yes Yes Yes	\$1.00 \$10.00 \$10.00 \$1.00	0 0 0 0	\$0.00 \$0.00 \$0.00 \$0.00	Non Targeted HIV+ Adult Hispanic MSM HIV+ Adult Non-Hispanic Black Non Targeted
Contractual Services Contractual Services Contractual Services Contractual Services Contractual Services	Counseling Testing and Referral - HIV Counseling Testing and Referral - HIV Counseling Testing and Referral - HIV Counseling Testing and Referral - Syphilis	GRF GRF GRF GRF	Yes Yes Yes Yes	No No No	No No No	No No No	No No No	Yes Yes Yes Yes	\$1.00 \$10.00 \$10.00 \$1.00	0 0 0 0	\$0.00 \$0.00 \$0.00 \$0.00	Non Targeted HIV+ Adult Hispanic MSM HIV+ Adult Non-Hispanic Black Non Targeted

## Reimbursement

Once a Contract has been approved by the State, the Reimbursements tab will appear on the Contract form and Reimbursement Requests can be generated by clicking the "Create Reimbursement Request" button.

ain	Funding Sources	Line Items	Provider Contracts	Reimbursements	Contract Documents
Reim	bursements				
2	5 h <b>h</b> d	2 / 3	1 🗐 😘 🕞 🗋	Create Reimburse	ement Request

Note that only one active (Pending or Submitted) Reimbursement is allowed at a time for each Contract.

To Create a "Reimbursement Request" click on Create Reimbursement Request

Provide Enterprise - [Contract Reimbursement]					
File Find View Actions Tools Reports Windows Help					
🖣 Close 🖓 🛛 📀 Save					
Contract Reimbursement					
Main Billable Line Items Unbillable Line Items Documents					
Reimbursement Request Status	Pending				
Contracted Agency	FoundCare				
Reimbursement Thru Date					
Prepared By	Amanda Epping				
Prepared By Phone	(414) 454-0161				
Prepared By Email					
Processing Log					
	A				

Enter the Reimbursement Thru Date. The Reimbursement Thru Date will automatically adjust itself to the last day of the month. Enter or update the three "Prepared By" fields. These will appear on the printed Reimbursement report. Click the Save button and then click on the Billable Line Items tab.

Provide Enterprise - [Contract Reimbursement]						
∂ File Find View Actions Tools Reports Windows Help						
Quose Aligned Print ▼     Close Aligned Q Save ✓ Reconcile ✓ Submit ✓ Unreconcile ⊘ Print ▼						
Contract Reimbursement						
Main Billable Line Items Unbillable Line Items Documents						
Fee for Service Line Items						
📓 🎒 🖺 🎁 🦸 😃 🥕 🧕 🦉 Open Activity 🛛 🌾 Open Client						
Vendor Service Category Service Name Status Eligibility Date Amount Quantity Funding Source						

• To pull your services in the reimbursement, click on Reconcile. While the contract reconciles, you will not see anything happen on the screen. However, when the reconciliation process completes, a dialog box will appear telling you how many ledger entries were generated, similar to that in the figure below:

Reconcile Results 💦 🔀
208 Ledger Records Created.
ОК

• If additional services are created and you want them to be added to the reimbursement,

you will need to click on	🖋 Unreconcile	. Then, you can click	on	again to pull	
the new and additional services into the reimbursement. While the contract reconciles,					
you will not see anything happen on the screen					

#### **Billable Line Items Expenses**

On the billable line Items tab of the Reimbursement to view any Expense or Fee for Service entries that will not be included on the Reimbursement.

Close $   = \Rightarrow    =    =                              $						
Contract Reimbursement	Contract Reimbursement					
Main Billable Line Items Unbi	able Line Items Documents					
Fee for Service Line Items	Fee for Service Line Items					
2 4 4 🛱 🔞 😃 /	🔊 🎒 🖺 🖺 🖄 🥔 🦉 🦧 🖗 Open Activity 🛛 🌾 Open Client					
Vendor Service Category	Service Name Status Eligibility Date Amount Quantity Funding Source	<u>~</u>				
Compass Early Intervention S	rrvices Face to Face Encounter Submitted Not Eligible 2015/05/02 \$0.00 2 Ryan White MAI					
Compass Early Intervention S	rvices Face to Face Encounter Submitted Not Eligible 2015/05/04 \$0.00 2 Ryan White MAI					

# **Unbillable Items**

Click on the Unbillable Line Items tab of the Reimbursement to view any Expense or Fee for Service entries that will not be included on the Reimbursement.

