

New Feature Demo

August 22, 2024





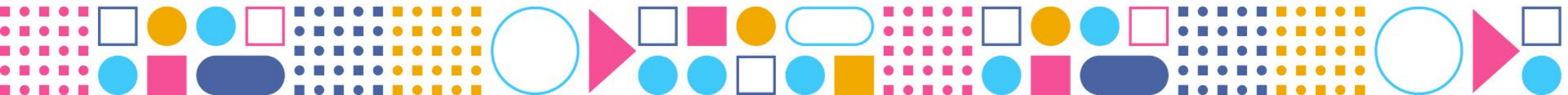
Sharlyn Katzner

- I/DD Specialist/Tooling Product Owner
- Joined Solana in 2005
- Live in Northwest Ohio
- Mother of Two Daughters (22 and 17)
- Love Dogs, Ice Cream, and Mani/Pedis
- Voting Rights Advocate

Agenda

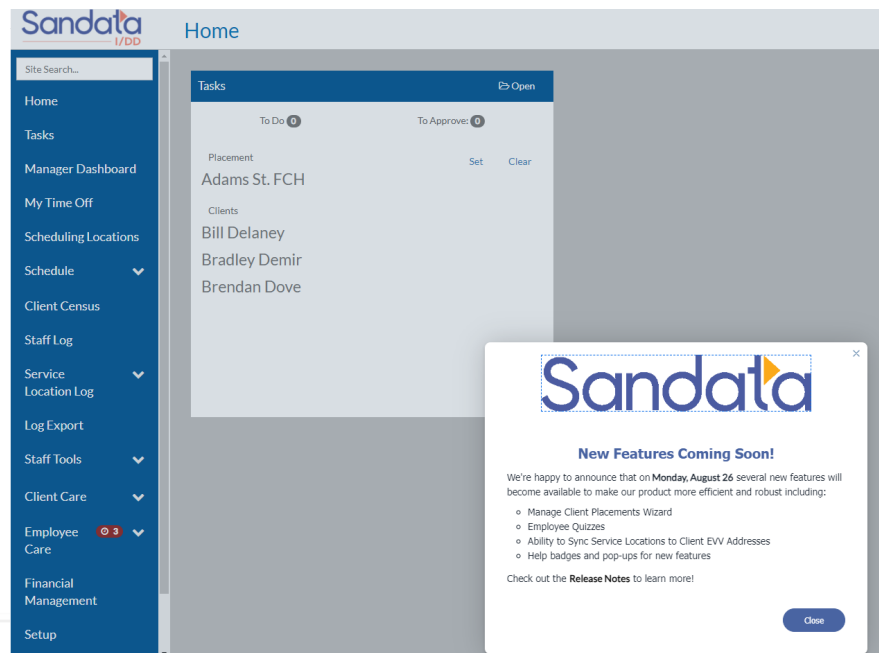
- ▶ Help in DataPlus
- ▶ Employee Add Wizard
- ▶ Client Add Wizard
- ▶ Manage Placements Wizard
- ▶ Service Plans
- ▶ Quizzes
- ▶ Adding Notes to Time Tracking Log Entry
- ▶ Client Log Transactions Grid
- ▶ Next Webinar

Help in DataPlus



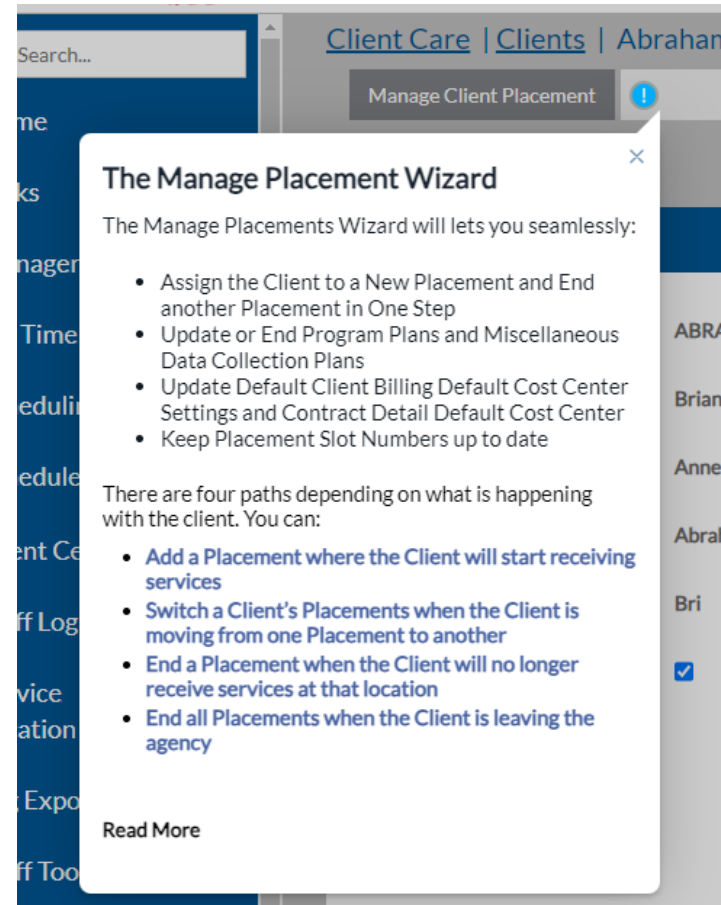
New Release Announcements

- ▶ You will see a one-time announcement when you log in about upcoming new features
- ▶ Clicking Read More will take you to the release notes which will give information on how to get the new feature.
- ▶ Links in the release notes give you details on how to use the new feature.



Help Badges

- ▶ Help badges appear on new features
- ▶ Click the badge to view a quick overview of the feature.
- ▶ Click the Read More link to open the help topic to learn how to use the feature.



The screenshot shows a software interface with a search bar and navigation links like 'Client Care | Clients | Abraham'. A 'Manage Client Placement' button has a blue help badge. A popup window titled 'The Manage Placement Wizard' is open, providing instructions on how to use the wizard. The popup includes a list of actions and a 'Read More' link.

The Manage Placement Wizard

The Manage Placements Wizard will lets you seamlessly:

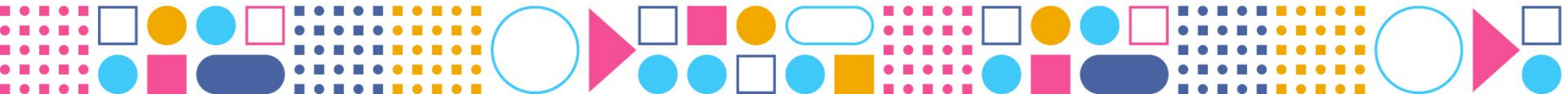
- Assign the Client to a New Placement and End another Placement in One Step
- Update or End Program Plans and Miscellaneous Data Collection Plans
- Update Default Client Billing Default Cost Center Settings and Contract Detail Default Cost Center
- Keep Placement Slot Numbers up to date

There are four paths depending on what is happening with the client. You can:

- **Add a Placement where the Client will start receiving services**
- **Switch a Client's Placements when the Client is moving from one Placement to another**
- **End a Placement when the Client will no longer receive services at that location**
- **End all Placements when the Client is leaving the agency**

[Read More](#)

Employee Add Wizard

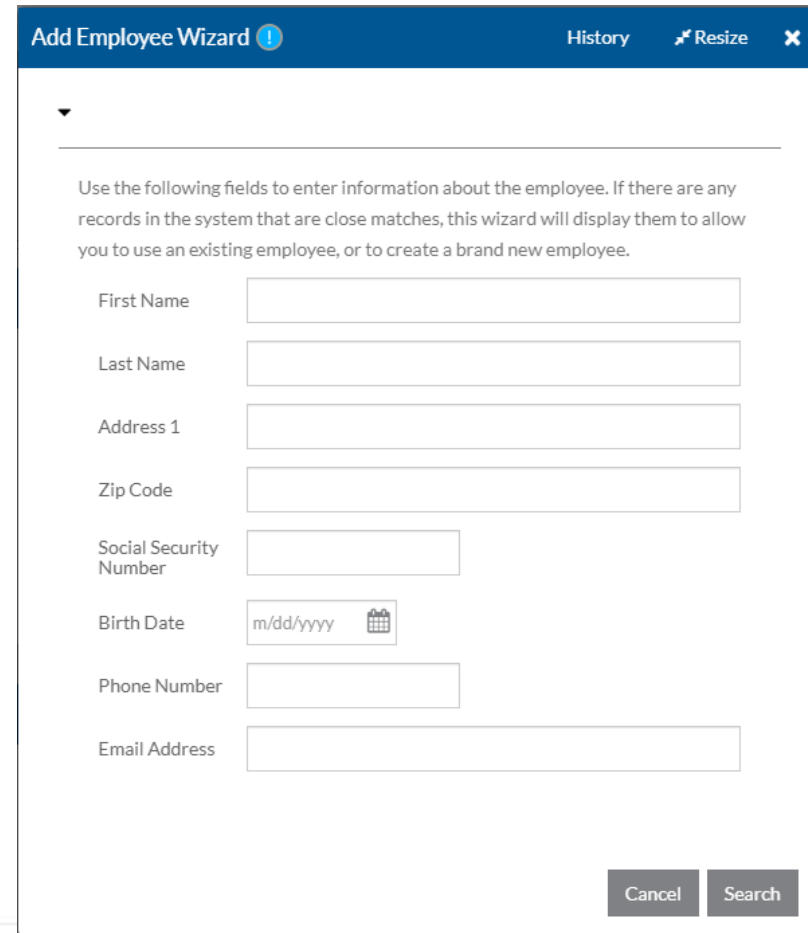


Employee Add Wizard

The Add Employee wizard guides you through adding an employee.

