Sandata

New Feature Demo

June 26, 2024

Sharlyn Katzner

- I/DD Specialist/Tooling Product Owner
- Joined Solana in 2005
- Live in Northwest Ohio
- Mother of Two Daughters (21 and 16)
- Love Dogs, Ice Cream, and Mani/Pedis
- Voting Rights Advocate

Agenda

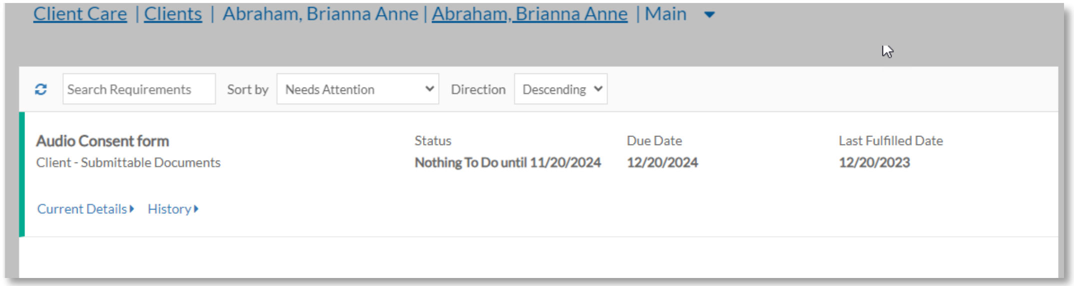
- Client Care Requirements
- Program Plan Assessments
- Application Tracking System
- Census
- Service Delivery Limits
- Extra Tidbits
- Q & A
- Next Webinar

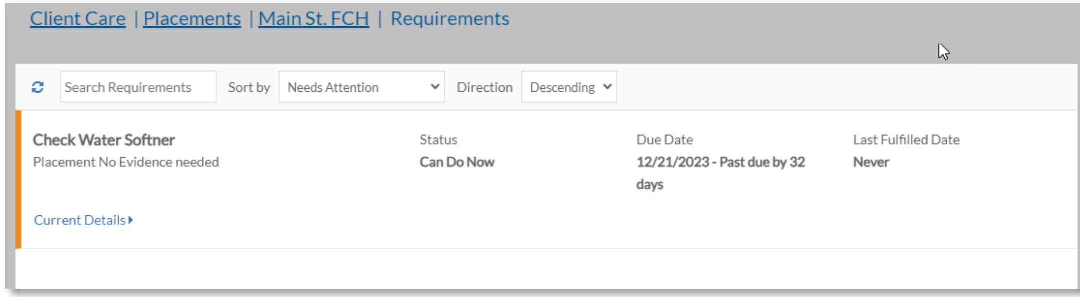
Client Care Requirements

Client Care Requirements

Requirements allow agencies to make sure that the requirements needed to stay in compliance are completed and completed on time.

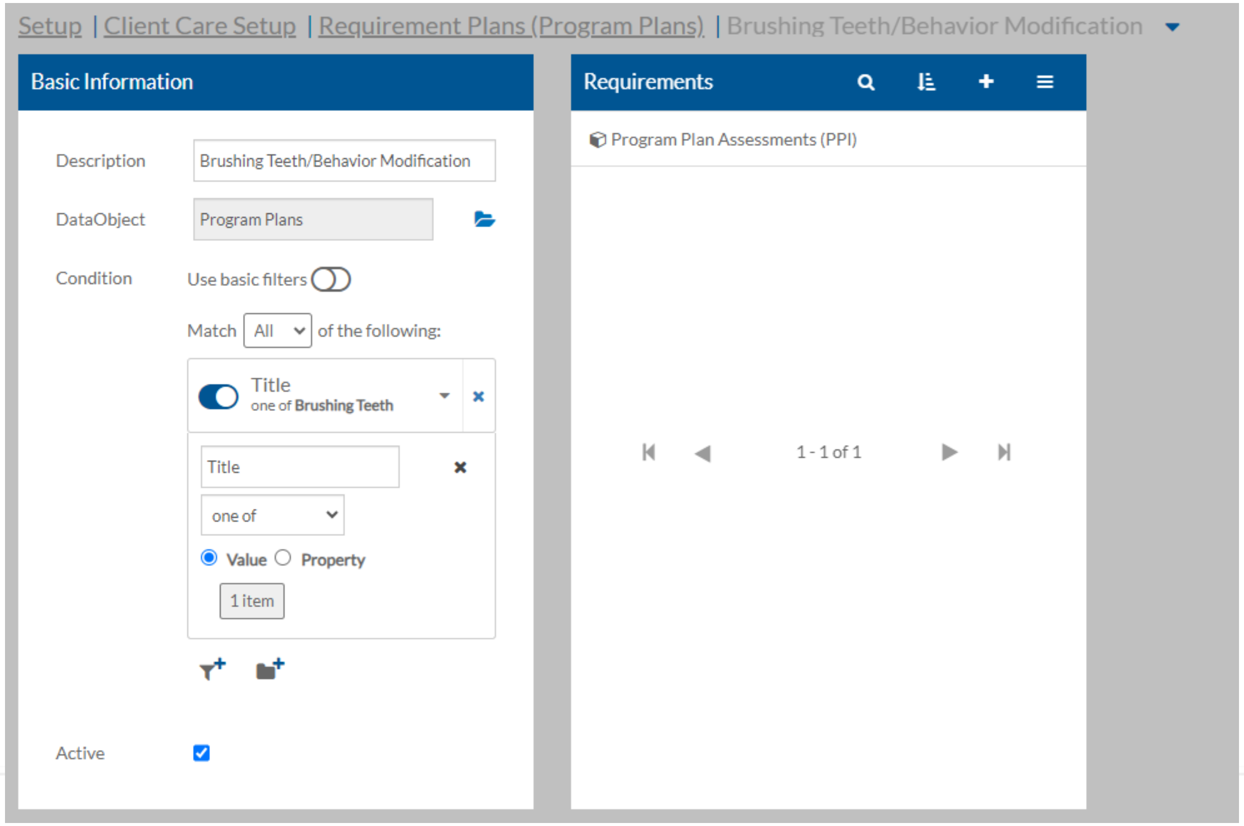
- **Clients** – An employee completes a requirement on behalf of a client who must complete a requirement regardless of where they are being served, such as completing an intake form.
- **Client Placements** – An employee completes a requirement on behalf of client who must a requirement based on where they are being served, such as completing an Health Records Form for an ICF/MR placement.
- **Placements** – An employee completes a requirement on behalf of a placement or location that must complete a requirement such as a fire drill or inspection.
- **Program Plans** – An employee completes a requirement on behalf of a program plan such as a monthly, quarterly, or annual assessment.





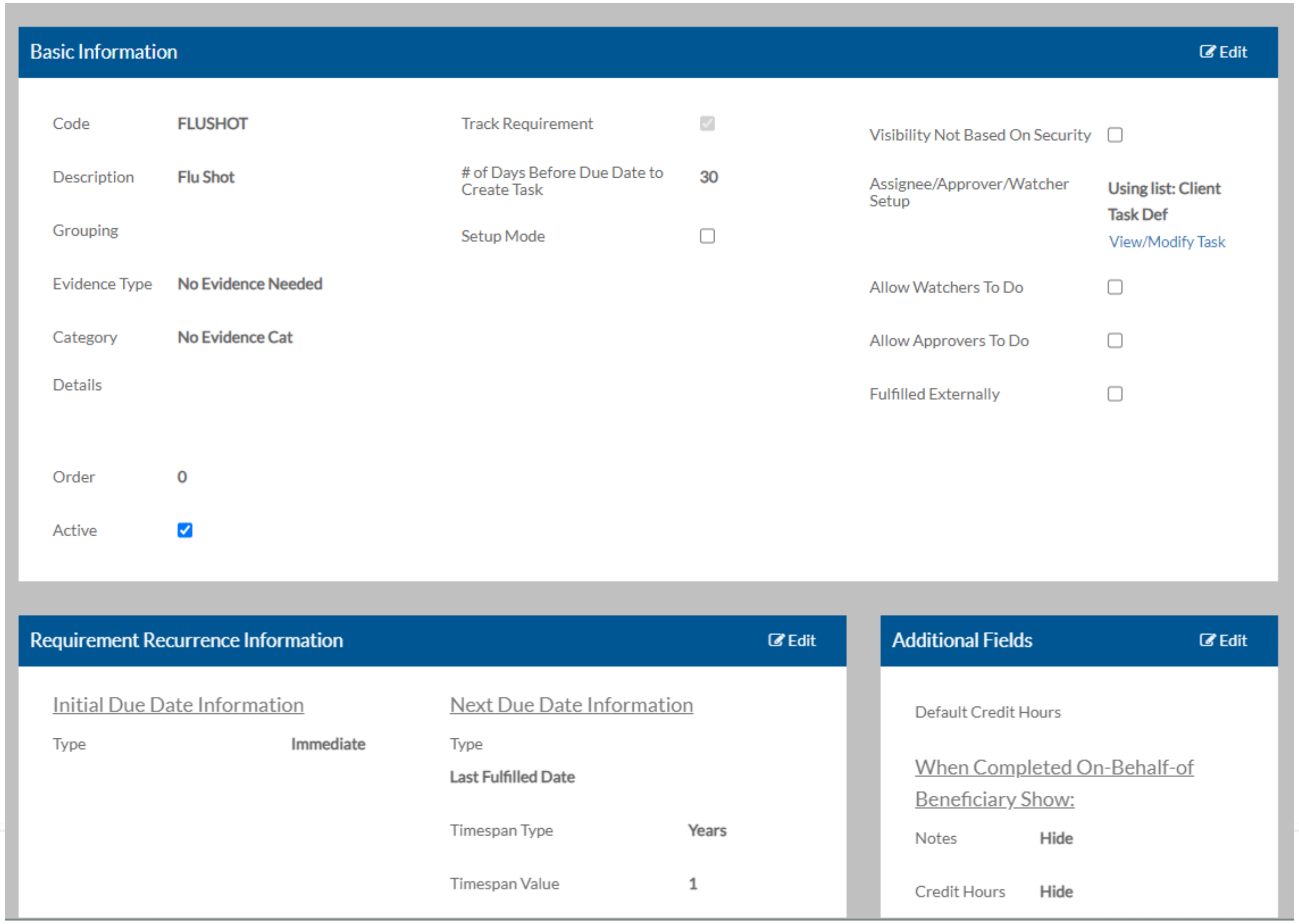
Client Care Requirements

- You determine who needs to have the requirements fulfilled based on filters such as any client who goes to day services or all program plans with a title of teeth brushing using **requirement plans**.



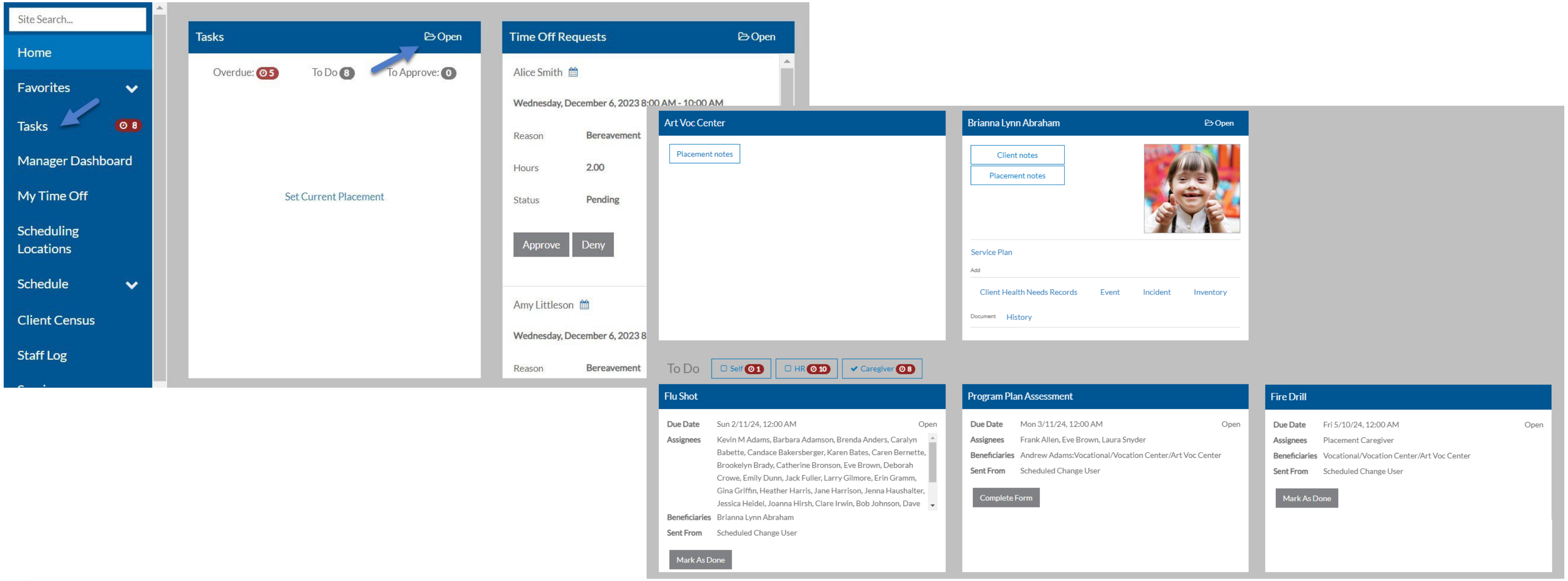
Client Care Requirements

- You also determine **when and how** often the requirement must be completed, for example every year, within 10 days of starting at a new placement, once and never again, etc.



