

New Feature Demo

June 26, 2024





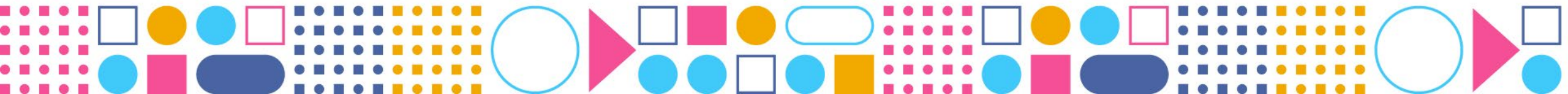
Sharlyn Katzner

- 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 Clients Abraham, Brianna Anne Abraham, Brianna Anne Main ▾ | | | |
| Search Requirements | Sort by | Needs Attention ▾ | Direction ▾ Descending |
| Audio Consent form | | | |
| Client - Submittable Documents | Status Nothing To Do until 11/20/2024 | Due Date 12/20/2024 | Last Fulfilled Date 12/20/2023 |
| Current Details ▶ History ▶ | | | |

| | | | |
|--|----------------------|--|------------------------------|
| Client Care Placements Main St. FCH Requirements | | | |
| Search Requirements | Sort by | Needs Attention ▾ | Direction ▾ Descending |
| Check Water Softner | | | |
| Placement No Evidence needed | Status Can Do Now | Due Date 12/21/2023 - Past due by 32 days | Last Fulfilled Date Never |
| Current Details ▶ | | | |

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**.

The screenshot displays the 'Requirement Plans (Program Plans)' configuration page for 'Brushing Teeth/Behavior Modification'. The interface is divided into two main panels: 'Basic Information' and 'Requirements'.

Basic Information Panel:

- Description:** Brushing Teeth/Behavior Modification
- DataObject:** Program Plans
- Condition:** Use basic filters (toggle is off)
- Match:** All of the following:
- Filter 1:** Title (one of Brushing Teeth) - toggle is on
- Filter 2:** Title (one of) - toggle is off
- Value/Property:** Value (selected), Property
- Item Count:** 1 item
- Active:** [checked]

Requirements Panel:

- Program Plan Assessments (PPI):** 1 - 1 of 1

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.

Basic Information

Code

FLUSHOT

Track Requirement

☒

Visibility Not Based On Security

☐

Description

Flu Shot

of Days Before Due Date to Create Task

30

Assignee/Approver/Watcher Setup

Using list: Client Task Def
[View/Modify Task](#)

Grouping

Setup Mode

☐

Evidence Type

No Evidence Needed

Allow Watchers To Do

☐

Category

No Evidence Cat

Allow Approvers To Do

☐

Details

Fulfilled Externally

☐

Order

0

Active

☒

Requirement Recurrence Information

Initial Due Date Information

Type

Immediate

Next Due Date Information

Type

Last Fulfilled Date

Timespan Type

Years

Timespan Value

1

Additional Fields

Default Credit Hours

When Completed On-Behalf-of Beneficiary Show:

Notes

Hide

Credit Hours

Hide

7

Sandata

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).

The screenshot displays the Sandata Client Care Requirements system interface. On the left is a blue sidebar with navigation links: Home, Favorites, Tasks (highlighted with a blue arrow and a red badge showing '8'), Manager Dashboard, My Time Off, Scheduling, Locations, Schedule, Client Census, and Staff Log. At the top of the sidebar is a 'Site Search...' input field. The main content area is divided into several panels. The top-left panel is titled 'Tasks' and shows counts for 'Overdue: 5', 'To Do: 8', and 'To Approve: 0'. A blue arrow points to the 'To Do' count. Below this is a button labeled 'Set Current Placement'. The top-right panel is titled 'Time Off Requests' and shows a request for Alice Smith on Wednesday, December 6, 2023, from 8:00 AM to 10:00 AM. The reason is 'Bereavement', hours are '2.00', and status is 'Pending'. There are 'Approve' and 'Deny' buttons. Below this is a request for Amy Littleton on Wednesday, December 6, 2023, with the same reason. The bottom-left panel is titled 'Flu Shot' and shows a due date of Sun 2/11/24, 12:00 AM. It lists assignees and beneficiaries. The bottom-middle panel is titled 'Program Plan Assessment' and shows a due date of Mon 3/11/24, 12:00 AM. The bottom-right panel is titled 'Fire Drill' and shows a due date of Fri 5/10/24, 12:00 AM. The right side of the interface features a profile for Brianna Lynn Abraham, including a photo, buttons for 'Client notes' and 'Placement notes', and a 'Service Plan' section with links for 'Client Health Needs Records', 'Event', 'Incident', and 'Inventory'. There are also 'Document' and 'History' links.

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.

