<u>SERV*tracker* Manual</u>

IN HOME SERVICES

for

Providers Contracted Under Hillsborough County

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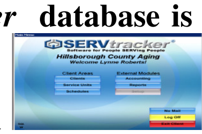
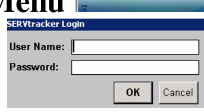
<u>In - Home Services/Quality Assurance:</u>
Agatha McRae 813-272-6956 Lynne Roberts 813-272-5991
<u>APS Referrals:</u>
Pam Capallia 272-5686 Regina Dean 276-8281 Felicia Southers 272-5935

☺ TIP You will see tips throughout this manual. The first tip for working with the SERV*tracker* database is how to log off properly. Exit out of all screens back to the Main Menu  **Click 'Log Off.' Next, on your second log on and password screen.** 

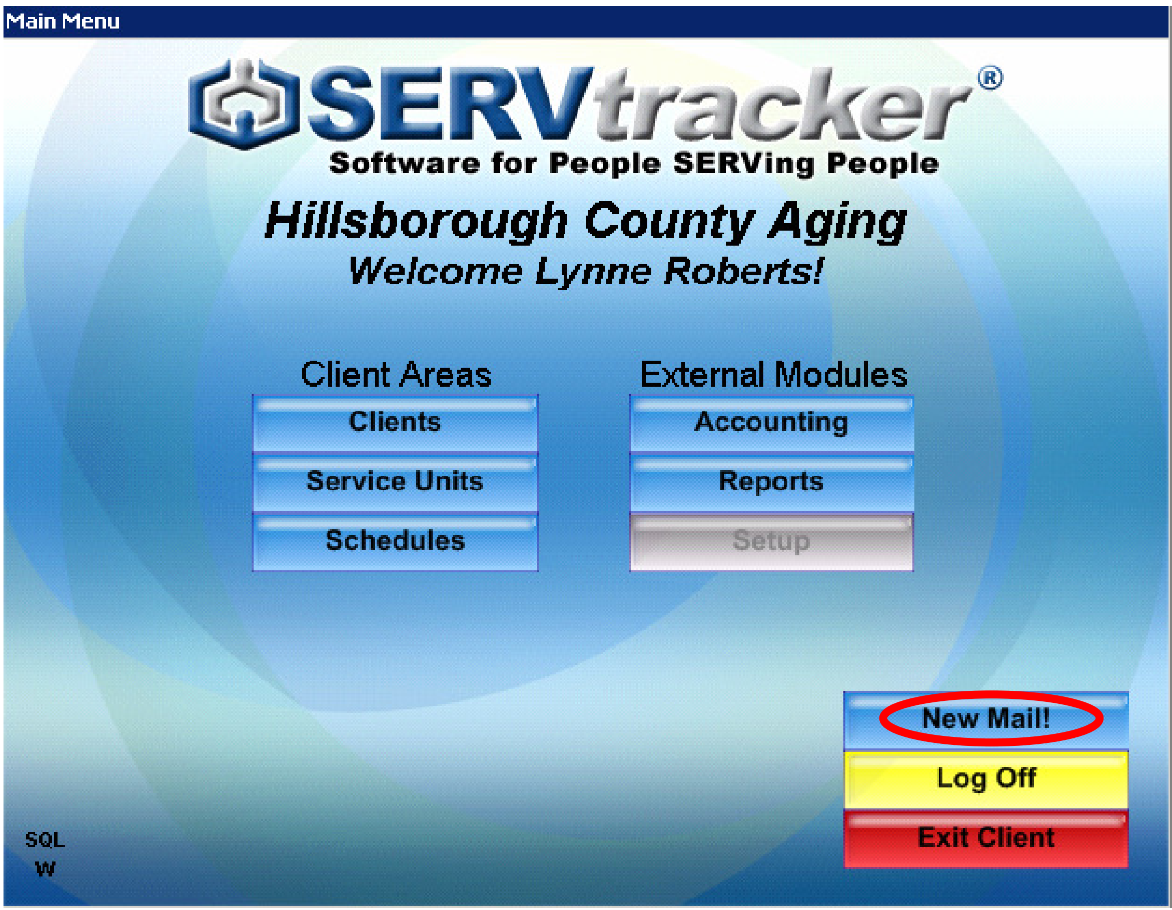
Click 'Cancel.' Next, click on the start button in the lower left hand corner of the screen, click on "log off." 

If you do not log off this way, you may not be able to access the database the next time.

RECEIVING A REFERRAL

It is a requirement for all vendors to check their SERV*tracker* e-mails several times throughout each business day for referrals. You may choose the times during the day, however, Case Managers cannot wait past the 24 hours deadline for your response by either accepting or declining the referral. Services must be started within 72 hours of the e-mail notification and referral.

APS referrals require a SAME DAY response in SERV*tracker* and 24 hours to start service. Failure to respond through SERV*tracker* within the SAME DAY means that you will be passed over to the next vendor on the rotation list.

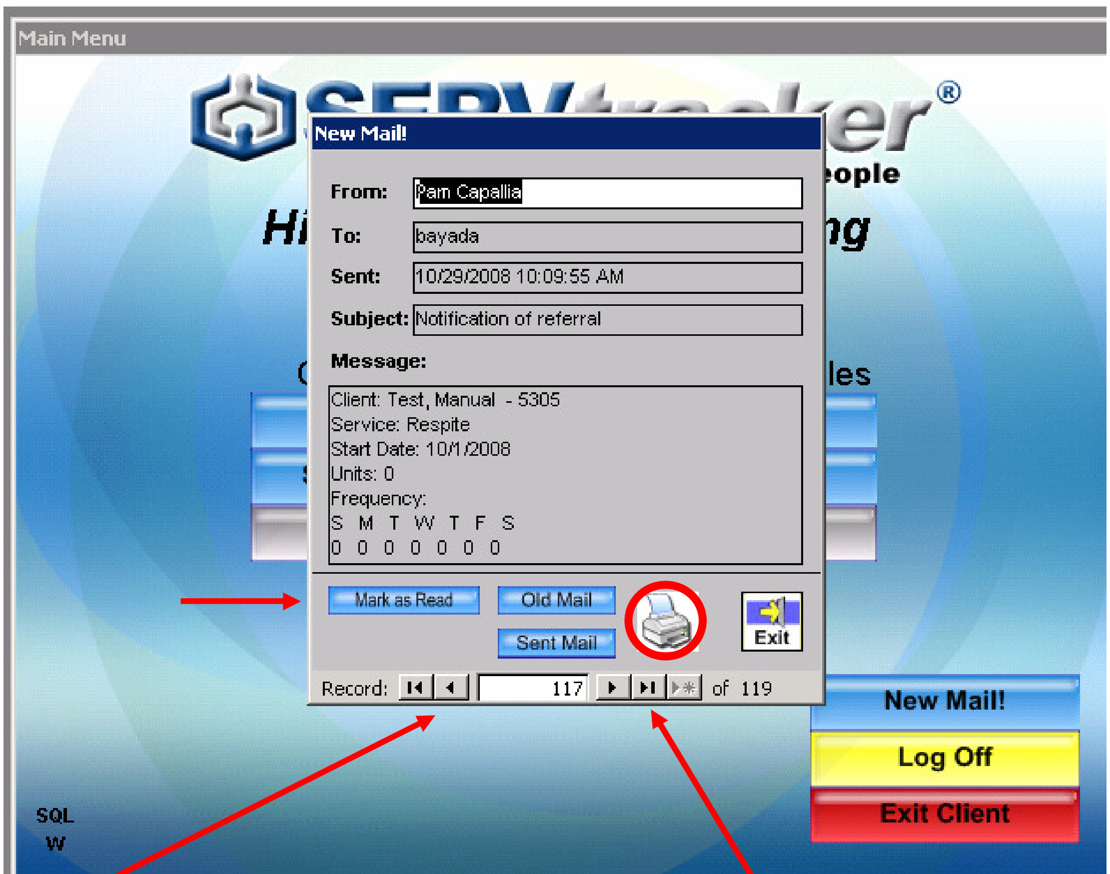


- All referrals for new or revised services will be sent to the vendor automatically via SERV*tracker* e-mail when the Case Manager generates a referral for the client in the SERV*tracker* database system.

- Notification will be indicated by the **'New Mail!'** module on the **'Main Menu'** screen.

You have the option of printing and /or saving SERV*tracker* e-mails. You may also delete e-mails that you do not want to save.

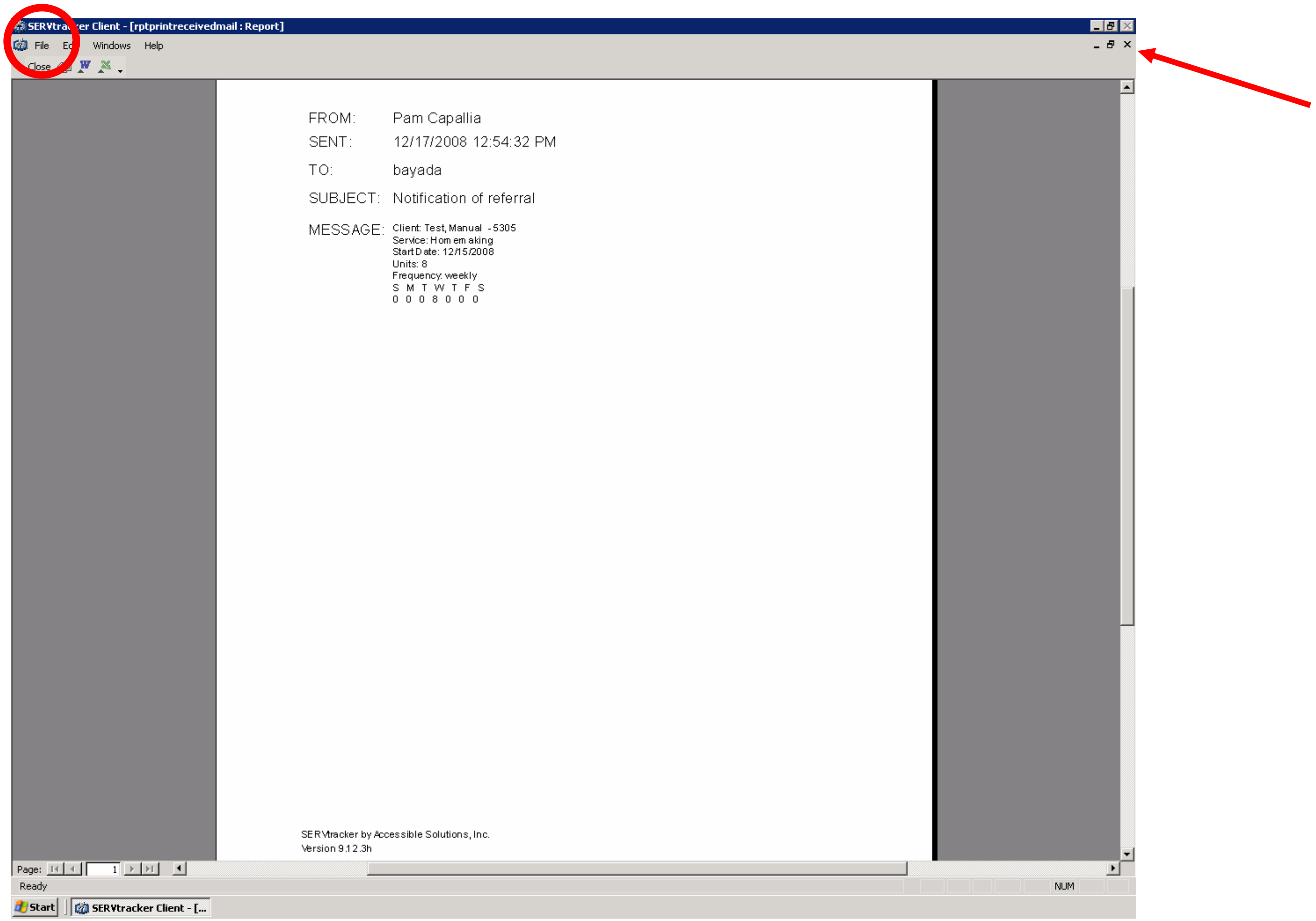
- To print the e-mail, click on the printer icon shown in the circle.



☺ TIP When looking for latest e-mails sent to you, click the ►▌ scroll button, then click the ◄ button one at a time to see each of the latest e-mails. ▌◄ will take you back to the first e-mail.

- After clicking the printer icon, you will see the following screen:

- Go to **'file'** in the upper left corner of the screen → **'print'**

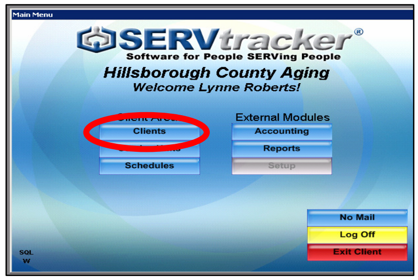


- After printing, exit out of the screen by clicking the small black "**x**" in the upper right corner. This brings you back to the **'New Mail!'** screen. Click the button **'Mark as Read'** This will save the e-mail for you. The module on the **'Main Menu'** screen will change to **'No Mail'** when you exit out of the print screen and return to the **'Main Menu'** screen.

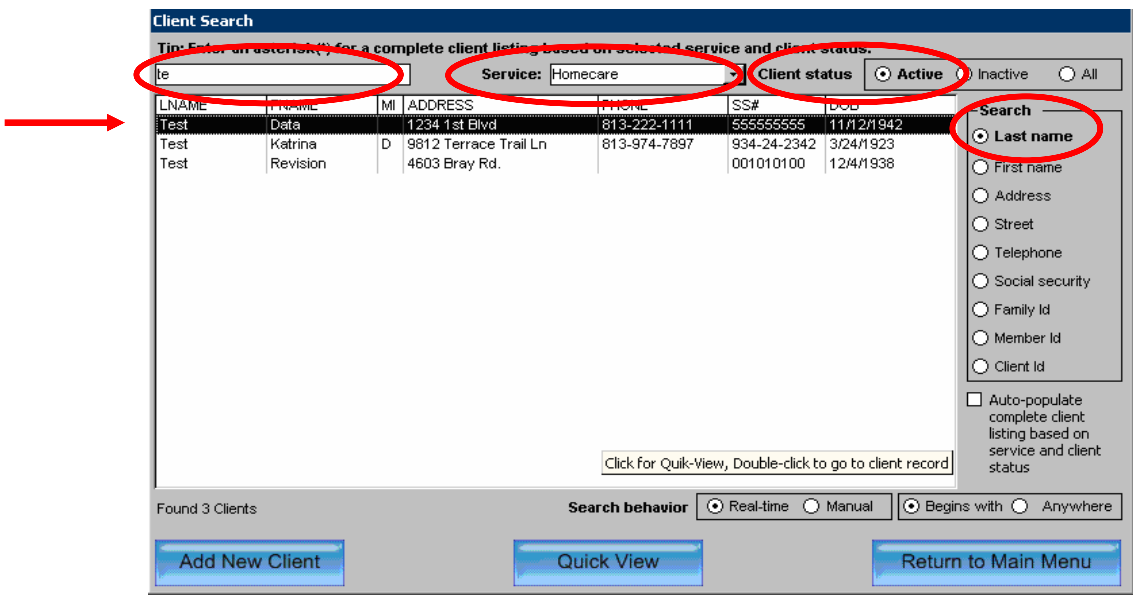
- You will be able to retrieve your e-mails later by clicking **'Old Mail'** or **'Sent Mail'** and scrolling through them using the ◄ and ► at the bottom of the e-mail screen.

<u>**ACCEPTING OR DECLINING A NEW REFERRAL**</u>

- Return to the **'Main Menu'** screen and select the '**Clients**' module.



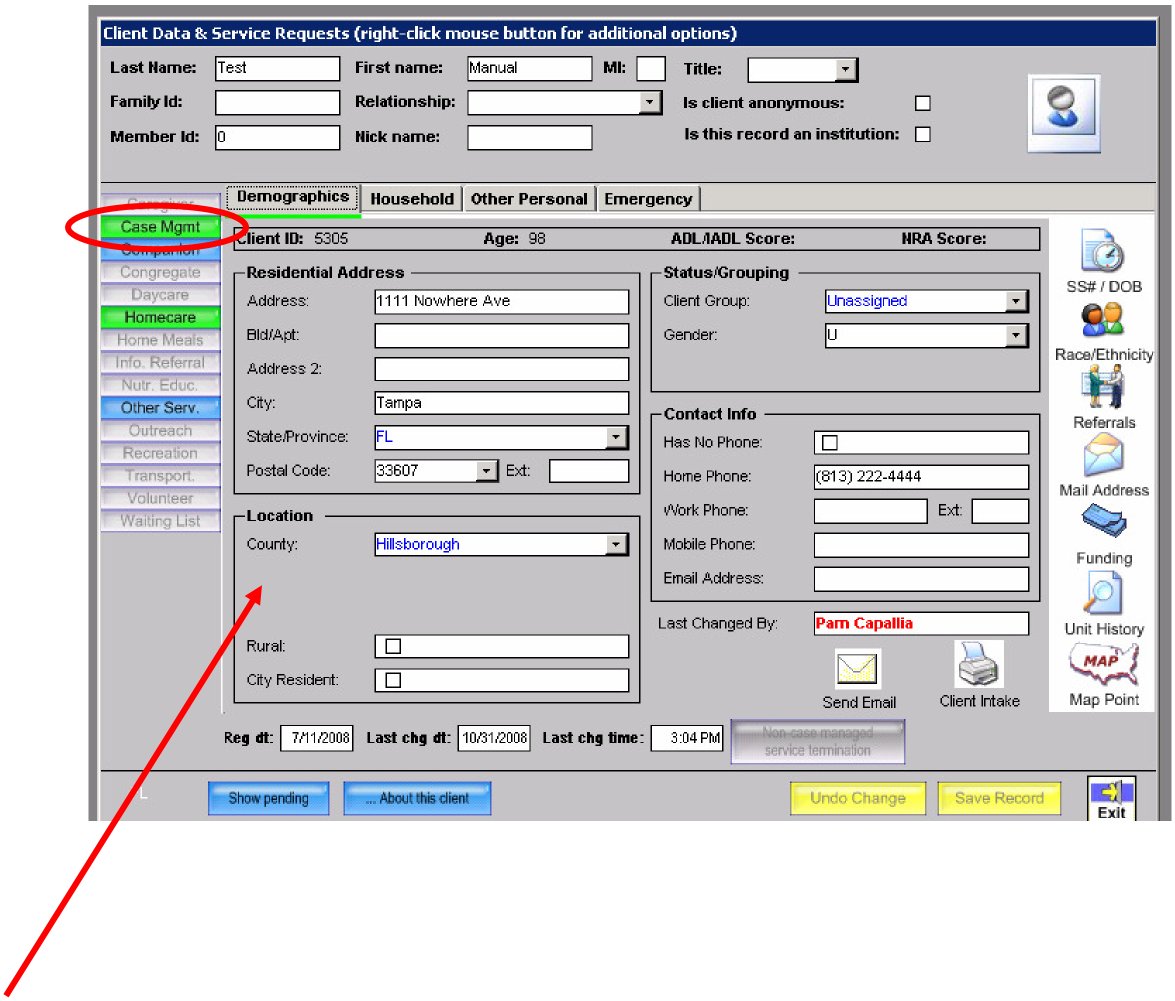
- To **search** for the client by last name: Make sure that the drop down field for service says **'Homecare'**; the client status button indicates **'Active'**; the search box indicates **'Last name.'** Enter the client's last name in the top left field. An asterisk (*) should be in the field where you begin typing. The client's name should appear in the window below.



- Single-click on client's name for quick view showing client's name, address, phone number, social security number, and date of birth.

- Double-click on client's name to go to the **'Client Data & Service Request'** screen.

- Select the green **'Case Mgmt'** button on the left side of the **'Client Data & Service Request'** screen.

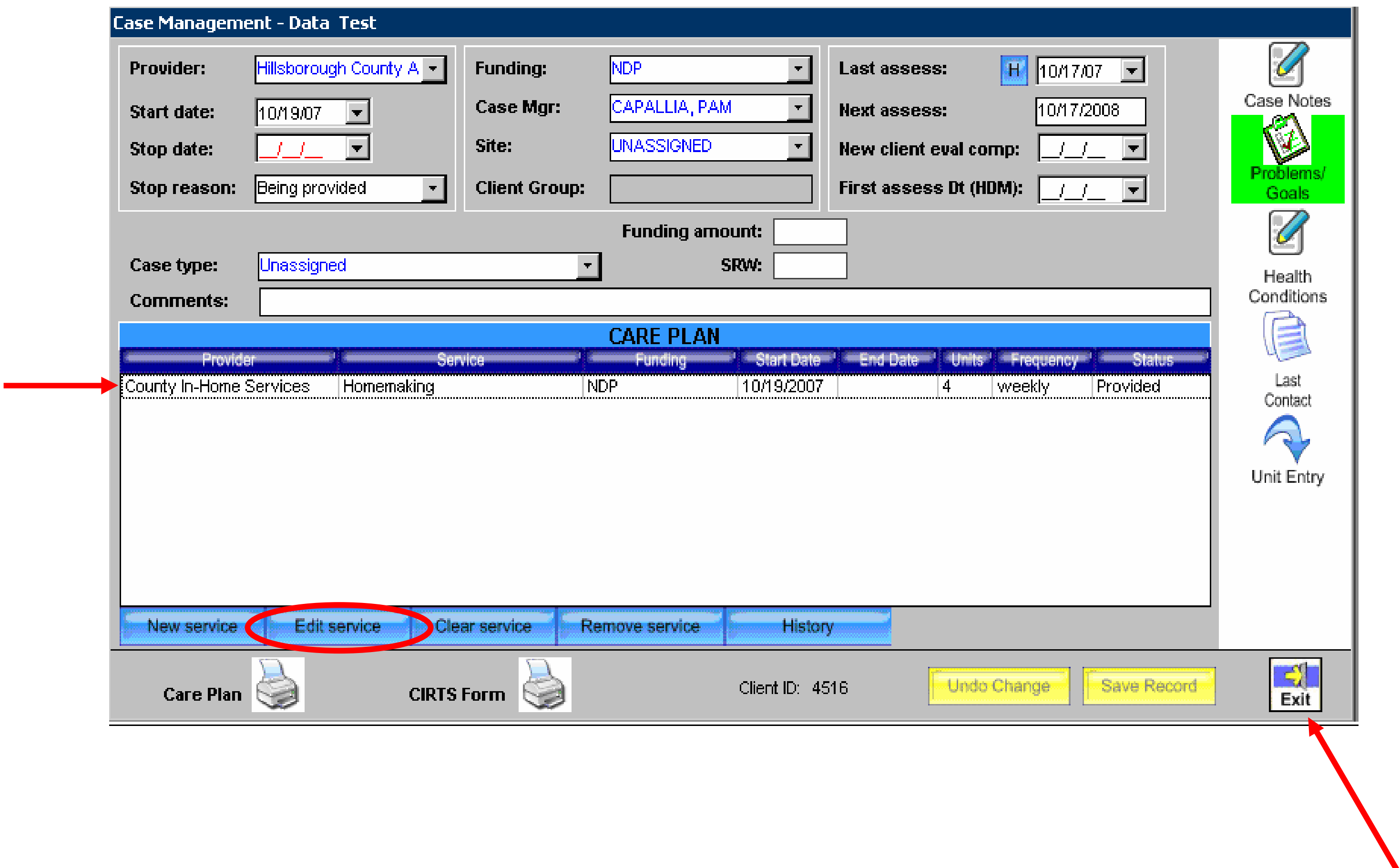


☺ **TIP** Any time that you are in this screen and you would like to return to the **'Search'** screen, you can **right** click in the grey area, view a drop down list and click 'search.' (You do not have to 'exit' out and return to the 'Main Menu' screen.)

You will now see the **'Case Management'** screen with the line of service, including referred service units (service hours), start date, funding, status, and frequency.

To accept or decline the referral:

- Single click on the line of service so that it is highlighted, then click the blue **'Edit service'** button below the '**CARE PLAN**' window.

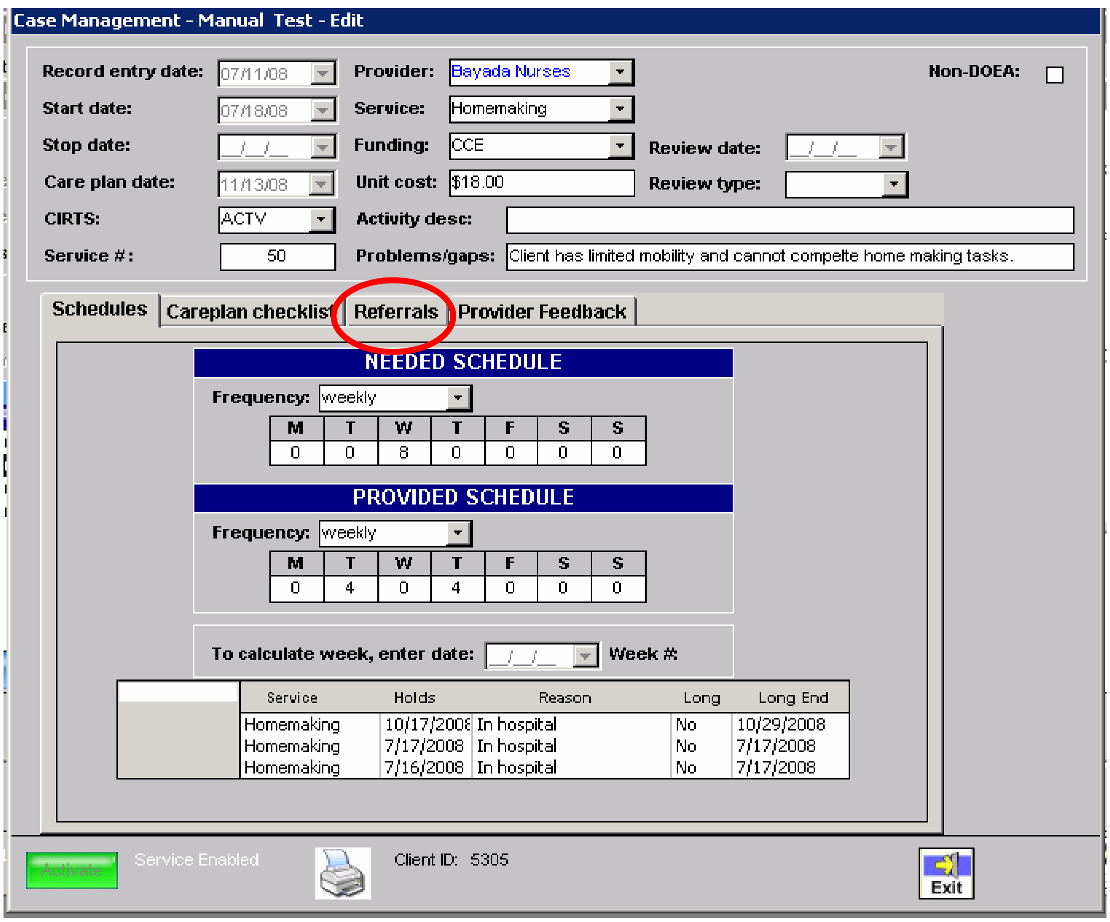


If you intend to accept this referral, click the **[Exit →]** button at the lower right corner of the screen. Continue to exit out of the SERV*tracker* database now. Contact the client and /or caregiver and arrange start of service. Make sure that you confirm the **start date** for service, including the **scheduled days for service**, and the **aide** assigned to the case. You will need this information to accept the referral. Come back to this screen when you are ready to accept the referral and proceed to the next step. You have 24 hours to either accept or decline the referral. *****APS** referrals require **same day** response for either accepting or declining the referral.***

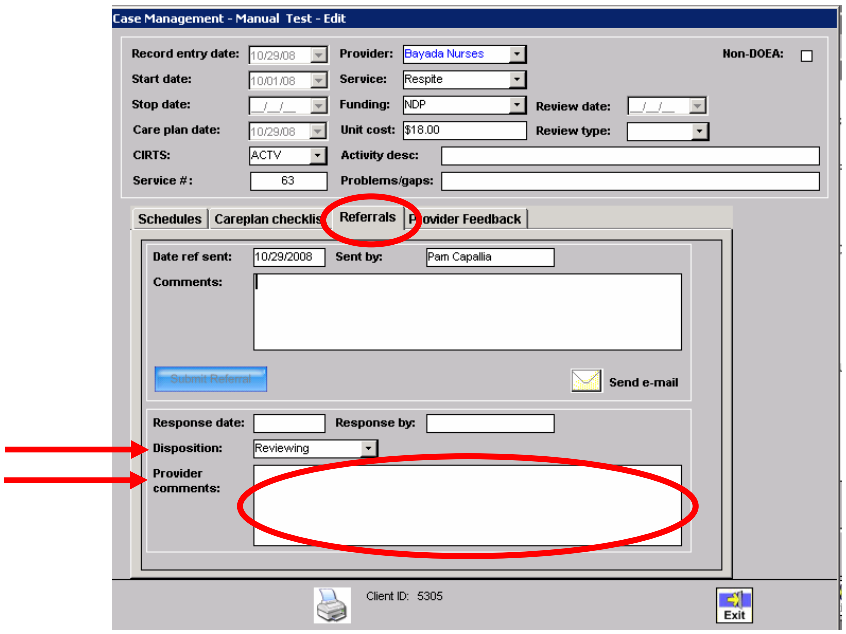
The nurse intake visit is not considered start of service. If you cannot contact the client by phone, you must attempt a home visit to make contact with the client or caregiver.