- ▶ Complete the information on the first screen
- ▶ Click Search

(Don't worry this information won't be lost!)



The screenshot shows a web application window titled "Add Employee Wizard" with a blue header bar. The header bar contains the title "Add Employee Wizard" with a blue information icon, and "History", "Resize", and "Close" icons on the right. Below the header, there is a dropdown arrow and a horizontal line. The main content area contains the following text: "Use the following fields to enter information about the employee. If there are any records in the system that are close matches, this wizard will display them to allow you to use an existing employee, or to create a brand new employee." Below this text are several input fields: "First Name", "Last Name", "Address 1", "Zip Code", "Social Security Number", "Birth Date" (with a date format "m/dd/yyyy" and a calendar icon), "Phone Number", and "Email Address". At the bottom right of the form, there are two buttons: "Cancel" and "Search".

Employee Add Wizard

The Employee Add wizard ensures that you do not add the same employee more than once.

Add Employee Wizard History Resize Close

Select an existing employee if the person you're adding matches. If not, click create new employee.

Select from existing employees

First Name	Last Name	Address 1	Address 2	Birth Date	Email Address	Email Address 2	Email Address 3	Phone 1	Phone 2	Phone 3	SSN	Zip Code
June	Crouse											
John	Goodwill	12356 Count...										43567
John	Shephard	155 Shoop Ave.		07/14/1966	john.shephar...			4193351432			987869004	43567
Clare	Conrad	445 Main St.		02/09/1970	clare@email.c...			4193358655			345999431	43567
Jenna	Hirsh	7091 Ace Ave.						5984844323				91096
Jane	Heidel	6411 County ...						4188505895				67529
Joanna	Kelly	7748 Dul Ave.						5923709010				96408
Jane	Neal	8395 Nonard ...						1081364732				20020
Joanna	Hirsh	7 Lowland Gr...		04/28/1966	Joanna@Kan...			8952766970			807954593	43567
Jenna	Haushalter	56 Merton Av...		10/29/1977	jenna@kanga...			6862737969			591262411	43545

Back Create New Employee Cancel Next

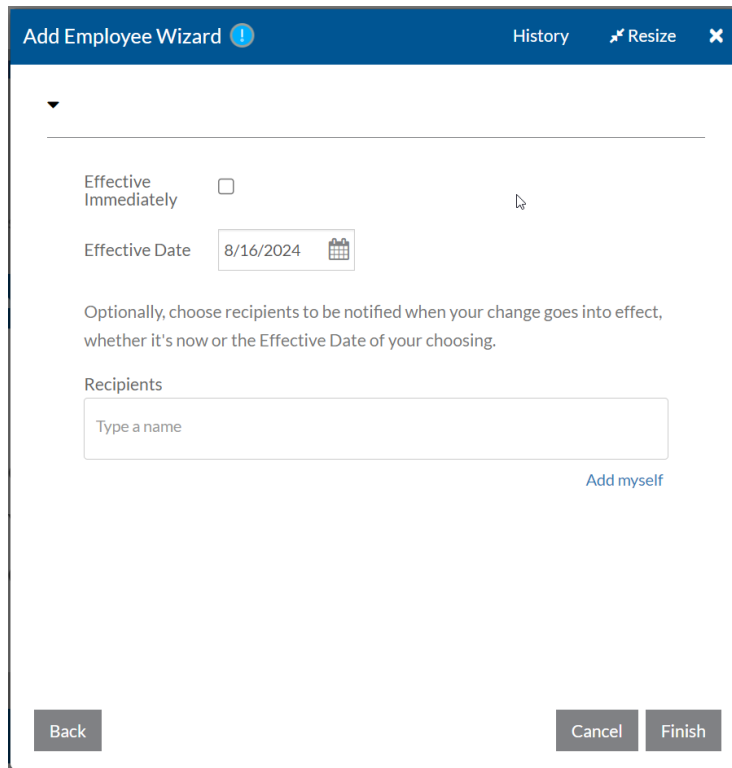
Employee Add Wizard

Continue entering the basic and *required* information (including any custom required information!)

The screenshot displays two overlapping windows of the 'Add Employee Wizard' application. The background window is on the 'Basic Information' tab, showing fields for Sex (Unknown), Birth Date (2/9/1970), Social Security Number (345-53-4555), Payroll Group (Required), Overtime Type, and EIN. The foreground window is on the 'Required Information' tab, showing fields for Address 2, City, State (None), Zip Code (43402), Phone Numbers (Phone 1: (345) 666-2345 x___), and Anniversary Date (Required). Both windows include a 'Back' button and a 'Next' button.

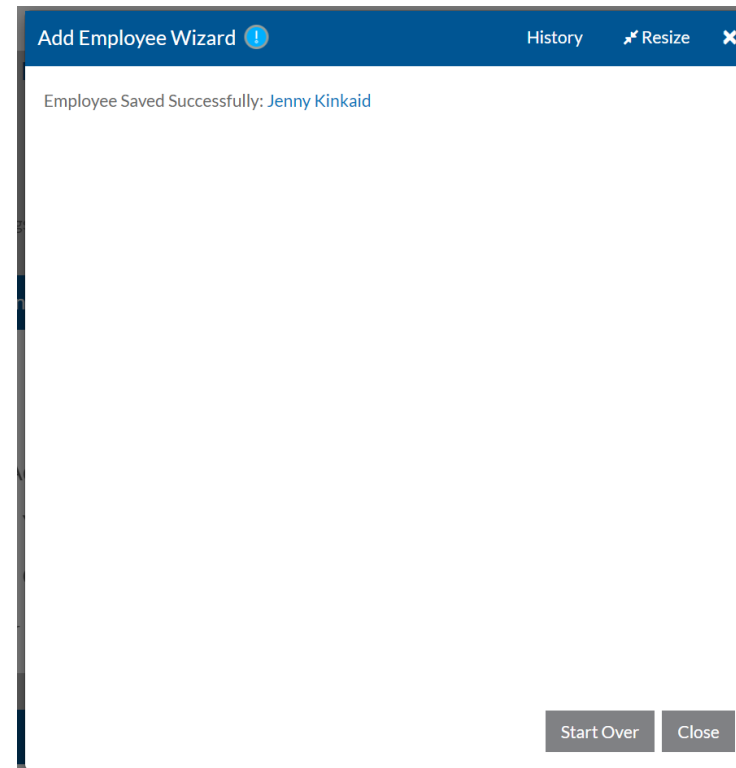
Employee Add Wizard

In addition, you can schedule the new employee to be added at a future date as well as designate who is notified that a new employee was added.



The screenshot shows the 'Add Employee Wizard' dialog box with the following elements:

- Header: 'Add Employee Wizard' with a blue bar, a help icon, and window controls (History, Resize, Close).
- Form fields:
 - 'Effective Immediately' checkbox (unchecked).
 - 'Effective Date' field with the value '8/16/2024' and a calendar icon.
 - 'Recipients' section with a text input field containing 'Type a name' and an 'Add myself' link.
- Footer: 'Back', 'Cancel', and 'Finish' buttons.



The screenshot shows the 'Add Employee Wizard' dialog box with the following elements:

- Header: 'Add Employee Wizard' with a blue bar, a help icon, and window controls (History, Resize, Close).
- Message: 'Employee Saved Successfully: Jenny Kinkaid'.
- Footer: 'Start Over' and 'Close' buttons.

Employee Add Wizard

Can also launch the wizard from the Application from the Create Employee button (new Application Tracking)

Application

[Employee Care](#) | [Applications\(ATS\)](#) | [jorge l ramos](#) | [Main](#) ▾

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

Basic Information

Status	Offer Accepted			
First	jorge	Middle	I	Last

Contact Information

Address

City	State	None
------	-------	------

Employee Add Wizard

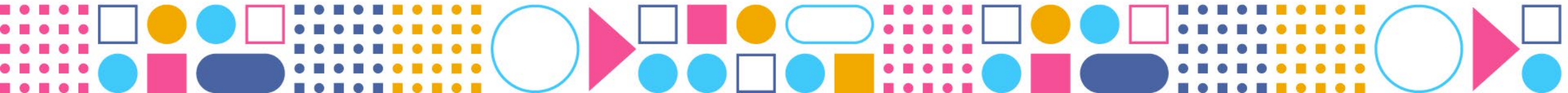
After adding the employee run the Employment Tracking Wizard or assign a Position or Employee Group

The screenshot displays the 'Employee Add Wizard' interface. The main content area is titled 'Employee' and shows the 'Basic Information' tab for an employee named Jenny Kinkaid. The interface includes a sidebar menu on the right with various options, and a main content area with several sections: 'Basic Information', 'Address', 'Phone Numbers', and 'Email Addresses'. A blue arrow points to the 'Employment Tracking' option in the sidebar menu.