Program Plan Assessment

Assessment Information

Status

Client: Adams, Andrew

Client Placement: Adams, Andrew-Art Voc Center-Vocation Center-Vocational

Assessment Date: m/dd/yyyy

Type: Yearly

Start Date: m/dd/yyyy

End Date: m/dd/yyyy

Program Plan: ADAMANDR 05/01/2023 Reading

Objective:

Meeting Date/Time: m/dd/yyyy

Meeting Location:

Cancel Save

I have reviewed this document.

Signature

My signature indicates that I have reviewed this document.

Cancel Accept

Upload a photo of your driver's license

Drag files here or click the +

At least one document is required.

Fulfilled Date: 9/25/2020

Expiration Date: m/dd/yyyy

Merit Evaluation

Fulfilled Date: 9/24/2020

Override Next Due Date: m/dd/yyyy

Notes

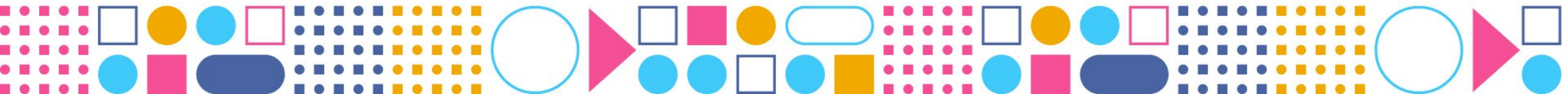
Cancel Submit

Cancel Submit

Client Care Requirements

| | | | | | |
|---------------------------|----------------------|-------------------------------|-------------------------|-------------------------------|---------------------|
| Setup Client Care Setup | | | | | |
| Agency | | Client Placement Requirements | | Client Placements | |
| Agencies | QIDPs | Categories | | Options - Client Care | Placement Services |
| Case Managers | Service Coordinators | Groupings | | Physical Locations | Program Types |
| Document Types | Social Workers | Requirement Management | | Placement Contacts | Termination Reasons |
| Managers | Supervisors | Requirement Plans | | Placement Locations | |
| QA Coordinators | | Settings | | | |
| Client Requirements | | Contact Information | | Data Collection | |
| Categories | | Communication Methods | Phone Types | Miscellaneous Collection Sets | |
| Groupings | | | Notification Reasons | Palettes | |
| Requirement Management | | Medical | | Medications | |
| Requirement Plans | | Allergies | Medical Provider Groups | Active Ingredients | Reasons |
| Settings | | Body Parts | Medical Provider Types | Classifications | Units |
| | | Diagnoses | Medical Providers | Controlled Substance Statuses | Routes |
| | | Diagnosis Types | | Frequencies | Trade Names |
| | | ID/DD Function Levels | Nurses | | |
| | | | Vaccines | | |
| Program Plan Requirements | | Program Plans | | Placement Requirements | |
| Categories | | Documentation Guidelines | | Categories | |
| Requirement Groupings | | Program Titles | | Groupings | |
| Requirement Management | | Recommendations | | Requirement Management | |
| Requirement Plans | | | | Requirement Plans | |
| Requirement Settings | | | | Settings | |
| | | | | Referrals | |
| | | | | Housing Types | |
| | | | | Referral Sources | |

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 Date |
|-------------|------------------------------|-------------------------------|----------------------------|-----------------------|---------|-----------------|
| 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 |

1 - 12 of 34

Program Plan Assessment Changes

Data Collection Results Based On

▶ All Program Plan Objectives

Or

▶ Selected Objective

[Client Care](#) | [Program Plan Assessments](#) | ADAMANDR 05/01/2023 Reading 01/01/2024-01/31/2024

CloseDisregard

Reports

Add Copy

Assessment InformationEdit

StatusIn Progress

ClientAdams, Andrew (ADAMANDR)

Client PlacementAdams, Andrew-Art Voc Center-Vocation Center-Vocational

Assessment Date1/1/2024

TypeMonthly

Start Date1/1/2024

End Date1/31/2024

Irregular Dates☐

Program PlanADAMANDR 05/01/2023 Reading

ObjectiveReading

Meeting Date/Time1/1/2024 12:00 AM

Meeting Location

Designated Coordinator

Date1/1/2024

Contact the Designated Coordinator at:

Data Collection Results

Times Implemented25

Times Met24

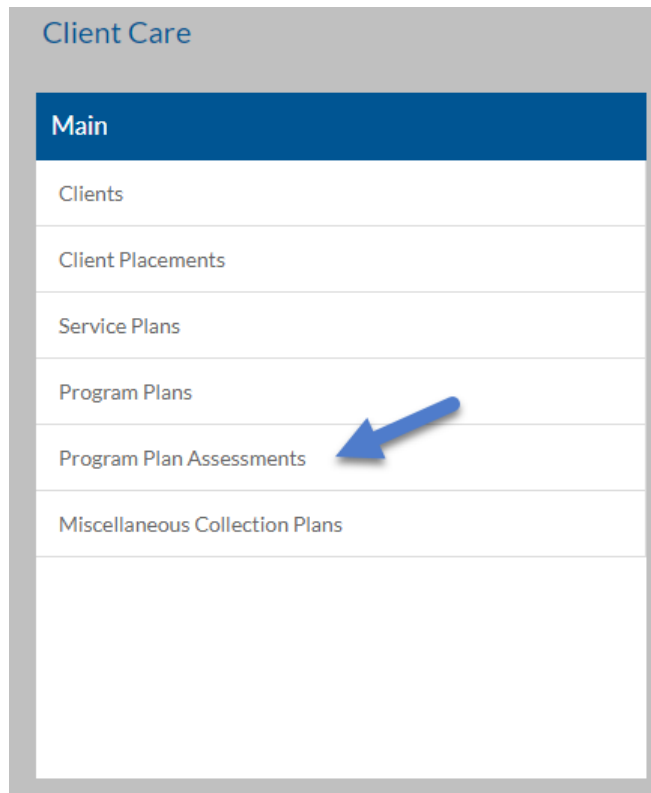
Times Not Met1

Times Declined0

Success96.00

Program Plan Assessment Changes

All Program Plan Assessments



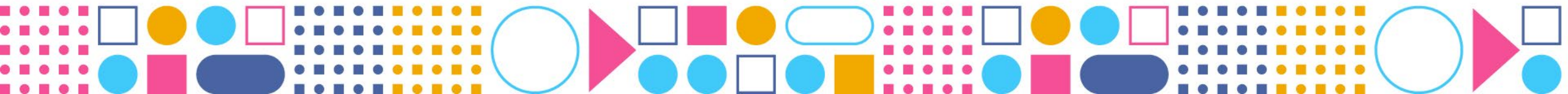
One Client's Assessments

The screenshot shows the 'One Client's Assessments' page. The breadcrumb trail is 'Client Care | Program Plans | DELABILL 02/28/2024 Reading | Assessments'. The page has a top navigation bar with a dropdown menu (Main, Documentation, Objectives, Assessments) and buttons for Reports, Delete, Add Copy, and Edit. The main content area is titled 'Assessments' and contains a table with the following data:

| Status | Assessment Date | Recommendation | Type | Times Met | Times Not Met | Times Declined | Success |
|-----------|-----------------|-------------------------|---------|-----------|---------------|----------------|---------|
| Completed | 3/8/2024 | Continue same objective | Monthly | 25 | 24 | | 96.00 |
| Completed | 3/29/2024 | Continue same objective | Monthly | 28 | 26 | 2 | 92.86 |

The table has a pagination bar at the bottom showing '1 - 2 of 2'.

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.

pro.formview.io/#/sandata-applications/application-1394?header=1&reset=1

Form.io Application-ZionDemoSharlyn

Applicant Information Affirmative Action/EEOC Information Employment Eligibility Availability Additional Information and Consents

Contact Information

First Name * Middle Name Last Name *

Email Address Phone Number *

Address City State

Position Applied For

Position Applied For *

Résumé and Cover Letter

Resume Cover Letter

File Name Size File Name Size

Drop files to attach, or browse

*Accepted file types: PDF, DOC, DOCK, PNG up to 5MB

Additional Background Information

Work History

Company Name Last Position Held Begin Date End Date May Contact

+ Add Employer

Applicant Information Affirmative Action/EEOC Information Employment Eligibility Availability Additional Information and Consents

Affirmative Action / EEOC Information

As an Equal Opportunity Employer, as required by law, we must record certain information to be made a part of our Affirmative Action Program.

Applicants for employment are invited to participate in the Affirmative Action Program by reporting their status as handicapped, disabled veteran, veteran of the Vietnam era or other minority. In extending this invitation you are also advised that: (a) workers (applicants) are under no obligation to respond, but may do so in the future if they choose; (b) responses will remain confidential within the Human Resources Department and will not be used for any other purpose.