The **'Case Management'** edit screen opens to the '**Schedules'** tab. (Make sure you have the 'edit' screen and not the 'read only' screen.) The **NEEDED SCHEDULE** has been entered by the Case Manager. It indicates the number of referred hours and the suggested days to divide the hours of service. It is optional. The **PROVIDED SCHEDULE** is what the client will actually receive from you. You will not be able to edit these schedules, however, if you are accepting the referral, when the auto notification goes back to the Case Manager, the Case Manager will enter the scheduled units in the **PROVIDED SCHEDULE** based on the information you enter in your comments. (see next page)

- Click the '**Referrals**' tab to accept or decline the referral.



At this point you have determined whether you are going to accept or decline the referral. The **'Disposition'** drop down box will indicate **"Reviewing"** in the drop down field. <u>DO NOT click this drop down box yet.</u>



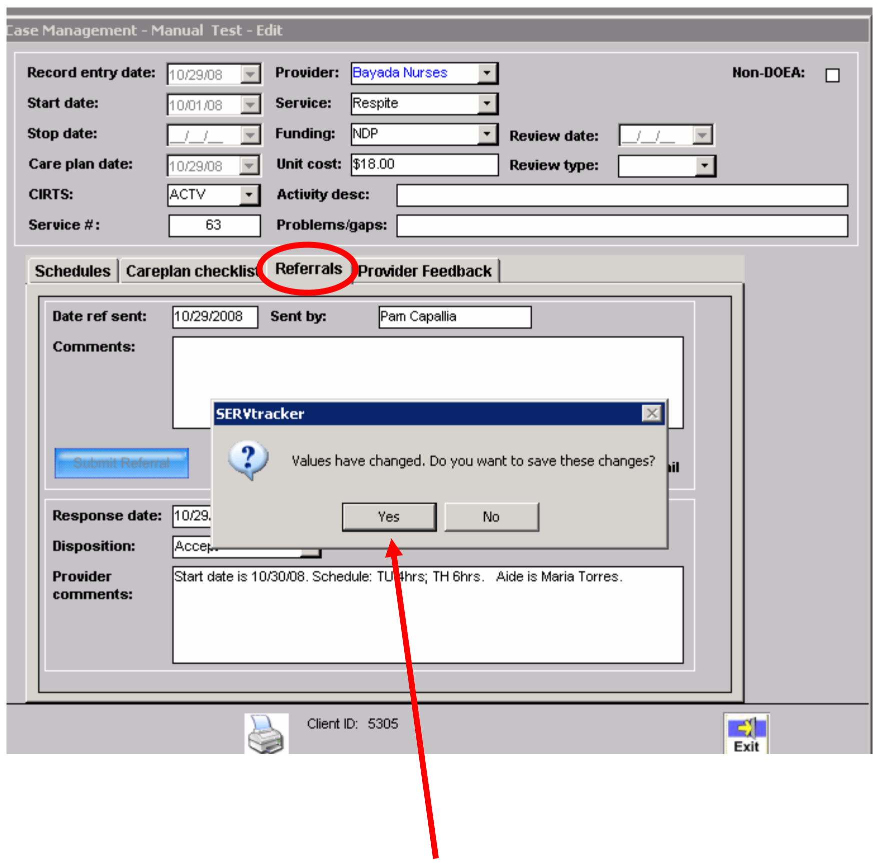
***** Very important ! *****

You must enter your comments in the **'Provider comments'** field *<u>before</u>* clicking the **'Disposition'** drop down box to accept or decline the referral.

- To **'Accept'** - comments must include the actual **start date** of service, the **schedule** including days of service with units (hours of service) for each day, and **aide** assigned. You must be sure of the **start date** before you accept the referral. If the schedule and aide change later, that information can be edited at a later date. Enter your comments in the **'Provider comments'** field.

- To **'Decline' -** state the reason you are declining the referral in the **'Provider comments'** field.

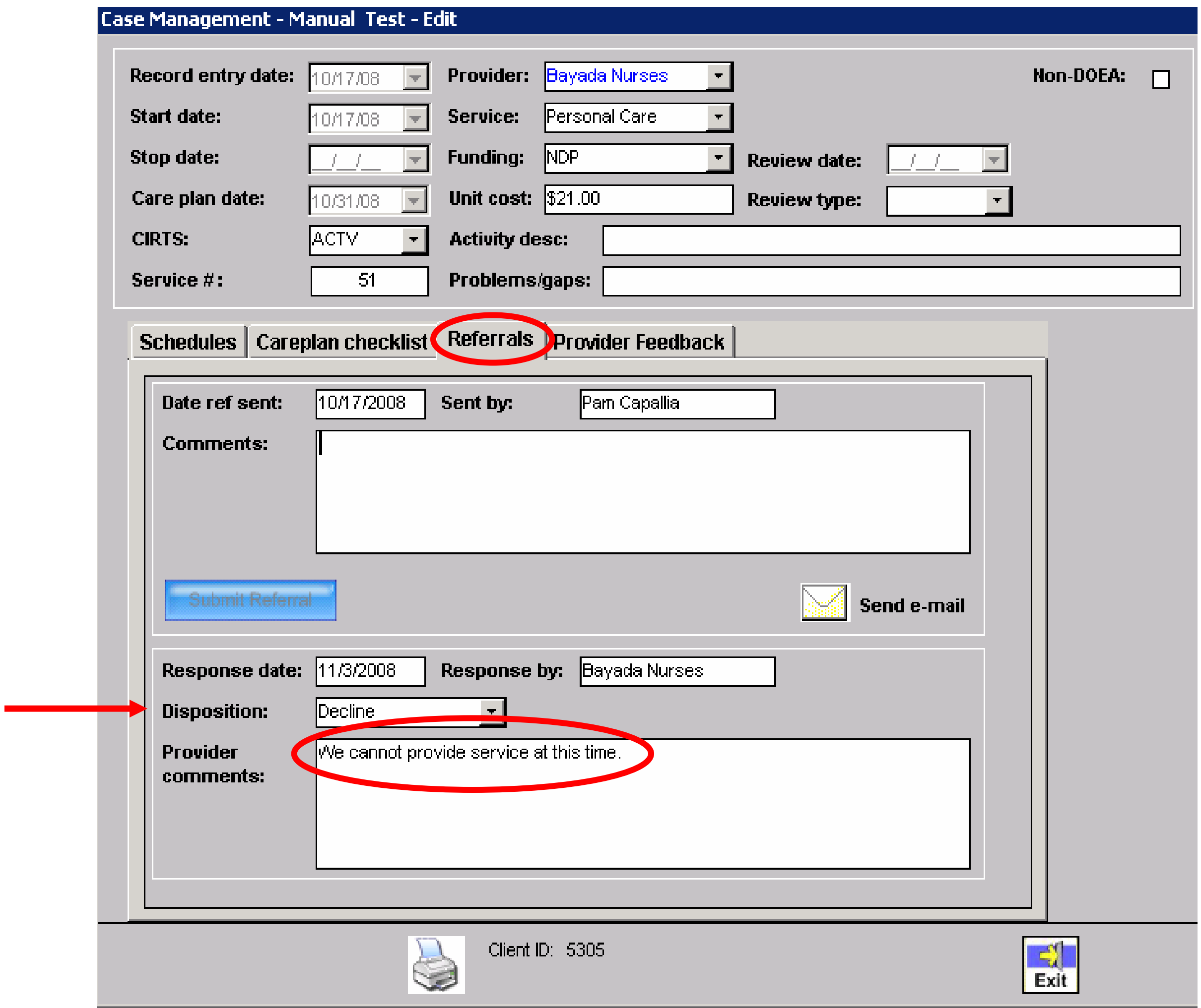
- After entering your comments, go to the **'Disposition'** drop down box and select the appropriate disposition, either **'Accept'** or **'Decline'**. Once you have made your selection, when you click the **[exit →]** button, a question box will pop up: **"Values have changed. Do you want to want to save these changes?"**



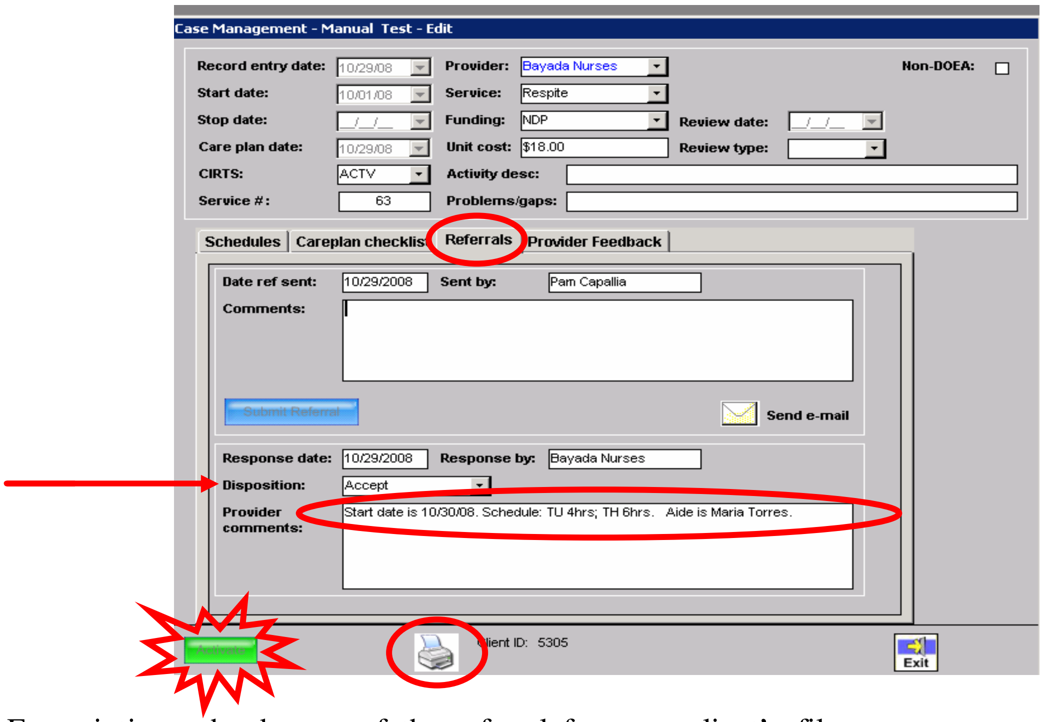
*** Please be sure that you have entered your comments and selected the correct disposition, because when you click **"Yes"** to save it, you may not be able to make any changes.***

Choosing **'Accept'** or **'Decline'** will fill the **'Response date'** field with the current date. An auto notification will be sent back to the Case Manager.

Example of a **'Declined'** referral:

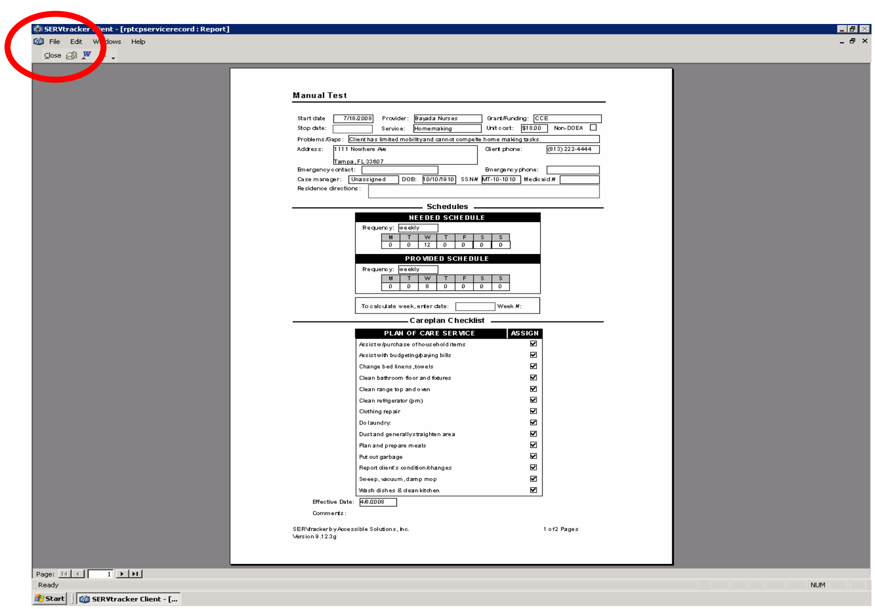


Example of an **'Accepted'** referral:



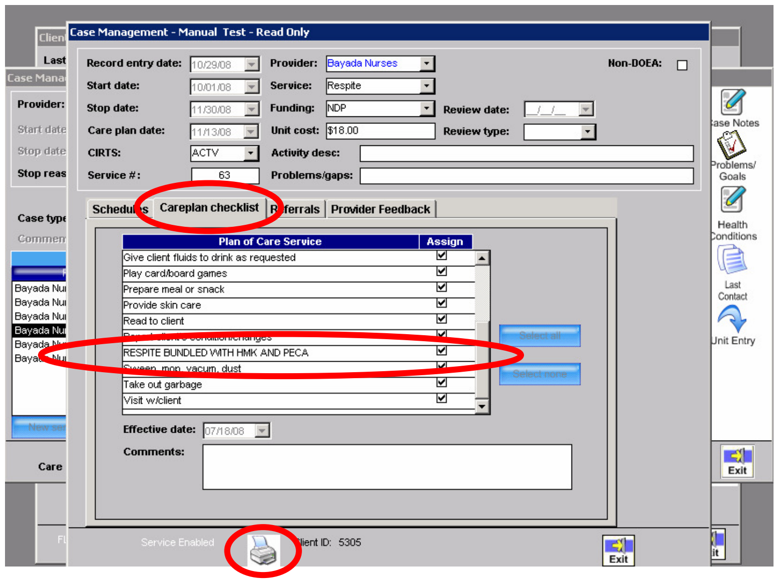
For printing a hard copy of the referral for your client's file, you may want to use the **'Referrals'** tab or click on the **'Careplan checklist'** tab.
<u>Before printing</u>: *WAIT* for the e-mail notification from the Case Manager that the referral has been **'ACTIVATED.'** At this point the referral will have the correct start date for service. You will also see the status change from **'referred'** to **'provided'** when you return to the **'Case Management'** screen.

- On the **'Referrals'** tab, click on the printer icon, go to **'file'** in the upper left corner of the screen and click **'file'** → **'print'**

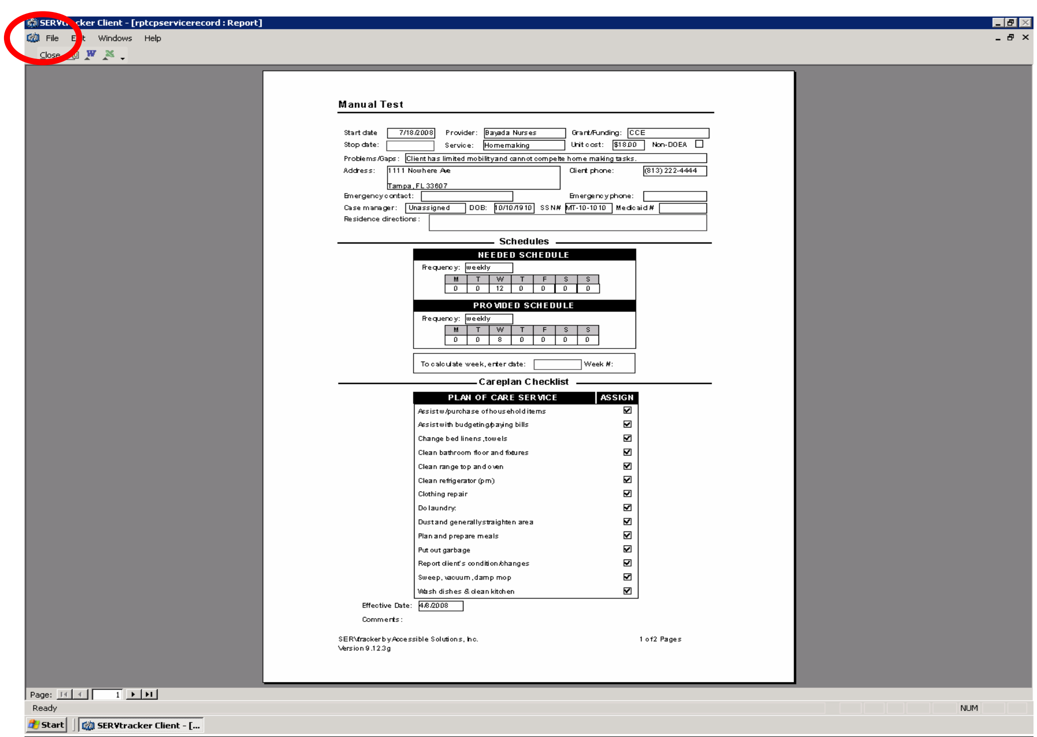


- Clicking on the **'Careplan checklist'** tab will show the duties requested by the Case Manager.

*** Important *** If the service is **BUNDLED RESPITE**, it will be checked on this **'Careplan checklist.'** It should also have been stated as a bundled service in the Case Manager's comments on the **'referrals'** tab.

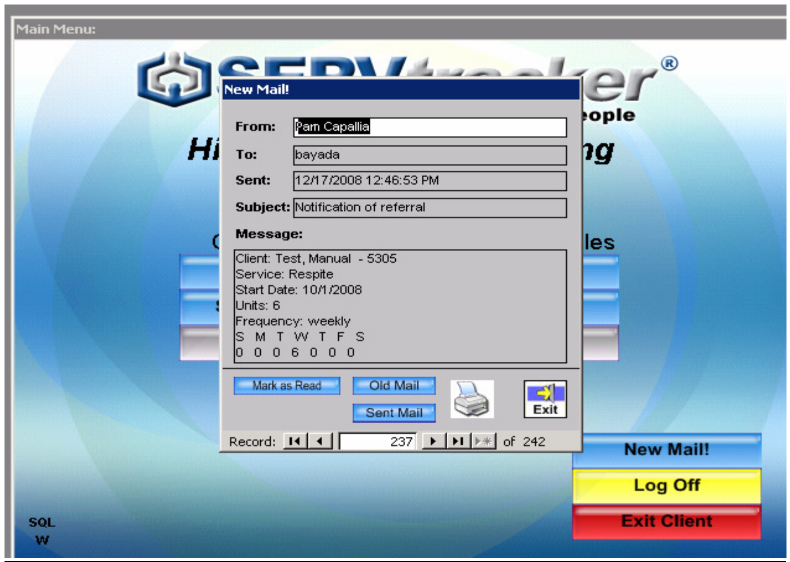


- Clicking on the printer icon will bring you to the following screen which shows the client's information, schedule, and duties:
- Go to the upper left corner of the screen, click **'file'** → **'print'**

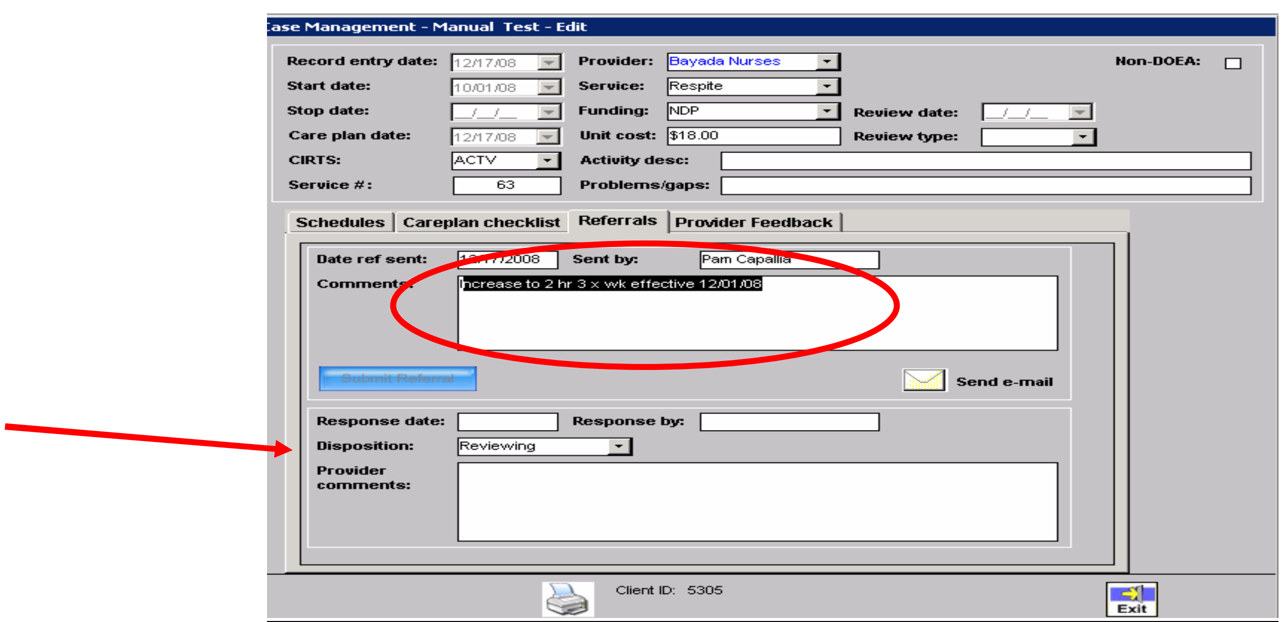


UPDATED REFERRALS

Changes to client services will be generated by the Case Manager and you will receive e-mail notification. For example, the Case Manager may be increasing the service hours. You will receive an e-mail:

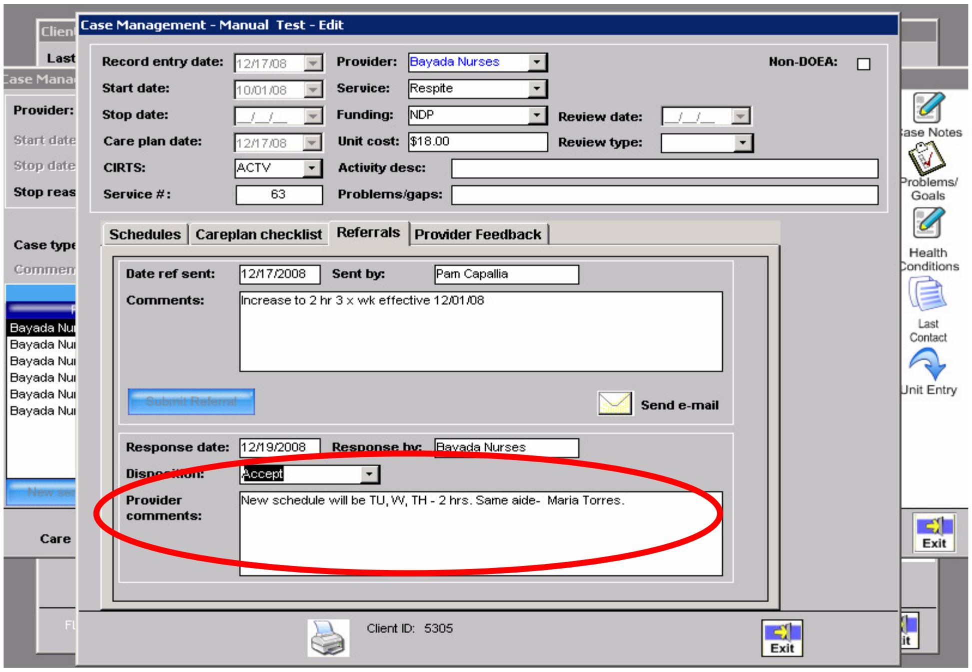


Since the subject line in the e-mail does not specify the type of referral, you will need to read the Case Manager's COMMENTS on the 'Referrals' tab:
Follow the same steps as accepting a referral by going to **'Client'** module on the **'Main Menu,** and proceed to the **'Case Management'** screen and then the **'Referrals'** tab. You will see the disposition as **'Reviewing'** and the Case Manager's notes with an **EFFECTIVE DATE** for the increase in service hours.

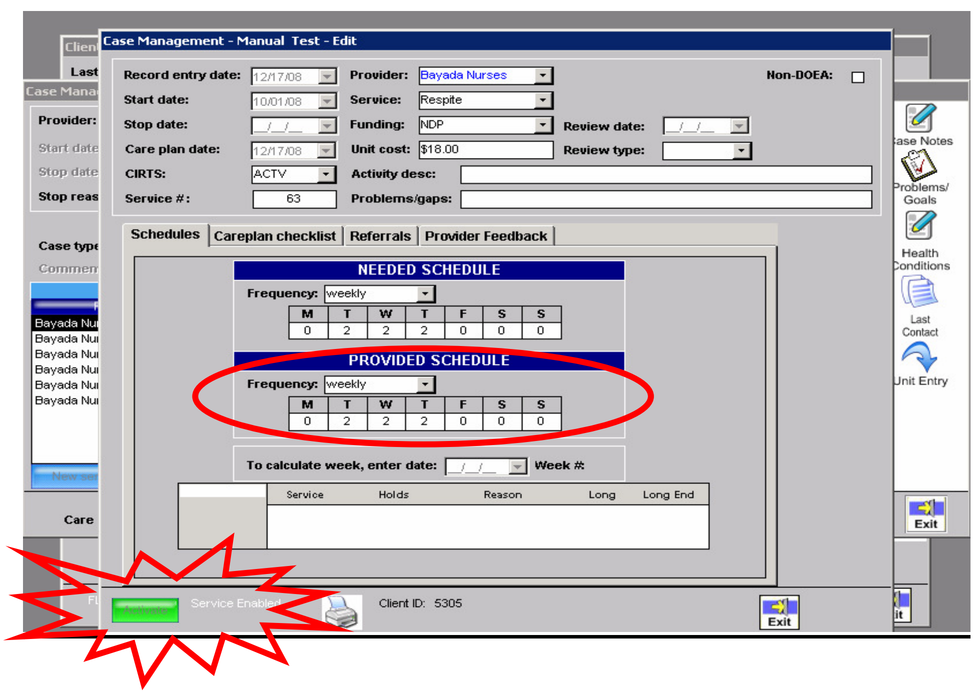


[Exit →] SERV*tracker*, contact the client and arrange an updated schedule. Come back to the **'Case Management'** screen to accept the referral.