Provide Enterprise - [Contract Reimbursement]					
∂ File Find View Actions Tools Reports Windows Help					
$\P \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$					
Contract Reimbursement					
Main Billable Line Items Unbillable Line Items Documents					
Unbillable Fee for Service Line Items					
📓 🎒 🖺 🥞 🖉 🥜 🧕 🦉 Men Unbillable Activity 🛛 🌾 Open Unbillable Client					
Vendor Service Category Service Name Reject Reason Date Amount Quantity Funding Source					

Common reasons Fee for Service Line Items may be marked as unbillable include the client not being Eligible for the service, the Line Item Cap being exceeded or the Provider Contract not being in a status of Open. The Line Item Cap being exceeded means that billing the Amount of this ledger record would put the total amount billed to the Provider Contract Line Item over the amount of money allocated to the Line Item. A Contract Amendment would need to be completed to move additional money into the Line Item in order to bill for the service.

# Submitting the Reimbursement

Once all the desired Expense records have been created and the Fee for Service records Reconciled and reviewed, the Reimbursement can be taken through the Submittal process. Click on Submit. This will submit the record to the County

The County has three options when reviewing a Reimbursement Request. It may Approve, Return or Reject the request. Returning the request sets the request status back to Pending.

The County may decide to reject the request. The request cannot be altered or resubmitted, though a new Reimbursement Request can be created. In the unlikely case that the State outright Rejects a Reimbursement Request, they will provide additional information as to why the request was rejected on the Documents tab of the Reimbursement.

Chapter 2

# Palm Beach County

# **Open Client Request**

When an agency request a client to be open to them, Palm Beach staff will review the request and approve or reject the request.

To view an open client request, click on "View- Administration -Open Client Request- All by Status" or "By Status" as shown below:

Viev	v Actions Tools Reports	V	Vindo	ws Help		
	Activity	۲				
	Administration	►		Eligibility Overrides	•	
	Benefits Management	۲		Open Client Requests	•	All by Status
	Clients	۲				
	Contract Management	⊁				
	Lab Import	►				
	Providers	►				
	Reference	۲				
	Reporting	۲				
	System Administration	►				

If you select "All by Status," you then can view the client request that are "Approved," "In Progress," "Rejected," and "Submitted."

Provid	e Enter	prise -	[Client\Op	en Clien	t Requests	s\All by Stat	us]							
🕗 File	Find	View	Actions	Tools	Reports	Windows	Help							
Close	2	9 h	6	😃 🥜	<u>i</u>	0 0								
:	Status	Rec	uesting Ag	ency			Requested	Last Name	First Name	MI	SSN	DOB	Gender	
Approve	ed													
🗄 In Progr	ess													
⊞ Rejecte	d													
<ul> <li>Submitte</li> </ul>	ed													

By clicking the [⊞], it will expand each view. In the "Submitted" Section, it will list the agency who is making the quest and the client name. Double click on the client to open the request. The client, request, and attachments will then be displayed for you review. After reviewing the request, you can select "Approved or Rejected."



You will then fill in the appropriate response information (many fields will automatically populate) and you will need to type in a rejection reason (if the request was rejected).

# Approving User Profile Setup

If the setup request passes all edit checks it is placed in a queue for Contract Administrators to review and Approve if appropriate. Open the view "Contract Management\Setup Requests\User" as shown below:

Close	e 😰 é	9 h 🛱 剑	😃 🥜 🞑	👸 👝 🍙 🗋 Contract User Setup Requ	iest	
	Status	Requested By	Agency	Program	Last Name	First Name
🖽 Appro	ved					
🗄 Subm	itted					

Open the submitted record and click ether the "Approve" or "Reject". Once approved, they will go into a Queue for the PE Administrators (GTI staff) to "Process". The User Name and initial password for the new User will be emailed to the email address that was entered as the "Requested by Email Address" on the Contract User Setup record.

# Approving Contract User Profile Setup

In order for a PE User to be able to access any Client or Service data associated with a given Contract the User must have a "User Profile" associated with the Contract. These are created from the view "Contract Management\Setup Requests\User Profiles". Then, they need to be approved by a County Employee. In the view, double click on a "Submitted" user profile.