Disabled * Ethnicity * Gender *

Sex * Race *

Cancel Previous Next

Applicant Information Affirmative Action/EEOC Information Employment

Employment Eligibility

Answers provided below will not necessarily exclude you from being considered for

Do you have the legal right to work in the United States? *

Will you now or in the future require sponsorship for employment visa status? *

Are you 18 years of age or older? *

Do you have a High School Diploma or GED? *

Have you ever been convicted of a crime? *

What is your desired hourly rate or salary? *

Date / Time *

Do you have a valid Driver's license? *

Do you have reliable transportation to get to and from work? *

Are you able to lift up to 50lbs? *

Applicant Information Affirmative Action/EEOC Information Employment Eligibility Availability Additional Information and Consents

Availability

Type of Employment (check all that apply)

☐ Full Time

☐ Part Time

☐ Other

Days of the week available to work (check all that apply)

Sunday ☐ Mornings ☐ Days ☐ Afternoons ☐ Nights

Monday ☐ Mornings ☐ Days ☐ Afternoons ☐ Nights

Tuesday ☐ Mornings ☐ Days ☐ Afternoons ☐ Nights

Wednesday ☐ Mornings ☐ Days ☐ Afternoons ☐ Nights

Thursday ☐ Mornings ☐ Days ☐ Afternoons ☐ Nights

Friday ☐ Mornings ☐ Days ☐ Afternoons ☐ Nights

Saturday ☐ Mornings ☐ Days ☐ Afternoons ☐ Nights

Holiday Availability

☐ Yes

☐ No

Are you willing to work a changing schedule?

☐ Yes

☐ No

☐ Occasionally

Cancel Previous Next

Applicant Information Affirmative Action/EEOC Information Employment Eligibility Availability Additional Information and Consents

Additional Information

Consents and Authorizations

Cancel Previous Submit Form

Application Tracking

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

Employee Care | Applications(ATS) | jorge l ramos | Main

Approve Reject Withdraw

Basic Information [Edit](#)

Status Applied (New)

First jorge Middle I Last ramos Suffix

[Contact Information](#)

Address

City State None Zip

Phone (123) 123-1231 Email Address jramos@sandata.com

SSN

Demographics [Edit](#)

Sex Male

Gender Male (M)

Preferred Pronouns He/Him/His

Race Black/African American (BAA)

Ethnicity Hispanic or Latino (HL)

Application Information [Edit](#)

Application Date 5/1/2024

Position Applied For

Previous Employee No

Withdraw Reason

Reject Reason

Previous State

Recruitment Source

Referred By

Referring Employee

Education

Begin Date Graduated Degree End Date

Employee Care | Applications(ATS) | jorge l ramos | Original Application

Approve Reject Withdraw

Please fill out all required fields on the form.

[Applicant Information](#) [Affirmative Action/EOC Information](#) [Employment Eligibility](#) [Availability](#) [Additional Information and Consents](#)

Contact Information

First Name * Middle Name Last Name * Suffix

jorge I ramos

Email Address Phone Number *

jramos@sandata.com (123) 123-1231

Address City State Zip Code

Position Applied For

Position Applied For *

38

Résumé and Cover Letter

Resume Cover Letter

File Name Size File Name Size

*Accepted file types: PDF, DOC, DOCX, PNG up to 5MB

Additional Background Information

Application Tracking

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

[Employee Care](#) | Applications(ATS)

+

▼

Q

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🖨️

☰

Applied (New) 1

HR Reviewed 0

HR Contacted 0

HR Screened 0

Manager Assigned 0

Manager Reviewed 0

Interview Scheduled 0

Interview Completed 0

Notified of Rejection 0

Offered 1

Offer Accepted 1

Withdrawn 0

Rejected 0

Hired 0

My Open Items (Global)

| Application Date | Status | First Name | Last Name | Position Applied For | Phone 1 | Best Time To Call |
|------------------|----------------|------------|-----------|----------------------|------------|-------------------|
| 5/3/2024 | Offer Accepted | Marcus | Simpson | | 4195455555 | Night |
| 5/3/2024 | Applied (New) | Jenny | Jones | | | |
| 5/3/2024 | Offered | Mary | Simpson | | 4195455555 | Night |

Application Tracking

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

The screenshot shows a web application interface for 'Application Tracking'. A modal dialog box titled 'Assign to Manager' is open, displaying the name 'Jenny J Jones' at the top. Below the name, there is a section labeled 'Assignees' with a text input field containing the placeholder 'Type a name'. A blue arrow points to this input field. To the right of the input field is a link labeled 'Add myself'. Below the 'Assignees' section is a 'Notes' section with a larger text area. At the bottom of the dialog are 'Cancel' and 'Submit' buttons. The background shows a blurred view of the application's main interface, including sections for 'Basic Information', 'Contact Information', and 'Demographics'.