Employee Profile: Jenny Kinkaid (Code: KINKJENN, SSN: 345-53-4555, Date of Birth: 2/9/1970, Age: 54.52). Active status is checked. System settings include 'Use Position Management' and 'Sync to DataPlus' checked, and 'Sync to CaraSolva MedSupport' unchecked.

Address		Phone Numbers		Email Addresses	
Address 1	132 High St	Phone 1	(344) 224-555	Email 1	jkinkaid@em
Address 2		Type 1		Type 1	
City		Phone 2		Email 2	

Client Add Wizard



Client Add Wizard

The Add Client wizard guides you through adding a client.

- ▶ Complete the information on the first screen
- ▶ Click Search

(Again, don't worry this information won't be lost!)

Add Client Wizard ⓘ History ⌵ Resize ✕

▼

Use the following fields to enter information about the client. If there are any records in the system that are close matches, this wizard will display them to allow you to use an existing client, or to create a brand new client.

First Name

Last Name

Address 1

Zip Code

Social Security Number

Medicaid Number

Birth Date 📅

Phone Number

Email Address

Cancel Search

Client Add Wizard

The Client Add wizard ensures that you do not add the same client more than once.

Add Client Wizard History Resize Close

Select an existing client if the person you're adding matches. If not, click create new client.

Select from existing clients

First Name	Last Name	Address 1	Address 2	Birth Date	Email Address	Email Address 2	Email Address 3	Phone 1	Phone 2	Phone 3	SSN	Medicaid Number	Zip Code
Jay	Soltero			02/20/1970								123456789	

Back Create New Client Cancel Next



Client Add Wizard

Continue entering the basic and *required* information (including any custom required information!)

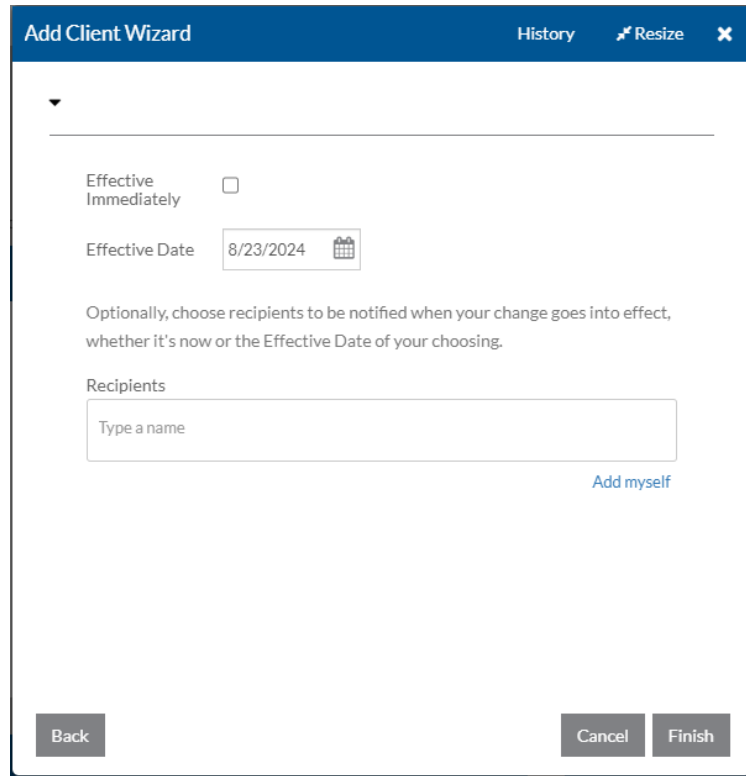
The screenshot shows the 'Add Client Wizard' interface with the following sections and fields:

- Client Name and Address:** Code (MARTIAS), First Name (Jason), Middle Name, Last Name (Martinez), Nickname (Jay), Address 1, Address 2, City, State (None), Zip Code.
- Basic Information:** Sex (Unknown), Birth Date (m/dd/yyyy), Social Security Number, Medicaid Number, Medicare Number, Use In Billing/Day Services (checked), Sync To DataPlus, Sync to CaraSolva MedSupport.
- Phone Numbers:** Phone 1, Type 1, Phone 2, Type 2, Phone 3, Type 3.
- Email Addresses:** Email 1, Type 1 (MAIN-Main).
- Required Information:** Case Manager.

Navigation buttons: Back, Cancel, Next.

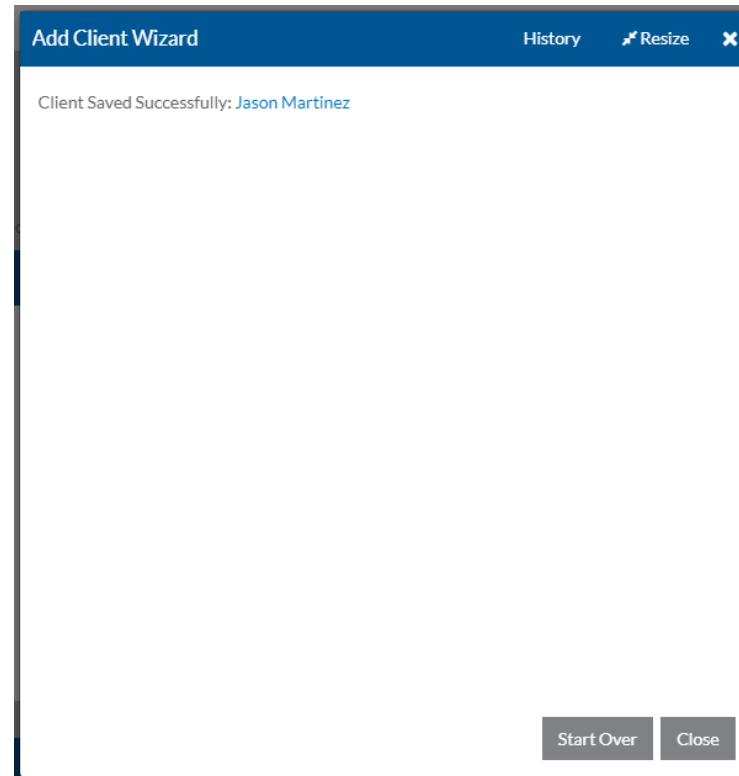
Client Add Wizard

In addition, you can schedule the new client to be added at a future date as well as designate who is notified that a new client was added.



The screenshot shows the 'Add Client Wizard' dialog box with the following elements:

- Header: 'Add Client Wizard' with 'History', 'Resize', and 'Close' icons.
- Effective Immediately: A checkbox that is currently unchecked.
- Effective Date: A text field containing '8/23/2024' with a calendar icon to its right.
- Text: 'Optionally, choose recipients to be notified when your change goes into effect, whether it's now or the Effective Date of your choosing.'
- Recipients: A text input field with the placeholder text 'Type a name'.
- Link: 'Add myself' located below the Recipients field.
- Buttons: 'Back', 'Cancel', and 'Finish' at the bottom.



The screenshot shows the 'Add Client Wizard' dialog box with the following elements:

- Header: 'Add Client Wizard' with 'History', 'Resize', and 'Close' icons.
- Message: 'Client Saved Successfully: Jason Martinez'.
- Buttons: 'Start Over' and 'Close' at the bottom.

Client Add Wizard

Can also launch the wizard from the Referral from the Create Client button

Client Referral

Client Care | [Client Referrals](#) | SMITHJUST 07/21/2024 | Main ▾

Reopen Create Client

Referred Individual

Basic Information

Code	SMITHJUST
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Client Add Wizard

After adding the client run the Manage Client Placement Wizard or add a Placement

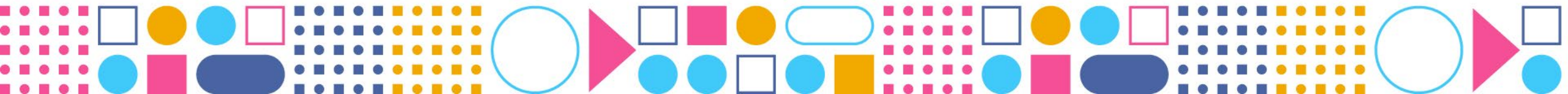
The screenshot displays the 'Client Add Wizard' interface for a client named 'Adams, Annie'. The interface is divided into several sections:

- Client Information:** Shows 'Adams, Annie' and 'Agency' in the breadcrumb navigation.
- Manage Client Placement:** A button highlighted with a blue arrow, indicating the next step in the wizard.
- Agency Information:** A table with the following data:

Intake Date	5/4/2008
Discharge/Service End Date	
Years Client Served	16.28
Medicaid Number	987654321901
Medicare Number	
- Agency Contacts:** A list of roles and names:

Case Manager	Adkins, Geoffrey (ADKIGEOF)
Manager	Cochran, Genevieve (COCHGENE)
Nurse	Fitzgerald, September (FITZSEPT)
QA Coordinator	Morin, Akeem (MORIAKEE)
QIDP	Gibson, Quentin (DUNCNISS)
Service Coordinator	Duran, Christen (DURACHRI)
Social Worker	Noble, Ivory (NOBLIVOR)
Supervisor	Sharpe, Armand (SHARARMA)
- Current Primary Placements:** A list of placement types:
 - Residential
 - Vocational
 - Other
- Placements:** A table with columns for 'Lookup Display', 'Begin Date', and 'End Date'. A blue arrow points to the '+' icon in the top right corner of this section, indicating the option to add a new placement.