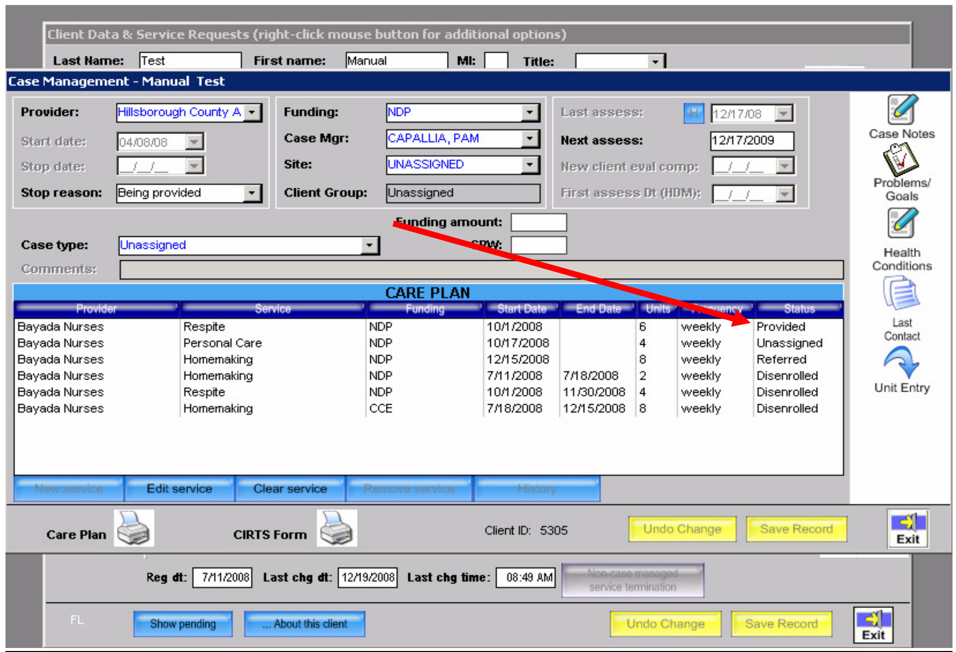
- Enter the new schedule arrangement in the **'Provider comments'** field, click the **'Disposition'** drop box, and click **'Accept'.**



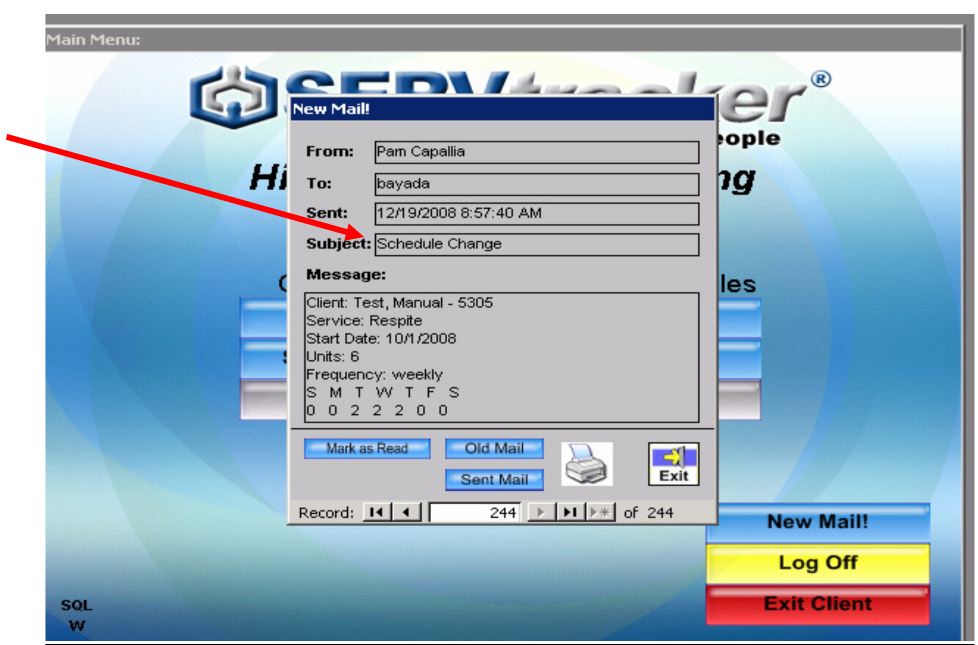
When the Case Manager receives your acceptance e-mail notification, the Case Manager will change the schedule and activate the service.



The status will now be changed to **'provided'** instead of **'referred'** in the line of service on the **'Case Management'** screen:

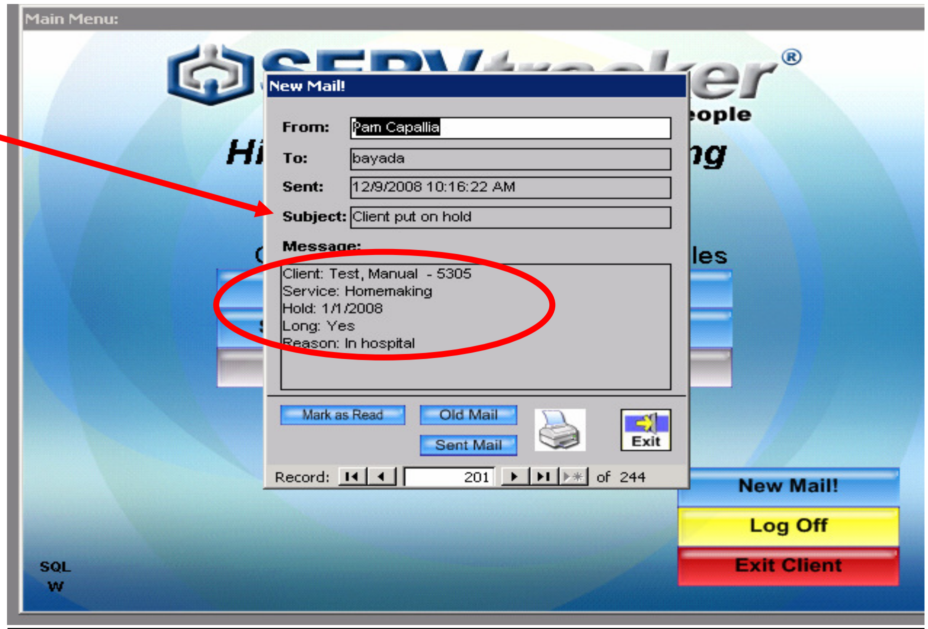


An automated e-mail is sent to you that the Case Manager has activated the service and a separate e-mail notification is sent when the Case Manager has changed the schedule.

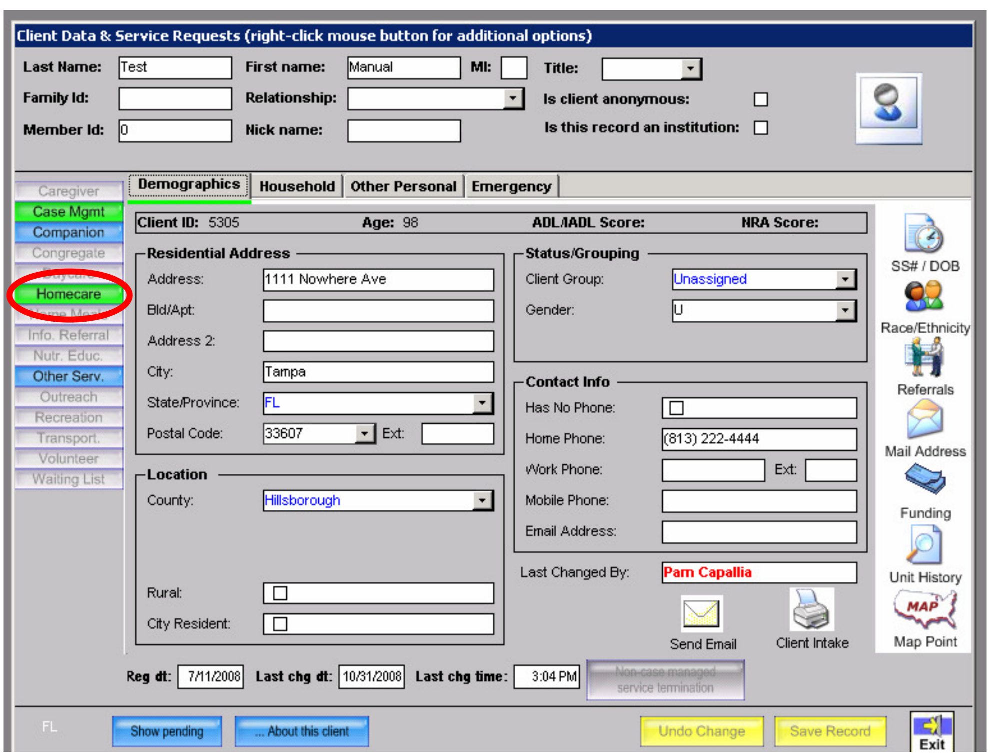


HOLDS AND REACTIVATIONS

When the Case Manager places the client's service on hold, you will receive an e-mail notification with the **'Subject'** line stating **'Client put on hold'**:

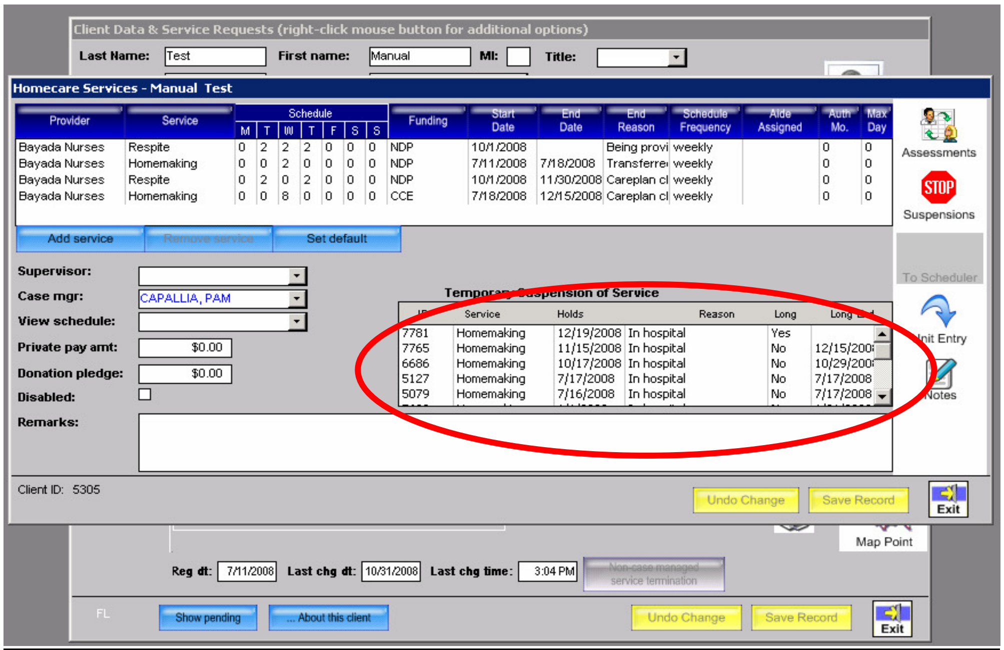


[Exit→] back to the **'Client'** module on the **'Main Menu,** proceed to the **'Case Management'** screen and then click the green **'Homecare'** button:

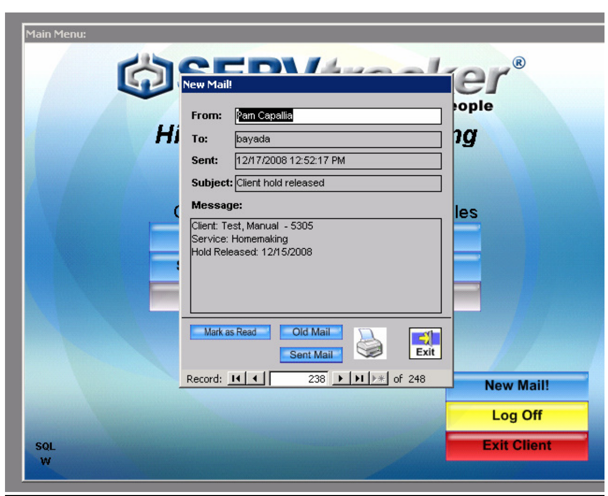


The details of the hold will be in the **'Temporary Suspension of Service'** window. You can also go back to the **'Case Management'** screen, then the **'Referrals'** tab to print the Case Manager's notes in the **'Comments'** field with the effective date.

To print the hold, click the 'stop sign', click the printer icon on the next screen. There you can print the hold history for your client file.

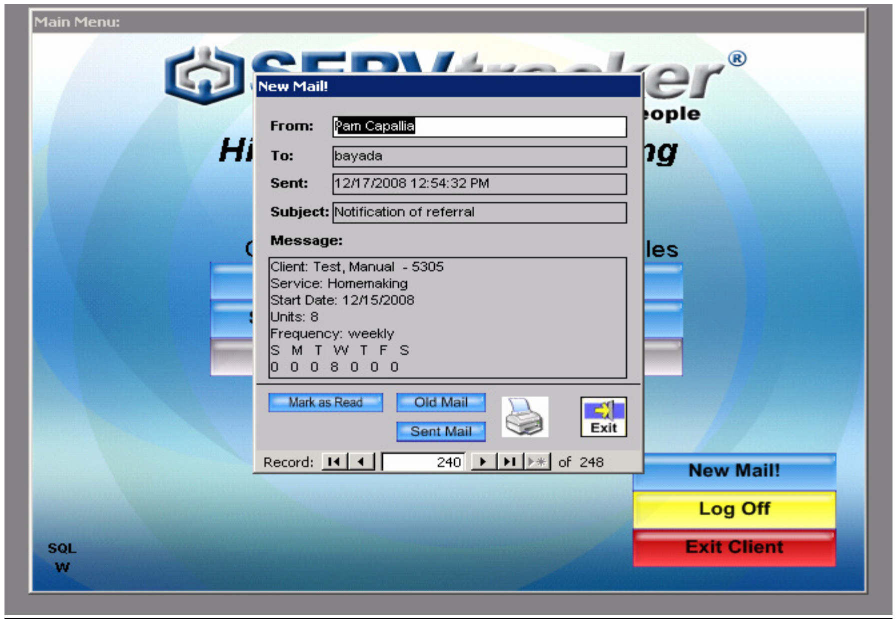


When the Case Manager reactivates the service, you will receive an e-mail notification that the **'Hold has been released.'** Follow the same steps to the **'Case Management'** screen and the **'Referrals'** tab to print the reactivation referral.



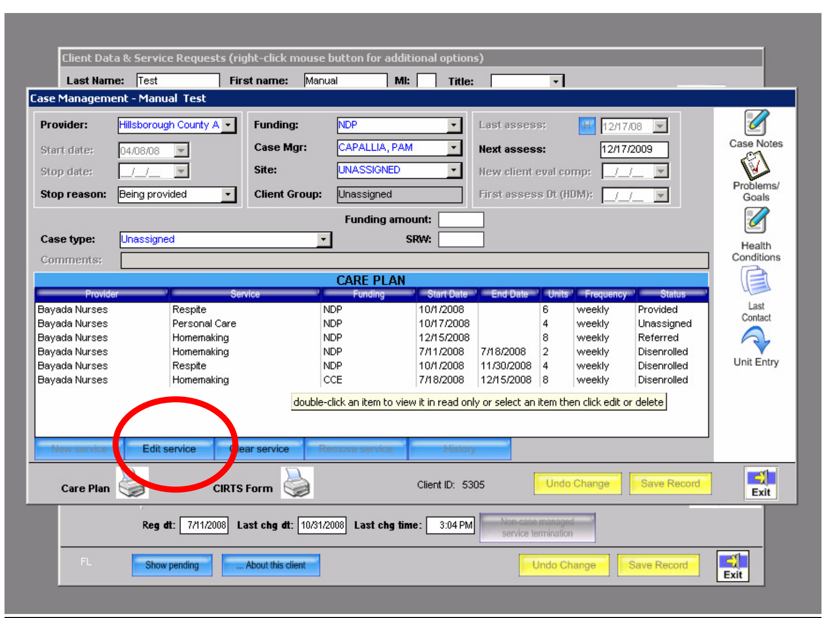
FUNDING TRANSFERS

When the Case Manager changes the funding, you will receive an e-mail notification.

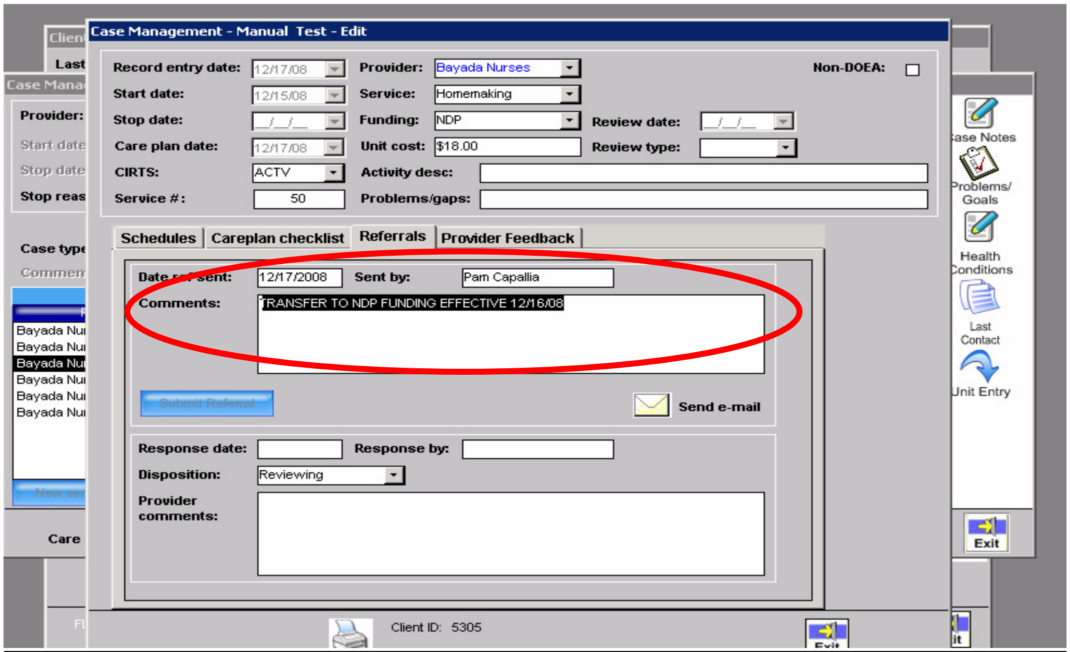


Since the subject line in the e-mail does not specify the type of referral, you will need to read the Case Managers **COMMENTS** on the **'Referrals'** tab. Proceed to the **'Case Management'** screen and highlight the line of service specified in the e-mail.

- Click the blue **'Edit Service'** button.

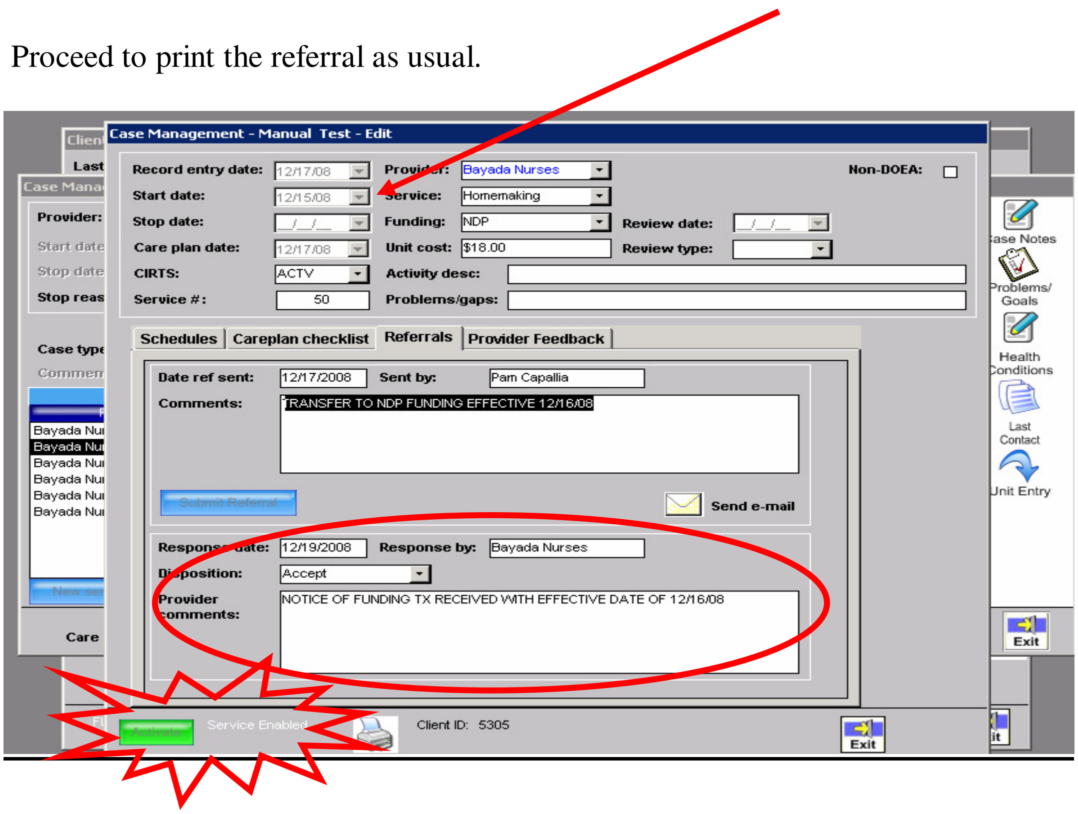


- Click the **'referrals'** tab and review the Case Manager's **COMMENTS. There should always be an effective date in the comments:**



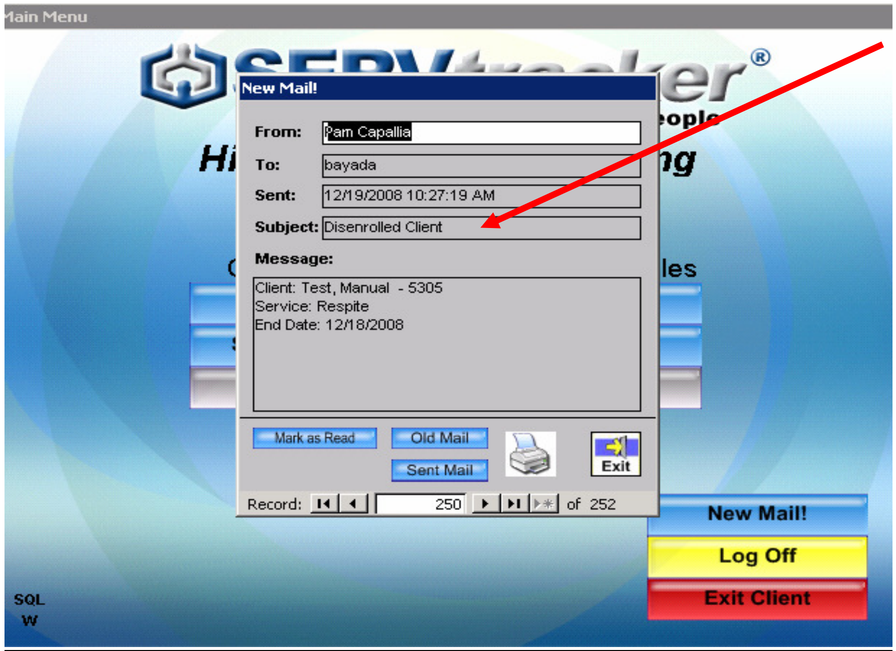
- Enter your comments in the **'Provider comments'** field and click **'Accept.'** Wait for the Case Manager to activate the referral. **The start date will change.**

- Proceed to print the referral as usual.



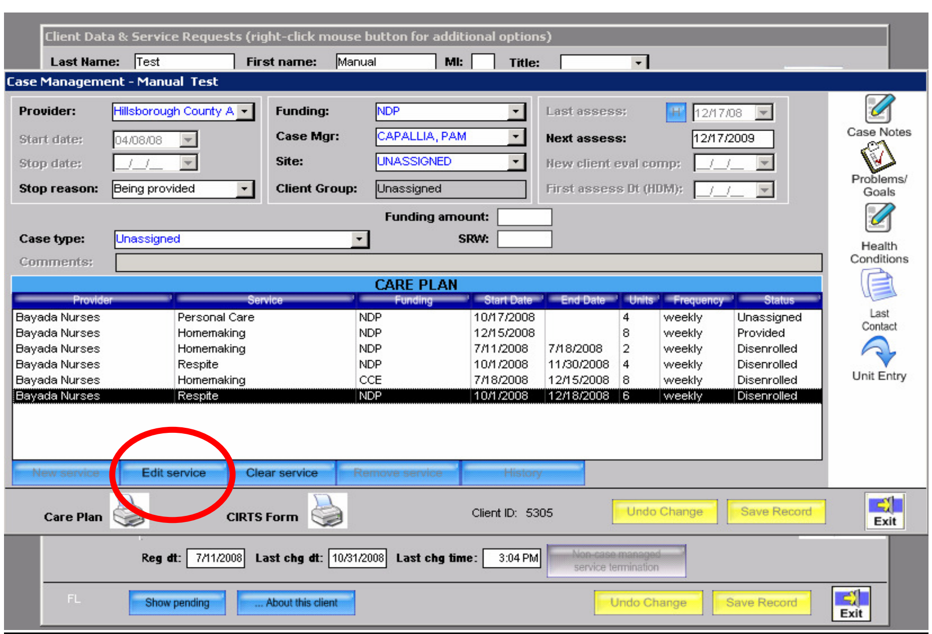
SERVICE TERMINATIONS

You will receive an e-mail when the Case Manager terminates the service:

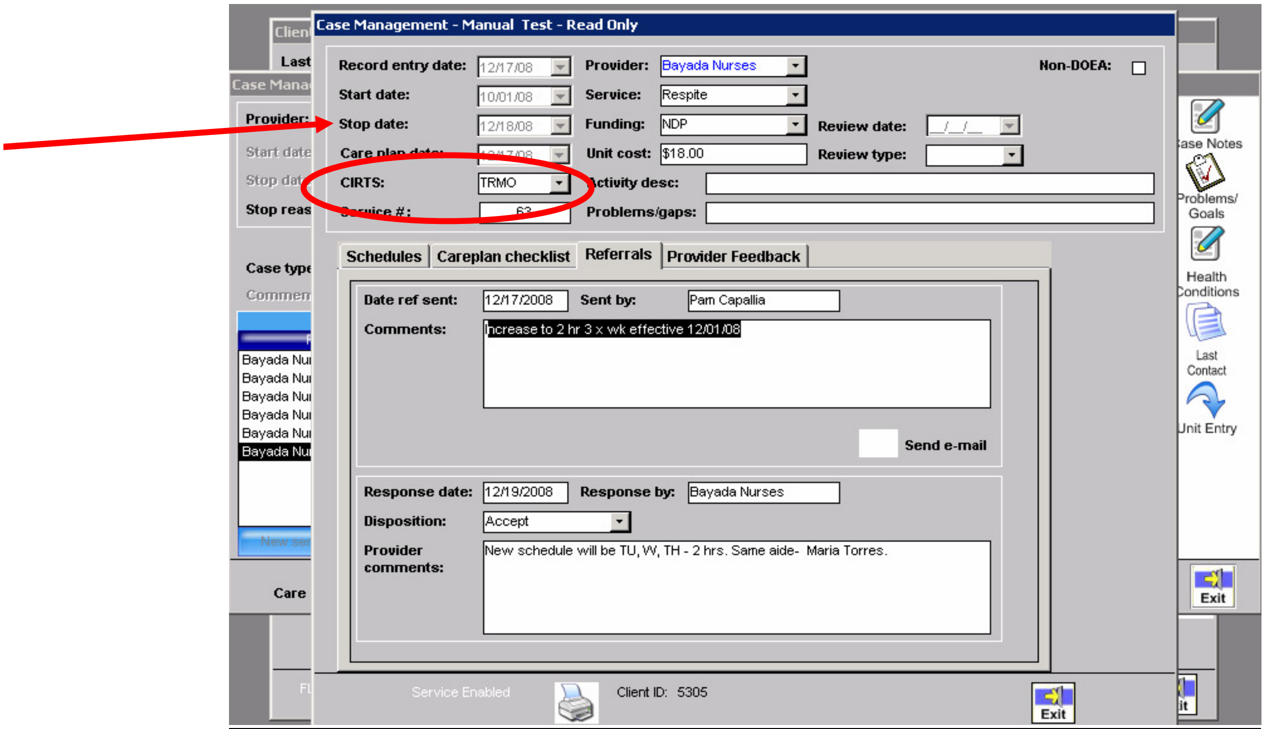


[Exit→] back to the **'Client'** module on the **'Main Menu,** proceed to the **'Case Management'** screen.