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 |



Application Tracking

- View the application history.

| Sara T Wizen History | |
|---|-------------------------|
| EVE noted on Application. With ID 6 | 04/25/2024, 2:13:44 PM |
| EVE Created a task with a description of Review Application Updated Status From: To: Open | 04/25/2024, 2:13:58 PM |
| EVE noted on Application. With ID 6 | 05/06/2024, 10:46:42 AM |
| EVE Updated a task with a description of Review Application Updated Status From: Open To: Closed | 05/06/2024, 10:46:42 AM |
| EVE Created a task with a description of Schedule Manager Interview Updated Status From: To: Open | 05/06/2024, 10:46:42 AM |
| EVE Updated a task with a description of Schedule Manager Interview Updated Status From: Open To: Closed | 05/06/2024, 10:46:57 AM |
| EVE Created a task with a description of Interview Applicant Updated Status From: To: Open | 05/06/2024, 10:46:57 AM |
| EVE Updated a task with a description of Interview Applicant Updated Status From: Open To: Closed | 05/06/2024, 10:47:13 AM |
| EVE Created a task with a description of Create Employee Record Updated Status From: To: Open | 05/06/2024, 10:47:23 AM |
| Close | |

Application Tracking

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

The screenshot displays the Sandata Employee Care Applications(ATS) interface. The top navigation bar includes the breadcrumb "Employee Care | Applications(ATS) | Sara T Wizen | Main" and a dropdown menu. Below this, a row of buttons contains "Hired", "Reject", "Withdraw", "Back to Offered", and "Create Employee". The main content area is divided into two panels. The left panel, titled "Basic Information", features a blue header "Application Requirements" and a list of links: "Categories", "Groupings", "Requirement Management", "Requirement Plans", and "Settings". The right panel, titled "Application Information", displays a form with fields for "Application Date" (4/25/2024), "Position Applied For", "Previous Employee" (No), "Withdraw Reason", "Reject Reason", "Previous State" (Offered), "Recruitment Source" (Internet (NET)), "Referred By", and "Referring Employee". A blue arrow points from the "Application Requirements" link in the left panel to the "Application Requirements" button in the right panel's sidebar.

Employee Care | Applications(ATS) | Sara T Wizen | Main

Hired Reject Withdraw Back to Offered Create Employee

Basic Information Edit

Application Requirements

Categories

Groupings

Requirement Management

Requirement Plans

Settings

Application Information

Application Date 4/25/2024

Position Applied For

Previous Employee No

Withdraw Reason

Reject Reason

Previous State Offered

Recruitment Source Internet (NET)

Referred By

Referring Employee

History

Audit Log

Scheduled Saves

Application Requirements

Application Tracking

- ▶ Create an Employee from a hired applicant.

[Employee Care](#) | [Applications\(ATS\)](#) | [Sara T Wizen](#) | [Main](#) ▾

[Hired](#) [Reject](#) [Withdraw](#) [Back to Offered](#) [Create Employee](#)

Basic Information [Edit](#)

Status **Offer Accepted**

First **Sara** Middle **T** Last **Wizen** Suffix

Contact Information

Address **1234 Maple Ct**

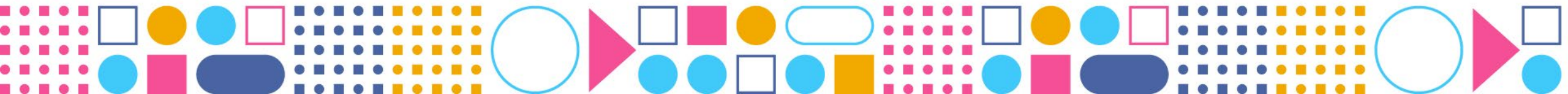
City **Bowling Green** State **Ohio** Zip **43402**

Phone **(419) 876-5843** 📞 Email Address **sarah@emailaddress.org** ✉

Best Time To Call

SSN

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 | Week of | 2/18/2024 - 2/24/2024 | | | | | |
| Location ↑ | ICF Census OH ADS | 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 | 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.

Client Census - Art Vocational Center - 02/19/2024

Please adjust the census information for each client at this location for this day. Click save to save changes. Make sure any clients that were added manually (not by defaults) are saved before Approving or Unapproving all.

[Add Client](#) [Remove All Clients](#) [Expand All](#) [Collapse All](#)

Adam Adamson (Unsaved Changes)

Attendance: Yes

Notes: Fall Schedule

| Service | Begin Time | End Time | Staff |
|---------|------------|----------|-----------------|
| ADS | 8:00 AM | 10:00 AM | Kevin Adams |
| VOC | 10:00 AM | 12:00 PM | Barbara Adamson |

[Add Service](#)

Morning Trip: ☒

Evening Trip: ☒

Adrian Baird

Attendance: Yes

Notes:

| Service | Begin Time | End Time | Staff |
|---------|------------|----------|-----------------|
| ADS | 8:00 AM | 12:00 PM | Kevin Adams |
| ADS | 1:00 PM | 3:00 PM | Barbara Adamson |

[Add Service](#)

Morning Trip: ☒

Evening Trip: ☒

[Cancel](#) [Save](#)

Census

- Managers approve the attendance entries by day:

Client Census - Art Vocational Center - 02/19/2024

Please adjust the census information for each client at this location for this day. Click save to save changes. Make sure any clients that were added manually (not by defaults) are saved before Approving or Unapproving all.