Provide Enterprise - [Contract User Profile Setup]	Provide Enterprise - [Contract User Profile Setup]					
🔿 File Find View Actions Tools Reports Wi	File Find View Actions Tools Reports Windows Help					
Contract User Profile Setup	Contract User Profile Setup					
Contract User Profile Setup Documentation	Contract User Profile Setup Documentation					
Status *	Submitted					
Requested By *	Amanda Epping/GTI					
Requested By Email Address	amanda@gti.com					
Request Type *	Add User Profile					
Agency Name *	PBC Health Care District					
Program Name	Client Services					
Provide Enterprise User Name *	CM Test					

Open the submitted record and click ether the "Approve" or "Reject". Once approved, they will go into a Queue for the PE Administrators (GTI staff) to "Process". Once Processed the User Profile will have been created and the User will then have access to the records associated with the Contract.

#### New Agency Program Setup

For every Agency that is funded to services an Agency Setup record is used to submit a request to complete setup of all of the required records to activate the Agency. To create a new Agency go to View – Contract Management – Setup Requests - Agency

one

0 / 0	5	
Program. Click on	ract Agency Setup Request . A screen will appear similar to t	the
shown helow:		
Provide Enterprise - [Contract Agency Setup]		
File Find View Actions Tools Reports	Windows Help	
Close AS □ General Save ✓ Submit     Save ✓ Submit		
Contract Agency Setup		
Contract Agency Setup		
Status	* Panding	
Requested By	* Amanda Epping/GTL	
Requested By Email Address		
Agency Name	*	
Provide Enabled Agency?	*	
Street Address 1	*	
Street Address 2		
State	* FL 🗸	
County	* Palm Beach	
City	* West Palm Beach	
Zip	* <u> </u>	
Phone		
Web Site Address		
E Message Recipient 1		
E Message Recipient 2		
Employer ID Number - EIN		
DUNS Number		
Contact Name - Last		
Contact Name - First		
Contact Title		
Contact Phone	( ) -	

Contact Fax

Contact Email

Fill in all required fields

*Key fields to be careful selecting are noted below:

- **Agency Name** Always first use the UI button to see if the Agency you are trying to set up is already set up in PE (e.g. you are actually adding a new Region/Provider Type program for the Agency). If the Agency name does not appear in the selection dialog then manually enter the Agency Name.
- **Program Type** Select the program name

Next select the "Associated Users" tab and fill in the fields on that tab.

Provide Enterprice - (Contract Agency Satur)	
- File Field View Actions Tools Report Windows Halp	
U The Third View Actions Tools Reports Windows Thep	
🖣 Close 🐇 🛛 🙀 Save 🛷 Submit	
Contract Agency Setup	
Contract Agency Setup Associated Users	
Existing PE Users to create a User Profile for this Agency/Program	
	*
User Setup Requests	
A the Constant of the Constant Hard State Depart	
2 🗃 📲 🔚 🌖 🙄 🥟 📃 egg 🔄 Contract User Setup Request	
Status Last Name First Name	

If any Users that are to be set-up to have access to records entered under the new Agency/Program are already set up in Provide Enterprise as users. If so, you can select them in the first field above using the UI button on the upper right hand corner of the field.

If there are new users that need to be set up use the Add User Setup Request button to create user Setup Request records for each.

After completing the form click the "Submit" button. It will go into a Queue for the PE Administrators (GTI staff) to "Process."

# Approving User Role Change

If users' roles need to be changed, a user role change record is submitted. These are created from the view "Contract Management\Setup Requests\User Roles Change". Then, they need to be approved by a County Employee. In the view, double click on a "Submitted" user profile.

	Pro	vide	e Ente	erprise	e - [	Cont	ract	Mar	nager	ment	\Seti	up Reque	sts∖	User Roles Change]	
	📿 Fi	le	Find	Vie	w	Acti	ons	То	ols	Rep	orts	Windov	VS	Help	
	Closen	se	2	<b>a</b> (	þ		<b>d</b>	2	Þ			0		Contract User Roles Ch	hange Request
		S	tatus	Re	eque	ested	By		Agen	су				User Name	
	🗉 Pend	ding													
	Subr	nitte	ed												
1		S	ubmitt	ed Le	e G	odglu	Jck/G	GΤL .	AIDS	Heal	thcar	e Foundat	ion	Amanda Epping/GTI	
I															

Open the submitted record and click ether the "Approve" or "Reject". Once approved, they will go into a Queue for the PE Administrators (GTI staff) to "Process".