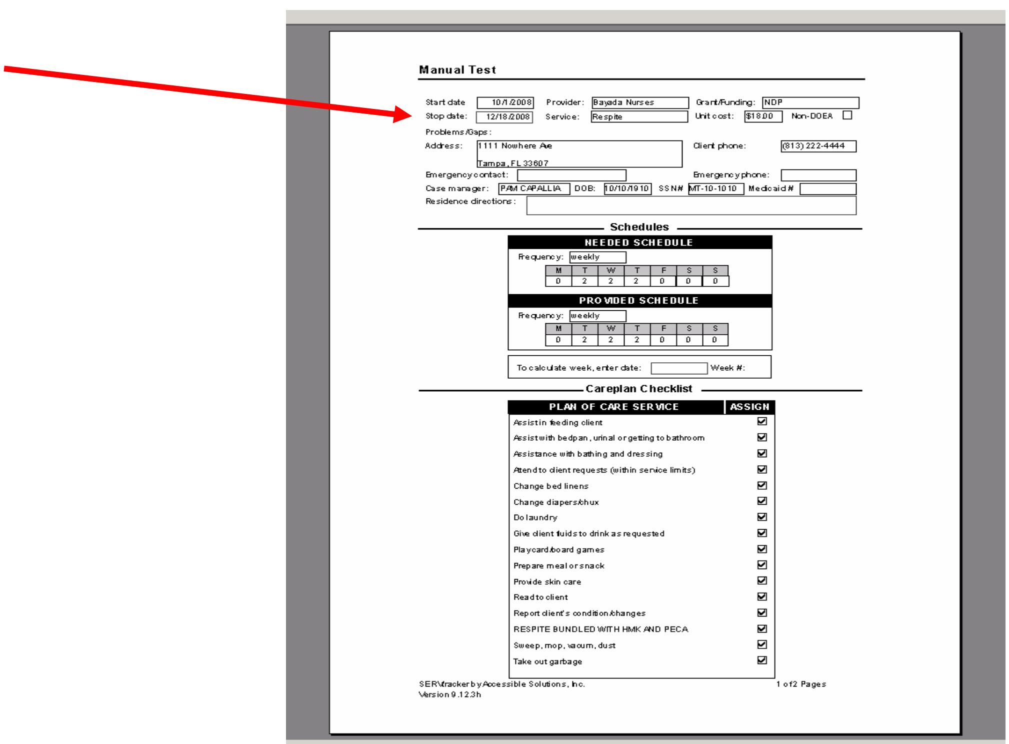
- Highlight the line of service for termination and click the blue **'Edit service'** button:



The latest referral information will be will be on the screen, however the termination date will be in the **'Stop date'** field and the **termination code** in the **'CIRTS'** field.



- Proceed to print the referral with termination date for the client's file.



Manual Test

Start date: 10/1/2008 Provider: Bayada Nurses Grant/Funding: NDP
Stop date: 12/18/2008 Service: Respite Unit cost: $18.00 Non-DOEA
Problems/Gaps:
Address: 1111 Nowhere Ave, Tampa, FL 33607 Client phone: (813) 222-4444
Emergency contact: Emergency phone:
Case manager: PAM CAPALLIA DOB: 10/10/1910 SSN#: MT-10-1010 Medicaid #:
Residence directions:

Schedules

NEEDED SCHEDULE

Frequency: weekly

M	T	W	T	F	S	S
0	2	2	2	0	0	0

PROVIDED SCHEDULE

Frequency: weekly

M	T	W	T	F	S	S
0	2	2	2	0	0	0

To calculate week, enter date: Week #:

Careplan Checklist

PLAN OF CARE SERVICE	ASSIGN
Assist in feeding client	☑
Assist with bedpan, urinal or getting to bathroom	☑
Assistance with bathing and dressing	☑
Attend to client requests (within service limits)	☑
Change bed linens	☑
Change diapers/chux	☑
Do laundry	☑
Give client fluids to drink as requested	☑
Play card/board games	☑
Prepare meal or snack	☑
Provide skin care	☑
Read to client	☑
Report client's condition/changes	☑
RESPITE BUNDLED WITH HMK AND PECA	☑
Sweep, mop, vacuum, dust	☑
Take out garbage	☑

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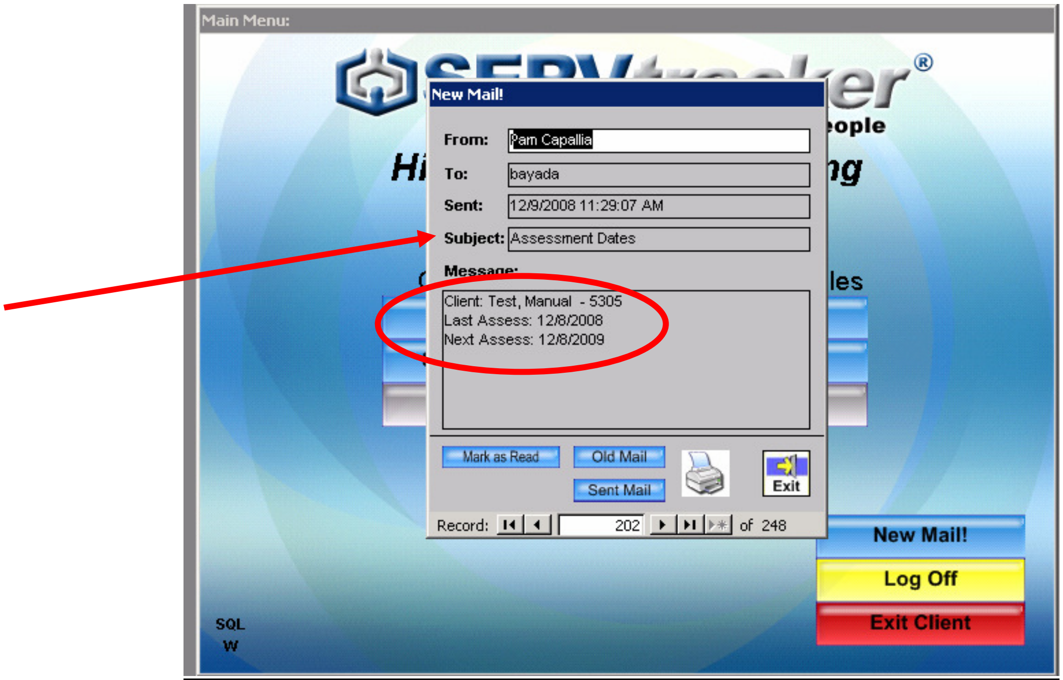
Version 9.12.3h

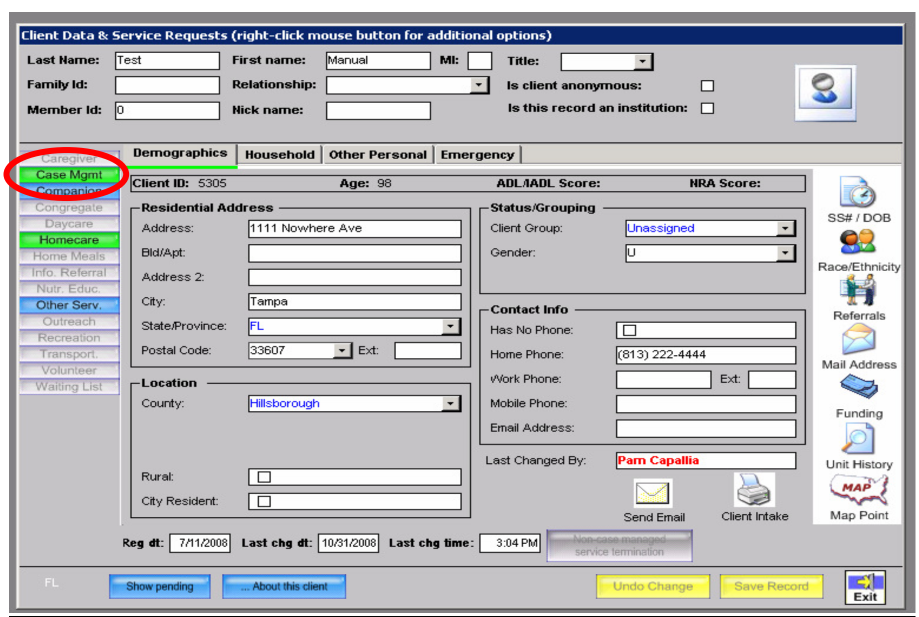
ANNUAL ASSESSMENTS

You will receive an e-mail notification when the Case Manager has completed an annual update. The assessment dates will be in the body of the message.

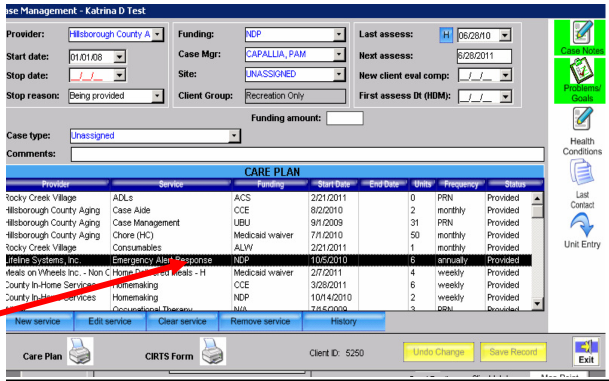


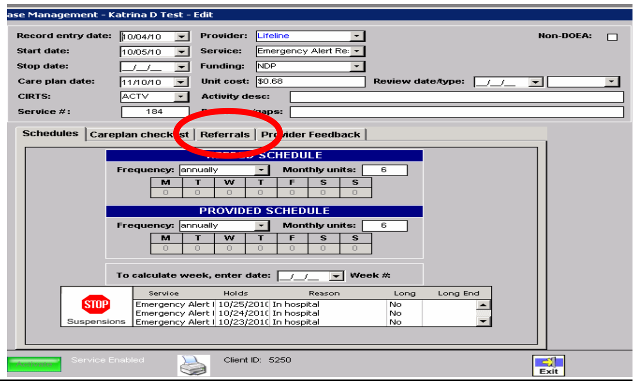
Go to **'Client'** module on the **'Main Menu',** enter client's name in the search screen and proceed to the **'Case Management'** screen.

- Click on the green 'Case Mgmt' button.

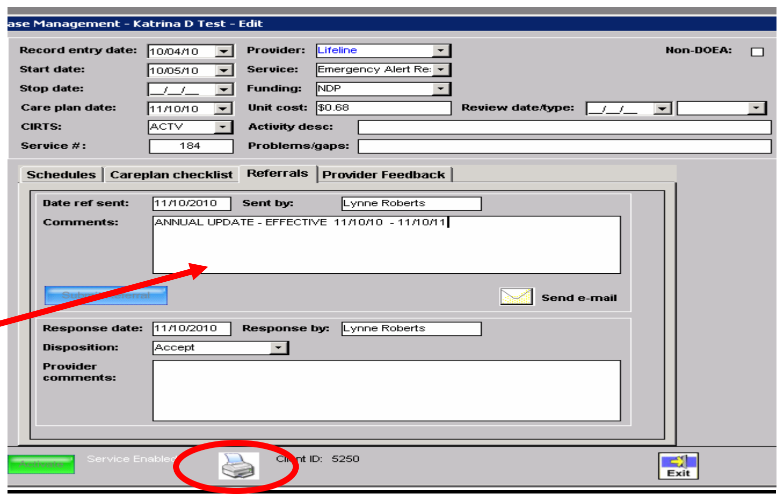


Double- click the line of service.   When you get to the next screen, click on the ‘Referrals’ tab:

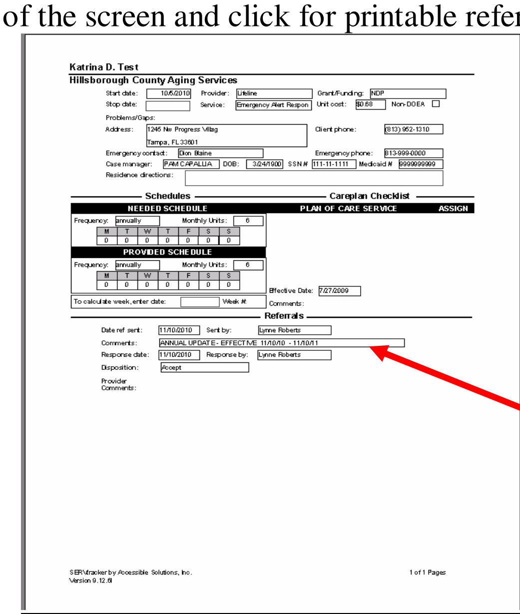




The case manager should have entered the annual updates in their comment field:



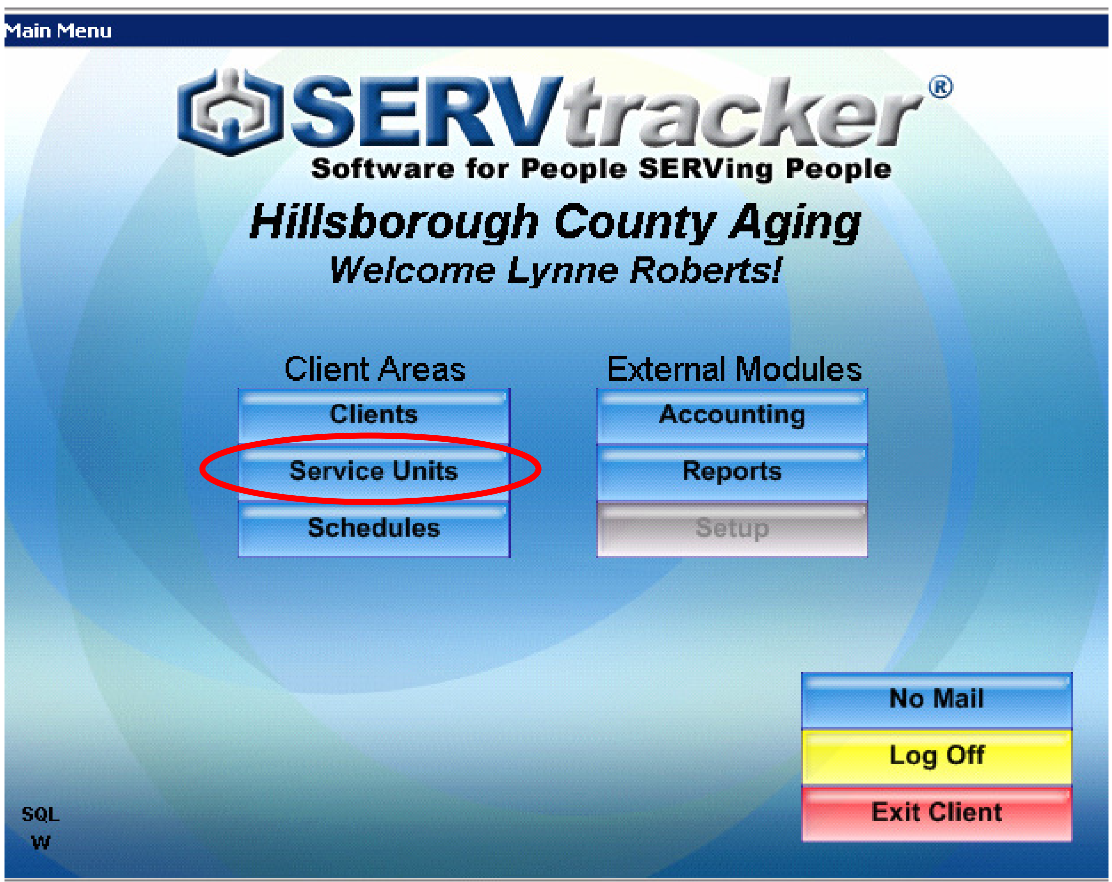
- Go to the printer icon of the screen and click for printable referral with effective dates:



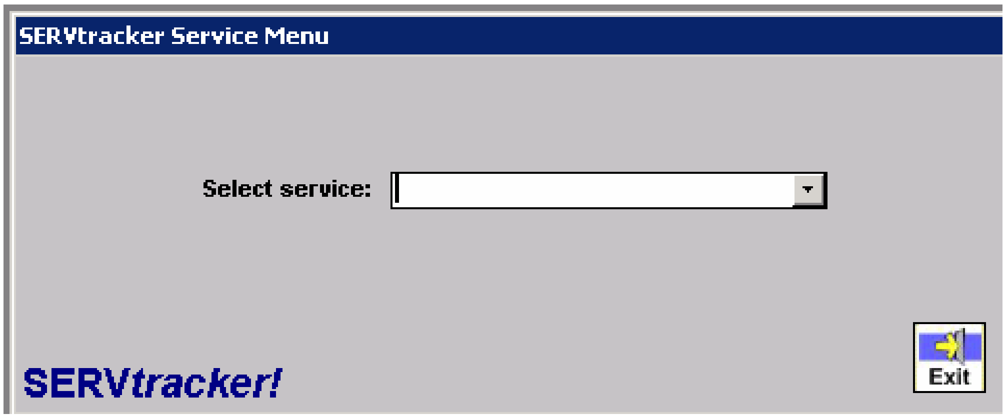
VERIFYING SERVICE UNITS FOR IN HOME SERVICES

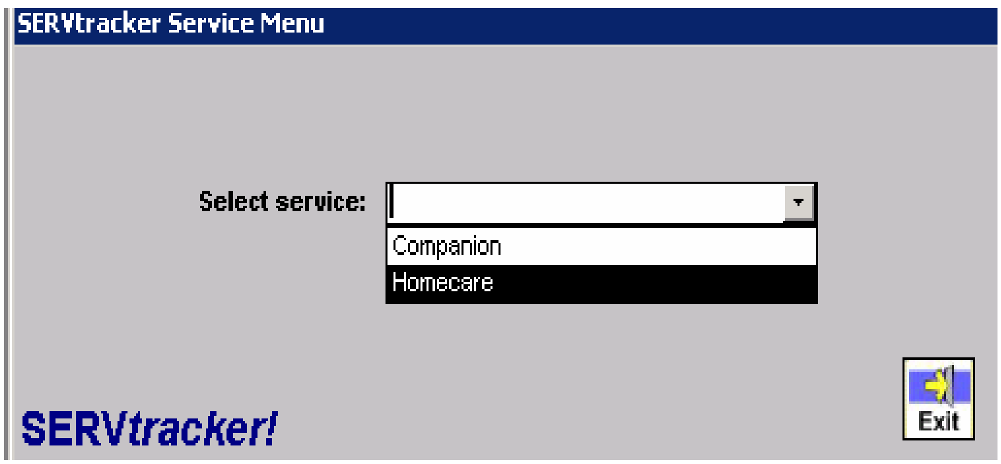
In this module, you will be verifying service units and posting the units to archive which sends the verified units to a reporting system for billing.

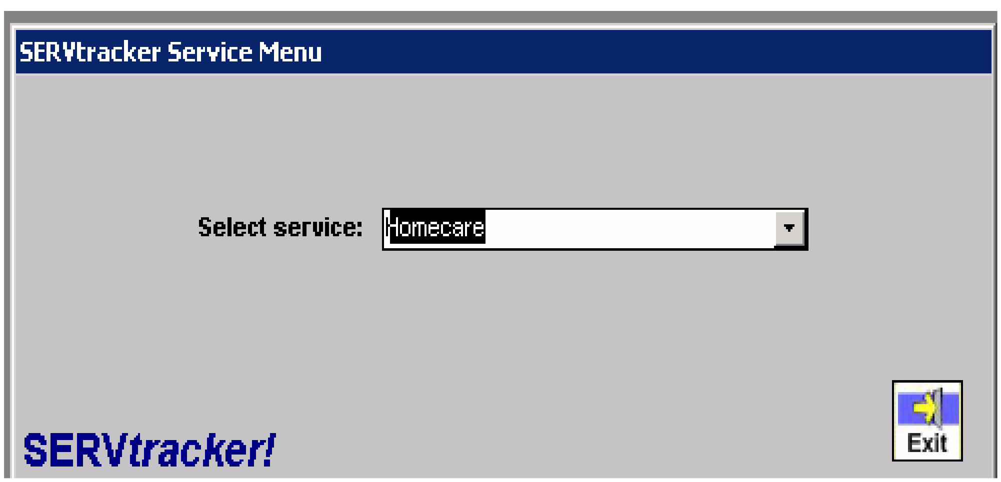
- From the **'Main Menu'** screen, click on the **'Service Units'** module.



- Click the drop down arrow and choose **'Homecare.'** See steps below:

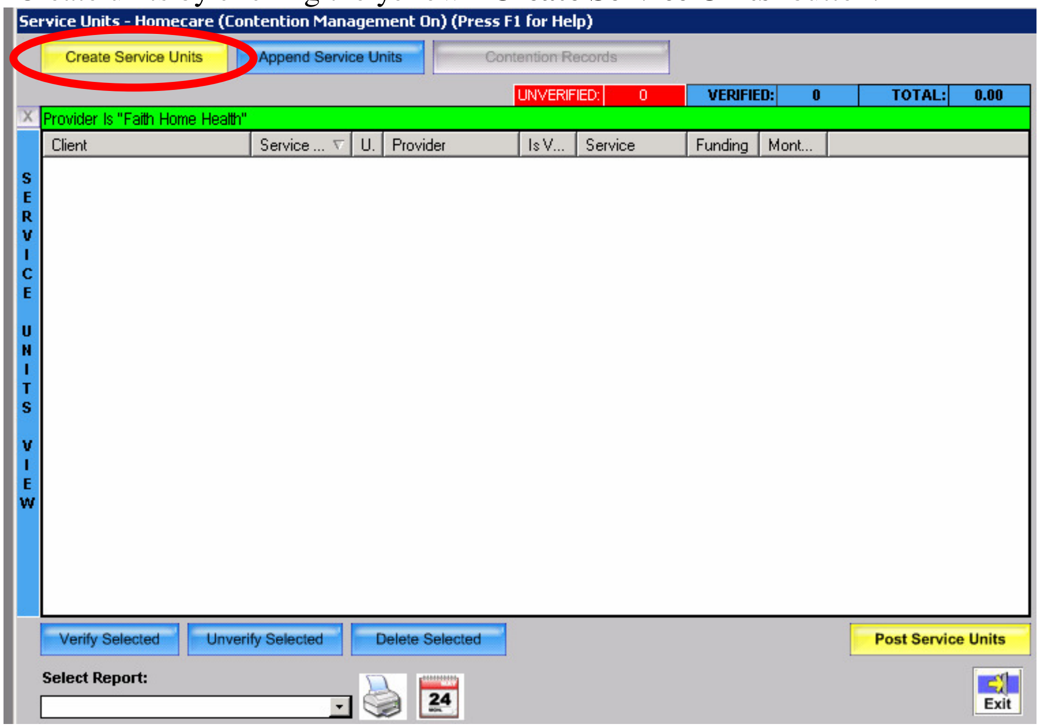




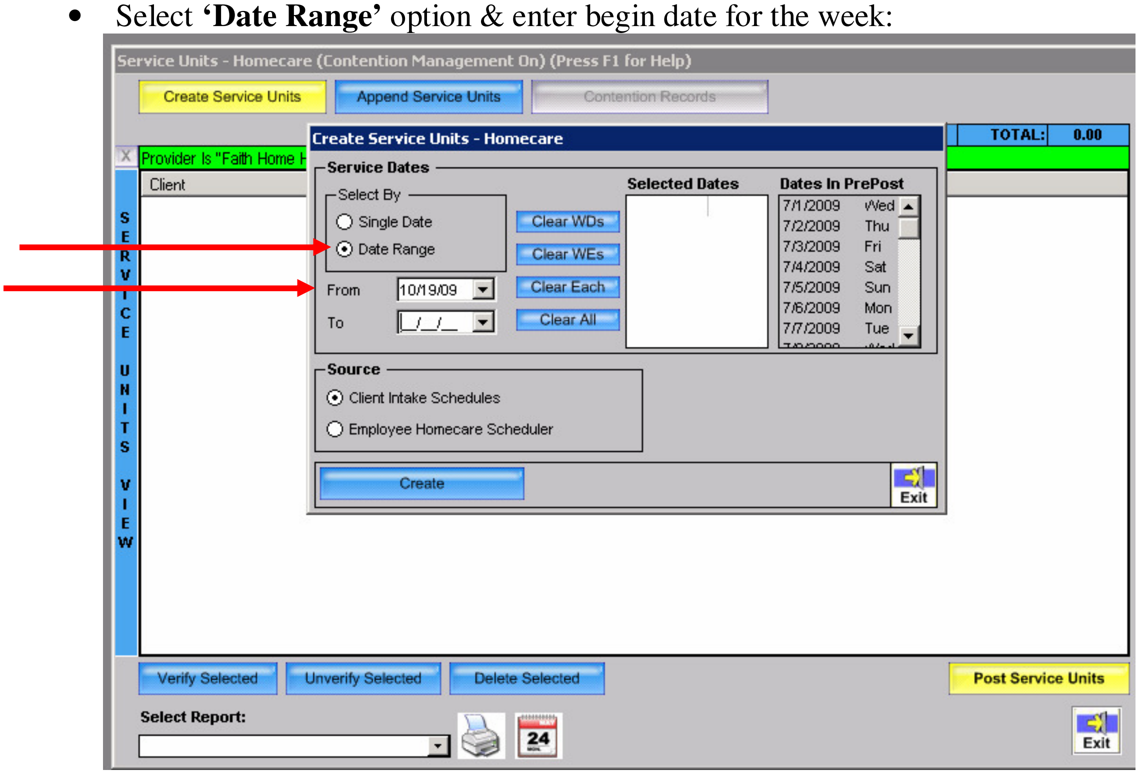


Creating Service Units

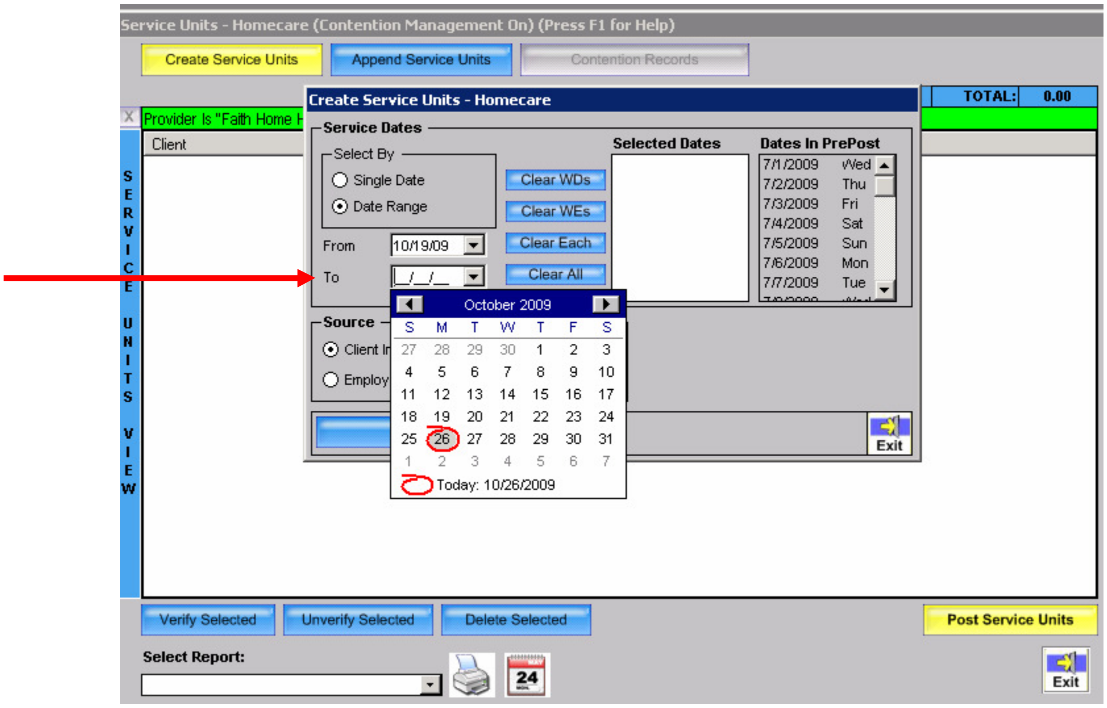
- Create units by clicking the yellow **'Create Service Units'** button:



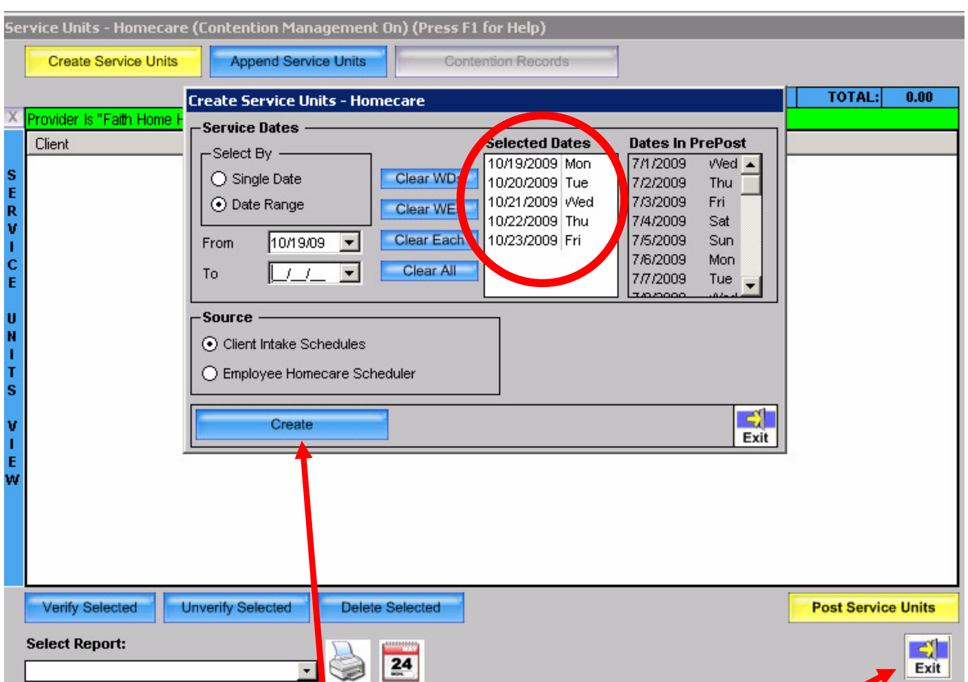
- Select **'Date Range'** option & enter begin date for the week:



- Click the drop down arrow in the **'To'** field, select **end** date for week:



The dates you selected will be in the window:

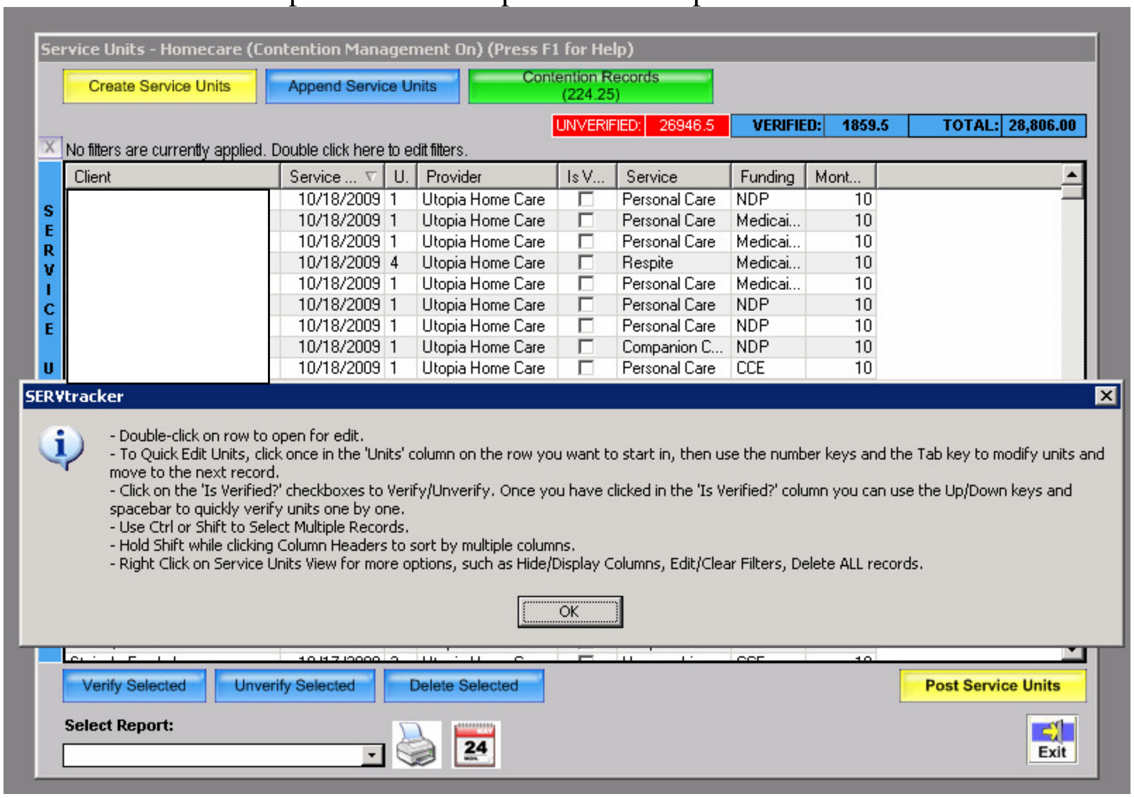


- Click the blue **'Create'** button. Exit the screen

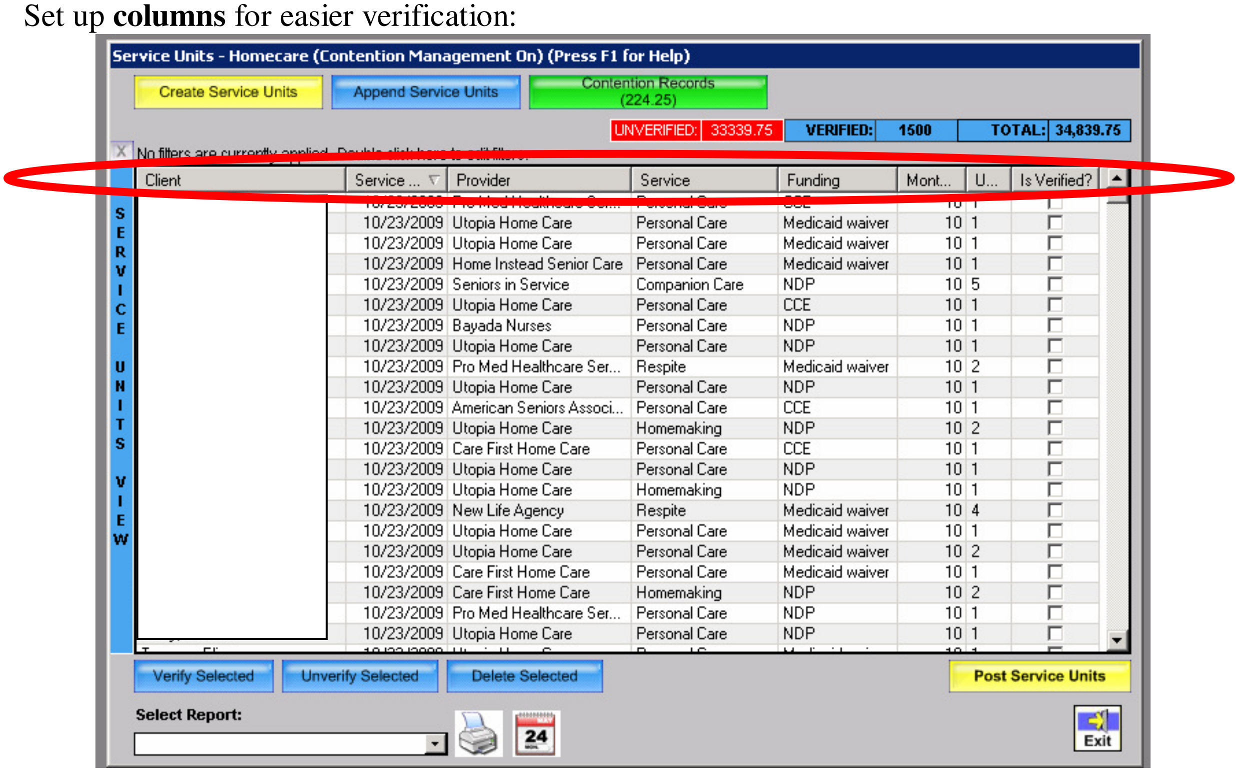
Lines of service will now appear in the window for the date range you created.

.

- Click F1 for a help screen to see options for set up & instructions:

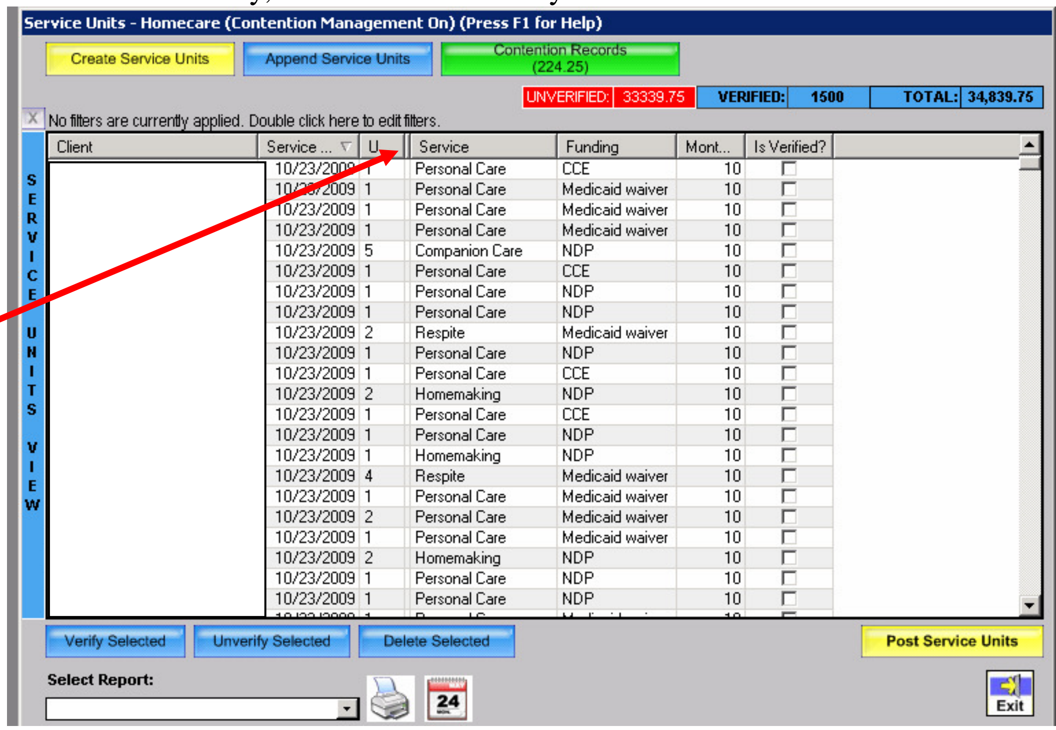


Set up **columns** for easier verification:

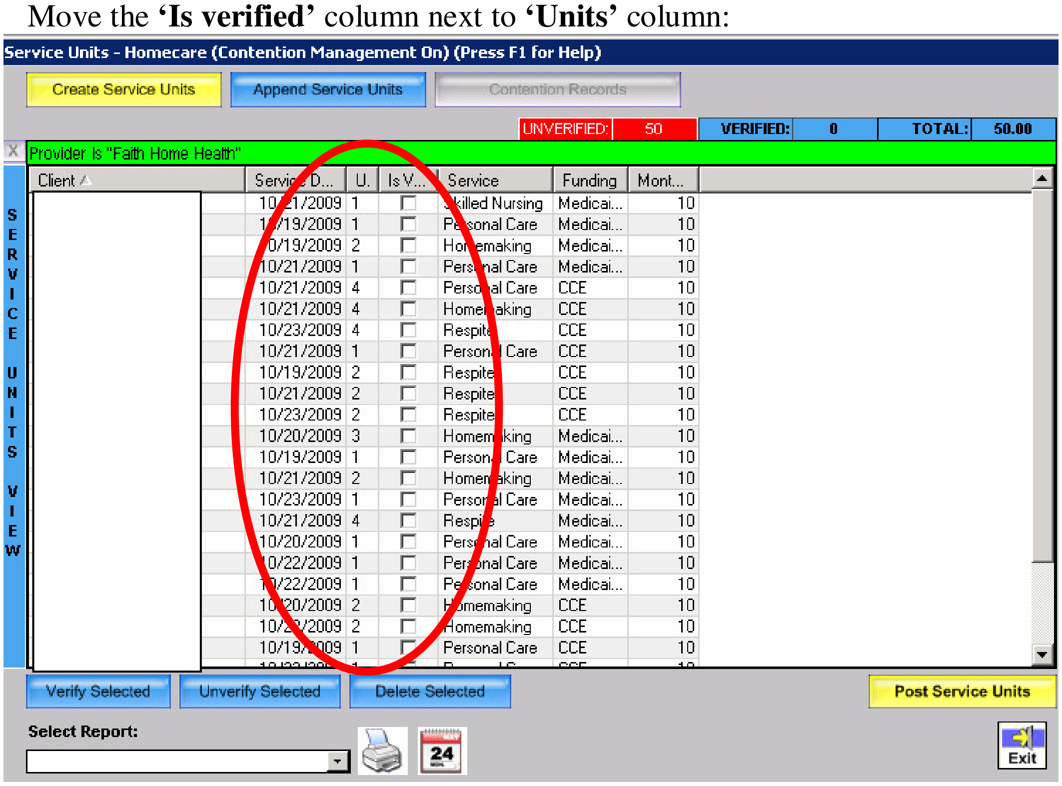


You can close the **'Provider'** column & move **'Units'** column next to **'Date'** column.

- **Hold** the shift key, and click on column you want to move:



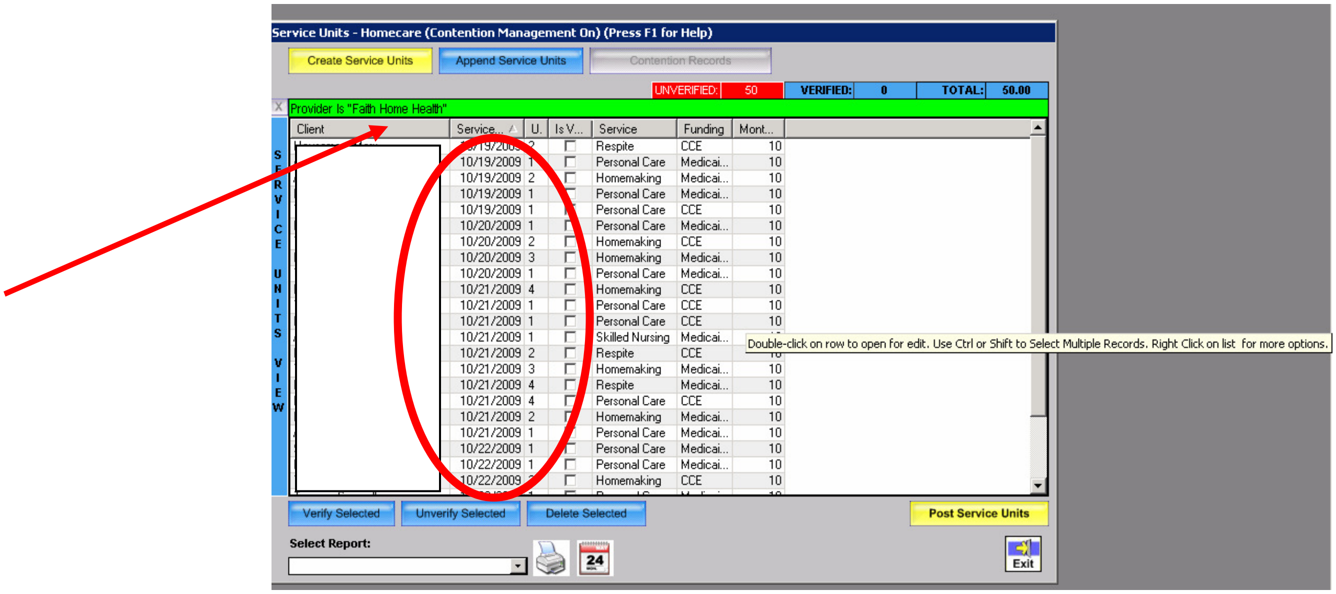
- Move the **'Is verified'** column next to **'Units'** column:



Servtracker will hold the column set up when you exit the database. The filters will have to be set up each time you re-enter the screen.

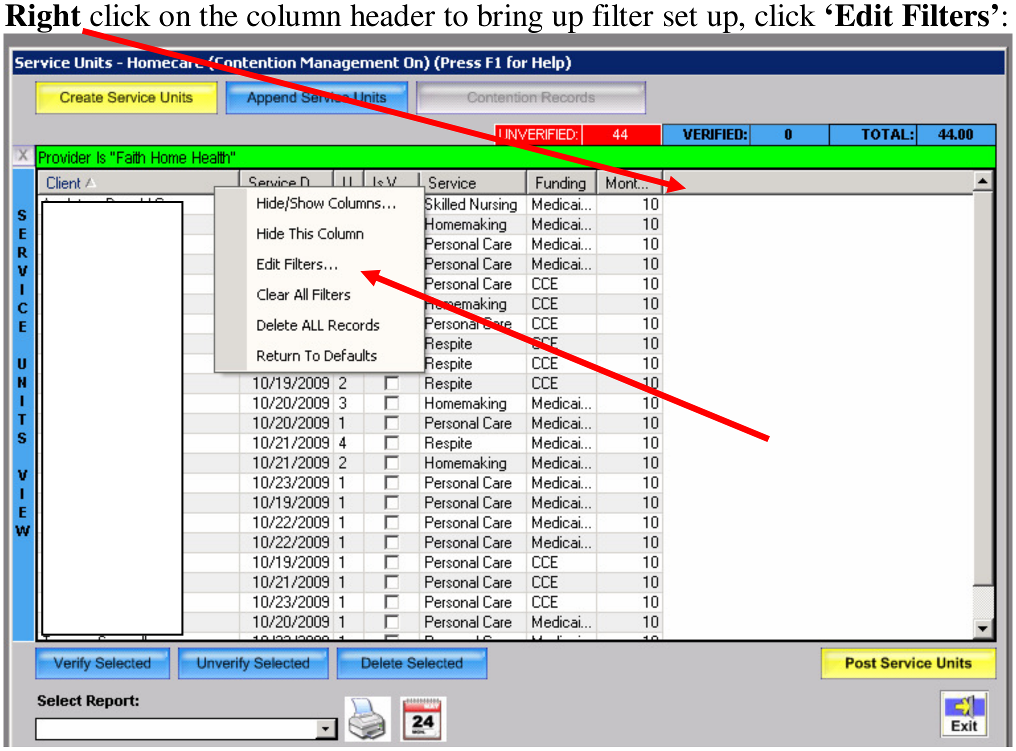
You can click on any column header to **sort** data in order:

- Click once to sort top to bottom. Click again to sort bottom to top.



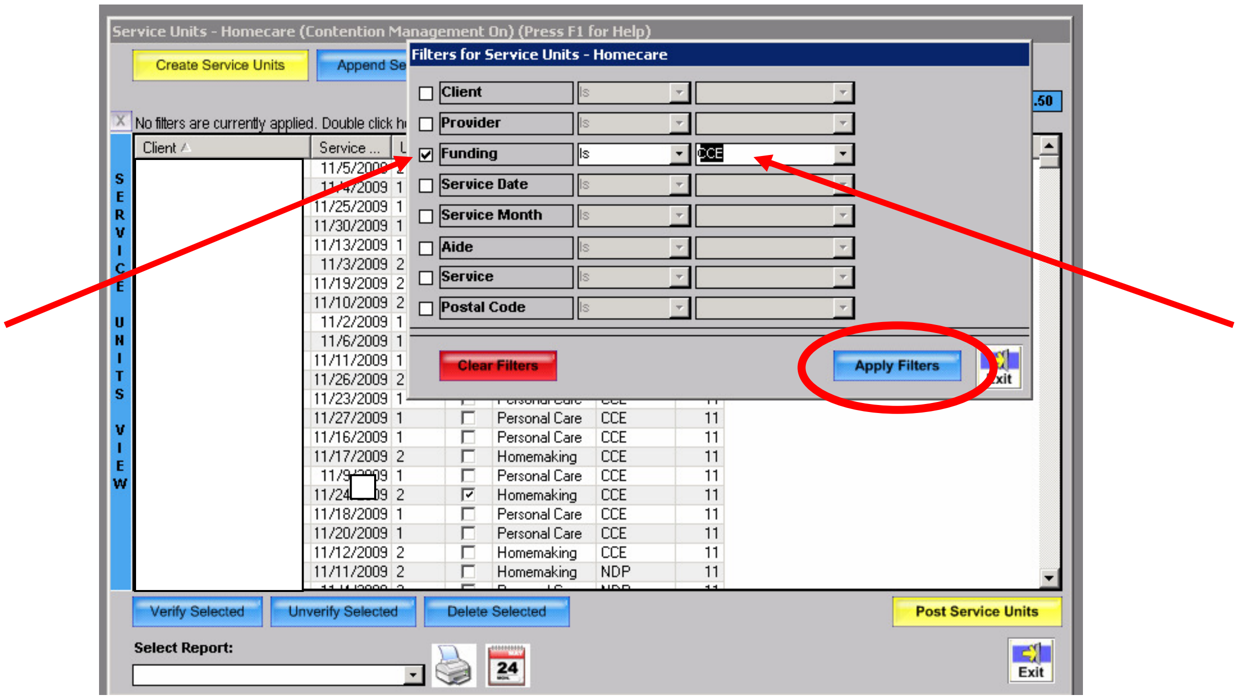
Using the Filter Feature:

- **Right** click on the column header to bring up filter set up, click **'Edit Filters'**:

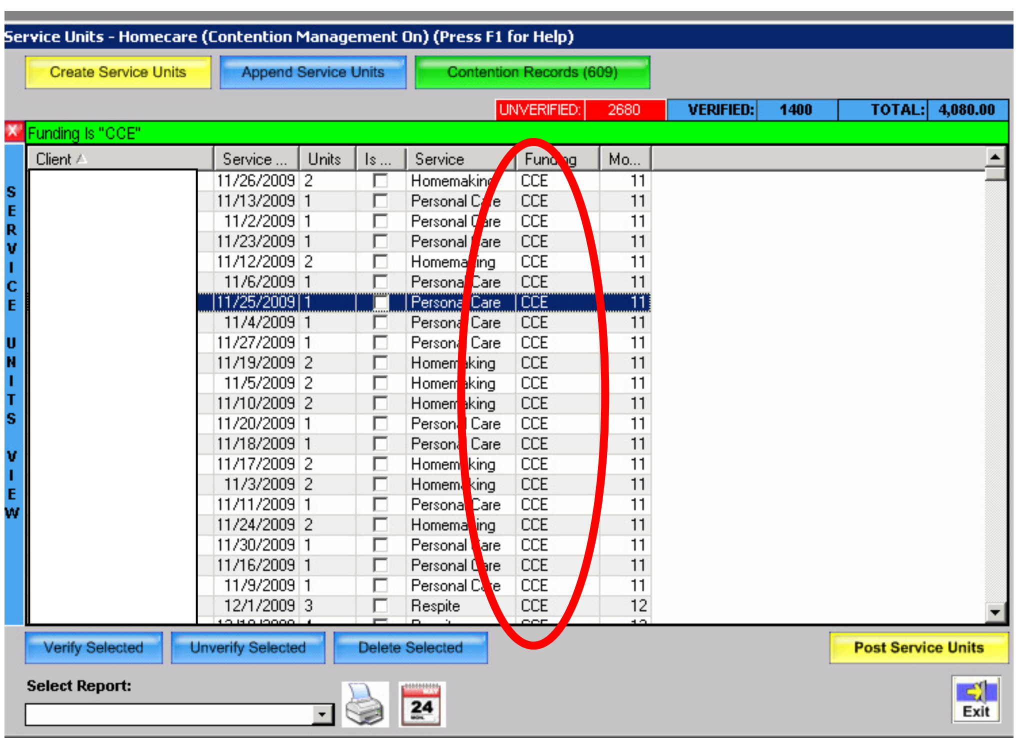


Select the option you would like to filter by clicking the check box on the left side and going to the drop down box on the right.