Manage Client Placement Wizards

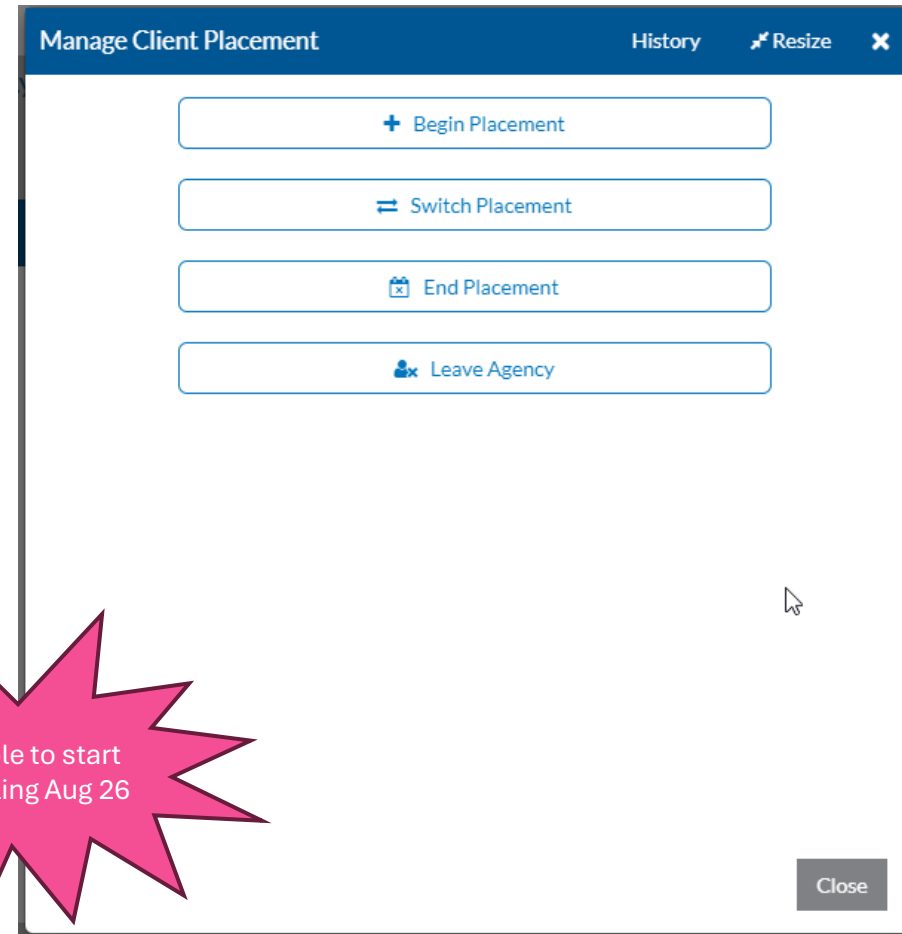


Manage Client Placements

The Manage Placements wizard guides you through the process of adding and removing a client to or from a Placement. In addition, you have the option to update the client's program plans and miscellaneous collection plans, update the client's billing defaults, and update the open slot count in the placement's Placement Slots.

The Manage Placement wizard has four paths depending on what is happening with the client. You can:

- Add a Placement where the Client will start receiving services
- Switch a Client's Placements when the Client is moving from one Placement to another
- End a Placement when the Client will no longer receive services at that location
- End all Placements when the Client is leaving the agency



Manage Client Placements

Add a new placement

- Placement must be tied to Global Location
- Update Client's Billing Defaults
- Can Sync to Client EVV Address
- Will be set to Primary Placement for type
- Update Placement Slots
- Can Schedule for Future

Manage Client Placement

Select the name of the placement/service location where the client will begin receiving services:

Back St. FCH (2001)

Will this location have a valid EVV address for this client?

No Yes

Do you want to update the open placement slots for this location?

No Yes

4 open slots available.

Will this placement/service location be the client's:

Default Billing Cost Center?

No Yes

Unit Payroll Cost Center?

No Yes

Time Payroll Cost Center?

No Yes

Effective Date/Time

m/dd/yyyy

Back Cancel Next

Manage Client Placements

Client Care | Clients | Abraham, Brianna Lynn | Agency

Manage Client Placement

Agency Information [Edit](#)

Intake Date: 5/4/2018

Discharge/Service End Date:

Years Client Served: 6.30

Medicaid Number: 5432124

Medicare Number:

Agency Contacts [Edit](#)

Case Manager: Jones, Benjamin (BENAJONE)

Manager: Miller, Mike J (MIKEMILL)

Nurse: Reynolds, Verna (VERNREYN)

QA Coordinator: Barnes, Leona (LEONBARN)

QIDP: Johnson, Lauren K (LAURJOHN)

Service Coordinator: Martinez, Joan (JOANMART)

Social Worker: Short, Maria L (MARISHOR)

Supervisor: Clark, Molly J (MOLLCLAR)

Current Primary Placements

- Residential: Abraham, Brianna Lynn-Front St. FCH-Family Care Home-Residential
- Vocational:
- Other:

Placements

Lookup Display	Begin Date	End Date
Abraham, Brianna Lynn-Front St. FCH-Family Care Home-Residential	5/15/2024	

Client

Client Care | Clients | Abraham, Brianna Lynn | Billing/Day Services

Manage Client Placement

Billing Information [Edit](#)

Use In Billing/Day Services:

Billing Client Type: Client

Default Billing Cost Center: Front St. FCH (2002)

Default Billing County: Defiance County (DEFIANCE)

Time Payroll Cost Center: Front St. FCH (2002)

Unit Payroll Cost Center: Front St. FCH (2002)

ID 1: 335871

Employee Code:

Day Services Billing Merge: Always Use Hourly Rate



Manage Client Placements

Client Placements

Eve Brown
ZionDemo_Sharlyn_Dev

[Client Care](#) | Client Placements

- Departments
 - Residential
 - Programs
 - Family Care Home
 - Placements
 - Adams St. FCH
 - Back St. FCH
 - Franklin Ave FCH
 - Front St. FCH**
 - Clients
 - Jefferson St. FCH
 - Main St. FCH
 - Orchard Rd. FCH
 - Washington St. FCH
 - Supported Living
 - Vocational

Basic Information [Edit](#)

Description Front St. FCH

Type **Residential**

Program Family Care Home

Placement Location Front St. FCH

Service

Active

Sync to Carasolva

Placement Slots [Search](#) [+](#) [Menu](#)

Available Slot Count	Begin Date	End Date
2	5/15/2024	8/9/2024
3	8/9/2024	8/13/2024
2	8/13/2024	8/13/2024
3	8/13/2024	

1 - 4 of 4

Client Placements [Filter](#) [Search](#) [+](#) [Menu](#)

Client	Begin Date	End Date
Maxwell, Edward (MAXWE...)	4/19/2012	
Maxwell, Laura (MAXWLA...)	4/19/2012	
Pace, Charles (PACECHAR)	7/5/2014	

- Departments
 - Residential
 - Programs
 - Family Care Home
 - Placements
 - Adams St. FCH
 - Back St. FCH
 - Franklin Ave FCH
 - Front St. FCH
 - Clients
 - Abraham, Brianna Lynn**

Basic Information [Edit](#)

Placement Front St. FCH

Client **Abraham, Brianna Lynn (ABRABRIA)**

Primary Placement For This Type

Begin Date **5/15/2024**

End Date

Years In Placement

Reason For Leaving **Benefits (BEN)**

Reason For Leaving Notes

Other Information

Contact

Vocational Position

Vocational Hourly Rate

Level Of Staffing

Transportation

Use for EVV



Manage Client Placements

Moving between placements:

- End Placement with reason and notes for ending
- Update open slots
- Add Placement (must be tied to Global Location)
- Can Sync to Client EVV Address
- Will be set to Primary Placement for type
- Update Placement Slots

The image displays two screenshots of the 'Manage Client Placement' application interface. The top screenshot shows the 'Ending services at a placement/service location' screen. It includes a dropdown menu for selecting the placement/service location (Abraham, Brianna Lynn-Back St. FCH-Family Care Home-Residential), a text input field for the reason for ending service (Moving (M)), and a text area for notes. The bottom screenshot shows the 'Begin service at a placement' screen. It includes a dropdown menu for selecting the placement/service location (Art Vcc Center (3001)), two radio button options for 'Will this location have a valid EVV address for this client?' (Yes is selected), and two radio button options for 'Do you want to update the open placement slots for this location?' (Yes is selected). Both screens have 'Cancel' and 'Next' buttons, with blue arrows pointing to the 'Next' buttons in both.