Client Care Requirements

- After the requirement “rules” are in place the requirements system takes over, using tasks. When the requirement is coming due a new task will appear in the Tasks dashboard for person who will be completing the requirement (such as a Caregiver).



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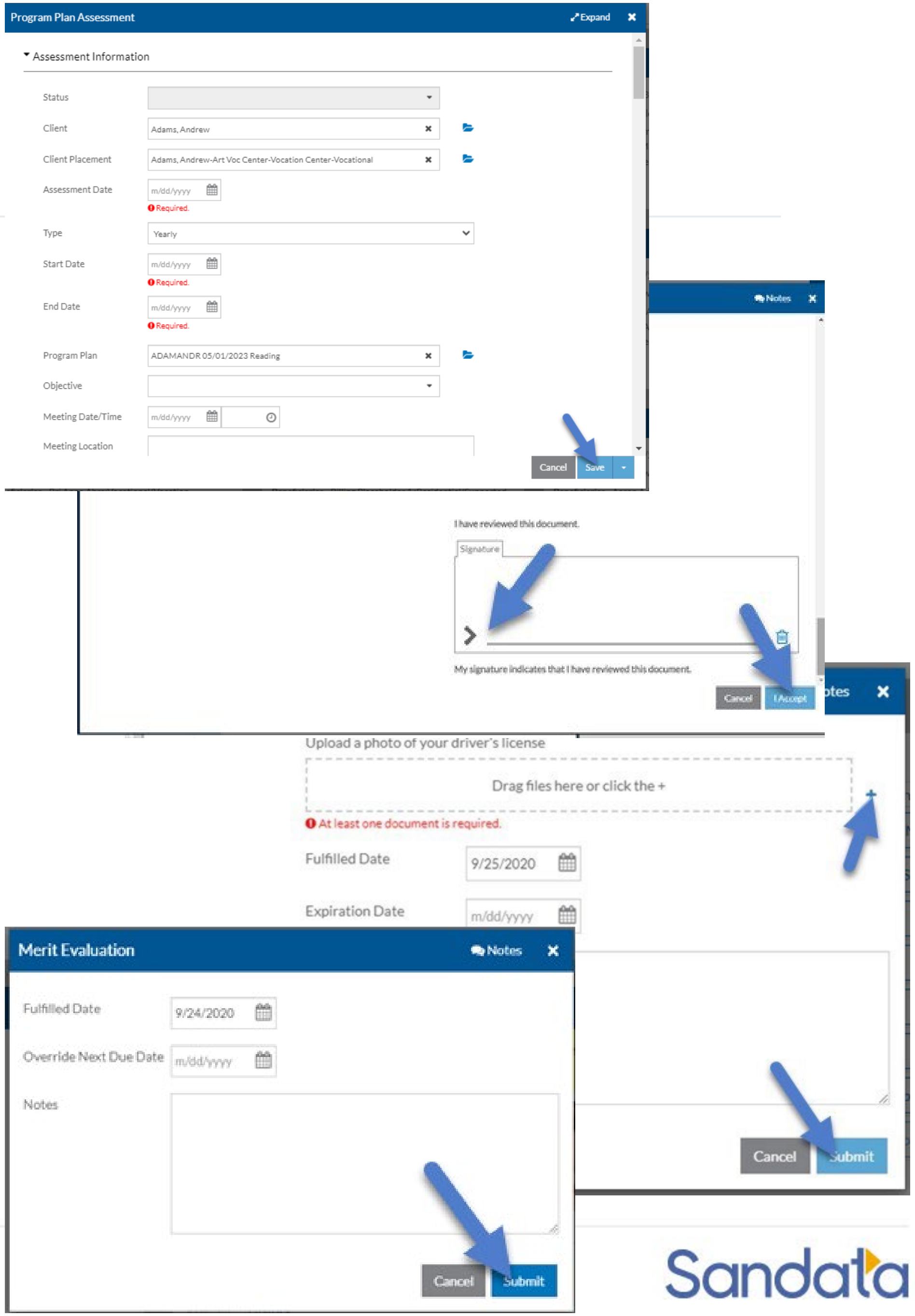
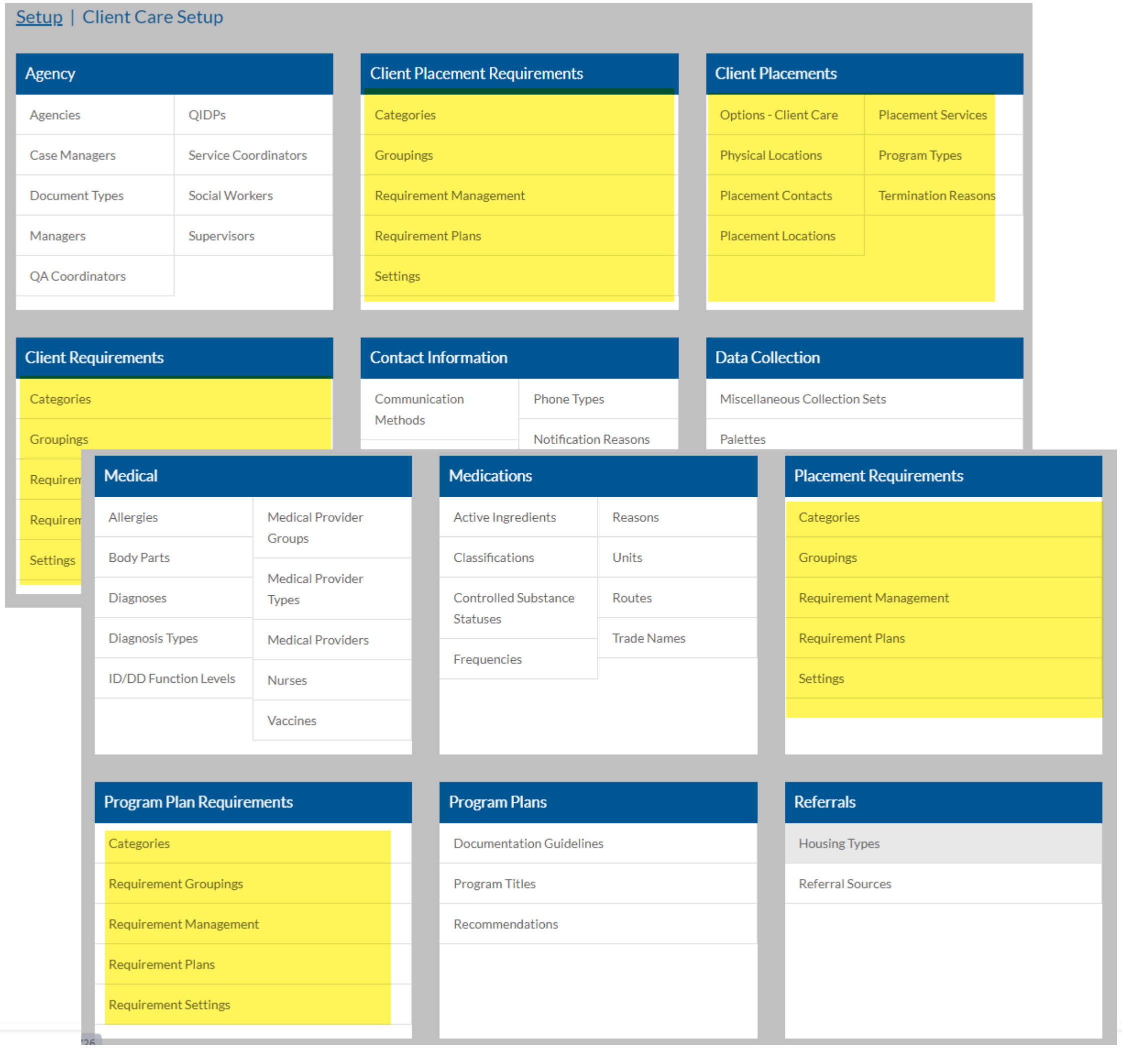
Client Care Requirements

- Submit Document – The user can upload a document such as a completed health form from a doctor.
- Signable Document – A document will appear for the user to review along with a place for the user to electronically sign it, such as an attestation or consent.
- Complete a Form – The user fills in the information in one of the Client Care screens (standard or custom) such as the Program Plan Assessment.
- No evidence needed - This is a catch all if nothing else applies and allows the user to simply mark a requirement complete without providing evidence.



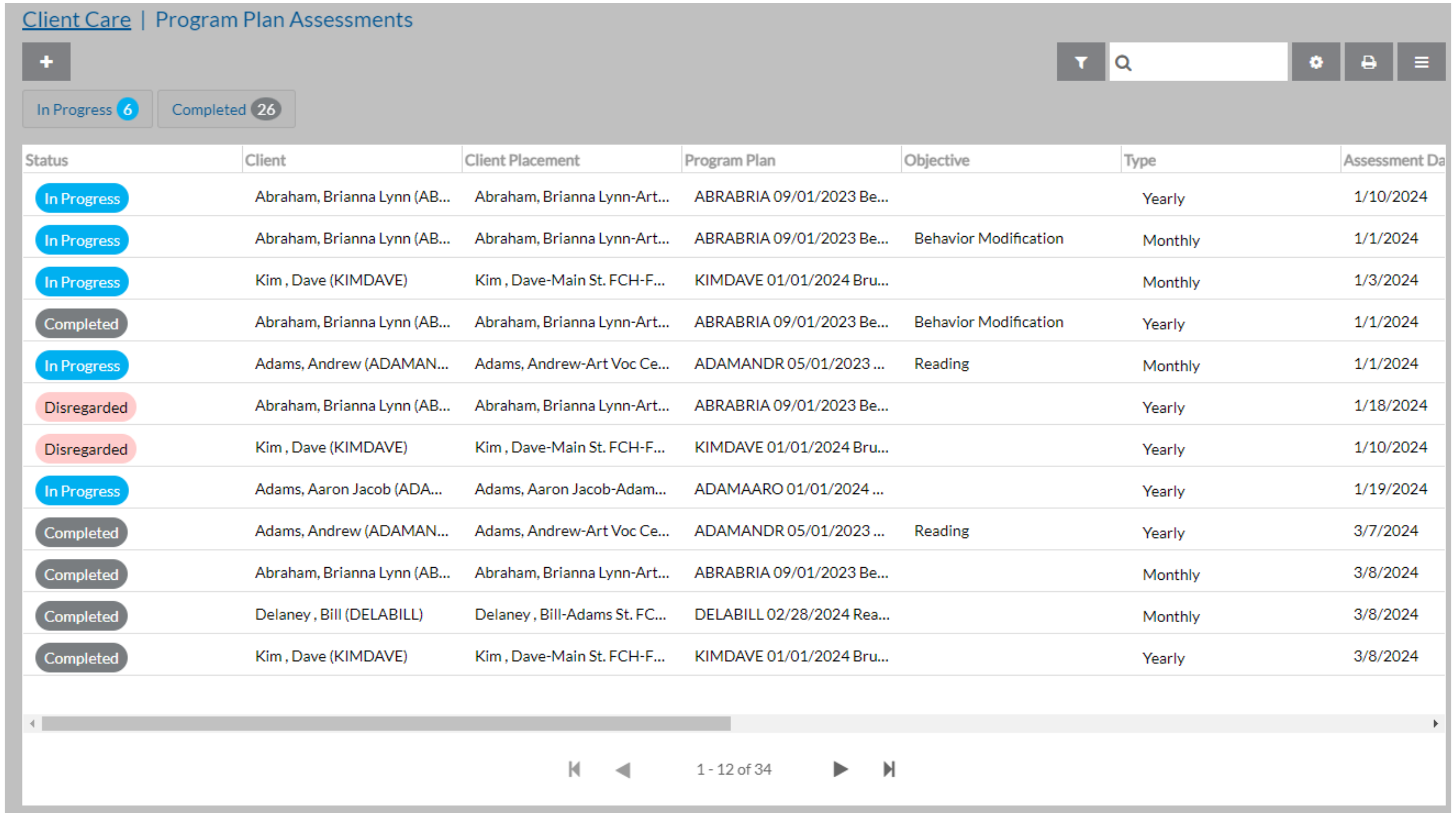
Client Care Requirements



Program Plan Assessments

Program Plan Assessment Changes

- Now a Workflow
- Select one of our workflows
- Turn on Status filters and grid colors
- Assign to another user via Tasks when changing Status
- Associate it with a Program Plan Requirement