## Approving Insurance Enrollments

The County will need approve Insurance Service Enrollments that have been submitted to the County. The "submitted" insurance enrollments are in the view "Benefit Management\Insurance Services Enrollment \Submitted to County".

nterp	rise				
View	Actions Tools Reports	W	ndows Help		
	Activity	۲			
	Administration	•			
	Benefits Management	F	ADAP Premium Assistance Enrollments	١	
	Clients	•	Insurance Services Enrollments	Þ	All By Status
	Contract Management	×	Payment Request Batches	F	Currently Enrolled
	Lab Import	•	Payment Requests Approved to Pay		Enrollment Requested
	Providers	×	Payment Requests Submitted		Submitted to County
	Reference	•	Premium Client Payment Due	٦	
	Reporting	×	Premium Client Payment Overdue		
	System Administration	×	Premium Payment Batches	۲	
_			Premium Payment Due		
			Premium Payments Approved to Pay		
			Premium Payments Pending		

A screen similar to below will appear:

S	Provide	e Ente	rprise -	[Benefit	ts Man	agen	nent\	Insu	rance Servi	ces Enroll
0	File	Find	View	Action	ns To	ols	Rep	orts	Window:	s Help
∢	Close	2	<i>8</i> Þ	1 🛱 🤞	9 😃	Þ	₫			
	Date	Subm	itted	Program	Туре	Las	st Na	me	First Name	e MI
	2015	5/05/28		ACA Ins	urance	Gra	зу		Keith	
	2015	5/04/02		ACA Ins	urance	Beg	gala		Paul	Т

In the view, double click on a "Submitted" Enrollment.

ile Find view Actions Tools Reports Window	ws Help	
Close 🌾 🗢 ⇒ 📄 ▼ 🖋 Enroll 🖋 Deny 🦿	) Create 🔻 📀 View 👻	
nsurance Services Enrollment : Keith Gray () Compase - Client Services : Keith Gray/GTL (05/28/	2015	
Documentation		
Status	Submitted to County	
Premium Payer	* Compass	
Date Requested	Thursday May 28, 2015	2
Date Submtted	Thursday May 28, 2015	3
Program Type	ACA Insurance	
ACA Application ID		
Health Plan Carrier	<ul> <li>UnitedHealthCare of Florida</li> </ul>	
Plan Name	<ul> <li>United Healthcare Sliver Compass 4000</li> </ul>	
Member/Subscriber ID	<ul> <li>456456456</li> </ul>	
Premium Payment Due	* Monday June 15, 2015	
Grace Period (# Days)	* 30	
Premium Assistance Coverage Start Date	<ul> <li>Monday June 01, 2015</li> </ul>	
Premium(s) Overdue At Enrollment?	* No	
Payee Name	UnitedHealthCare of Florida	
Payee Vendor ID		
Payee Street Address 1	<ul> <li>1445 W. Wayward</li> </ul>	
Payee Street Address 2		
Payee City	<ul> <li>West Palm Beach</li> </ul>	
Payee State	* FL	
Payee Zip	* 33333-3333	
Payee Phone	() -	
Payee Payment Method	* Check	
Payment MEMO Line Type	Client Name - Member ID	
Premium Amount	* \$400.00	
Premium Amount - Support Portion	* \$374.00	
Premium Amount - Client Portion	\$26.00	
Client Payment Method	Check to Paver	
Payment Cycle	* Manuful	

Review the requested enrollment record. Click on the Forol to approve the enrollment or click on Click on to deny the to deny the application. If denied, select the reason for denial and click on "Ok."

#### Approving Reimbursements

The County will need approve reimbursements that have been submitted to the County. The "submitted" reimbursements are in the view "Contract Management\Reimbursements\ All Submitted."
View Actions Tools Report	Windows Help		
Activity	> [		
Administration	>		
Benefits Management	>		
Clients	•		
Contract Management	<ul> <li>Billing Rates</li> </ul>		
Lab Import	<ul> <li>Contract Age</li> </ul>	ncies	
Providers	<ul> <li>Contracts</li> </ul>	• • _	
Reference	Reimbursem	ents 🕨	All By Status
Reporting	<ul> <li>Setup Reques</li> </ul>	ts 🕨	All Submitted
System Administration	► _		By Status

A screen similar to below will appear:

Provid	e Enter	prise - [	Contract	Manager	ment\Rei	mbursen
⊘ File	Find	View	Actions	Tools	Reports	Windo
Close	<b>2</b> (	9 h	🖺 🁌	😃 🥜	<u>i</u>	
A	gency	Status	Date R	eimburse	Thru Ar	nount
Compass						
C	ompas	s 2015/0	)5/27 20	015/05/31	\$0	).00

In the view, double click on a "Submitted" Reimbursement.