Manage Client Placements

Moving between placements:

- Update Client's Billing Defaults
- Update Billing Cost Center in Contract Detail
- Update Program Plans and Misc Data Collection Plans
- Can Schedule for Future

Manage Client Placement

History | Resize | X

Do you need to update the client's defaults for billing? (You may need to do this if the ending placement is the current default.)

Default Billing Cost Center?

Unit Payroll Cost Center?

Time Payroll Cost Center?

Do you want to update the billing cost center of the client's active Contract Details?

What do you want to do with the program plans and miscellaneous data collection plans for this placement/service location?

Update the Program Plans and Miscellaneous Data Collection Plans?

Effective Date/Time

8/7/2024 12:00 AM

Manage Client Placements

Client

Client Care | Clients | Manage Client Placement

Client Contracts

Description

Facility Hab Services

Facility Hab Services222

Employee Payrate Override

Service

Employee 837 Billing Relationships

View Resize X

Contract Information Edit

Client: Abraham, Brianna Lynn (ABRABRIA)

Funding Source: testfundingsource (TFSJ)

Begin Date: 3/1/2024

End Date: 12/31/2024

Description:

Prior Authorization Number:

Status: Active

Contract Details Search + Menu

Processing Group	Service	Service Plan	Cost Center
Family Care Homes (FCH)	Case Management (CM)		Jefferson St. FCH (2005)
Family Care Homes (FCH)	Day Services (DS)		Back St. FCH (2001)
Family Care Homes (FCH)	Case Management (CM)	Brianna Ly...	Front St. FCH (2002)

1 - 3 of 3

Delete Previous Next Add Copy

Client Care | Clients | Abraham, Brianna Lynn | Miscellaneous Collection Plans

Manage Client Placement Reports Delete Add Copy Menu

Miscellaneous Collections Plans Filter Search + Menu

Description	Collection Type	Start Date	End Date	Active	Placement: Placement: Description
Vitals	Unscheduled Only	11/1/2023	8/1/2024	False	Front St. FCH
Sleeping	Both	2/8/2024	8/1/2024	False	Art Voc Center

Client Care | Clients | Abraham, Brianna Lynn | Program Plans

Manage Client Placement Reports Delete Add Copy Menu

Program Plans Filter Search + Menu

Client	Title	Start Date	End Date	Duration	Active	Placement: Placement: D
Abraham, Brianna Lynn (ABRABRIA)	Behavior Modification	9/1/2023	8/9/2024		False	Day Programs Center
Abraham, Brianna Lynn (ABRABRIA)	Communication	2/8/2024	12/31/2024		True	Front St. FCH
Abraham, Brianna Lynn (ABRABRIA)	Yoga	6/3/2024	8/9/2024		False	Day Programs Center
Abraham, Brianna Lynn (ABRABRIA)	Communication	6/3/2024	6/27/2024		False	Art Voc Center

1 - 4 of 4

Manage Client Placements

End placements

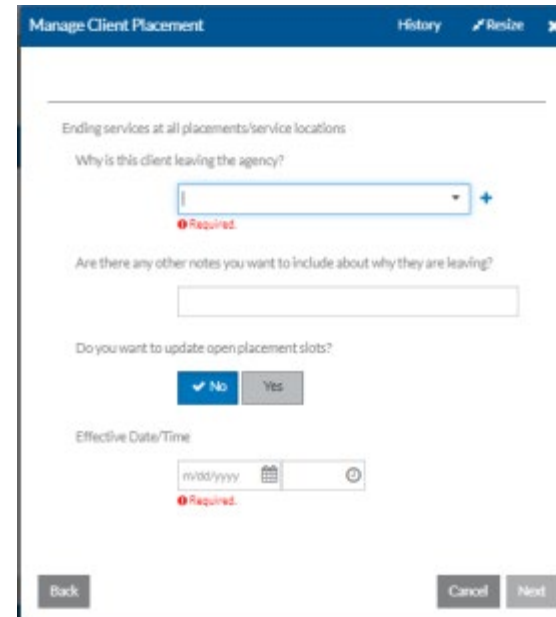
- End Placement with Reason for Ending and Notes
- Update Client's Billing Defaults & Billing Cost Center in Contract Detail
- Update Program Plans and Misc Data Collection Plans
- Update Placement Slots
- Can Schedule for Future

The image displays two screenshots of the 'Manage Client Placement' web application interface. The left screenshot shows the 'Ending services at a placement/service location' section, which includes a dropdown for 'Select the placement/service location where the client is ending services' (currently showing 'Abraham, Thomas Lynn-Back St, FCH Family Care Home-Residential'), a text field for 'What is their reason for ending service here?' (containing 'Moving MO'), a text area for 'Are there any notes you want to add about why they are ending services here?', and a confirmation section 'Do you want to update the open placement slots for this location?' with 'No' and 'Yes' buttons. The right screenshot shows the 'Billing Defaults' section, which includes a confirmation 'Do you need to update the client's defaults for billing?' with 'No' and 'Yes' buttons. Below this are three sections for selecting new default cost centers: 'Default Billing Cost Center', 'Unit Payroll Cost Center', and 'Time Payroll Cost Center', each with a 'No' button and a 'Yes' button. The 'Yes' buttons are selected, and the dropdowns show 'Baskets Voc Center (3002)'. There is also a section for updating the billing cost center of the client's active Contract Details, with 'No' and 'Yes' buttons, and the 'Yes' button selected. The dropdown shows 'Baskets Voc Center (3002)'. At the bottom, there is a section for updating program plans and miscellaneous data collection plans, with 'No' and 'Yes' buttons, and the 'Yes' button selected. The dropdown shows 'Barber, Alop-Baskets Voc Center-Vocaton Center-Voc'. At the very bottom, there is an 'Effective Date/Time' section with a date field set to '8/7/2024' and a time field set to '12:00 AM'. The interface includes 'Back', 'Cancel', and 'Next' buttons.

Manage Client Placements

Leave agency

- End All Placements with Reason for Ending and Notes
- Update Client's Discharge Dates
- Leaves Active Selected for X Days
- Clears Sync to DataPlus
- Can Schedule for Future



The screenshot shows a 'Manage Client Placement' dialog box with the following fields and options:

- Ending services at all placements/service locations:**
 - Why is this client leaving the agency? (Dropdown menu, required field)
 - Are there any other notes you want to include about why they are leaving? (Text area)
 - Do you want to update open placement slots? (Radio buttons for 'No' and 'Yes')
 - Effective Date/Time (Date picker, required field)
- Buttons:** Back, Cancel, Next

Manage Client Placements

Client Care | Clients | Abraham, Brianna Lynn | Main

Manage Client Placement

Basic Information

Code	ABRABRIA	Sync To DataPlus	<input type="checkbox"/>
First Name	Brianna	Sex	Female
Middle Name	Lynn	SSN	777-77-7777
Last Name	Abraham	Birth Date	3/1/2013
Nickname		Age	11.47
Active	<input checked="" type="checkbox"/>		



Client

Client Care | Clients | Abraham, Brianna Lynn | Agency

Manage Client Placement

Agency Information	Agency Contacts
Intake Date: 5/4/2018	Case Manager: Jones, Benjamin (BENAJONE)
Discharge/Service End Date: 8/31/2024	Manager: Miller, Mike J (MIKEMILL)
Years Client Served: 6.33	Nurse: Reynolds, Verna (VERNREYN)
Medicaid Number: 5432124	QA Coordinator: Barnes, Leona (LEONBARN)
Medicare Number:	QIDP: Johnson, Lauren K (LAURJOHN)
	Service Coordinator: Martinez, Joan (JOANMART)
	Social Worker: Short, Maria L (MARISHOR)
	Supervisor: Clark, Molly J (MOLLCLAR)

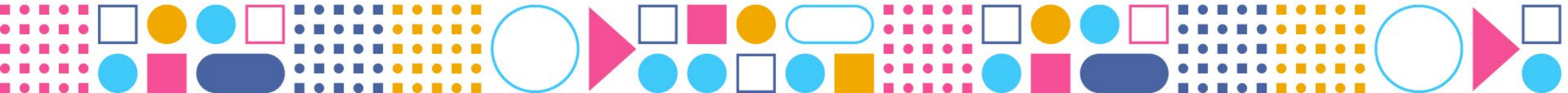
Option

Setup | Client Care Setup | Options - Client Care

Client Care Options

Deactivate Client Days 30

Service Plans



Service Plans

The Service Plan gives agencies and caregivers:

- A single view of the client's Program Plans, Collection Plans and Contract Details in one place
- Pertinent client information so they no longer have to piece it together.
- Ability to quickly see what's important to the client and open the service plan directly from the Task dashboard

Dave Kim Open

Client notes

Placement notes

What is Important to Me: My friends are important to me.
How you can best support me: Giving me space to try things on my own.