Client Care | Program Plan Assessments

In Progress 6 | Completed 26

Status	Client	Client Placement	Program Plan	Objective	Type	Assessment Da
In Progress	Abraham, Brianna Lynn (AB...	Abraham, Brianna Lynn-Art...	ABRABRIA 09/01/2023 Be...		Yearly	1/10/2024
In Progress	Abraham, Brianna Lynn (AB...	Abraham, Brianna Lynn-Art...	ABRABRIA 09/01/2023 Be...	Behavior Modification	Monthly	1/1/2024
In Progress	Kim , Dave (KIMDAVE)	Kim , Dave-Main St. FCH-F...	KIMDAVE 01/01/2024 Bru...		Monthly	1/3/2024
Completed	Abraham, Brianna Lynn (AB...	Abraham, Brianna Lynn-Art...	ABRABRIA 09/01/2023 Be...	Behavior Modification	Yearly	1/1/2024
In Progress	Adams, Andrew (ADAMAN...	Adams, Andrew-Art Voc Ce...	ADAMANDR 05/01/2023 ...	Reading	Monthly	1/1/2024
Disregarded	Abraham, Brianna Lynn (AB...	Abraham, Brianna Lynn-Art...	ABRABRIA 09/01/2023 Be...		Yearly	1/18/2024
Disregarded	Kim , Dave (KIMDAVE)	Kim , Dave-Main St. FCH-F...	KIMDAVE 01/01/2024 Bru...		Yearly	1/10/2024
In Progress	Adams, Aaron Jacob (ADA...	Adams, Aaron Jacob-Adam...	ADAMAARO 01/01/2024 ...		Yearly	1/19/2024
Completed	Adams, Andrew (ADAMAN...	Adams, Andrew-Art Voc Ce...	ADAMANDR 05/01/2023 ...	Reading	Yearly	3/7/2024
Completed	Abraham, Brianna Lynn (AB...	Abraham, Brianna Lynn-Art...	ABRABRIA 09/01/2023 Be...		Monthly	3/8/2024
Completed	Delaney , Bill (DELABILL)	Delaney , Bill-Adams St. FC...	DELABILL 02/28/2024 Rea...		Monthly	3/8/2024
Completed	Kim , Dave (KIMDAVE)	Kim , Dave-Main St. FCH-F...	KIMDAVE 01/01/2024 Bru...		Yearly	3/8/2024

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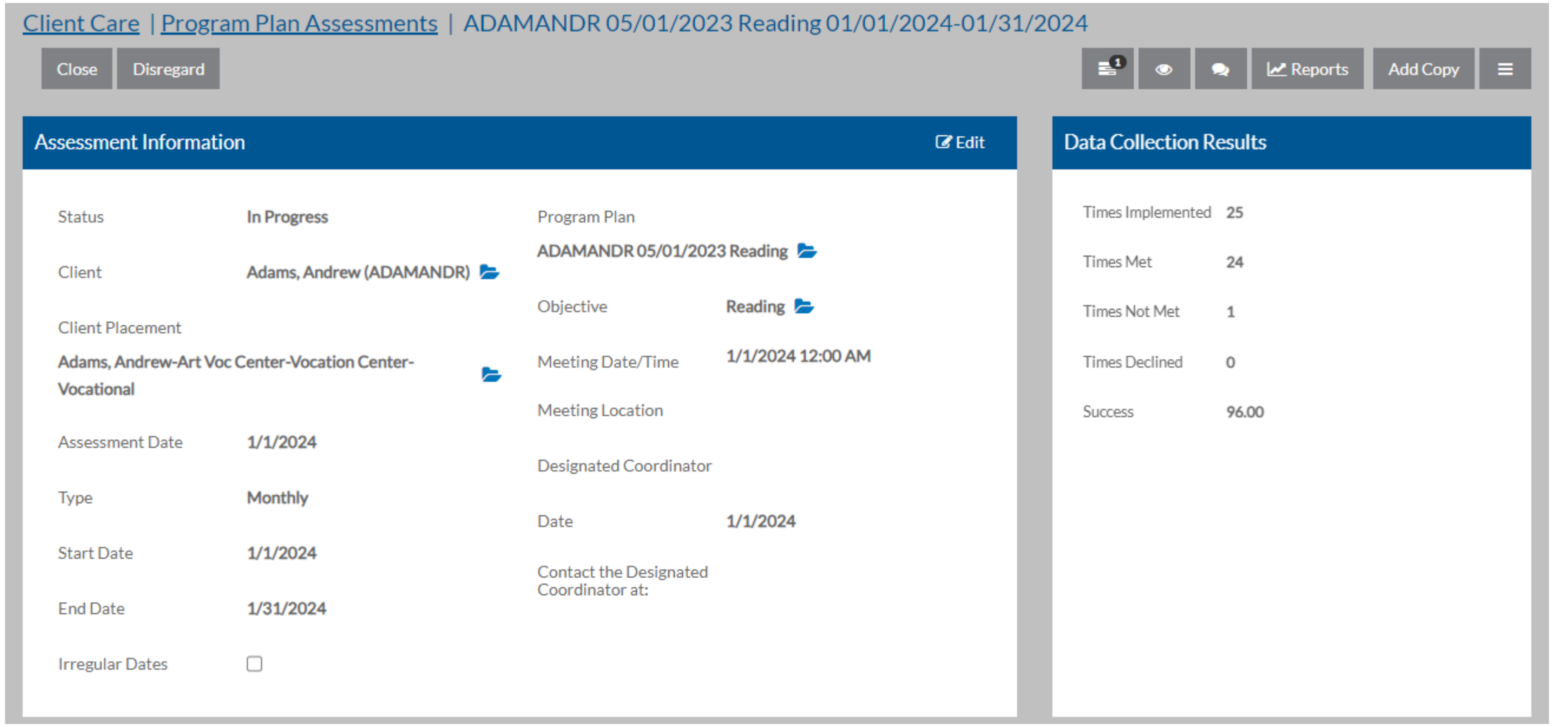
Program Plan Assessment Changes

Data Collection Results Based On

- All Program Plan Objectives

Or

- Selected Objective



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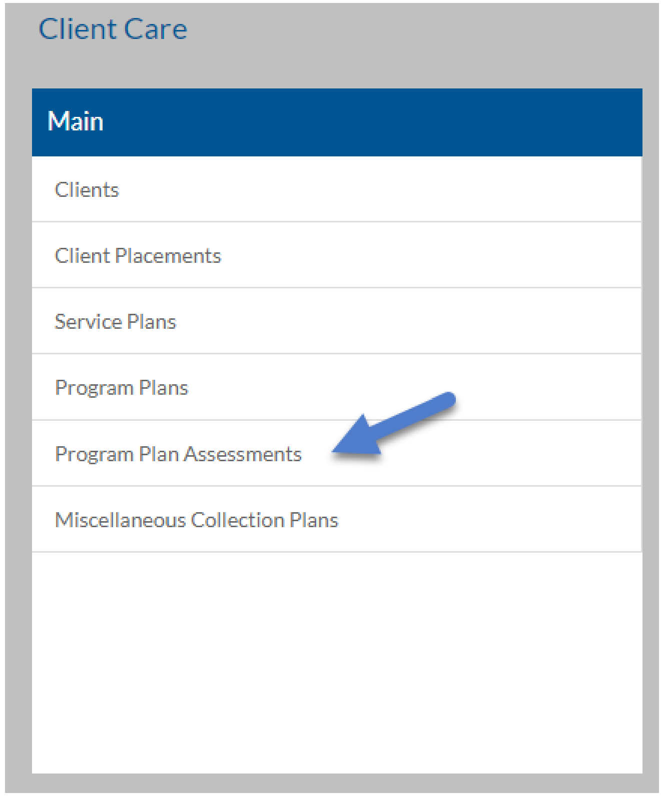
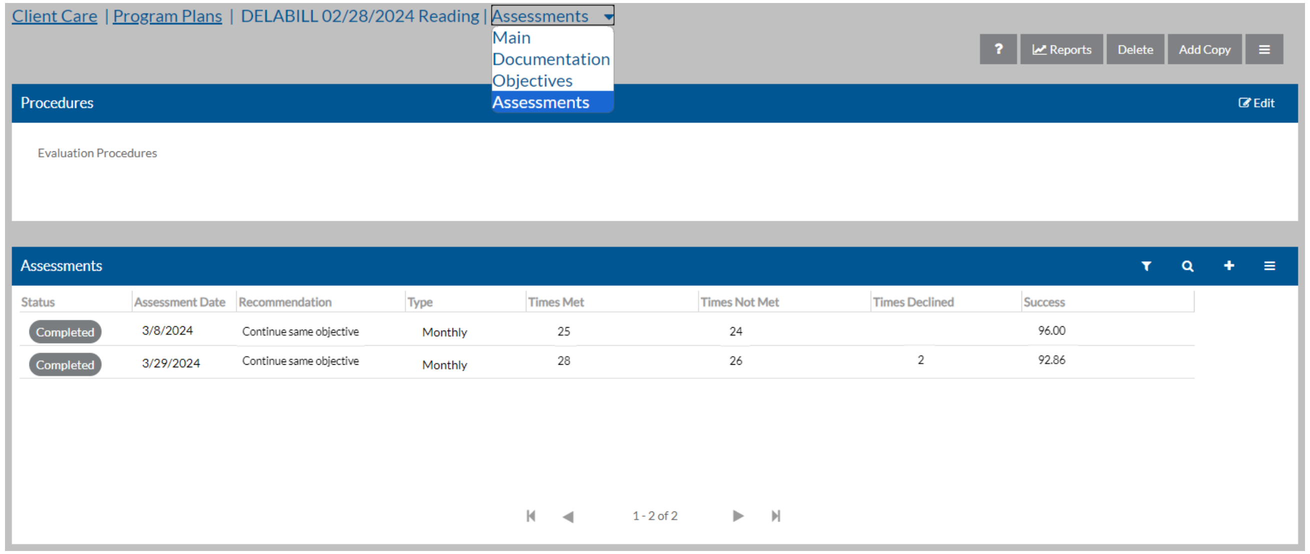
Program Plan Assessment Changes

All Program Plan Assessments



One Client’s Assessments



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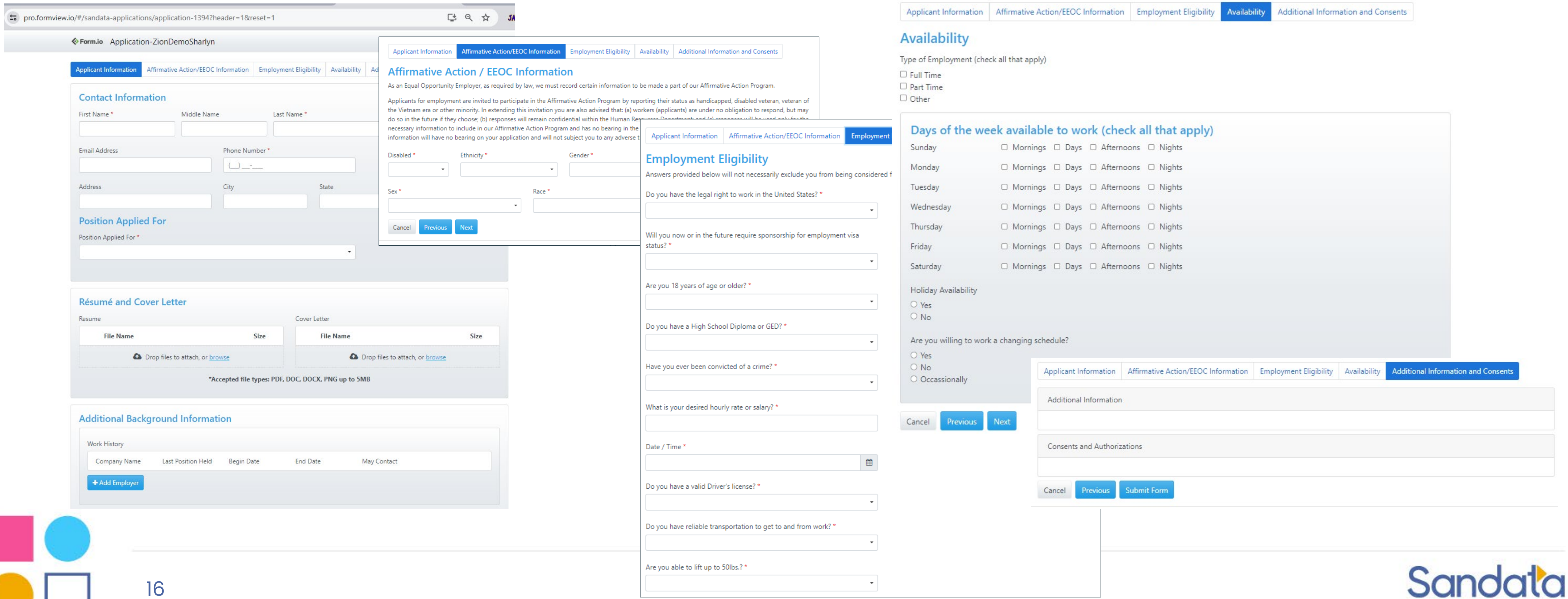
Application Tracking System