[Add Client](#) [Remove All Clients](#) [Expand All](#) [Collapse All](#)

Adam Anderson (Unsaved Changes)

Attendance
Yes

Notes
Fall Schedule

| Service | Begin Time | End Time | Staff |
|---------|------------|----------|-----------------|
| ADS | 8:00 AM | 10:00 AM | Kevin Adams |
| VOC | 10:00 AM | 12:00 PM | Barbara Adamson |

Add Service

Morning Trip ☒

Evening Trip ☒

Adrian Baird

Attendance
Yes

Notes

| Service | Begin Time | End Time | Staff |
|---------|------------|----------|-----------------|
| ADS | 8:00 AM | 12:00 PM | Kevin Adams |
| ADS | 1:00 PM | 3:00 PM | Barbara Adamson |

Add Service

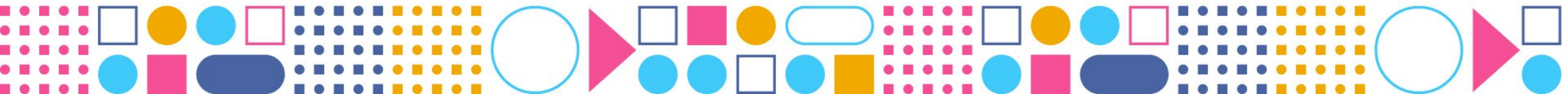
Morning Trip ☒

Evening Trip ☒

Approve

Close

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 | |

⏮ ⏪ 1 - 4 of 4 ⏩ ⏭

Service Delivery Limits

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

The screenshot displays two overlapping windows from a software application. The 'Time Logging' window on the left shows a calendar for January 26th (Friday) with a date picker set to 10. A blue 'End' button is visible. A red warning message at the bottom states: 'This end time is beyond the re... Brianna Abrah... - 01/27/2024. Hours that exceed the limit may not be billable.' A modal dialog box titled 'Service Limit Exceeded' is centered over the calendar, containing the text 'This time entry exceeds the amount authorized. Do you wish to log this time?' and two buttons: 'No, Cancel' and 'Yes, Log Time'.

The 'Hours' window on the right is titled 'Hours' and contains a 'Transaction ID' field, a 'Notes' text area, and an 'Insert Template' dropdown menu. Below the text area, a red warning message states: '4.75 hours over for Brianna Abraham. 01/21/2024 - 01/27/2024'. At the bottom of this window are 'Save and Add', 'Cancel', and 'Save' buttons. Blue arrows point from the warning messages in both windows towards the bottom right of the image.

Service Delivery Limits

► Enter Directly in Time Tracking

Setup | Service Limit

Save and Add Save Cancel Reports

| Basic Information | Services |
|---|----------|
| <p>Client <input type="text"/> +</p> <p>❗ Required.</p> <p>Service Location <input type="text"/> +</p> <p>Start Date <input type="text"/> m/dd/yyyy </p> <p>❗ Required.</p> <p>End Date <input type="text"/> m/dd/yyyy </p> <p>❗ Required.</p> <p>Limit <input type="text"/></p> <p>❗ Required.</p> <p>Flag if Service Exceeds Limit <input type="checkbox"/></p> <p>External ID Not syncing externally</p> | |

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

The screenshot displays three overlapping software windows from a billing system, illustrating the process of syncing service delivery limits.

Funding Source Window: Shows the 'Funding Source' as 'STATE837P' (State 837P Funding Source). A list of 'Billing Service Types' is visible, including 'FHG-Facility Habilitation', 'FHI-Facility Habilitation', 'INECOM4-Comm4-In', 'DAYHAB-Day Habilitation', and 'PCA-Personal Care As'. An arrow points to the 'Open' button for the 'FHG-Facility Habilitation' entry.

Billing Service Type Window: Displays details for the 'FHG - Facility Habilitation Group'. The 'Contract Codes' tab is active, showing a table with columns: Code, Description, First Day Of Week, and Include In Patient Liability Distribution. The entry 'FHG Facility Hab Group Mon' is highlighted. An arrow points to the 'Open' button for this entry.

Contract Code Window: Shows the 'Contract Code' details for 'FHG'. The 'Time Tracking' tab is active, displaying 'Time Service Types'. It features two lists: 'Available' and 'Selected'. The 'Available' list contains 'COMBO15 ADS/Voc Services 15 Min'. The 'Selected' list contains 'DAYHAB Day Habilitation'. Arrows indicate the 'Add' button for the 'Available' list and the 'Remove' button for the 'Selected' list.