Service Plan

Add

Client Health Needs Records Event Incident Inventory

Document: History

Brushing Teeth Daily Life Skills

Nutrition Physical Activity

Stress Vitals

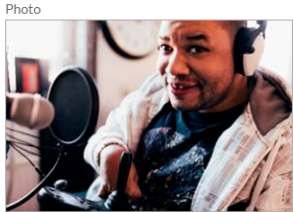
Available to schedule now



Service Plans

Reports Delete Add Copy

My Service Plan Edit



Client **Kim, Dave (KIMDAVE)** Marital Status **Single** Audio Consent **Full (F)**
 Start Date **1/2/2024** Age **67.36** Video Consent **Full (F)**
 End Date Religion **Baptist (BA)** DNR Type **State Order (S)**
 External ID Sex **Male**

Details

These are the details of Dave's service plan. It outlines his plans for the year of 2024.

About Me Edit

My living environment

I live in a group home with 3 other roommates.

My interests and activities

I like listening to music and playing drums.

What is important to me

My friends are important to me.

How you can best support me

Giving me space to try things on my own.

Contract Details

Description	Client Contract ID: Funding Source	Cost Center	Service	Contract Code	Begin Date
	State 8371 Funding Source (STATE8371)	Adams St. FCH (2006)	ICFM...	ICFMR (ICF...	2/5/20...

Program Plan Objectives Filter Search + Menu

Objective	Collection Type	Start Date	End Date	Result Picklist	Last Collection Date	Collection Result	Collection Notes	ID
Brush teeth 2x a day when prompted	Unscheduled Only	1/1/2024		Results: Compl/Incmpl/Ref/NA: Show Notes	2/27/2024 7:41 AM	Refused		27

1 - 1 of 1

Miscellaneous Data Collection Plans Filter Search + Menu

Description	Placement	Start Date	Last Collection Date	Collection Result	Collection Notes
Physical A...	Kim, Dave-Main St. FCH-Family Care Home-Residential	10/1/2020	2/26/2024 11:08 AM	Collected	
Daily Life...	Kim, Dave-Main St. FCH-Family Care Home-Residential	1/1/2020	2/27/2024 7:41 AM	Collected	

1 - 2 of 2

Service Plans

The image displays three overlapping 'Reverse Reference Add' dialog boxes, each with a dark blue header containing 'Reverse Reference Add', 'History', 'Resize', and 'Close' icons. The dialog boxes are arranged in a staggered fashion from top-left to bottom-right.

- Top-left dialog:** Contains three options:
 - Add Existing Client Contract Detail
 - Add a new Client Contract Detail to an existing Client Contract ID
 - Add a new Client Contract Detail to a new Client Contract ID
- Middle dialog:** Contains three options:
 - Add Existing Program Plan Objective
 - Add a new Program Plan Objective to an existing Program Plan
 - Add a new Program Plan Objective to a new Program Plan
- Bottom-right dialog:** Contains two options:
 - Add Existing Collection Plan
 - Add New Collection Plan

Each dialog box has a 'Cancel' button in the bottom right corner. The dialog boxes are semi-transparent, allowing the underlying content to be partially visible.

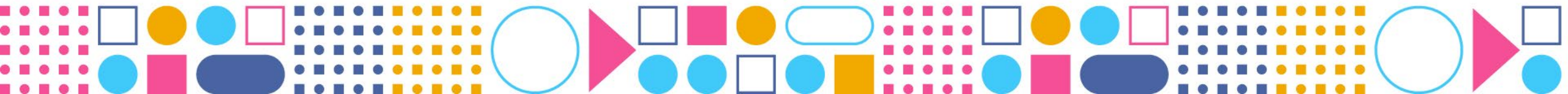


Service Plans

The screenshot displays a software interface for managing service plans. It is divided into several sections:

- Client Contract Details:** A sidebar on the left showing contract information. Under "Contract Detail Information", it lists:
 - Begin Date: 2/5/2024
 - End Date: 2/14/2024
 - Service Plan: Dave Kim Jan 02 24 - (highlighted in yellow)
 - Billing Service Type: ICFMR (ICFMR)
 - Contract Code: ICFMR (ICFMR)
 - Global Billing Rate:
 - Income Statement Account: ICFMR (ICFMR)
 - Balance Sheet Account: AR CL Control Account - ICFMR (ICFMR)
- Plan Information:** A central form with fields for:
 - Client: Kim, Dave (KIMDAVE)
 - Placement: Kim, Dave-Main St. FCH-Family Care Home-Res
 - Description: Stress
 - Instructions: (empty text area)
 - Start Date: 10/1/2020
 - End Date: m/dd/yyyy
 - Service Plan: (dropdown menu, highlighted in yellow)
- Data Collection:** A section on the right with fields for:
 - Result Picklist: Results: Collected: Show Notes
 - Collection Type: Unsched
- Program Plan Objectives:** A floating window on the right showing:
 - Objective Information: Edit button
 - Description: Brushing Teeth
 - Objective: Brush teeth2X a day when prompted
 - Start Date: 1/1/2024
 - End Date: (empty)
 - Service Plan: Dave Kim Jan 02 24 - (highlighted in yellow)
 - Data Collection: Edit button

Quizzes



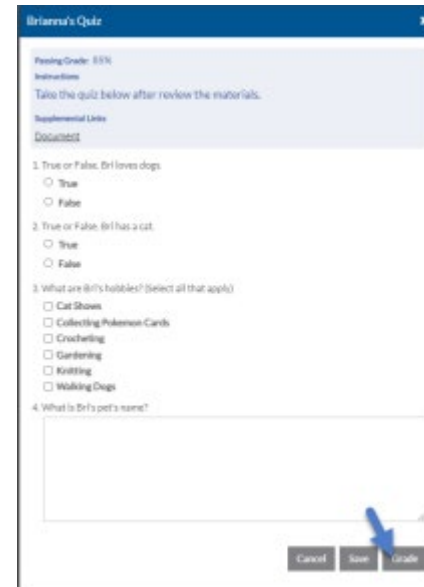
Quiz Management

The Quiz Management module allows you to:

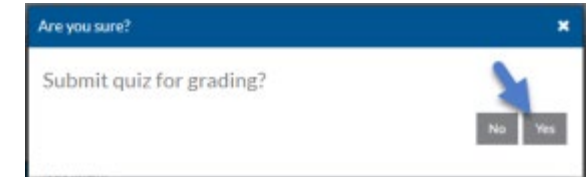
- ▶ Provide learning content (PDFs, documents, links to videos, etc.) to employees
- ▶ Administer an open-notes, auto-graded quiz to them about that content.

The quiz can be about a:

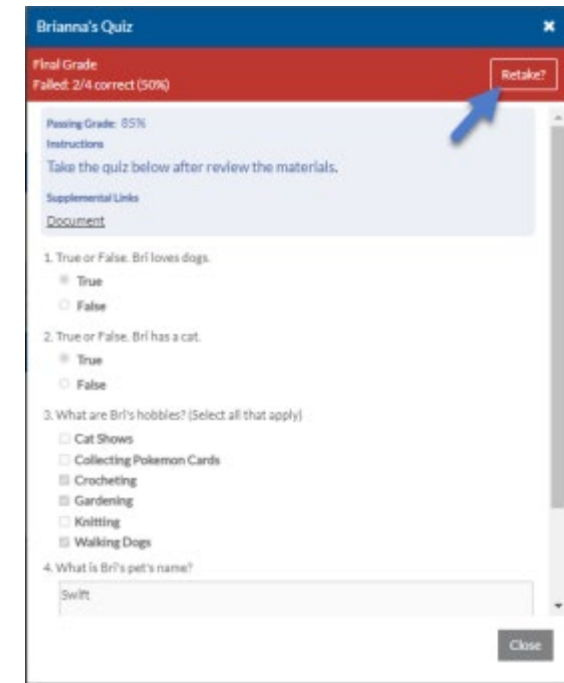
- ▶ Client (or a Client in relation to their Placement)
- ▶ Placement
- ▶ Other topic



The screenshot shows a quiz titled "Brianna's Quiz" with a passing grade of 85%. It includes instructions to take the quiz after reviewing materials and a document link. The quiz contains four questions: two true/false questions, a multiple-choice question about hobbies, and an open-ended question about the pet's name. The "Save" button at the bottom right is highlighted with a blue arrow.



The screenshot shows a confirmation dialog box titled "Are you sure?" with the text "Submit quiz for grading?". It has two buttons: "No" and "Yes". A blue arrow points to the "Yes" button.



The screenshot shows the same quiz interface as the previous one, but with a red header bar indicating the final grade: "Final Grade Failed: 2/4 correct (50%)". A "Retake?" button is visible in the top right corner, highlighted with a blue arrow. The "Close" button is at the bottom right.



Quiz Management

- ▶ The quiz is associated with an employee requirement (which can optionally be auto-generated) to track compliance
- ▶ The requirement is assigned to a requirement plan (which can optionally be auto-generated) to determine who must take it.