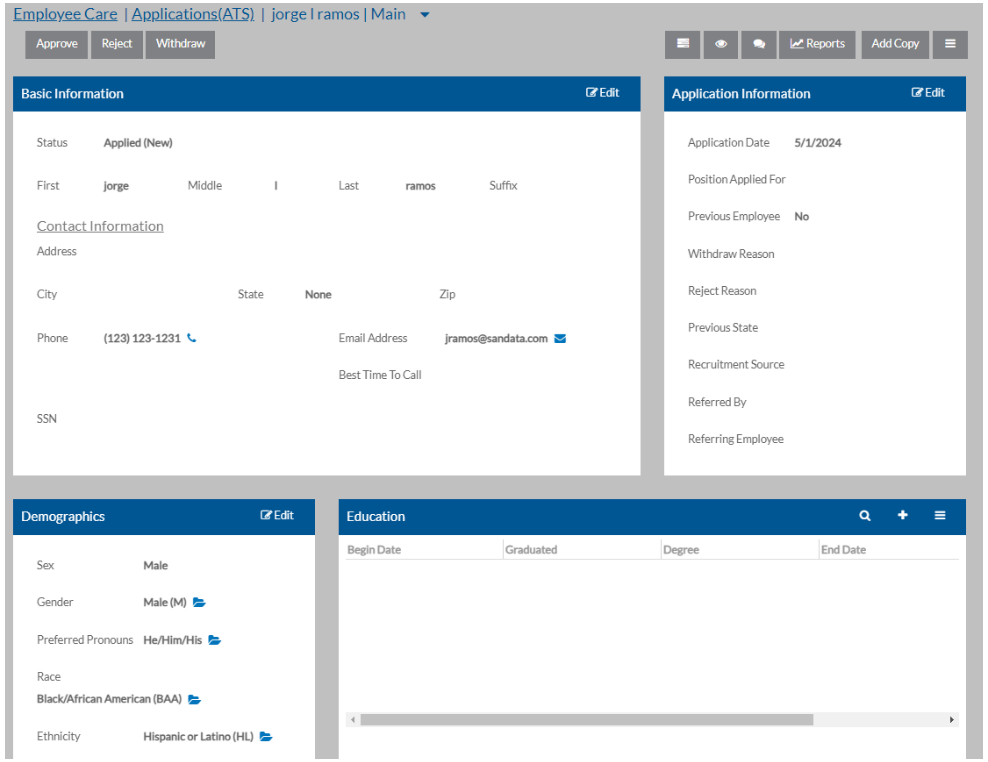
Application Tracking

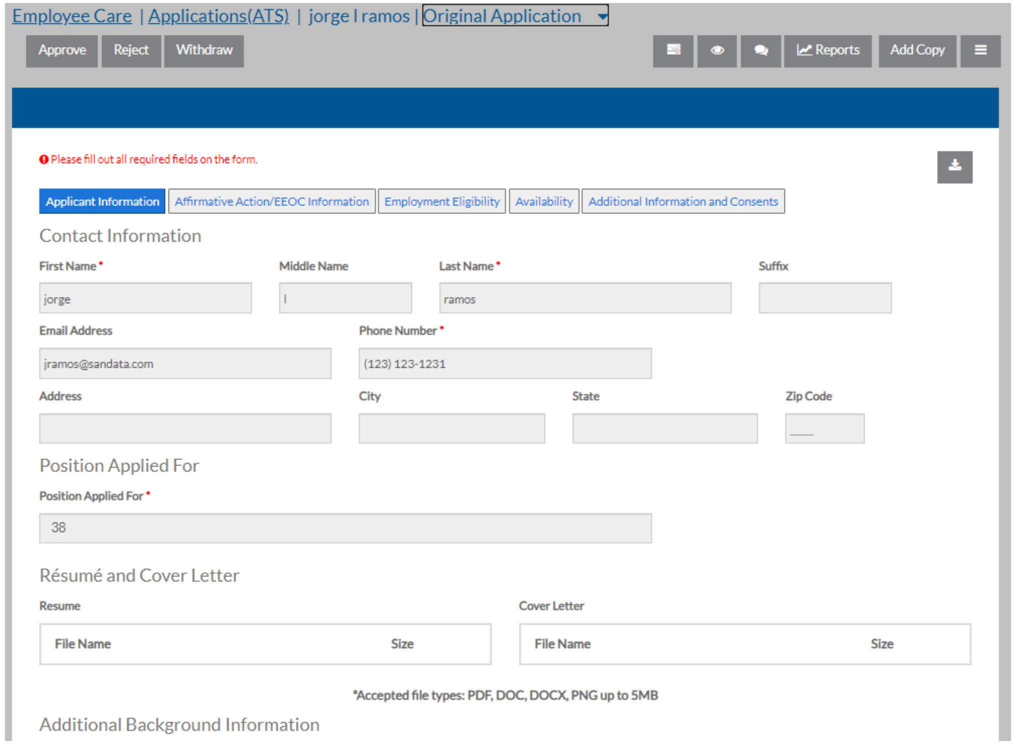
- Have an external Form.io web application with a unique web address that applicants can complete without having to log in to DataPlus.



Application Tracking

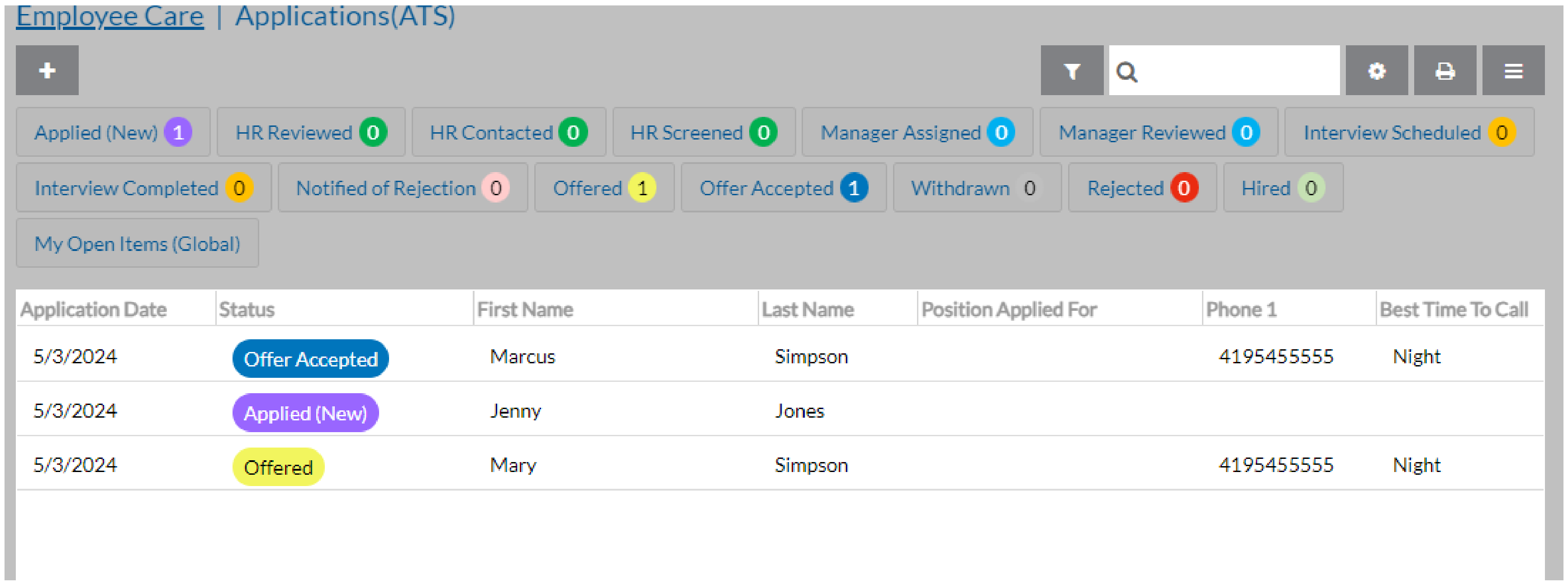
- Review the completed Form.io web application in Employee Care via the Application Tracking screen on the Original Application tab.





Application Tracking

- See immediately how many applications are in a particular status.



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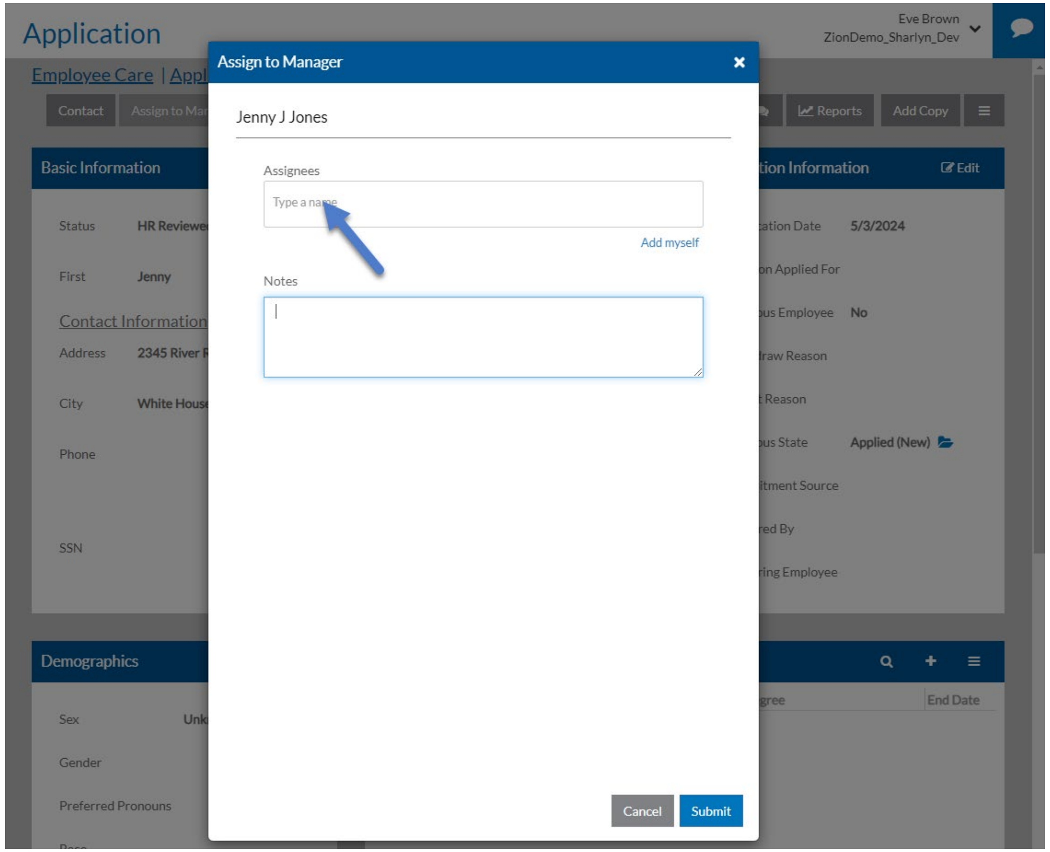
Application Tracking

- Route the application to the hiring manager (via tasks) when changing statuses.