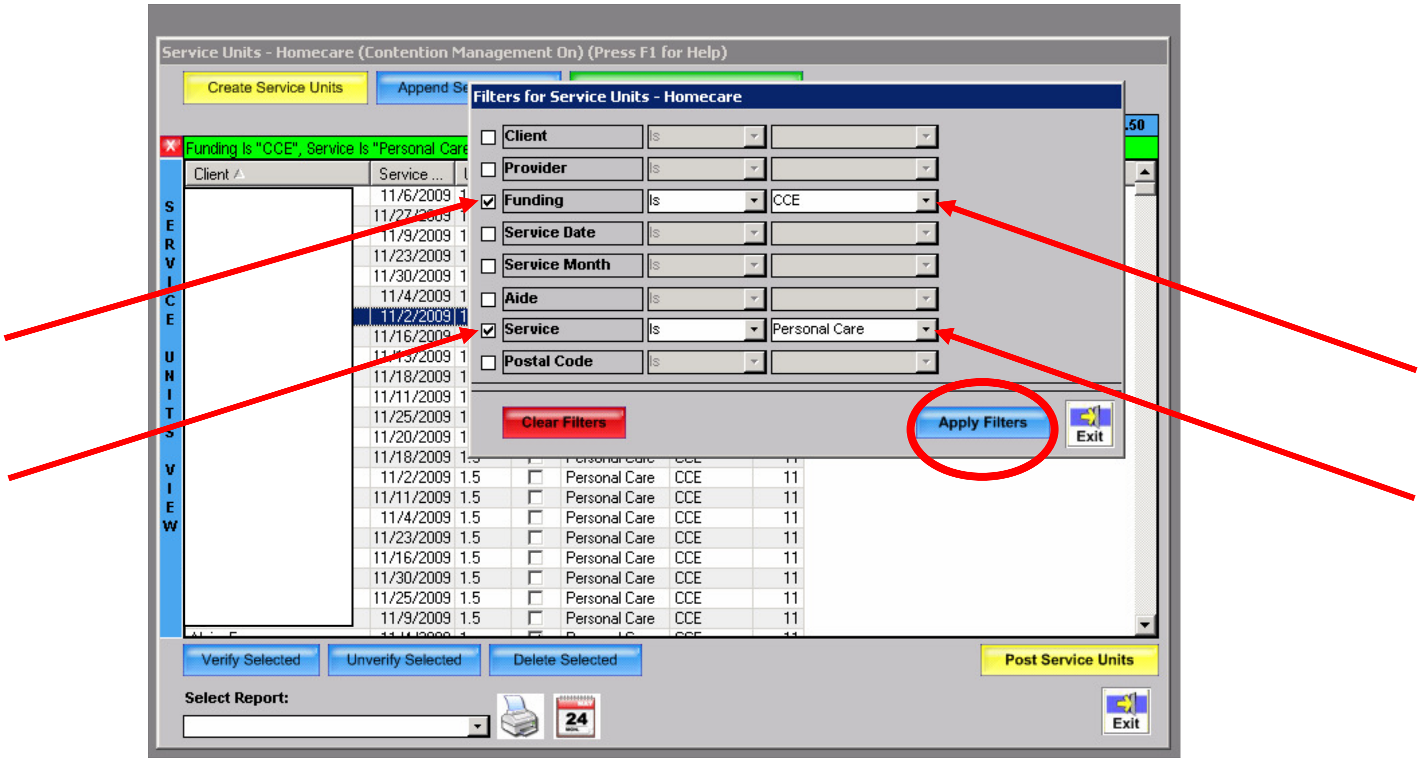
- Click the blue **'Apply Filters'** button:



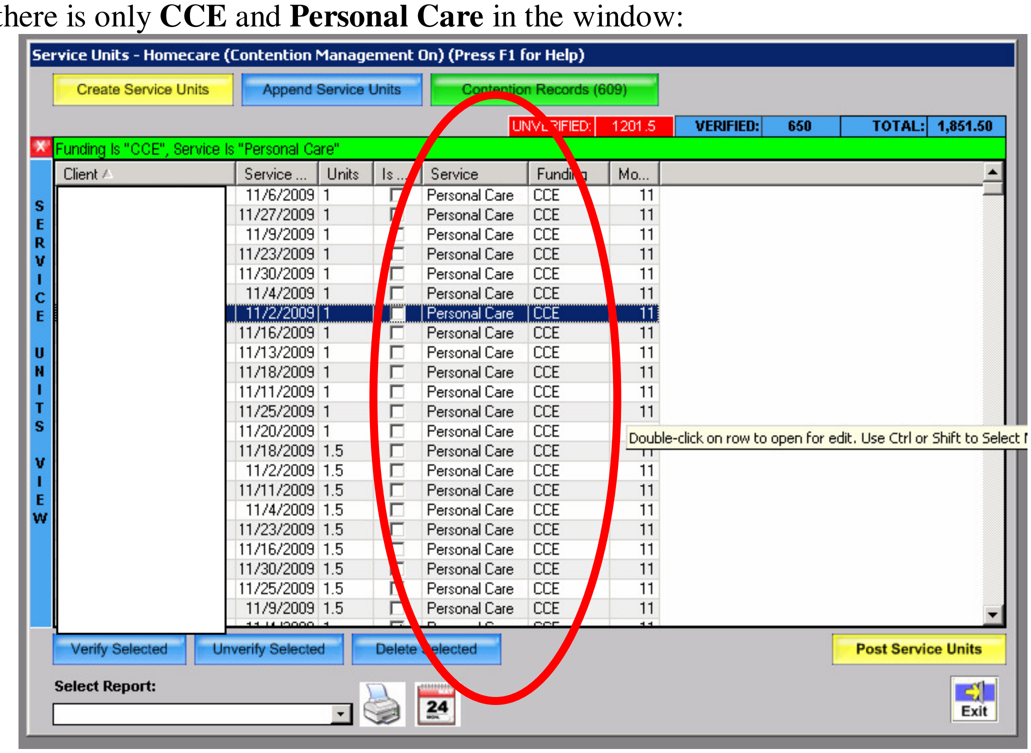
Now the screen has only **CCE** clients in the window:



It is possible to set up multiple filters at the same time:

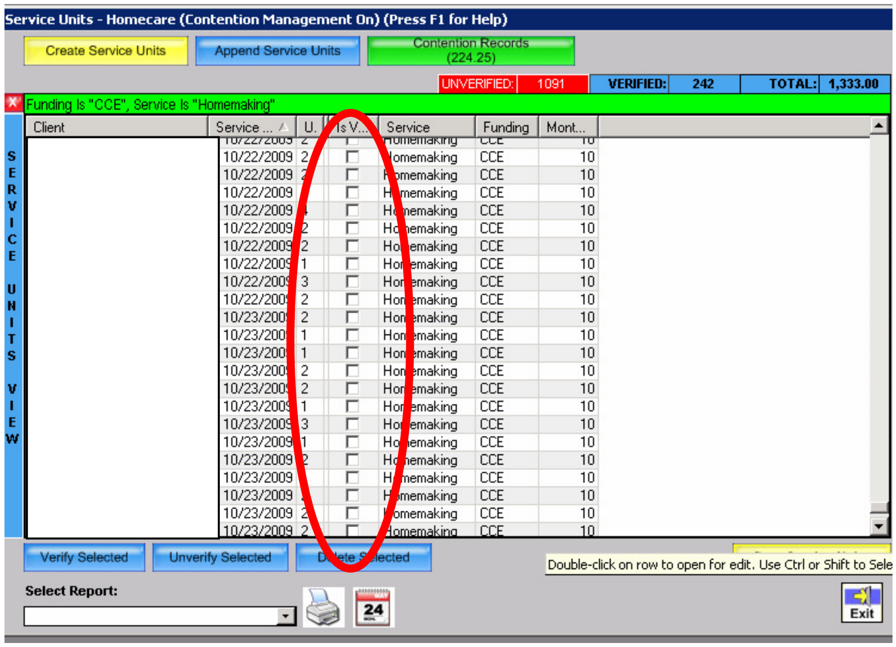


Now there is only **CCE** and **Personal Care** in the window:

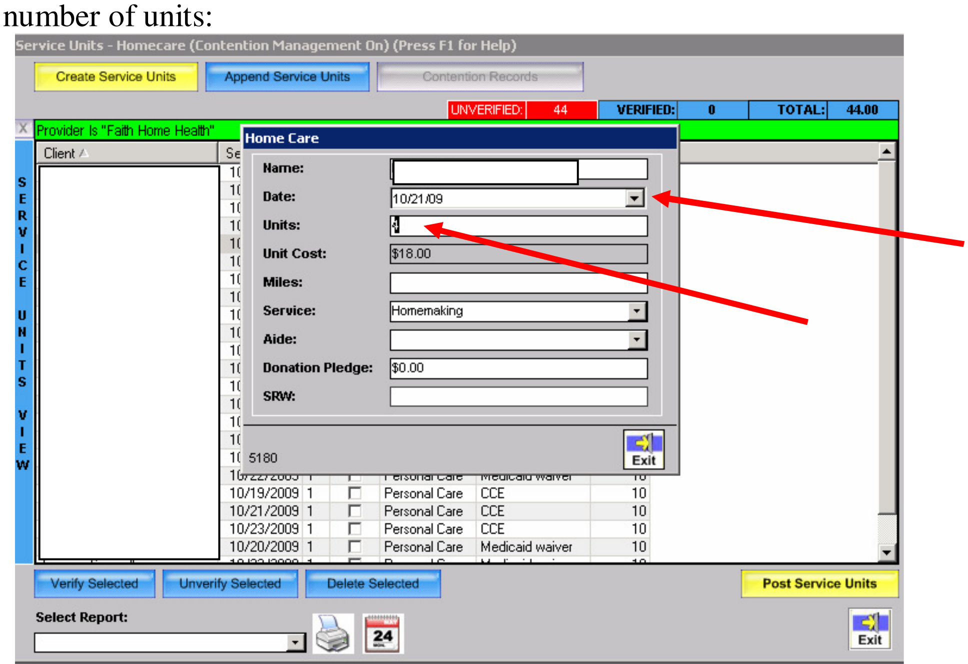


When you have the screen set up the way it works best for you, you can begin the verification process.

Verification Process



- Check the box if line of service is correct. If the line of service needs to be changed, double click on it. An edit screen will pop up where you can edit the date, the service, or the number of units:

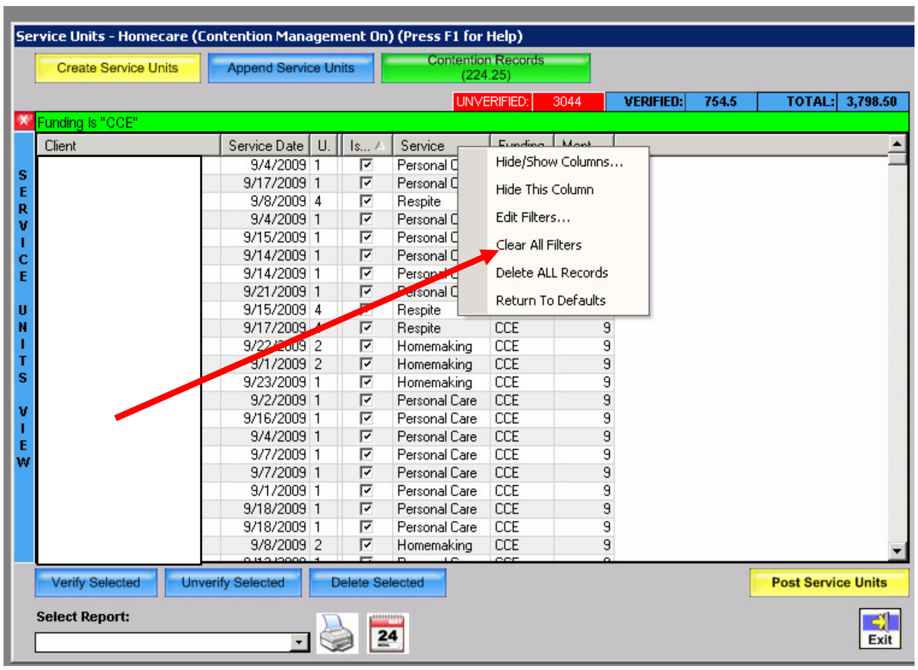


To change the **date,** use the drop down arrow which takes you to the calendar, or you can manually scroll over the date and enter the correct date. The **units** can be changed by placing the cursor next to the unit number or sliding the cursor over the unit number. When all data in the screen is correct, **[Exit →]** out of the screen. This will bring you back to the **'Service Window'** where you will see the line of service is automatically verified and the verification box has a 'check.'

☺ **TIP** It is recommended that you use the actual time sheets to conduct the verification. It is *possible that* *not all* of your clients will appear in the **'Service Window.'**

If this happens, you will need to **'Append' (pages 35-37)** those missing clients in to the **'Service Window.'** (You can skip this step if all of your clients have been verified and are ready to be posted to archive.)

To **CLEAR** the filters at any time, right click on a column header, you can bring up the screen to clear all your filters:



- If you see an error, you can unverify by 'un-checking' the box. Then go back to that line of service and double click to re-edit the line of service.

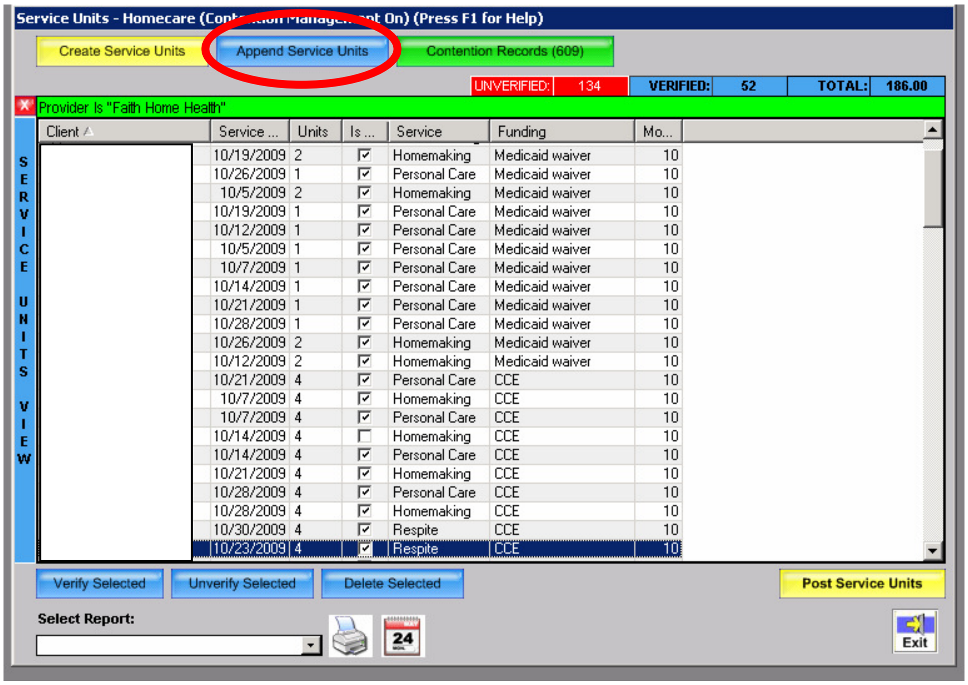
- If a line of service is in the '**Service Window'** that was not provided (client cancelled), single click on the line of service to highlight the line, and click the blue **'Delete Selected'** button. SERV*tracker* will then prompt you to provide a reason for the deletion. Or you can bring up the edit screen and enter **"0"** in the **'units'** field.

- If you prefer, you can proceed to posting to archive by each group of filtered clients. It is easier this way because you are working with a smaller number of clients.

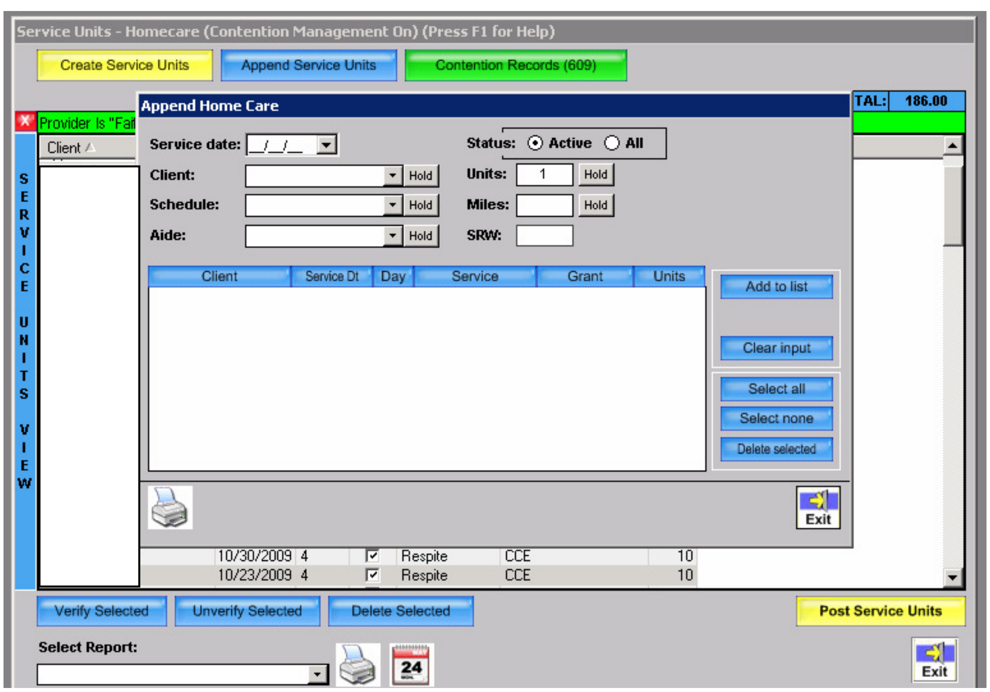
APPENDING SERVICE UNITS

Appending allows you to add clients into the **'Service Window'** whose names did not appear in the **'Service Window'** when you created the service units.

At the **'Service Units – Homecare'** screen you will see the blue **'Append'** button just above the **'Service Window.'**

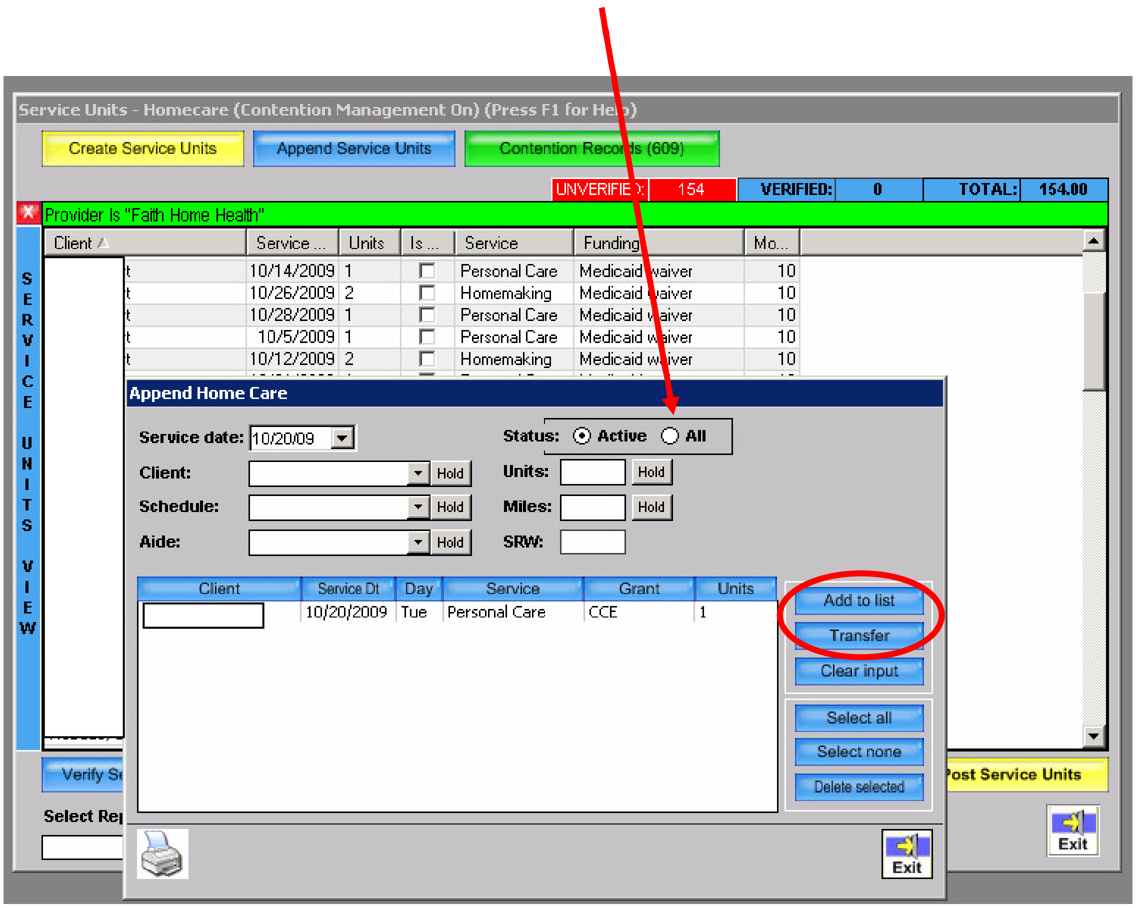


- Click the blue **'Append'** button and you will see the following **'Append Home Care'** screen:



To append client into the window, start by entering the correct service date in the **'Service'** field. Then click the drop down arrow in the **'Client'** field. The cursor will be blinking in the field and you can start typing the client's name. When you see the correct name and it is highlighted, hit enter on your keyboard, the client's name will appear in the field and the cursor will automatically pop over to the **'Units'** field. Enter the correct number of units (service hours) in the field. Enter the type of service in the **'Schedule'** field. When all data is correct, click the blue **'Add to list'** button to the right of the screen.

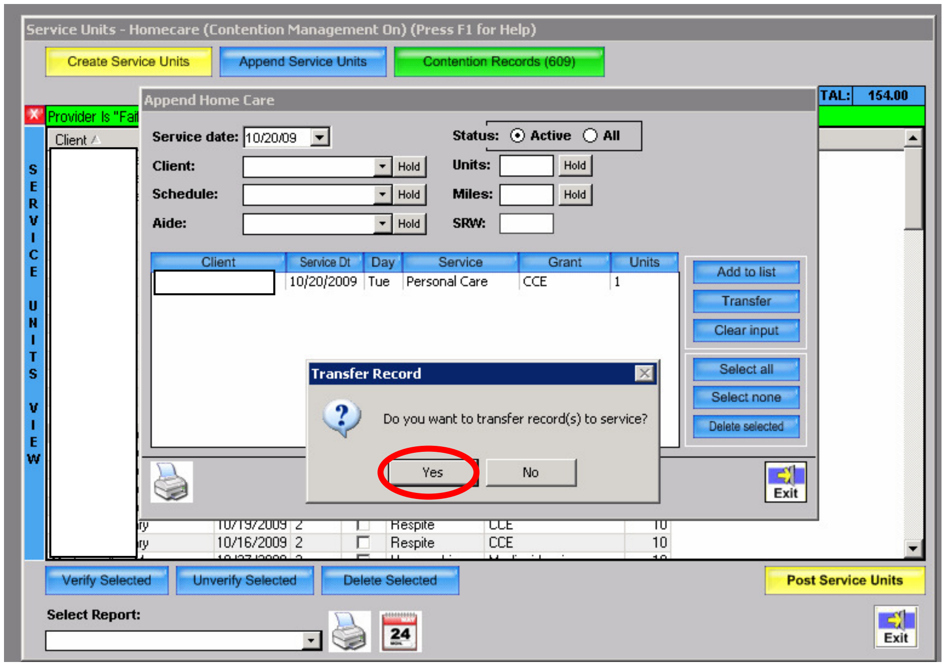
☺ **TIP Terminated clients will not append into the screen unless you change the 'Status' button from 'Active' to 'All.'**



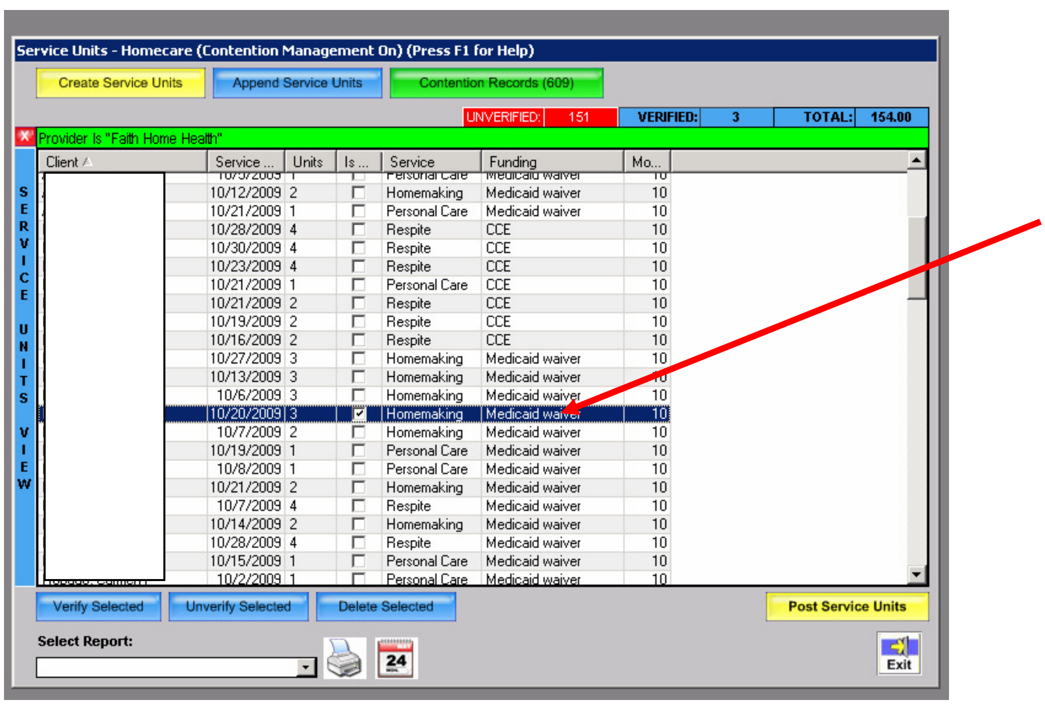
If you missed entering any of the fields, a pop up screen reminds you to go back and complete the necessary fields, click the blue **'Add to list'** button. You will now see the line of service in the window:

- You are now ready to click the blue **'Transfer'** button:

- Click on **'Yes'** and the line of service will be transferred back to the **'Service Window.'**



You will now see the data you appended in the **'Service Window'**. The line of service will automatically show that it is in the **'verified'** status:



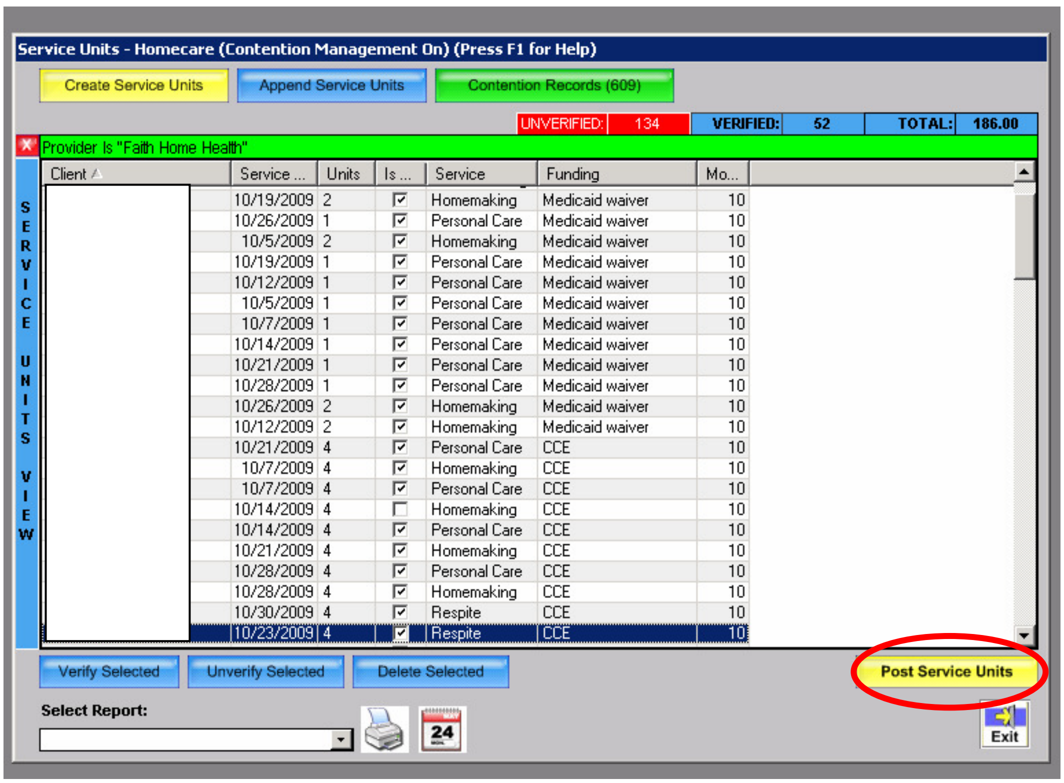
POSTING SERVICE UNITS

When you have completed verifying all client service units, you are now ready to post the units to the accounting module. Posting to archive sends the units you have verified to a reporting system for billing. You will have the option of printing reports both before and/or after posting to archive.

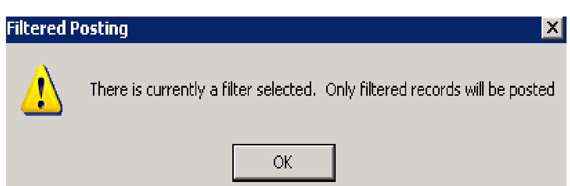
It is up to you as to how you want to proceed. The **'filter'** can remain as you set it or removed by clicking the blue **'Clear'** button. There is a higher degree of accuracy in archiving smaller, filtered groups.

Only verified units can be posted. Unverified units will remain in the **'Service Window.'**

- From the **'Service Units – Homecare' –** screen, click the yellow **'Post Service Units'** button at the bottom right of the **'Service Window.'**

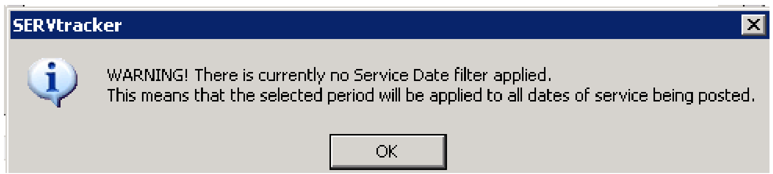


If there is a filter activated, you will see the **'Filtered Posting'** screen:



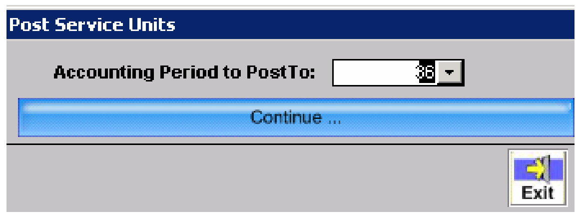
- Click **'OK'** and proceed to the next screen.