Setup | Employee Care Setup | Requirement Plans (Employees) | Quiz Plan Template

Basic Information		Requirements	
Description	Quiz Plan Template		
DataObject	Payroll - Employees		
Condition	Child: Client Care Placements greater than 0 where Placement equals and Data Type one of (1,3)		
Active	<input checked="" type="checkbox"/>		

Basic Information				Requirement Recurrence Information		Additional Fields	
Code	QUIZTEMPATE	Track Requirement	<input type="checkbox"/>	Not Visible To Beneficiary	<input type="checkbox"/>		
Description	Quiz Template	# of Days Before Due Date to Create Task	30	Visibility Not Based On Security	<input type="checkbox"/>		
Grouping		Setup Mode	<input type="checkbox"/>	Assignee/Approver/Watcher Setup	Quiz View/Modify Task		
Evidence Type	Quiz	On Demand	<input type="checkbox"/>	Allow Watchers To Do	<input type="checkbox"/>		
Category	Quizzes			Allow Approvers To Do	<input type="checkbox"/>		
Noncompliance Restriction Type	Restrict Time Tracking Data Entry						
Details							
Order	0						
Active	<input checked="" type="checkbox"/>						
<u>Initial Due Date Information</u>				<u>Next Due Date Information</u>			
Type	Immediate	Type					
				Last Fulfilled Date			
				Timespan Type	Years		
				Timespan Value	1		
<u>Pre-Due Date Levels</u>				<u>Post-Due Date Levels</u>			
Level 1 (Days)	3	Level 2 (Days)	1				
Level 2 (Days)	2	Level 3 (Days)	2				
Level 3 (Days)	1						
Default Credit Hours							
<u>When Completed By Beneficiary Show:</u>							
Notes	Hide						
Credit Hours	Hide						
<u>When Completed On-Behalf-of Beneficiary Show:</u>							
Notes	Hide						
Credit Hours	Hide						

Quiz Management

- ▶ Based on the requirement's settings, staff permission group settings, and the passing score designated in the quiz, if the employee does not pass the quiz the employee can optionally be prevented from logging Time Tracking entries (the agency can designate which entries are locked out via Time Tracking Options).

The screenshot shows the 'Time Logging' interface. At the top, it says '2:04:28 PM' and 'You are not currently logging time.' Below this, there are fields for date and time: 'Wed Feb 14' and '02 : 04 PM'. There are also dropdown menus for 'Type' (set to 'Client Time: Permission Group Service Locations'), 'Location' (set to 'Art Vocational Center'), and 'Service' (set to 'Wake Services Begin/End With Ratios'). The client name is 'Aaron Adams'. A yellow warning banner at the bottom states: 'You have outstanding requirements that must be met before logging any time. Please check requirements.' There is a 'Start' button at the bottom.

The screenshot shows the 'Time Tracking Options' settings page. It is divided into two main sections: 'Basic Information' and 'Data Collection Types'.
Basic Information:

- Allow Access To All Payroll Cost Centers
- Can Have Worked Time With Clients
- Allow Access To All Service Locations
- Restrict Data Entry If Service Delivery Limit Is Reached
- Use Clock In/Out Screen
- Default To First Item In Lists
- Auto Log Only
- Restrict Data Entry If Out of Compliance
- Active

Data Collection Types:

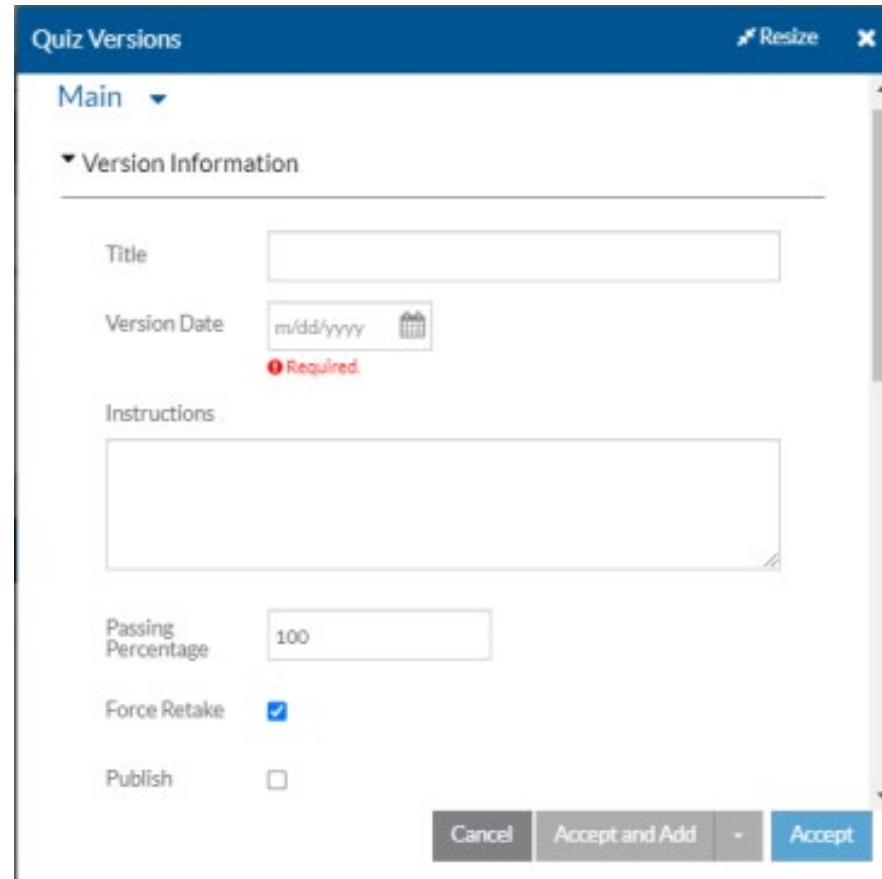
- Client Mileage: All Service Locations
- Client Time: All Service Locations
- ICF Census
- Non-Worked Time: All Cost Centers
- Reimbursements
- Staff Mileage: Mil
- Staff Time: All Co
- Unpaid Break: Be

The screenshot shows the 'Compliance Settings' dialog box. It has a title bar with 'Compliance Settings' and an 'Edit' icon. The text inside reads: 'This section controls restrictions placed on time logging if certain requirements are not met.' Below this, there are several checkboxes:

- Restrict Worked Time With Clients Entry If Out Of Compliance
- Restrict Worked Time Without Clients Entry If Out Of Compliance
- Restrict Non Worked Time Entry If Out Of Compliance
- Restrict Unpaid Break Entry If Out Of Compliance
- Restrict Mileage With Clients Entry If Out Of Compliance
- Restrict Mileage Without Clients Entry If Out Of Compliance
- Restrict Reimbursements Entry If Out Of Compliance
- Restrict Client Census Entry If Out Of Compliance
- Restrict Clock In/Out Entry If Out Of Compliance

Quiz Management

- ▶ If a new version of the quiz is needed, the agency can require everyone to retake the quiz immediately or set it so the new version of the quiz appears the next time the employee is required to take it and when new employees are required to take it.



The screenshot shows a 'Quiz Versions' dialog box with a blue header and a white body. The dialog is titled 'Quiz Versions' and has a 'Main' dropdown menu. Under the 'Main' menu, there is a 'Version Information' section. This section contains several fields: 'Title' (a text input field), 'Version Date' (a date picker showing 'm/dd/yyyy' with a calendar icon and a red 'Required' error message below it), 'Instructions' (a large text area), 'Passing Percentage' (a text input field containing '100'), 'Force Retake' (a checked checkbox), and 'Publish' (an unchecked checkbox). At the bottom right of the dialog, there are three buttons: 'Cancel', 'Accept and Add', and 'Accept'.

Quiz Management

Learning Content can be a link to a video or website or to a PDF

Quiz Learning Content

Main ▾

▾ Learning Content

Type Document ▾

Document

Drag files here or click the +

+

Caption ❗ Required.

Content Author

Author's Credentials

Training Duration

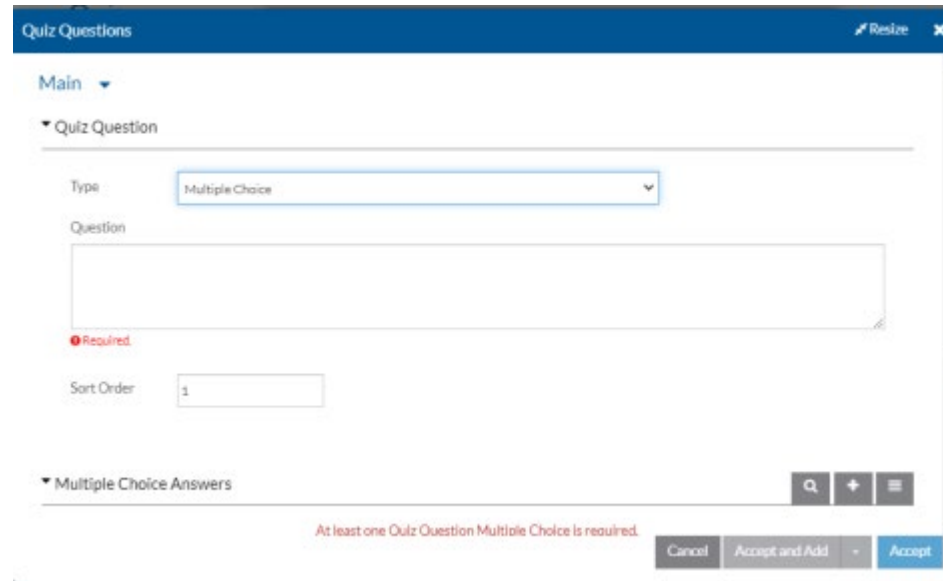
Sort Order

Cancel Accept and Add ▾ Accept

Quiz Management

Questions can be:

- True or False
- Multiple Choice
- Fill in Blank



The screenshot shows a web application window titled "Quiz Questions". The interface includes a "Main" dropdown menu, a "Quiz Question" section, and a "Multiple Choice Answers" section. The "Quiz Question" section has a "Type" dropdown menu set to "Multiple Choice", a "Question" text area, a "Sort Order" input field with the value "1", and a "Required" checkbox. The "Multiple Choice Answers" section has a search icon, a plus icon, and a minus icon. At the bottom, there are "Cancel", "Accept and Add", and "Accept" buttons. A red error message at the bottom reads: "At least one Quiz Question Multiple Choice is required."