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Application Tracking

- Run a report to determine where in the process the applicant was rejected or withdrew by including the previous state

Status of Application When Rejected or Withdrawn

5/7/2024 3:52 PM

Status	Previous State
Rejected	
	HR Reviewed
	Interview Completed
Withdrawn	
	Offered

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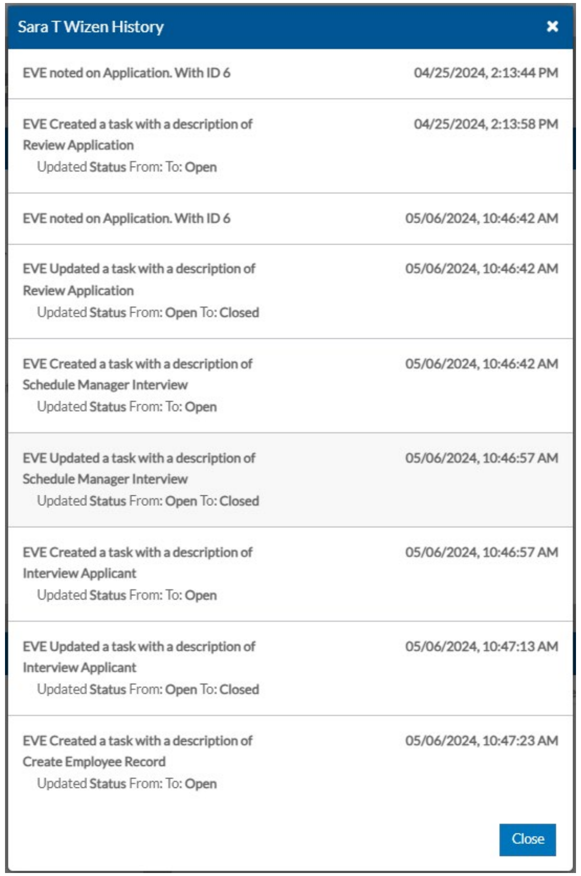
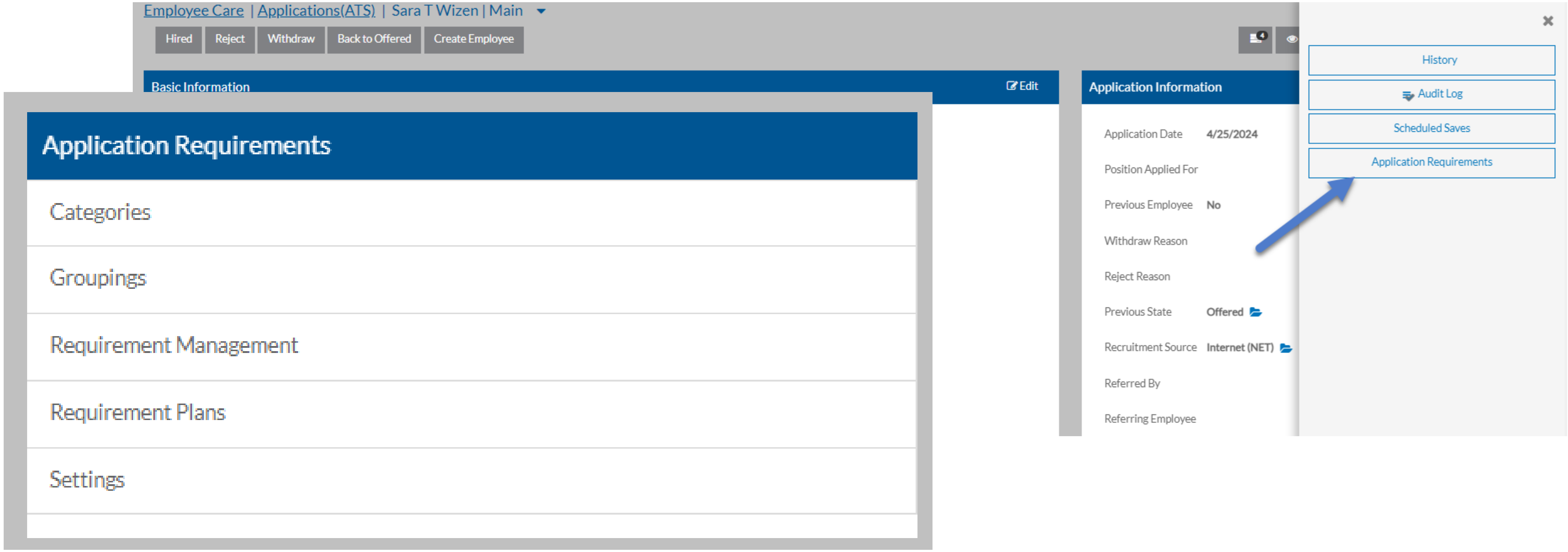
Application Tracking

- View the application history.



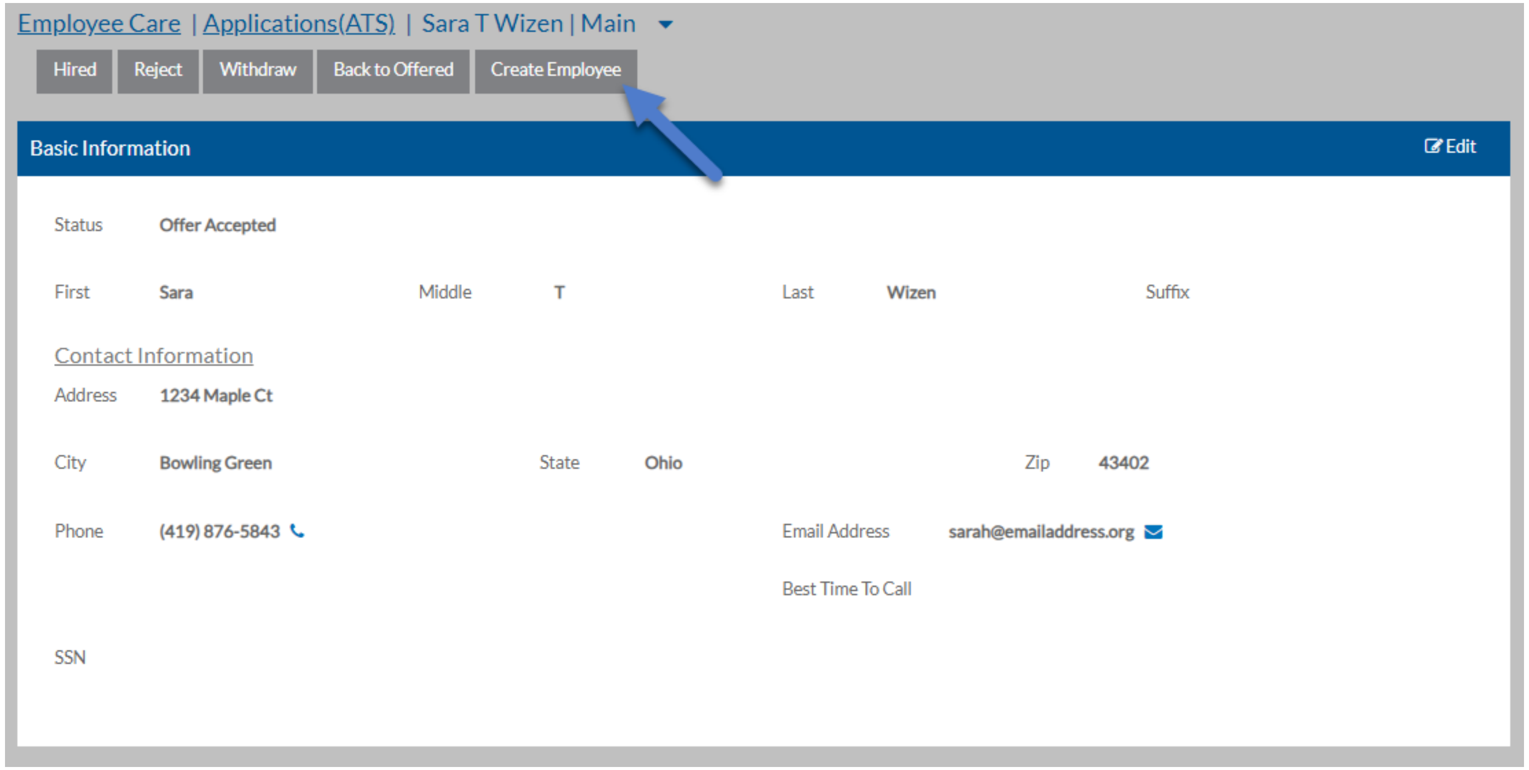
Application Tracking

- Tie a requirement to an application (such as Background Check or a Drug Screen)



Application Tracking

- Create an Employee from a hired applicant.



Census

Census

- Collects client attendance and has options for collecting Service information (with or without staff) and trip-based transportation
- Client Census does not involve staff or client ratios and will either generate a per diem or unit entry in the export file. If service information is collected it will create a time entry in the export file instead.
- If trip-based transportation is collected it will also create per diem or unit entries for the transportation entries.
- Client Census does **not** integrate with Payroll. It assumes that if unit or time entries are created that a billing placeholder employee is used and the service type selected is not set to merge to Payroll in Billing.

Census

- Staff select the appropriate Census Data Collection Type and then the day they want to take attendance for:

Data Collection Type: ICF Census (ICF Census / OH ADS) Week of 2/18/2024 - 2/24/2024

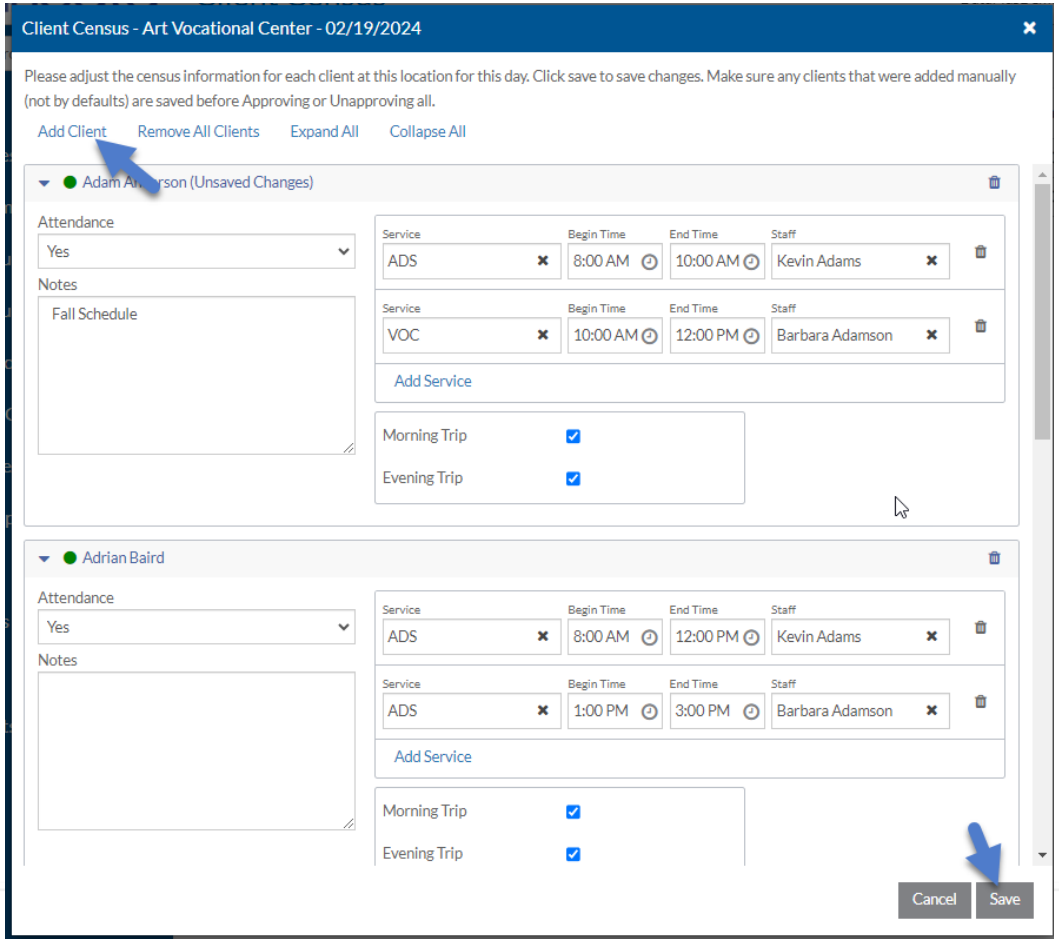
Location	Sun 2/18	Mon 2/19	Tue 2/20	Wed 2/21	Thu 2/22	Fri 2/23	Sat 2/24
ICF Census Location	0 / 0	0 / 0	0 / 0	0 / 0	0 / 0	0 / 0	0 / 0

Data Collection Type: OH ADS Week of 2/18/2024 - 2/24/2024

Location	Sun 2/18	Mon 2/19	Tue 2/20	Wed 2/21	Thu 2/22	Fri 2/23	Sat 2/24
Art Vocational Center	0 / 0	4 / 5	5 / 5	5 / 5	5 / 5	5 / 5	0 / 0
Day Programs Center	0 / 0	1 / 1	0 / 0	2 / 2	0 / 0	2 / 2	0 / 0

Census

- They can add clients for the day or the clients can prefill from a pre-set weekly schedule for the location.