You may see the following screen:

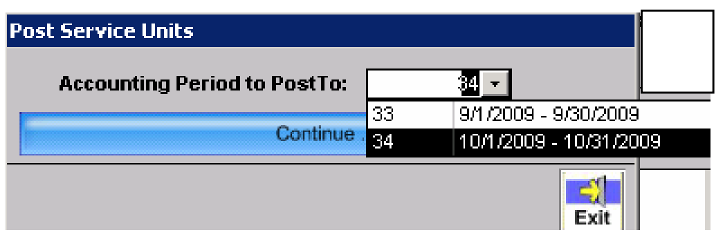


- Click **'Ok'**

The **'Post Service Units'** screen pops up:



- Click the blue **'Continue'** button if the accounting period is correct. To check, click the drop down arrow, and the date range will appear to indicate the correct accounting period.



**** Important **** It is possible that there is more than one accounting period in the **'Accounting Period to Post To'** if you have multiple months in the **'Service Window.'** There is a date range in the drop down box field. This will automatically include all verified service units from the **'Service Window'** within this date range. These will be archived *<u>if you do not change the dates</u>* using the drop down arrows. You can limit what you want to post by selecting the date range. For example, all of your clients will be in the **'Service Window'** for the dates you originally created and verified, however you may wish to post by the day. You can do this by entering the same date in both drop down boxes.

- In the **'Accounting Period to Post To'** field, click the drop down arrow and select the correct accounting period based on the dates you have selected.

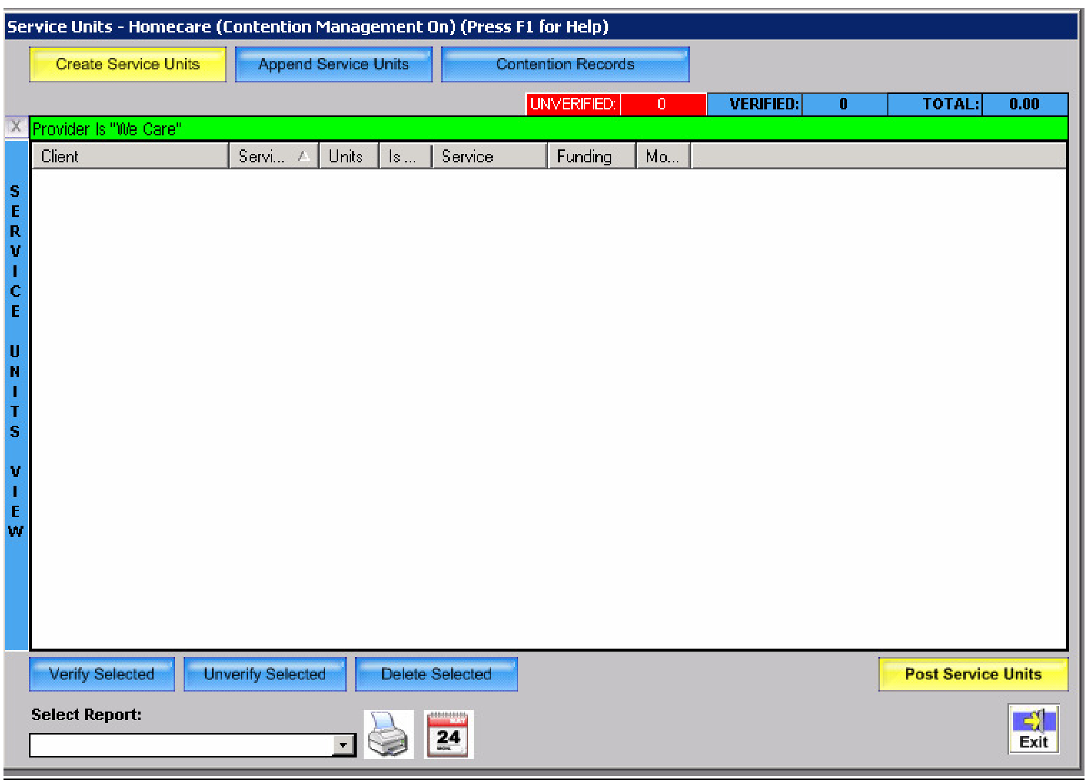
You must be sure that you want to post these service units before proceeding to the next step. You can **[Exit→]** out of the screen if you are not ready to post yet.

- When you are sure you have entered the correct date range, click the blue **'Continue'** button. The next screen you will see tells you the number of units that you have posted. Only the records you verified will transfer to archive.

The following screen pops up to tell you the number of units you have posted:

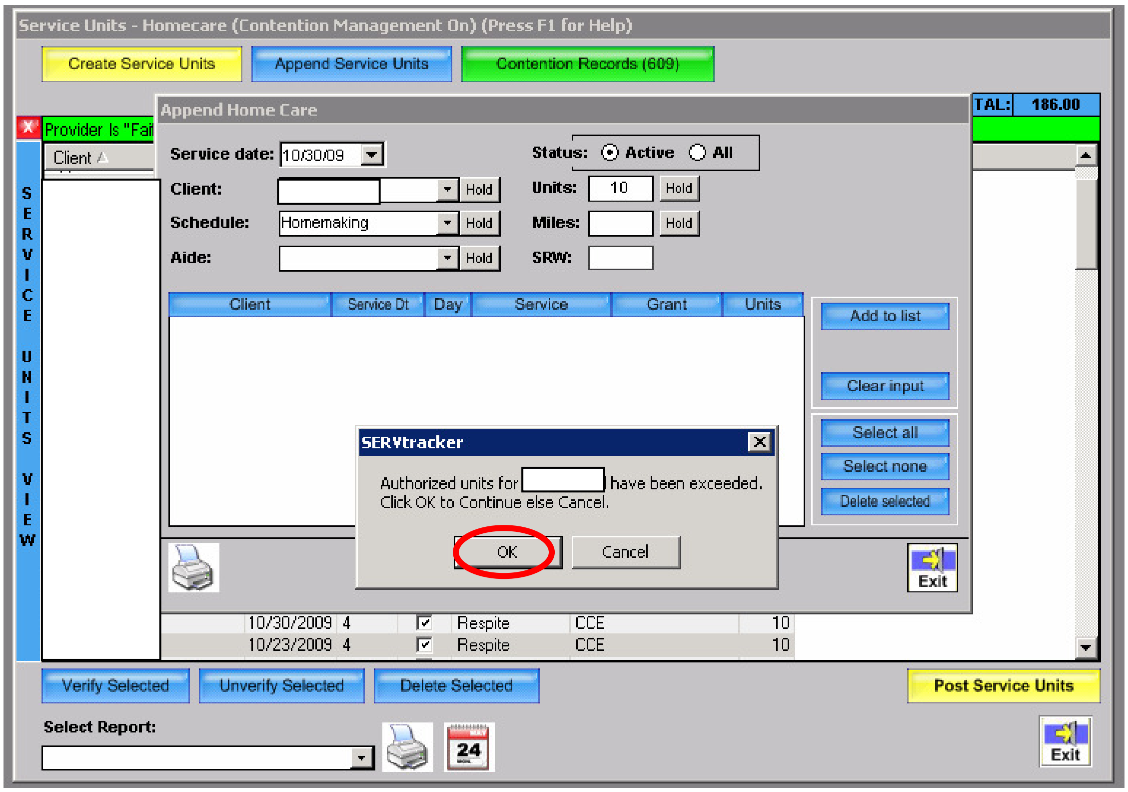
- Click **'OK'** to return to the **'Service Window'**

You will be brought back to the **'Service Window'** and the window should now be emptied of all client names with the exception of those you did not verify or those in contention.

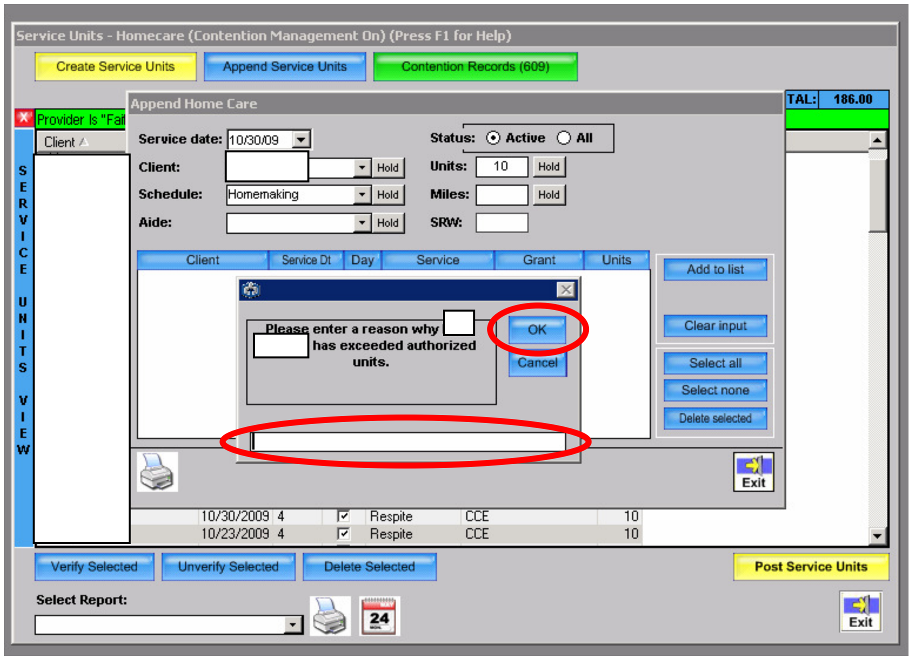


SERVICE UNITS IN CONTENTION

If you exceed the referred service units for the month, the following screen will pop up:



- Click the **'OK'** button and you will see the next screen:



- Type in the reason that the service was provided and click the **'OK'** button.

If you provided service for the referred amount of service hours, please feel free to comment that the hours did not exceed the referred amount of service hours for the week.

The SERV*tracker* database will not allow you to post to archive, service units that are in contention. When service units go into **'Contention,'** they will have to be reviewed and approved by the Fiscal section of the Department of Aging Services.

When this happens, please call the Department of Aging Services for assistance:

CONTACTS:

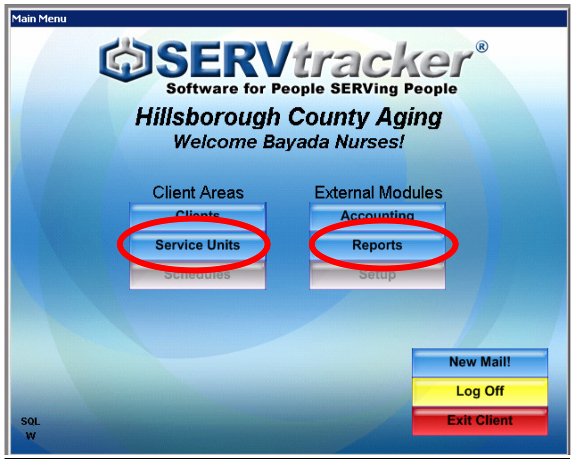
Diana DeMorales ……… 272-6642

Deborah Heckaman ………… 272-5692

Catherine Rivera (Medwaiver)…276-2230

PRINTING REPORTS

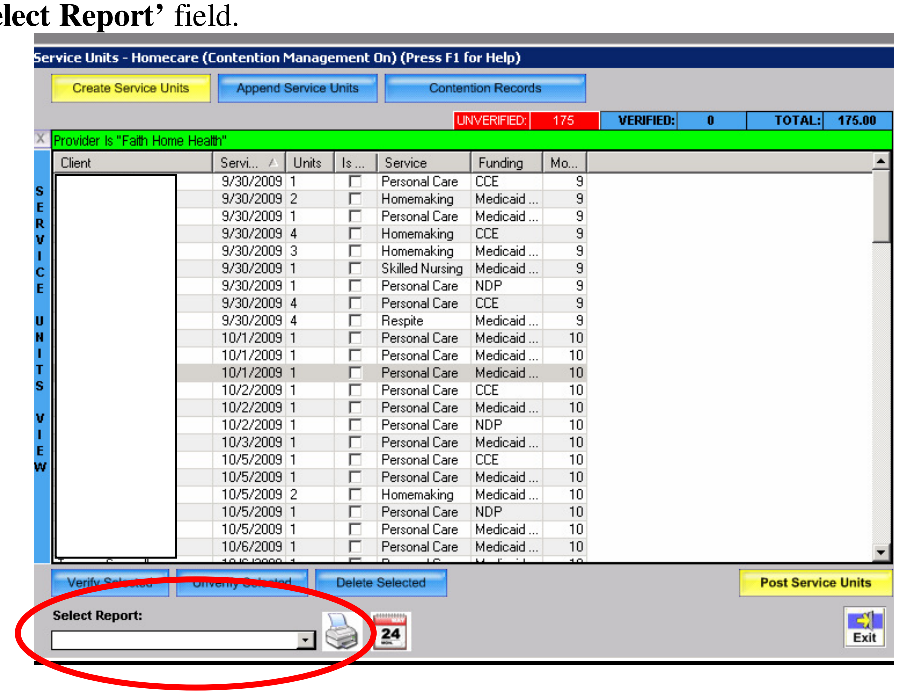
Depending on what you may need for hard copies, reports may be printed in the **'Service Units'** module or the **'Reports'** module.



Printing Reports from the 'Service Units' module:

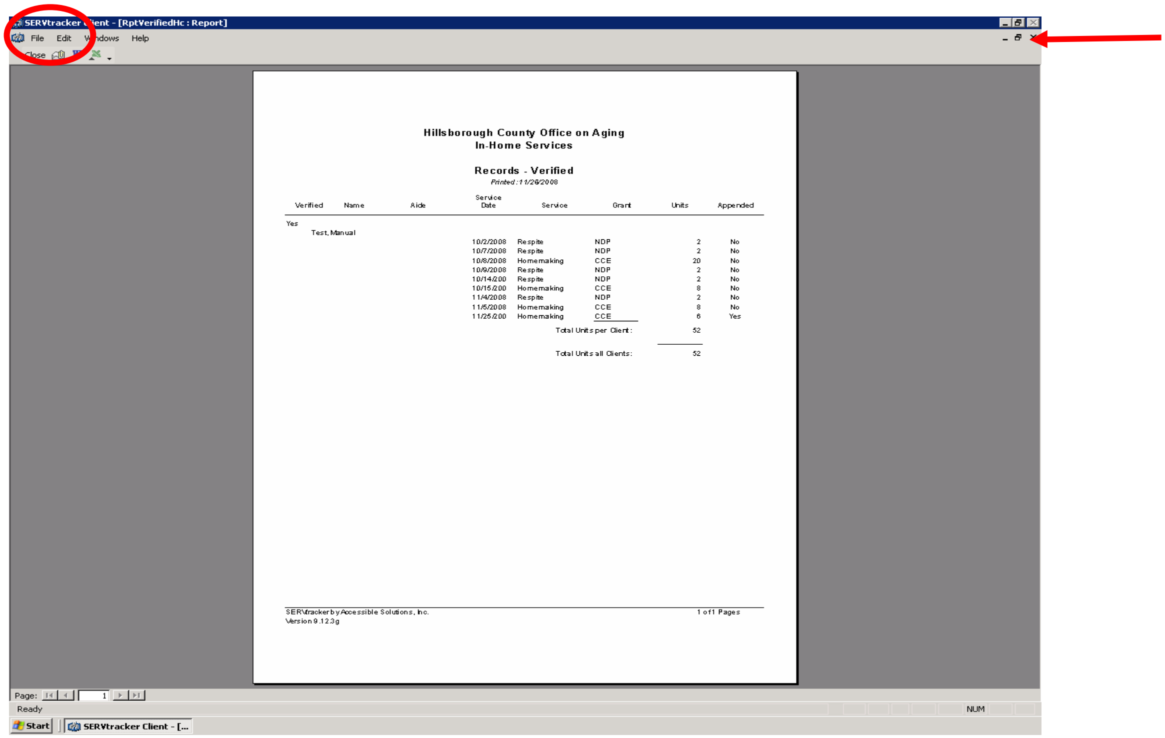
You may want to print reports before posting to archive while they are still in the **'Service Window.'**

- To print records in the **'Service Window,'** select the **'Service Units'** module and proceed to the **'Service Units - Homecare'** screen. Go to the drop down arrow in the **'Select Report'** field.

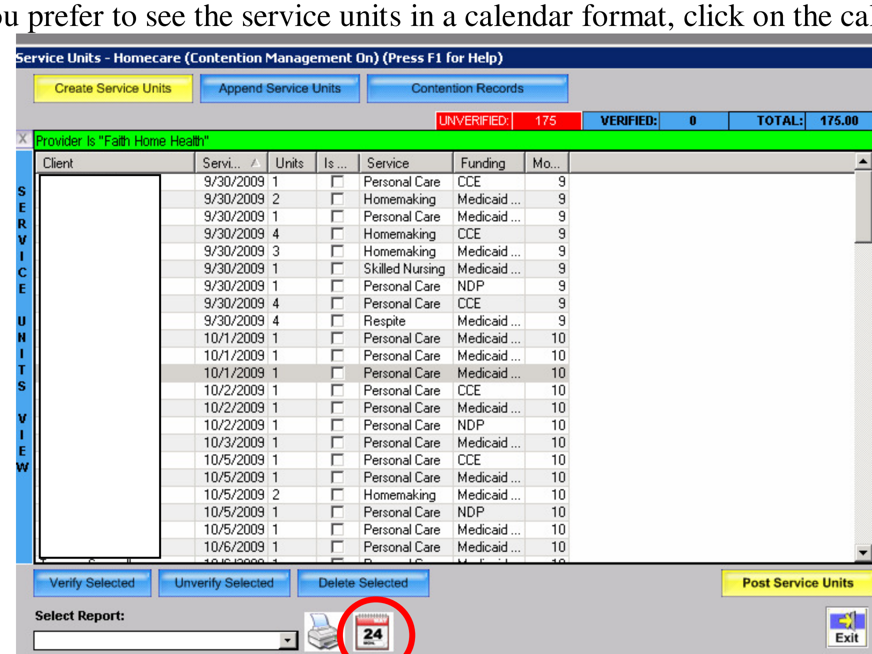


- Select an option from the drop down field, click on the printer icon.

- Go to the upper left corner of the screen, click **'file'** → **'print'**

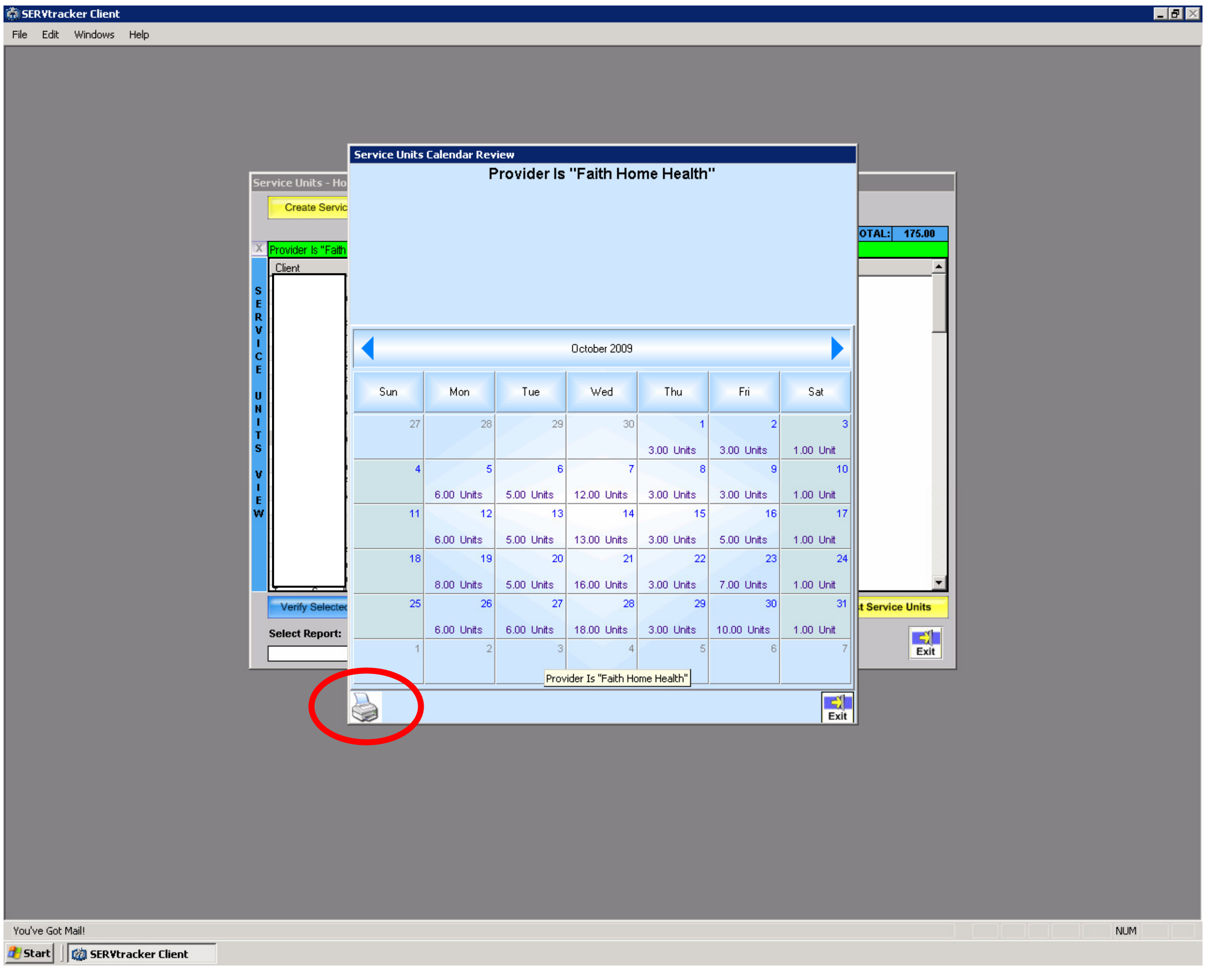


- If you prefer to see the service units in a calendar format, click on the calendar icon.



The following screen shows the calendar format and is printable.

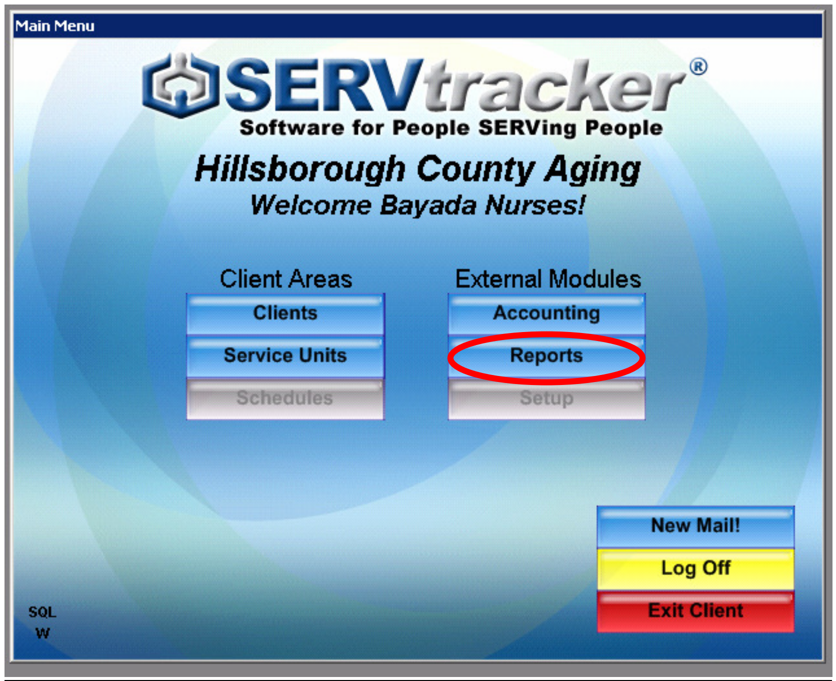
- Click on the printer icon:



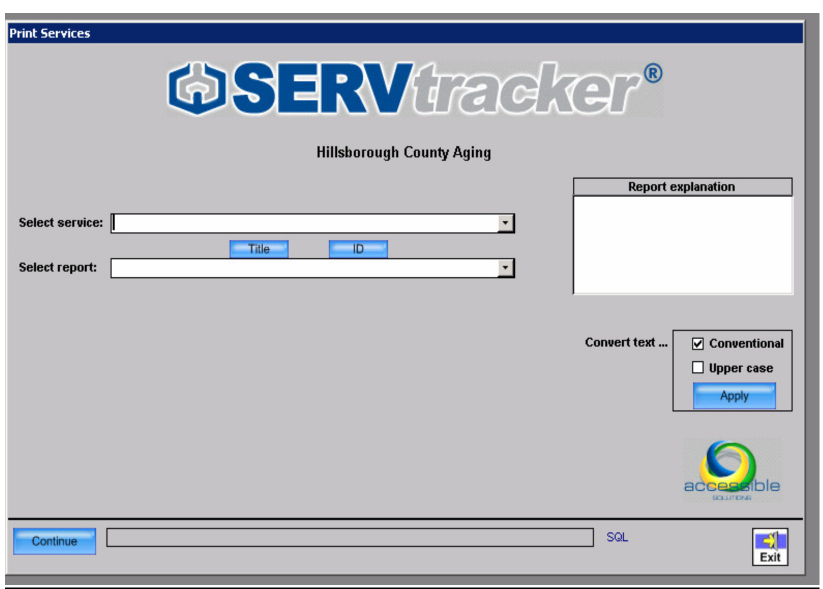
- Go to the upper left corner of the screen, click **'file'** → **'print'**

Printing Reports from the 'Reports' Module:

- From the **'Main Menu'** screen select the **'Reports'** module.



You will see the following **'Print Services'** screen:

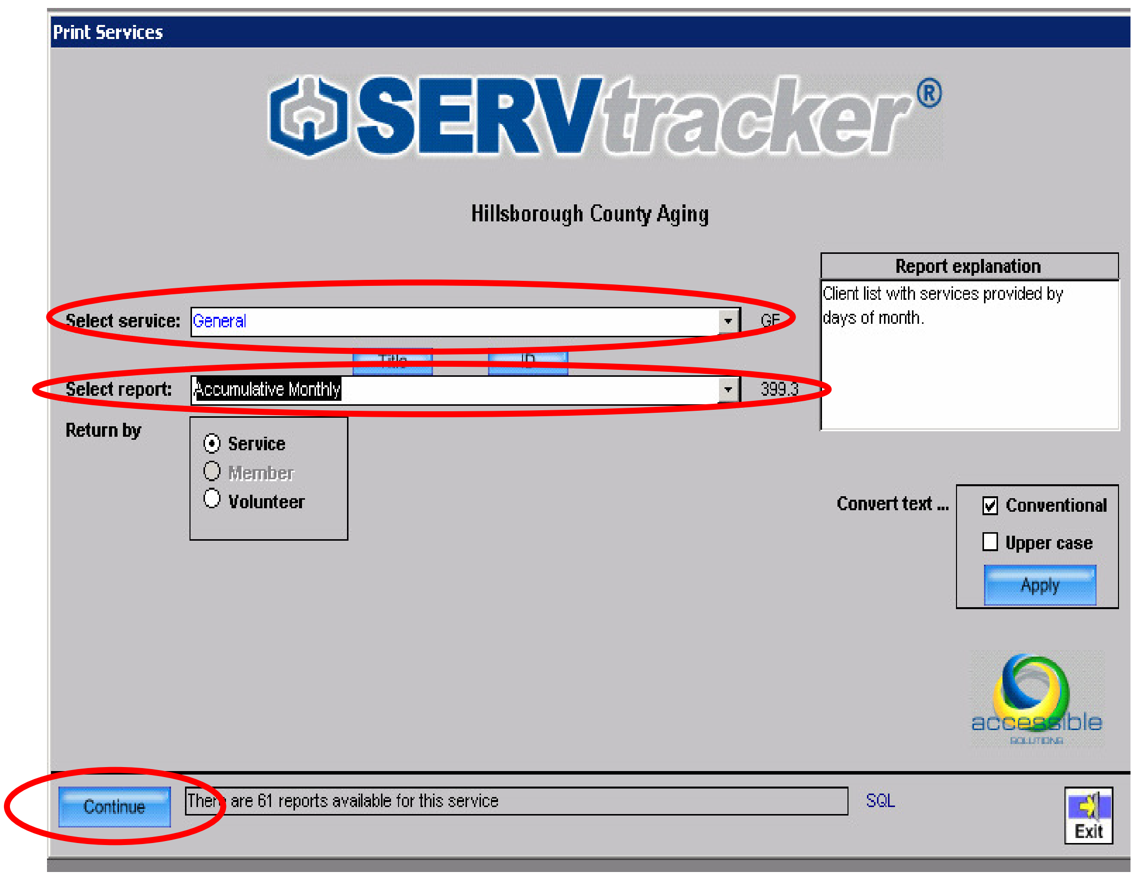


An example of a report you may want to print would be the units that you have posted to archive.