Quiz Management

Staff can view their own quiz history:

Employee Care | Quiz History

Compliance 3 items Active Only Quiz Type Client Client

Search History Sort by Employee Direction Ascending

Client: Aaron Adams Aaron's Quiz
Smith, Alice

Compliance: In compliance
Most Recent Quiz Version Date: 02/11/2024
Most Recent Quiz Completed Date: 3/6/24, 1:56 PM
Most Recent Status: Passed

[History](#)

Version Date	Completed	Status	Correct	Grade	Passing Grade	
02/11/2024	3/6/24, 1:56 PM	Passed	4/4	100%	90%	View Quiz

Client: Brianna Anne Abraham Quiz for Bri Abraham
Smith, Alice

Compliance: Out of compliance
Most Recent Quiz Version Date: 02/01/2024
Most Recent Status:

Quiz Management

Managers can view the quiz history of their staff and see if they are in compliance at a glance.

Employee Care

- My Information**
 - To-Do List 2
 - Registered Events
 - Job Requirements 3
 - Personal Information
 - Quiz History
- Resources**
 - Events
 - Document Center
 - Forms
- Employee Management**
 - Employees
 - Agency-Issued Resources
 - Corrective Actions
 - Employee Quiz History
 - Leave Tracking
 - Performance Appraisals
 - Work-Related Injuries

Employee Quiz History

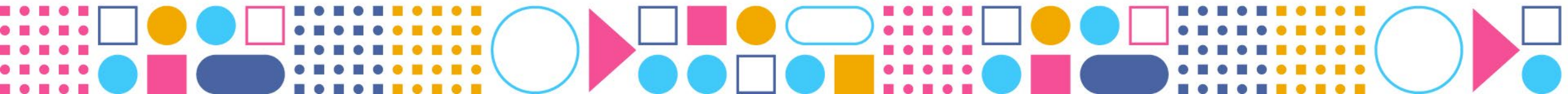
Employee: [Dropdown] Compliance: 3 items Active Only [Checked] Quiz Type: Client Client: [Dropdown]

Search History Sort by: Employee Direction: Ascending

Client	Compliance	Most Recent Quiz Version Date	Most Recent Status
Client: Dave Kim Johnson, Bob	Out of compliance	02/01/2024	In Progress
Client: Aaron Adams Jones, Dave	Not required	02/11/2024	Most Recent Quiz Completed Date: 2/20/24, 8:33 AM Passed
Client: Brianna Anne Abraham Jones, Dave	In compliance	02/01/2024	Most Recent Quiz Completed Date: 2/20/24, 3:03 PM Passed

Version Date	Completed	Status	Correct	Grade	Passing Grade	View Quiz
02/01/2024	2/20/24, 3:03 PM	Passed	5/6	83%	75%	View Quiz
02/01/2024	2/20/24, 3:03 PM	Failed	3/6	50%	75%	View Quiz

Other Tips



Add a Note to a Log Entry in Progress

The screenshot shows a 'Time Logging' interface with a modal 'Add Note' dialog box. The 'Time Logging' window displays the current time as 04:38 PM on Tuesday, August 20, 2024. It includes dropdown menus for 'Type' (Client Time: Selected Service Locations), 'Location' (Adams, Aaron), and 'Service' (Wake Services Begin/End With Ratios). The 'Clients' section shows 'Aaron Adams' and a 'Switch' button. The 'Add Note' dialog box is titled 'Add Note' and contains the text 'Enter New Note', an 'Insert Template' dropdown menu, a large yellow text area, and 'Cancel' and 'Save' buttons. In the background, the 'Hours' window shows 'Aaron Adams' and 'Transaction ID 210'. The 'Flags' section contains two messages: 'Hours are zero for this transaction' and 'Missing end date/time'. The 'Notes' section shows a note from 'Alice Smith' dated 'Aug 13, 2024 02:38 PM' with the text 'started service'. An 'Add Note' button is visible next to the note, and a 'Show Audit' button is at the bottom.

Time Logging My Log

You began logging time at 08/13/2024 2:38:00 PM

Tue Aug 20 04 : 38 PM End

To switch, pick a new Type, Cost Center or Task

Type Client Time: Selected Service Locations

Location Adams, Aaron

Service Wake Services Begin/End With Ratios

Clients Aaron Adams

Switch

Add Note

Enter New Note

Notes: Insert Template

Cancel Save

Hours

Aaron Adams

Transaction ID 210

Flags

- Hours are zero for this transaction
- Hours are zero for this transaction
- Missing end date/time
- Missing end date/time

Notes

Aug 13, 2024 02:38 PM Alice Smith

started service

Audit Show Audit

Time with Client Transactions

Sandata I/DD Time with Client Transactions

Site Search... [Home] [Favorites] [Tasks] [Manager Dashboard] [My Time Off] [Scheduling Locations] [Schedule] [Client Census] [Staff Log] [Service Location Log] [Service Limits] **View Transactions** [Log Export] [Staff Tools] [Client Care] [Employee Care]

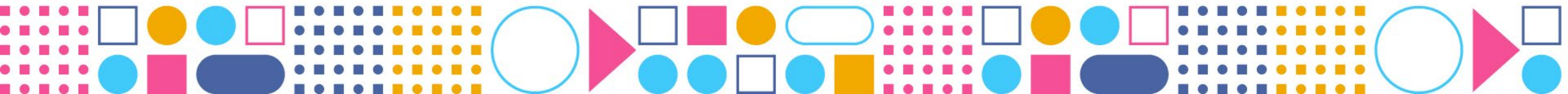
EVV 11/19/2023 - 11/25/2023 [Service Location] [Client] [Service] [Staff] [Voided] [EVV Call Type] [EVV Status] [EVV Geo Status] [EVV Voided]

Evv	Begin Date Time	End Date Time	Total Hours	Service Location	Service	Client	Staff	Voided	Evv Begin Call Type	Evv End Call Type
	11/20/2023 7:00 PM	11/21/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chad Griffin (GRIFCHAD)	Joanna Hirsh (000028)			
	11/20/2023 7:00 PM	11/21/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Charles Harris (HARRCHAR)	Joanna Hirsh (000028)			
	11/20/2023 7:00 PM	11/21/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chris Harrison (HARRCHRI)	Joanna Hirsh (000028)			
	11/22/2023 7:00 PM	11/23/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chad Griffin (GRIFCHAD)	Joanna Hirsh (000028)			
	11/22/2023 7:00 PM	11/23/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Charles Harris (HARRCHAR)	Joanna Hirsh (000028)			
	11/22/2023 7:00 PM	11/23/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chris Harrison (HARRCHRI)	Joanna Hirsh (000028)			
	11/24/2023 7:00 PM	11/25/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chad Griffin (GRIFCHAD)	Joanna Hirsh (000028)			
	11/24/2023 7:00 PM	11/25/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Charles Harris (HARRCHAR)	Joanna Hirsh (000028)			
	11/24/2023 7:00 PM	11/25/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chris Harrison (HARRCHRI)	Joanna Hirsh (000028)			
	11/19/2023 7:00 AM	11/19/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Chuck Haushalter (HAUSCHU...	Kara Jenkins (000029)			
	11/19/2023 7:00 AM	11/19/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Clay Heidel (HEIDCLAY)	Kara Jenkins (000029)			
	11/19/2023 7:00 AM	11/19/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Sarah Myers (MYERSARA)	Kara Jenkins (000029)			
	11/21/2023 7:00 AM	11/21/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Chuck Haushalter (HAUSCHU...	Kara Jenkins (000029)			
	11/21/2023 7:00 AM	11/21/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Clay Heidel (HEIDCLAY)	Kara Jenkins (000029)			
	11/21/2023 7:00 AM	11/21/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Sarah Myers (MYERSARA)	Kara Jenkins (000029)			
	11/23/2023 7:00 AM	11/23/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Chuck Haushalter (HAUSCHU...	Kara Jenkins (000029)			
	11/23/2023 7:00 AM	11/23/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Clay Heidel (HEIDCLAY)	Kara Jenkins (000029)			
	11/23/2023 7:00 AM	11/23/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Sarah Myers (MYERSARA)	Kara Jenkins (000029)			

Your current filter settings returned over 100 results. If you do not find what you are looking for, use the search or set additional filters to narrow your search results. Exports are not affected by the 100 row result limit and will export all results that match any chosen filters.

1 - 18 of 100

Q&A



Thank You

Next New Feature Webinar October 15, 2024 at 1:00 PM