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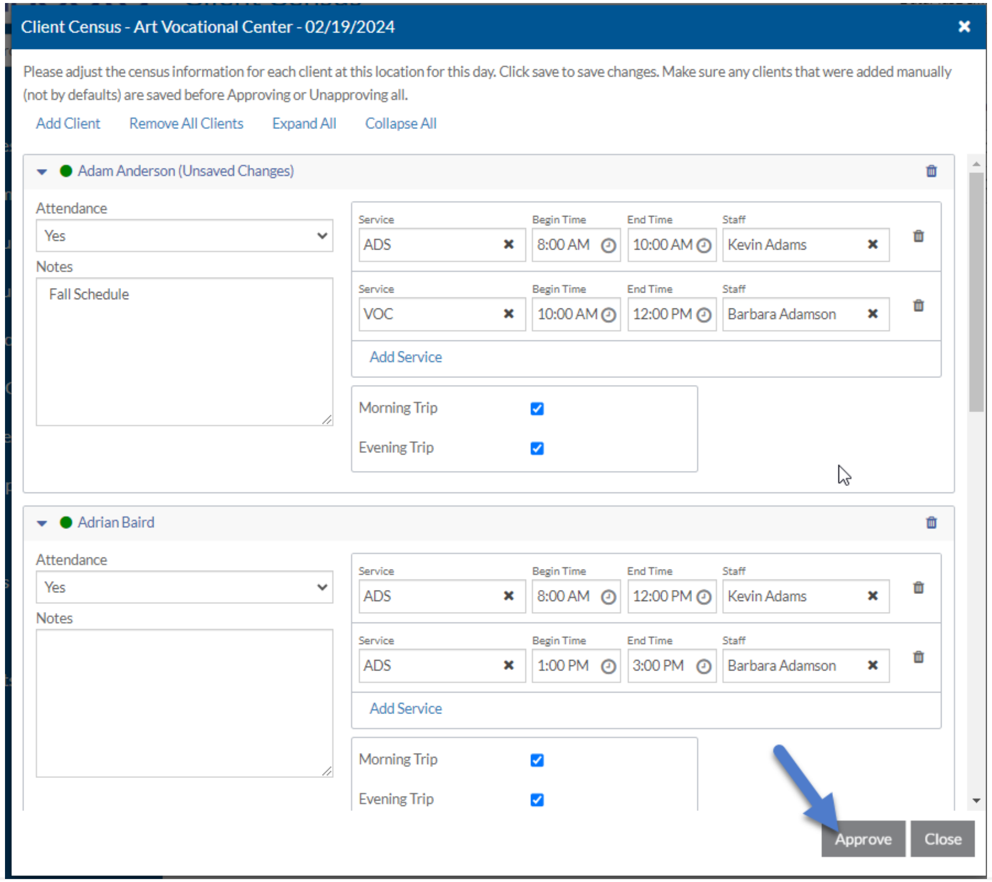
Census

- Managers approve the attendance entries by day:



Service Delivery Limits

Service Delivery Limits

- Overview of where Client is in Number of *Hours* Served Vs Limit

Setup | Service Limit

Date Range | Client | Service | Service Location | Status

Client	Service Type List	Service Location	Start Date	End Date	Limit	Status	Hours Served	Hours Remaining	External Id
Aaron Adams (ADAMAARO)	LPN/LVN Services (LPN)	Adams, Aaron (ADAMAARO)	12/6/2023	12/6/2023	2.00	Under Utilized	0.00	2.00	2
Brianna Abraham (ABRABRIA)	LPN/LVN Services (LPN)	Adams St. FCH (ADAMS)	1/21/2024	1/27/2024	5.00	Trending Under	0.00	5.00	
Dave Kim (KIMDAVE)	Wake Services Begin/End ...	Main St. FCH (MAIN)	1/26/2024	1/26/2024	8.00	Not Started	0.00	8.00	
Alex Barber (BARBALEX)	Wake Services Begin/End ...		1/21/2024	1/27/2024	12.00	Over Utilized	13.00	-1.00	

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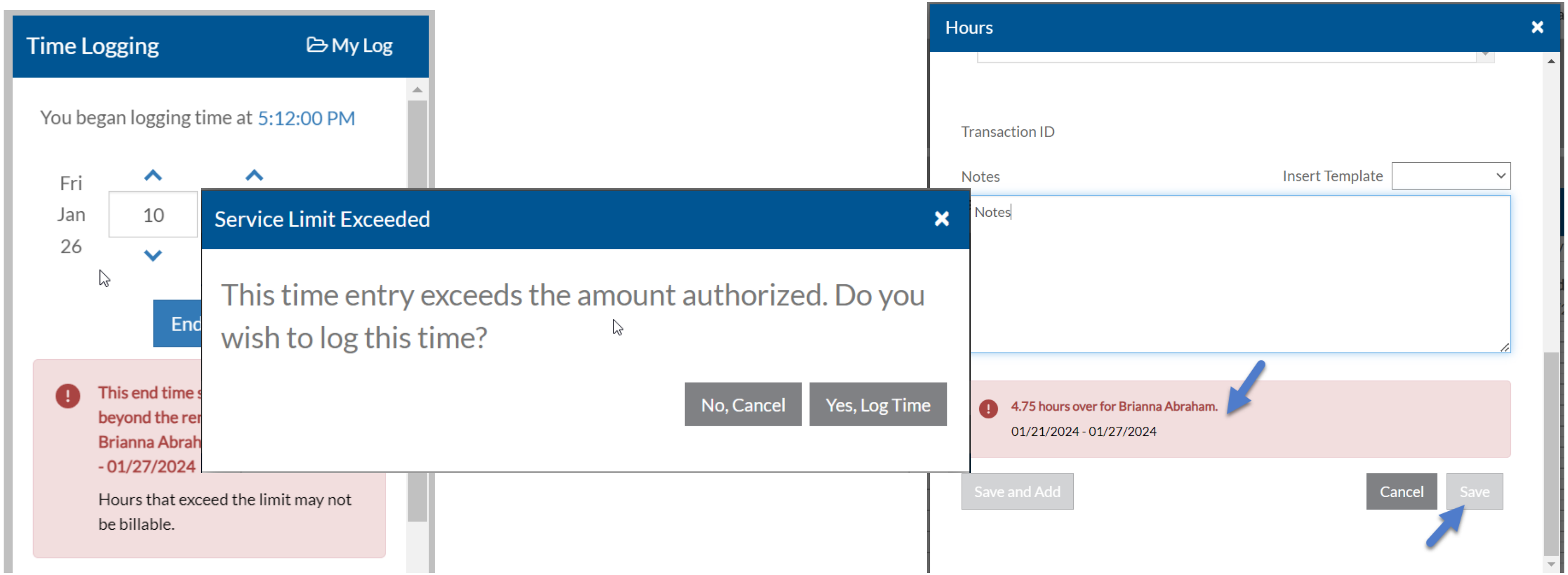
Service Delivery Limits

- Will Warn Staff if Over the Limit or Prevent them from Logging with the Client



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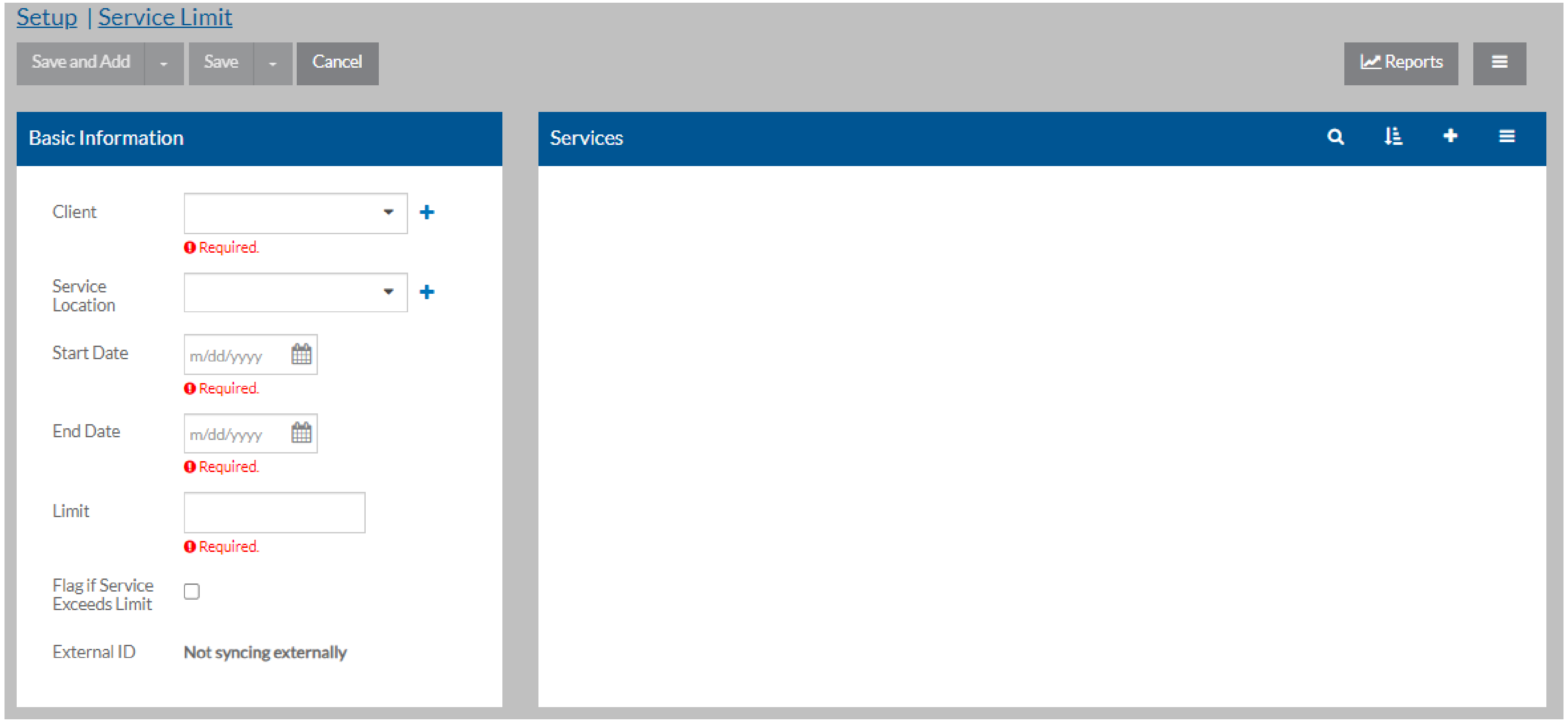
Service Delivery Limits