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

The image shows two overlapping software windows. The top window, titled 'Client Contract Detail*', displays contract information for 'Ohio Only'. The bottom window, titled 'Contract Code*', shows details for contract code 'A22'.

Client Contract Detail* Fields:

- Begin Date: 01/01/2024, End Date: 12/31/2024
- Billing Service Type: DS - Day Services
- Contract Code: A25 - A25
- Processing Group: FCH - Family Care Homes
- Description: Hab Services
- Global Rate: ☒
- Income Statement: DAY - Day Services Revenue
- Balance Sheet: DAY - AR CL Control Account - Day S...
- Billing Cost Center: 2006 - Adams St. FCH
- Place Of Service: (empty)
- First Day Of Week: Sunday
- Status: Active
- Billing County: DEFIANCE - Defiance County

Contract Code* Fields:

- Code: A22, Description: A22
- Global Limits: ☐ Use Global Limits

Contract Detail Limits Table:

| Limit Type | Begin Date | End Date | Dollar Limit | Unit Limit | Replaced |
|------------|------------|------------|--------------|------------|--------------------------|
| M | 1/1/2024 | 12/31/2024 | \$5,000.00 | 500.00000 | <input type="checkbox"/> |

Global Limits Table:

| Limit Type | Begin Date | End Date | Dollar Limit | Unit Limit |
|------------|------------|----------|--------------|-------------|
| S | 5/9/2024 | 5/8/2025 | \$30,000.00 | 5,000.00000 |

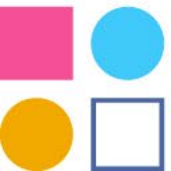
Service Delivery Limits

- ▶ 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



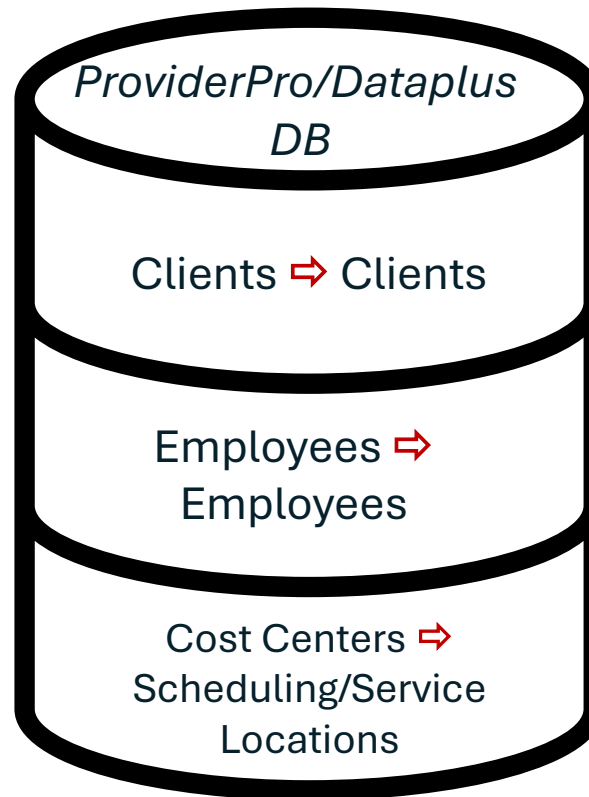
Combined Database

- ▶ Current System: Syncs Across Databases



Combined Database

- ▶ After Combining: Intra-Database Syncing



Extra Tidbits

“Right-Click” Menu

Client Care | Clients | Abraham, Brianna Anne | Main ▾

Basic Information

| | |
|-------------|--|
| Code | Property Information Edit |
| First Name | Main |
| Middle Name | The client's first name. |
| Last Name | Caption |
| Nickname | Clients.First Name |
| Active | Name |
| | IFS.ISS.BR.ClientInfo.Client.FirstName |
| | Database |
| | GLSubAccounts.PersonFirstName |
| | Set as User Default |
| | Set as Database Default |
| | Audit |

Choose from List of

Choose from list of Employees

- Active
- Address 1
- Address 2
- Address City/State/Zip
- Age Decimal
- Age String
- Anniversary Date
- Background Check
- ▶ Benefit Type

Filter on: ▾

Filter Employees on Placement Access

Employee Filters ✕

Child: Client Care Placements ✕

greater than ▾

0

Match **All** ▾ of the following:

☒ Placement equals Art Voc Center ▶ ✕

☒ Data Type equals SI ▾ ✕

Data Type ✕

equals ▾

Staff Inclusive ▾


🔍 + 📁 +

Apply

Extra Tidbits

Save with Audit Comments

Client Care | Clients | Abraham, Brianna

Save  Cancel Manage Client Placement



[Save with audit comment](#)

Basic Information

Code



Notes Required on "End"