Provide Enterprise - [Contract Reimbursement]						
File Find View Actions Tools Reports Windows Help						
$\left  \begin{array}{c} \P & \text{Close} & \stackrel{\text{\tiny ABS}}{\longrightarrow} \right  \rightleftharpoons \Longrightarrow \\ \blacksquare \bullet & \blacksquare \bullet \\ \bullet & \bullet \\ \bullet \\$	Qlose Aligner ← → □ ▼ Approved Approved Approved Print ▼					
Contract Reimbursement						
Main Billable Line Items Unbillable Line Items	Documents					
Reimbursement Request Status	Submitted 👻					
Contracted Agency	Compass					
Reimbursement Thru Date	Sunday May 31, 2015 🔹 👻					
Prepared By	Keith Gray					
Prepared By Phone	(414) 454-0161					
Prepared By Email						
Submitted Date	Wednesday May 27, 2015					
Submitted By	Keith Gray/GTI					
Processing Log						
5/27/2015 1:35:56 PM - Submitted By Keith Gray 5/27/2015 1:35:51 PM - 15 Ledger Records Create	d By Keith Gray					
	<i>▼</i>					

Review the reimbursement. The "Billable Line Items" will list the services that are being billed and the "Unbillable Line Items" will be a list of services that are not being billed. The "Documents" tab will include any documentation the agency provided.

Click on the Approved to approve the reimbursement or click on Rejected

to reject

the reimbursement. If you do reject the reimbursement, you will receive the warning below:

Reject Warning	X
Rejecting this Reimbursement will permane Reimbursement. Do you wish to continue?	ntly reject all line items on the
	Yes No

Click on "Yes" to continue.

If you want to return the reimbursement to the agency, click on Return. You will then be prompted to enter a "Reason for Return" and then click on "Ok."

If you click on "Print," you can also print the reimbursement request.

## Approving Eligibility Overrides

The County will need approve overrides that have been submitted to the County. The overrides that are pending review are in the view "Administration \Eligibility Overrides \All Pending Review."

Viev	v Actions Tools Reports	; V	/indo	ws Help		
	Activity	►				
	Administration	►		Eligibility Overrides	•	All By Status
	Benefits Management	►		Open Client Requests	•	All Pending Review
	Clients	►				
	Contract Management	►				
	Lab Import	►				
	Providers	►				
	Reference	►				
	Reporting	►				
	System Administration	►				

A screen similar to below will appear:

Provide Enterprise - [Administration\Eligibility Overrides\All Pending Review]						
∂ File Find View Actions T	ools Reports Windows	Help				
🖣 Close 📓 🎒 눹 🎁 🍏 🐸	🕽 🥜 🧕 🤠 🆐 Mark Ap	proved				
Agency RW Client ID Last N	Name First Name MI S	Service Category	Eligibility?	Date Start	Date End	
Compass 1468 Gray	Keith M	Mental Health Services	Eligible	2015/04/08	2015/06/08	
Compass 1477 Client	Test E	Early Intervention Services	Not Eligible	2015/05/01	2015/05/22	

In the view, double click on one of the records.

Provide Enterprise - [Eligibility Override For Te	st Client] ts Windows Help	
Bigibility Override : Test Client () Compass - Client Services : CM Test [05/	22/2015]	
Eligibility Override		
Status Eligibility Setting	Requested     Not Flinible	
Service Category Date Start	Early Intervention Services     Friday May 01, 2015	
Date End	* Friday May 22, 2015	
uverride hequest heason	Test override (cequest	* *
Support Doc Attachment Type Images	Image	•
🖉 Attach 🛛 🚽 Save As		

Review the request.

Click on the 🗹 Approved	to approve the Eligibility Override or click on 🛹 Rejected to	)
reject the Eligibility Ove	erride. If you do reject the reimbursement, you will need to en	nter
the reject reason and a	ny noted. Then, click on "Ok."	

E.