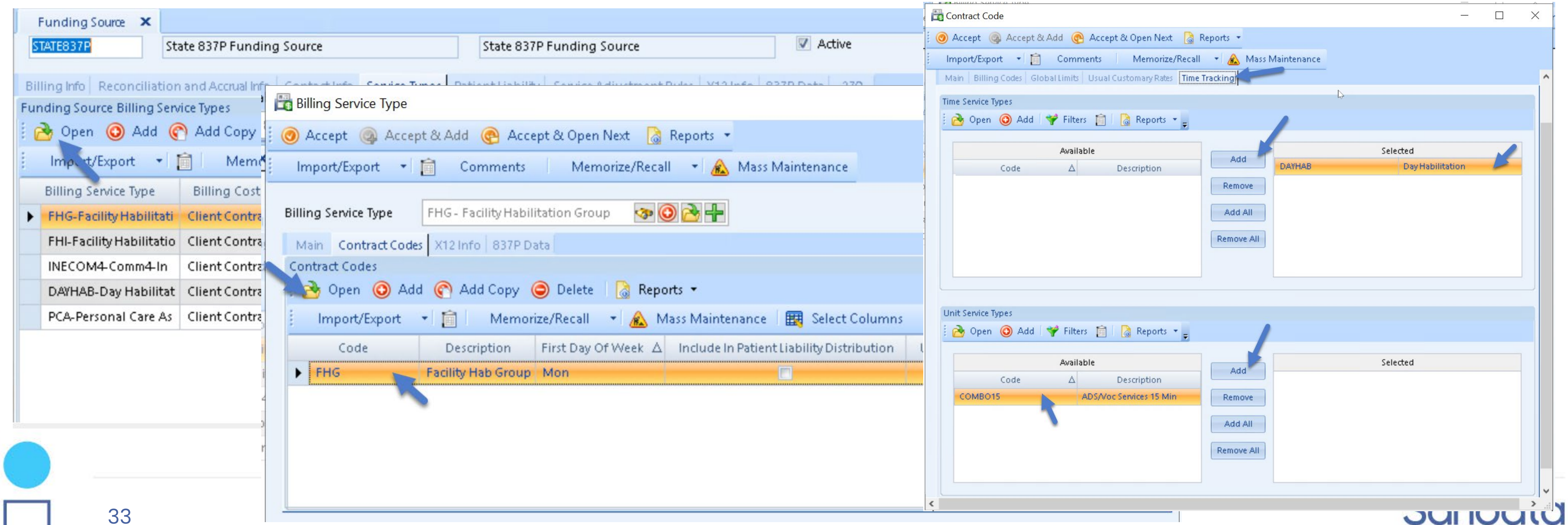
- Enter Directly in Time Tracking



Service Delivery Limits

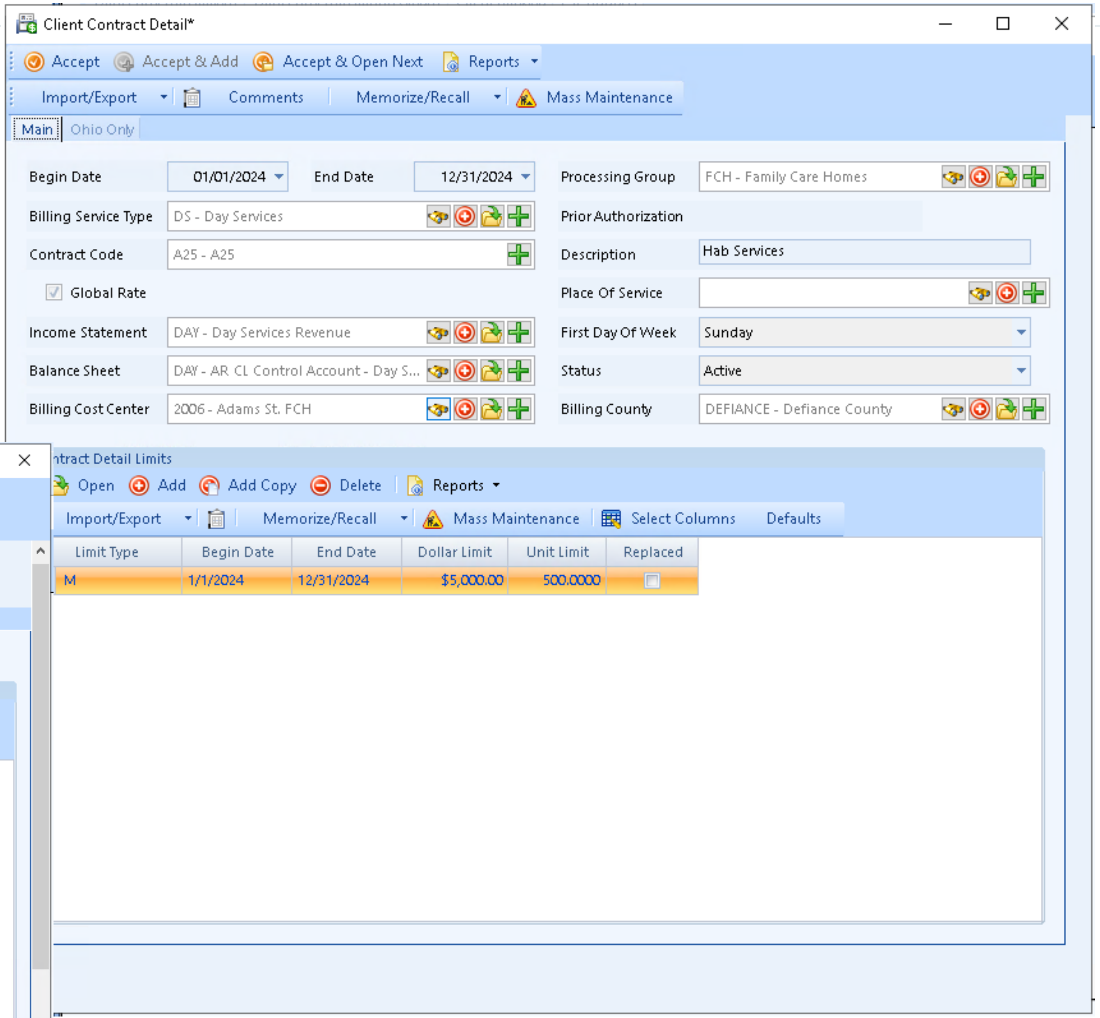
Sync from Billing:

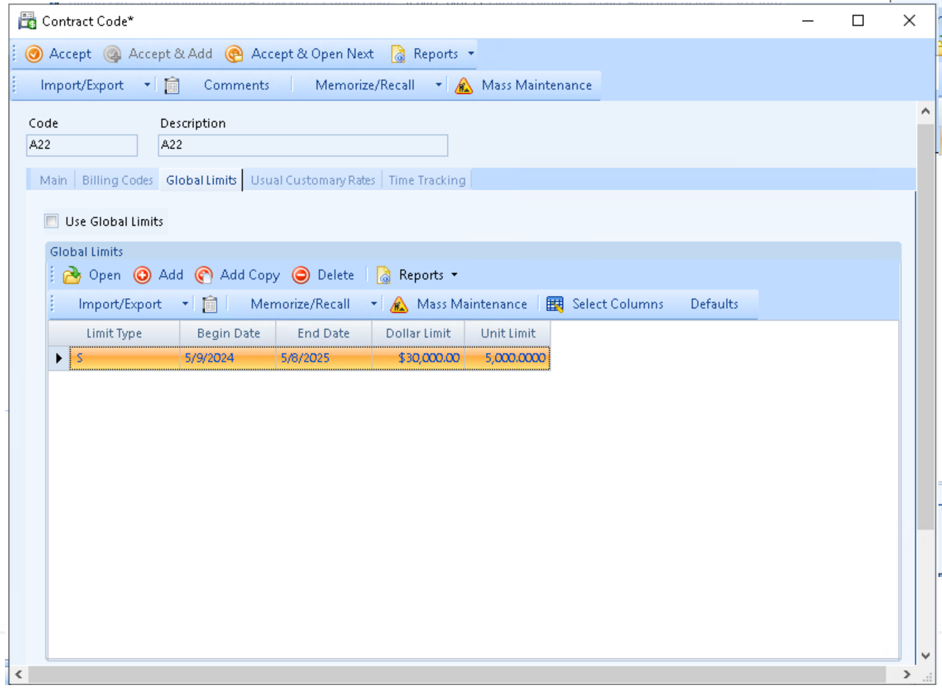
- Actual Services Client has in their Contract (via Contract Code)
- Contract Code designates Time Tracking Service Types associated with it



Service Delivery Limits

- Sync from Billing
  Converts Units to Hours Based on
  Billing Code Time Unit of Contract Code
- Doesn't Support Actual Unit Limits





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Service Delivery Limits

- When Syncing Services for Clients from Contracts:
  - Only those services appear for Client when selecting the Client
  - Contract Needs to be entered for the Client
  - For the Service Location, the services for all Clients that receive a service there will appear
  - Can’t sync services from Contracts for one Client and not another. Must sync for all clients.
  - Once set up can turn off exclusions

Service Limits

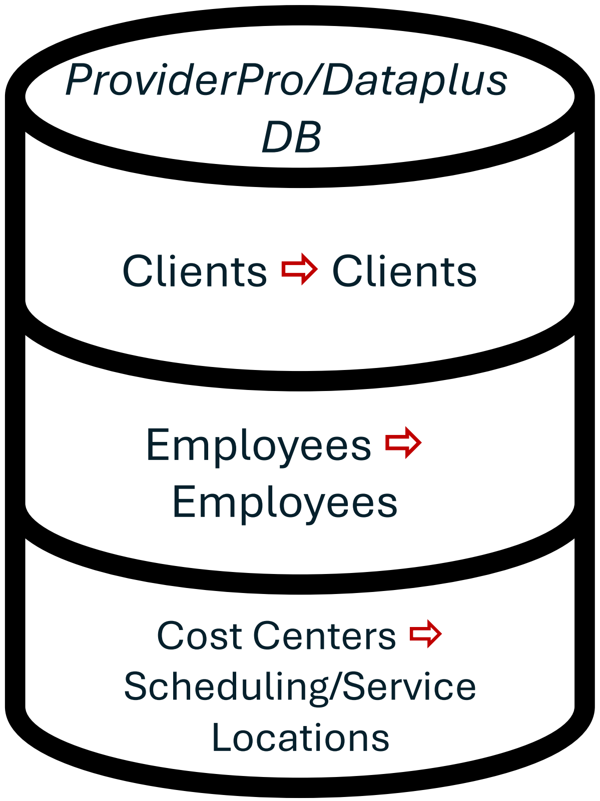
- Syncing Services from Contracts and Service Delivery Limits requires a Combined database.
- What does this mean?
  - Move the tables and data from your DataPlus database into your ProviderPro/Client Care/Employee Care database
  - Much faster faster syncs! Minutes to seconds!
  - Automatic syncs
  - Future syncs and reports that weren't possible before (like Service Delivery Limits)
  - 4-Hour Downtime

Combined Database

- Current System: Syncs Across Databases

Combined Database

- After Combining: Intra-Database Syncing



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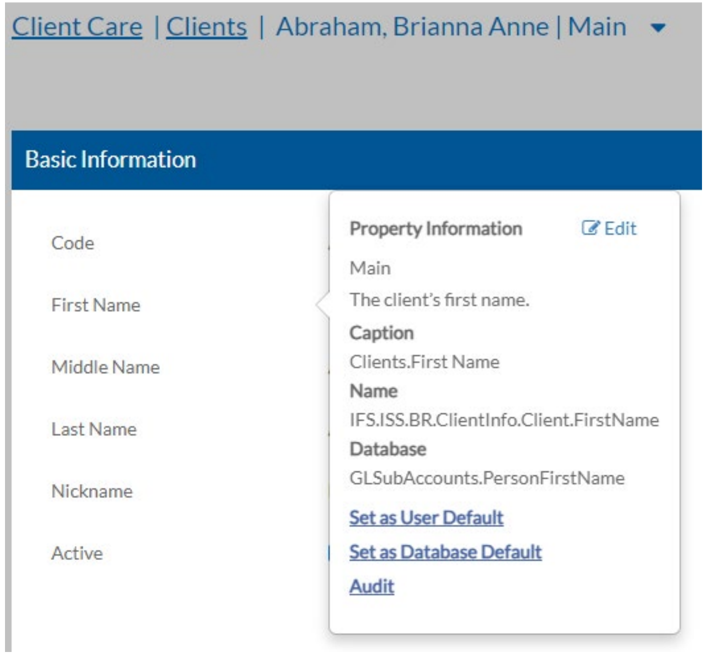
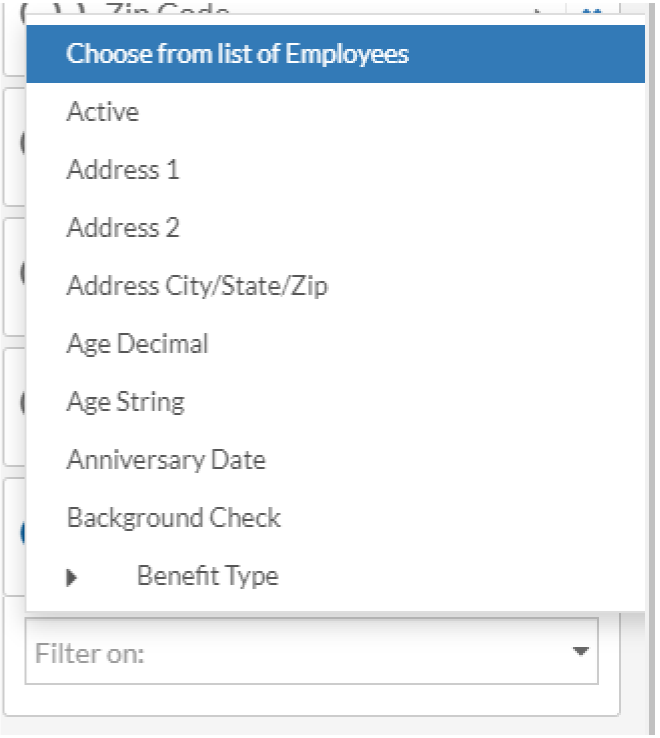
Extra Tidbits