Data Collection Types | Client Time: Permission Group Service Locations

Staff Time Client Service  

| | |
|-------------------------------|--|
| Time Service Type | On Behalf Of Begin/End with Staff Ratios |
| Order | 1 |
| Not Available To Staff | <input type="checkbox"/> |
| Require Log Entry Note When: | |
| Staff Adds | <input type="checkbox"/> |
| Staff Voids/Updates | <input checked="" type="checkbox"/> |
| Staff End (Home Screen) | <input type="checkbox"/> |
| Manager Adds | <input type="checkbox"/> |
| Manager Voids/Updates | <input checked="" type="checkbox"/> |
| Active | <input checked="" type="checkbox"/> |
| Electronic Visit Verification | |

Diagnostic Level


Client Diagnoses  

Main 


▼ Basic Information


Diagnosis Level


Diagnosis Type




Diagnosis




 Required.

Diagnosis Date 

Intellectual Disability Function Level







Extra Tidbits

Schedule Add/Change

The 'Schedule Save' dialog box is shown. It has a title bar 'Schedule Save' and a close button. The main text says 'Enter the date and time that these changes should be saved'. Below this is a 'Schedule Date and Time' section with a date field showing '4/16/2024' and a time field showing '9:30 AM'. There is a small calendar icon next to the date field and a clock icon next to the time field. Below the date and time fields is a text area labeled 'Add audit comment'. At the bottom right are 'Cancel' and 'Schedule Save' buttons.

Delete Scheduled Save

The 'Scheduled Saves' dialog box is shown. It has a title bar 'Scheduled Saves' and a close button. On the left is a sidebar with buttons: 'Audit Log', 'Scheduled Saves', 'Alarms', 'Requirements', 'Recurring Tasks', and 'Documentation History'. The main area shows a list of scheduled saves. The first entry is for 'Adams, Aaron' with a date of '4/23/24, 6:07 AM', a user 'Eve Brown (EVE)', and a status 'Pending'. Below this, it shows 'Changes' (Middle Name: Jacob, Nickname: Jake) and 'Comments' (Test Schedule Save). At the bottom right is a 'Close' button.

View Scheduled Save

The 'Property Information' page is shown. It has a title bar 'Property Information' and an 'Edit' button. The page is divided into sections: 'Main' (The client's middle name or middle initial), 'Caption' (Clients.Middle Name), 'Name' (IFS.ISS.BR.ClientInfo.Client.MiddleName), 'Database' (GLSubAccounts.PersonMiddleName), 'Scheduled Changes' (Apr 23, 2024 - Jacob (Test Schedule Save)), 'Set as User Default', 'Set as Database Default', and 'Audit'.



Extras

SURAG What?

| Security Groups |
|---|
| SURAG - ALICE - RG-EC Performance Appraisals Read (Permissions) |
| SURAG - ALICE - RG-EC Agency-IssuedResources Read (Permissions) |
| SURAG - ALICE - RG- Incidents Edit (Permissions) |
| SURAG - ALICE - RG- Incidents Read (Permissions) |
| SURAG - ALICE - RG- Client Care Staff (Permissions) |

Inheritance Viewer

| Set Security for Non-inheriting Properties | | |
|---|-------------------------------------|-------------------------------------|
| Select a security group P- Employee Edit RestMc | | |
| Property | <input type="checkbox"/> Read | <input type="checkbox"/> Change |
| Properties that Inherit | <input type="checkbox"/> | <input type="checkbox"/> |
| Active | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Code | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| First Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Full Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| ID | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Last Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Middle Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Nickname | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Pay Rate 1 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pay Rate 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pay Rate 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pay Rate 4 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pay Rate 5 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pay Rate 6 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pay Rate 7 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pay Rate 8 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Sort Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Subaccount Category | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Suffix | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

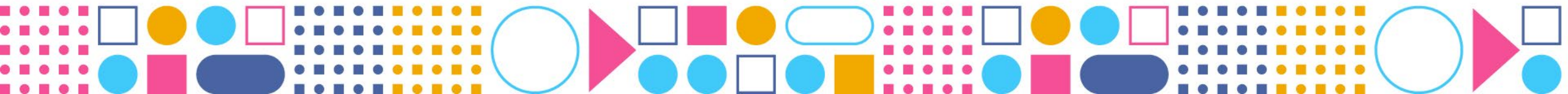
Better Error Messages

Delete Canceled: Transaction Aborted: Unable to delete from table RWCategories; The DELETE statement conflicted with the REFERENCE constraint "FK_RVSubmittableDocuments_CategoryID_RWCategories_ID". The conflict occurred in database "ZionDemo_John_Dev", table "dbo.RVSubmittableDocuments", column 'CategoryID'. The statement has been terminated.

Unable to delete from Categories. At least one Submittable Document is tied to this item.



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