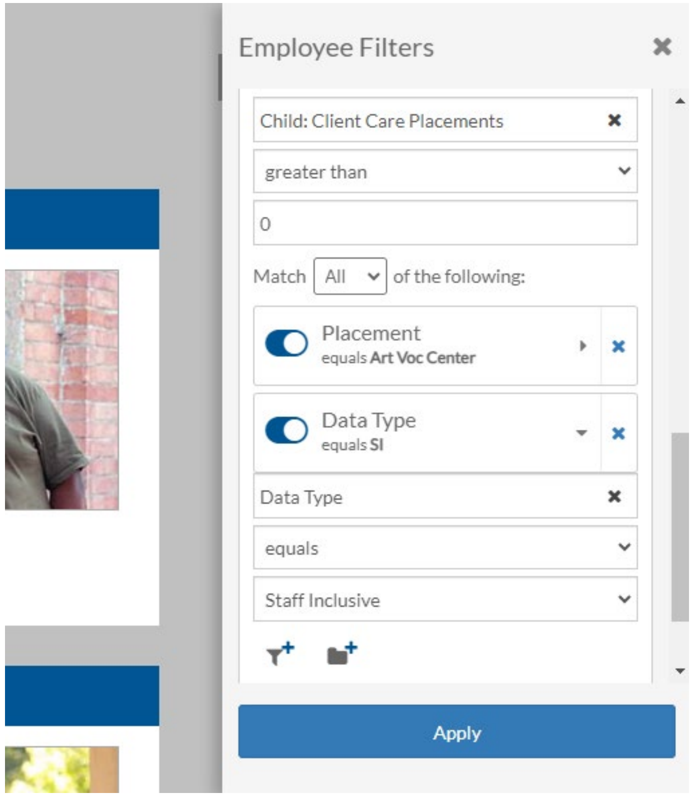
"Right-Click" Menu



Choose from List of

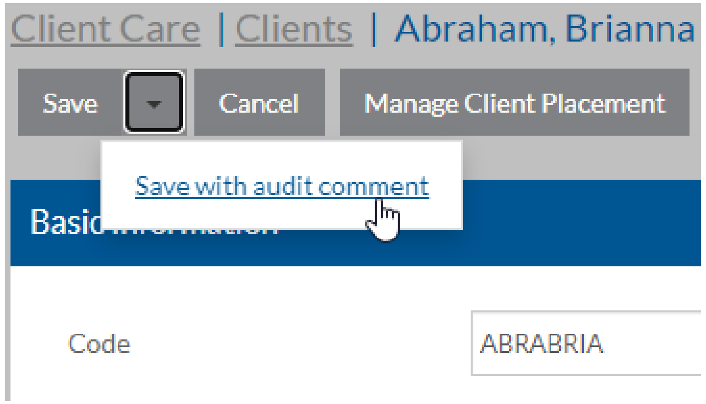


Filter Employees on Placement Access

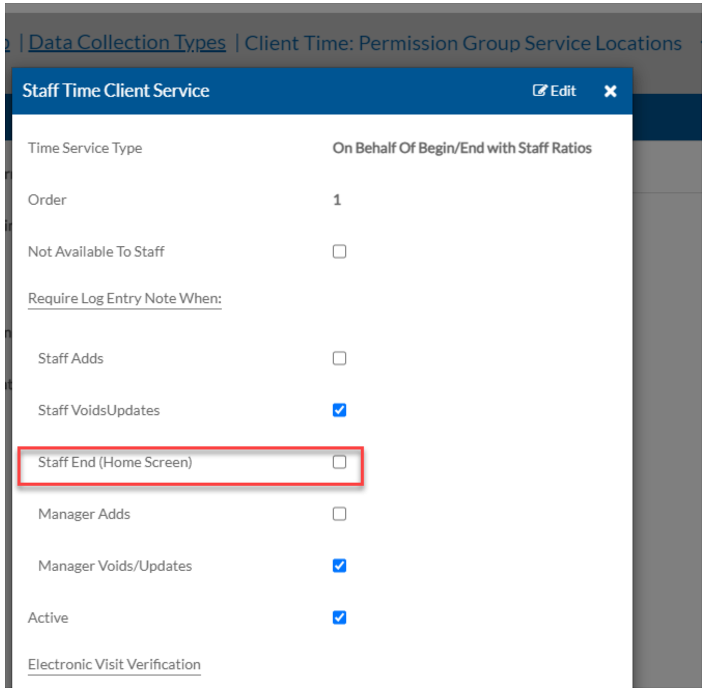


Extra Tidbits

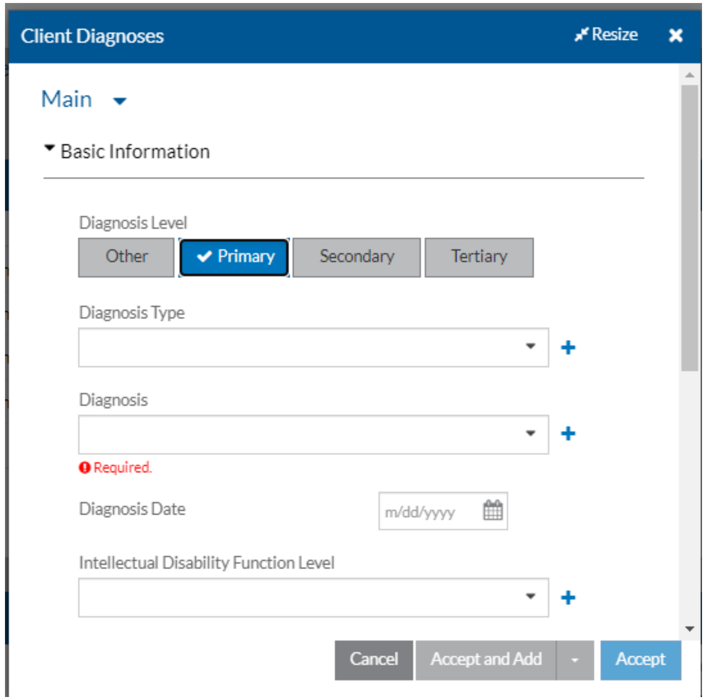
Save with Audit Comments



Notes Required on "End"

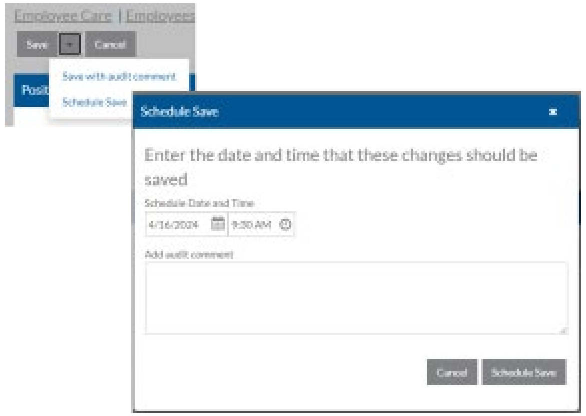


Diagnostic Level

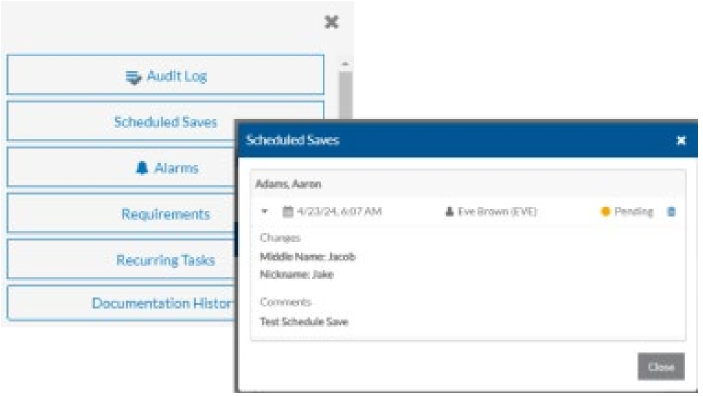


Extra Tidbits

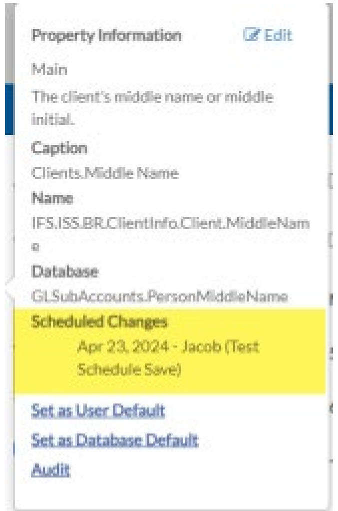
Schedule Add/Change



Delete Scheduled Save



View Scheduled Save



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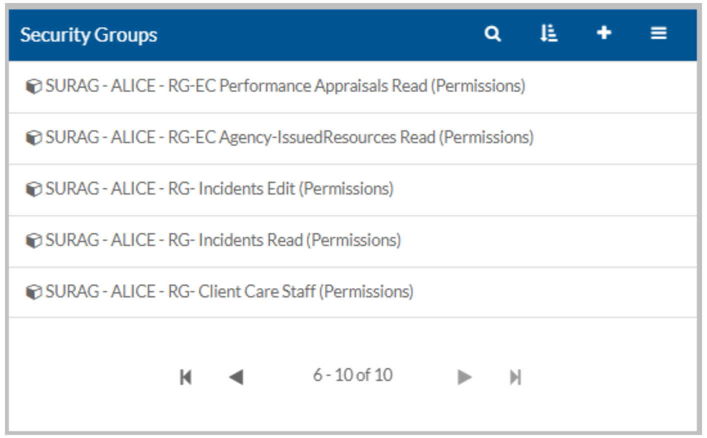
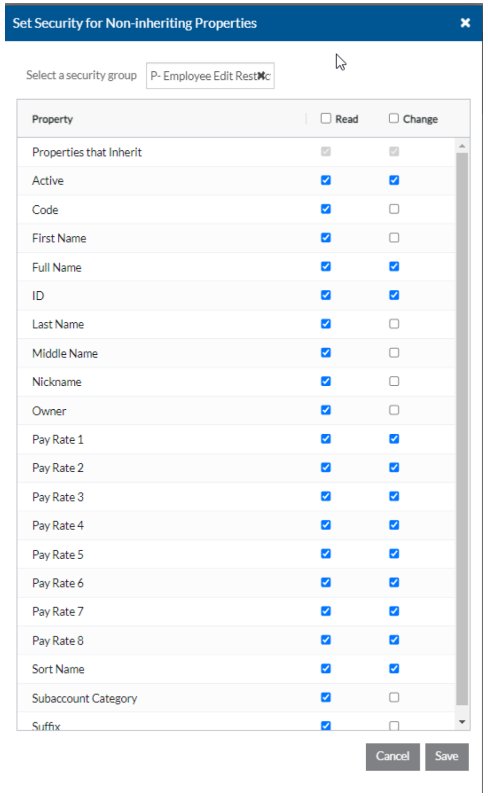
Extras

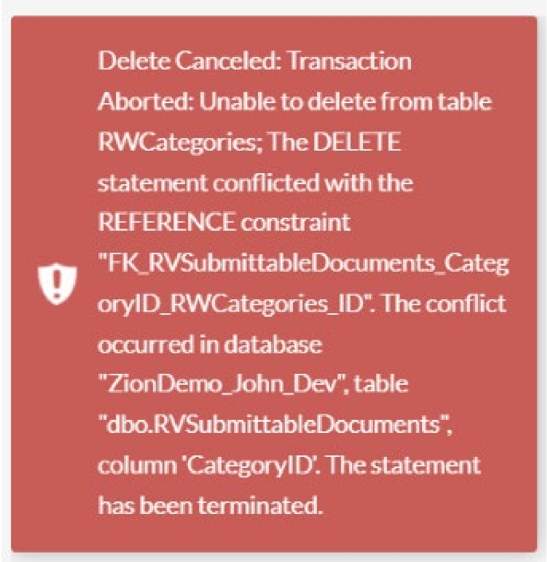
SURAG What?

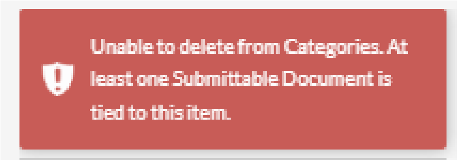


Inheritance Viewer



Better Error Messages





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Q&A

Thank You

Next New Feature Webinar: August 22, 2024 at 1:00 PM ET

Register here:

https://sandata.zoom.us/webinar/register/WN_WT3Sq9LCQdqv0ou1KLGqFg