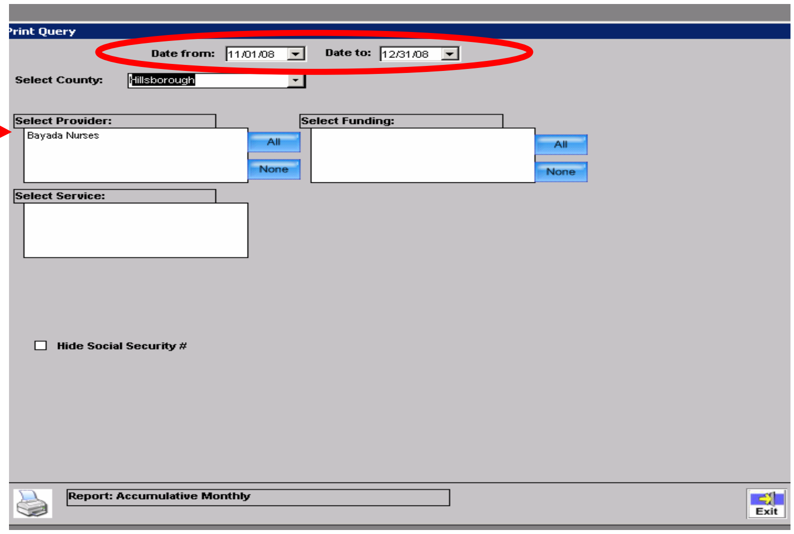
- Go to the top drop down field **'Select service'** and choose **'General.'**

- Go to the lower drop down field **'Select report'** and choose **'Accumulative Monthly.'**

- Click the blue **'Continue'** button in the lower left corner.



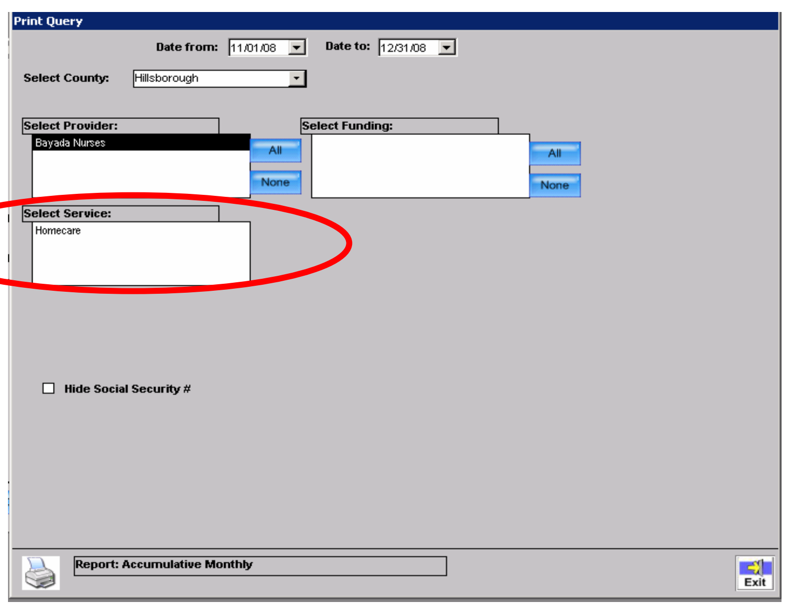
Next, you will see the following **‘Print Query’** screen:



- Select the date range in the **‘Date from:’** and **‘Date to:’** fields at the top of the screen. You can use the calendar in the drop down or manually enter the dates. It is suggested that you enter the 1st of the month and the last day of the month.

- Select **‘Hillsborough’** in the **‘Select County:’** field.

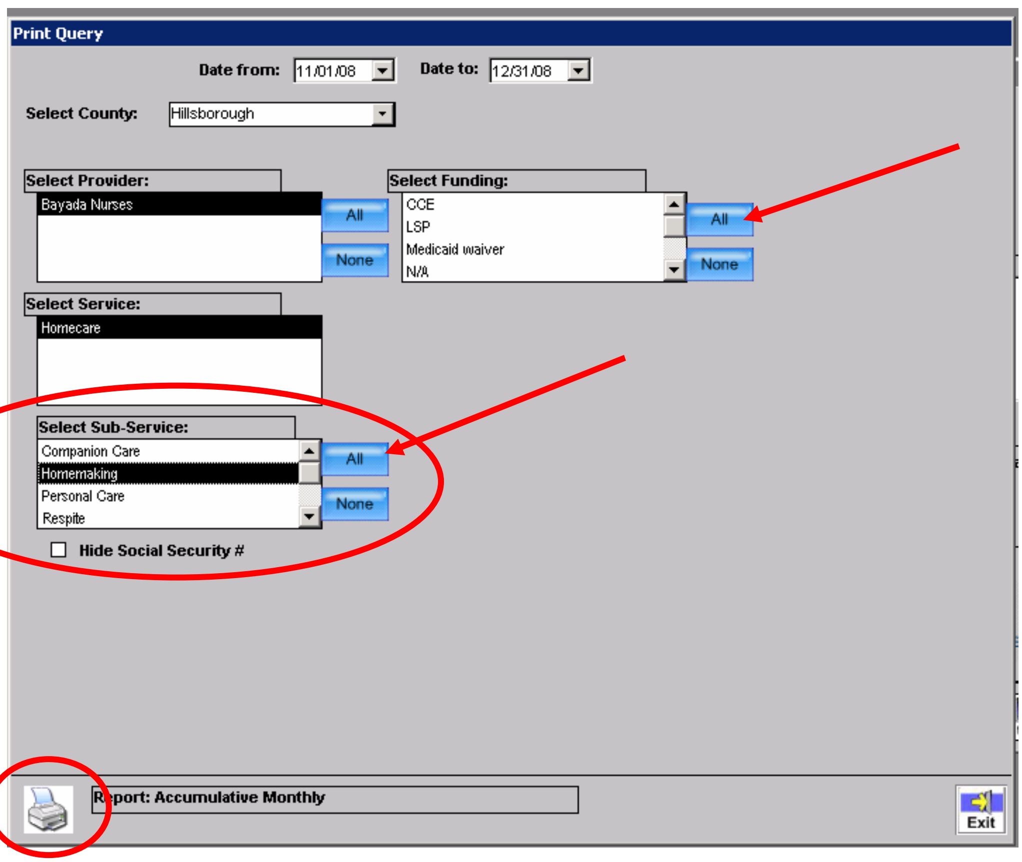
- You should see your vendor name in the **‘Select Provider’** field.



- Select the service in the **'Select Service:'** field. A **'Sub Service:'** field will open below the **'Select Service:'** You will be given the option of selecting all services by clicking the blue **'All'** button or selecting individually by clicking and highlighting.

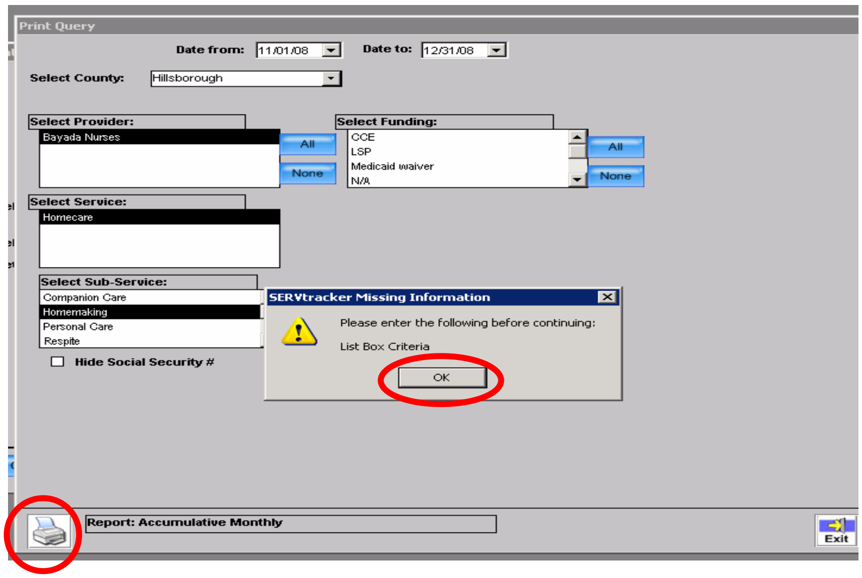
- Select the funding in the **'Select Funding:'** field. You will be given the option of selecting **all** funding sources by clicking the blue **'All'** button or selecting individually by clicking and highlighting.

- When all fields have been appropriately selected, click on the printer icon in the bottom left corner of the screen.



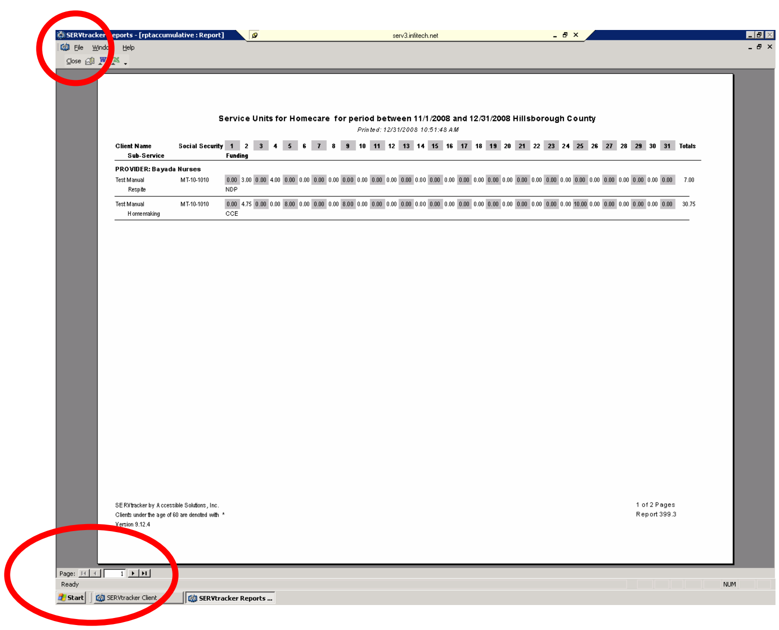
If the **'SERVtracker Missing Information'** screen pops up, it is because a selection has not been entered in one or more of the fields. It will specify the field with missing data.

- Click **'OK'** and go back to complete your selections. This will take you back to the previous screen. When all fields are entered, click the printer icon again.



The following report can be viewed and/or printed. Depending on how you filtered and made your selections, there may be multiple pages in the report. In the lower left corner of the screen, you will see arrows ◀ and ▶ for scrolling through multiple pages. A summary page will be at the end of the report. All pages will print.

- Go to the upper left corner of the screen, click **'file'** → **'print'**



If you review your archived reports and find an error, please call Quality Assurance. (see Table of Contents page) Corrections will be made so that you will have accurate invoice summaries.

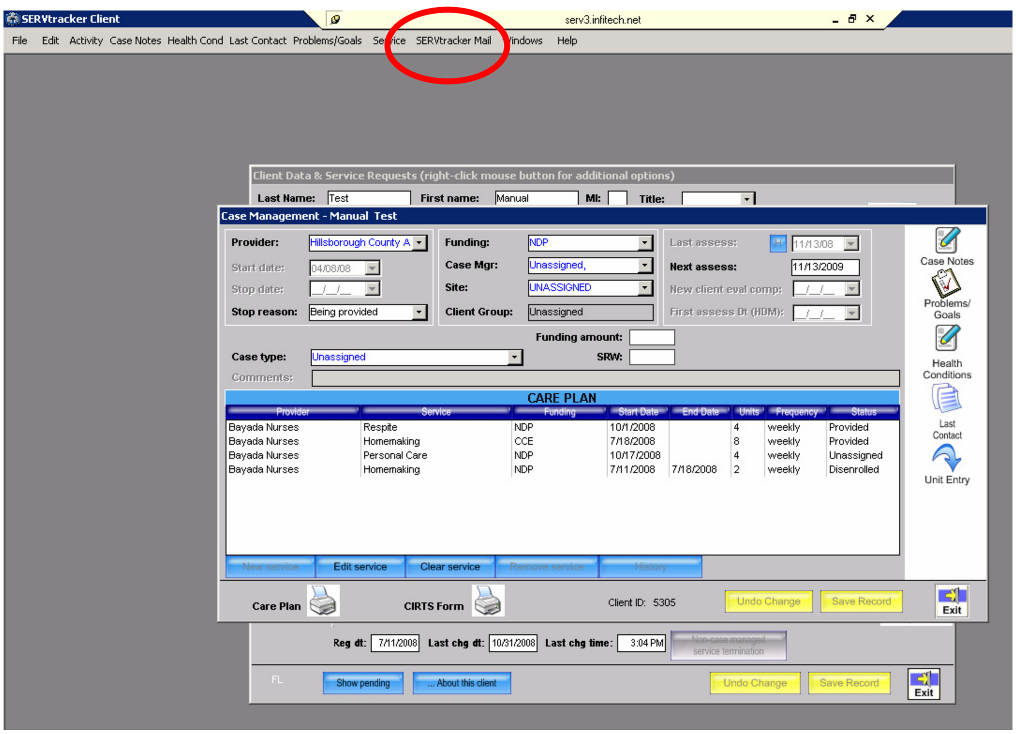
NOTIFICATIONS TO CASE MANAGERS

There are times when there are changes regarding the clients you service. Your aide may report back to you that the client is going in the hospital or has changed their phone number.

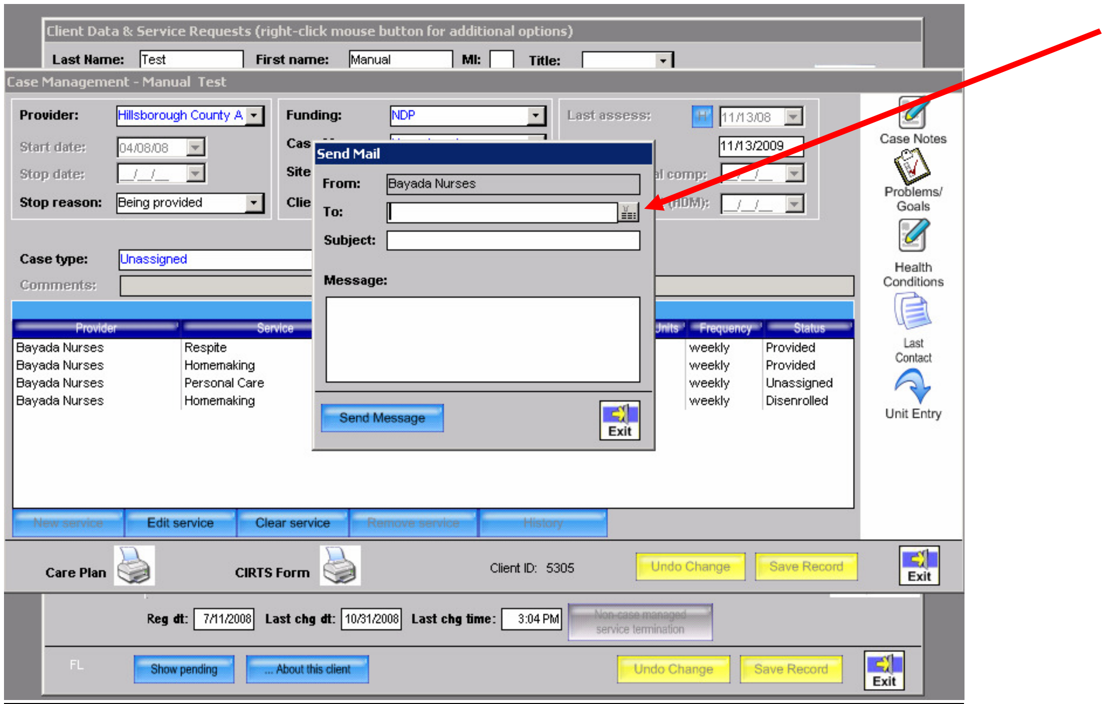
All notifications should be sent to the Case Manager via SERV*tracker* e-mail.

If written reports are required, such as an incident report, these should be faxed (in follow-up to the e-mail notification and phone call to the Case Manager) to the Hillsborough County Aging Services **Quality Assurance Department at 272-5125.**

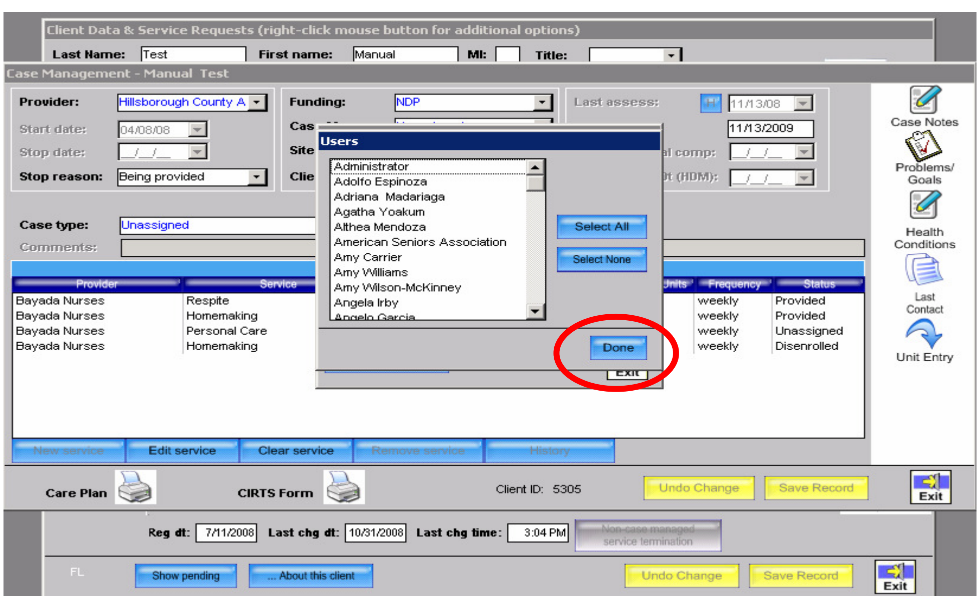
When you are in the **'Case Management'** screen, you can click on **'SERV*tracker* Mail'** at the top of the screen:



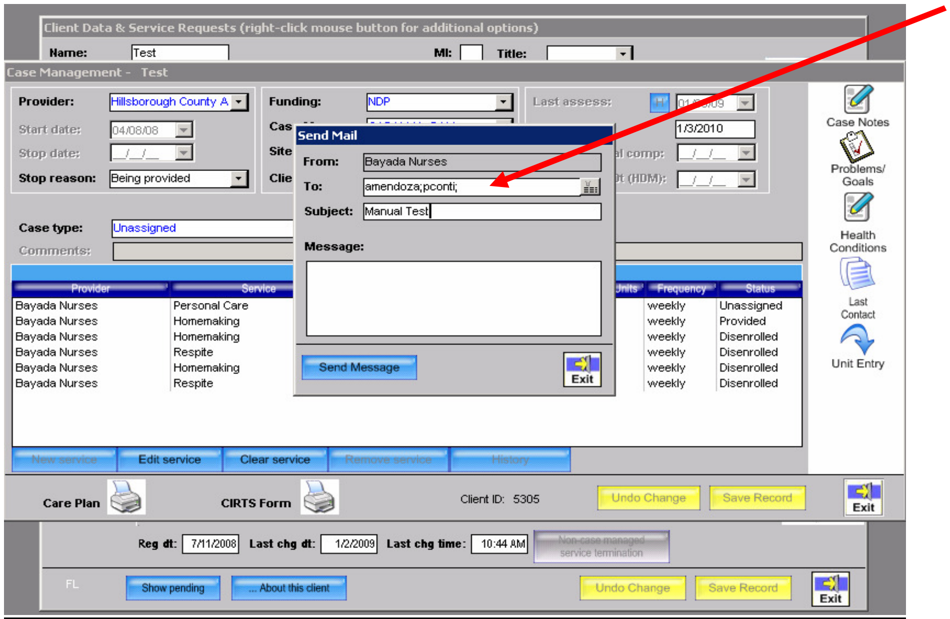
- On the **'Send Mail'** screen, click on the drop down arrow in the **'To:'** field.



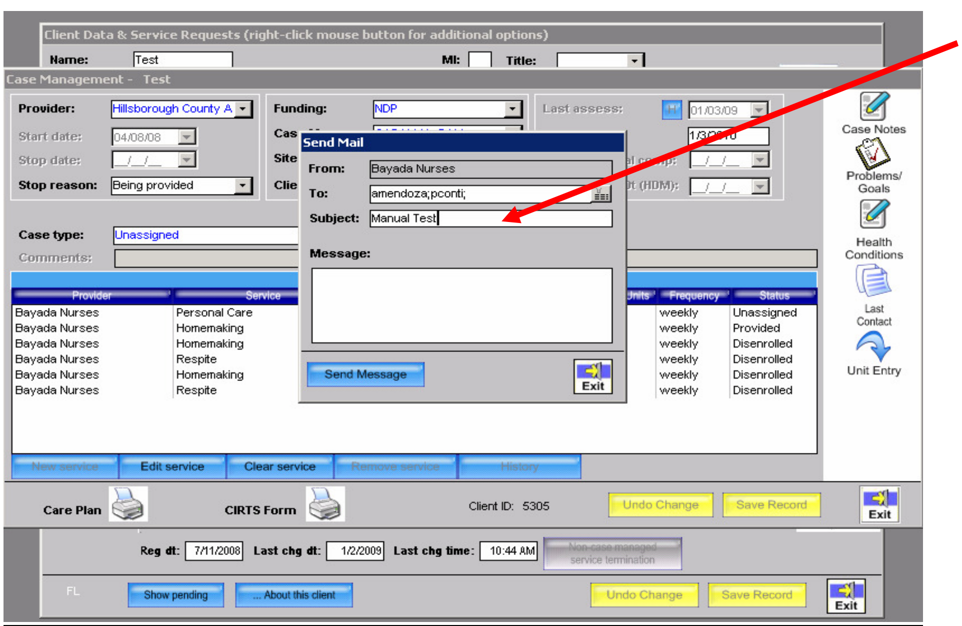
- Select the Case Manager <u>and their supervisor</u> by clicking on their names and then click the blue **'Done'** button.



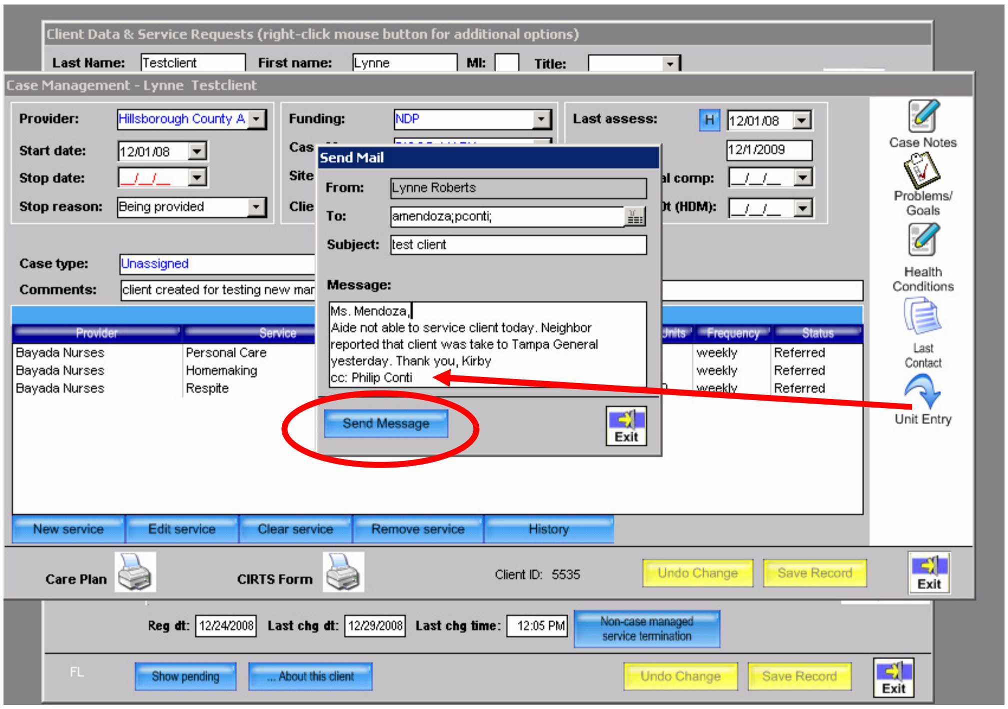
The Case Manager and supervisor names will appear in the **'To:'** field:



- **<u>Always</u>** enter the name of the client in the **'Subject:'** field:

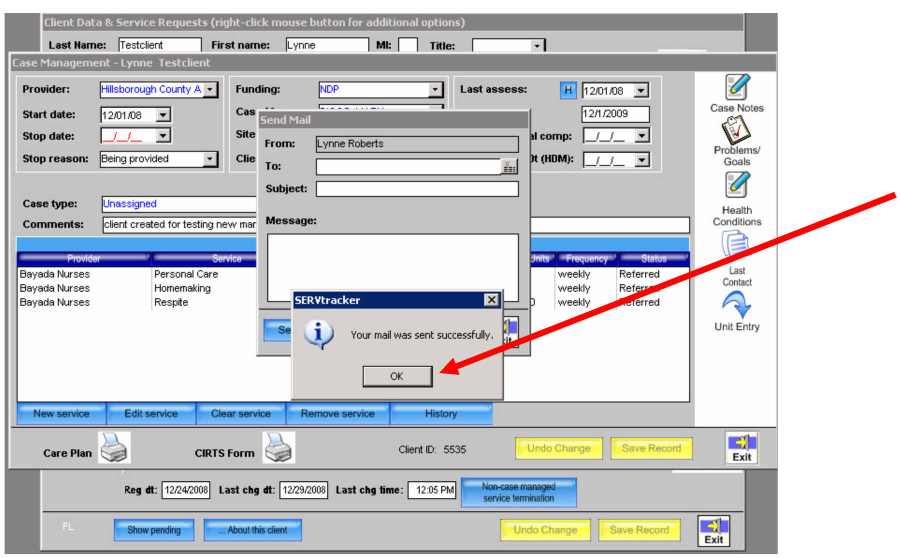


- Enter your message in the **'Message'** field with as much detail as necessary for the Case Manager. You can continue typing and the message will scroll as you type. Make sure to **'cc:'** the supervisor at bottom of message.



- Click the blue **'Send Message'** button and you will see the following message:
- Click **'OK.'**

The Case Manager is automatically notified that there is **'New Mail'** and will generate a referral if necessary, such as putting the client on hold or making changes to the client's information. You, in turn will receive e-mail notification of a referral by seeing **'New Mail'** on the **'Main Menu'** screen.

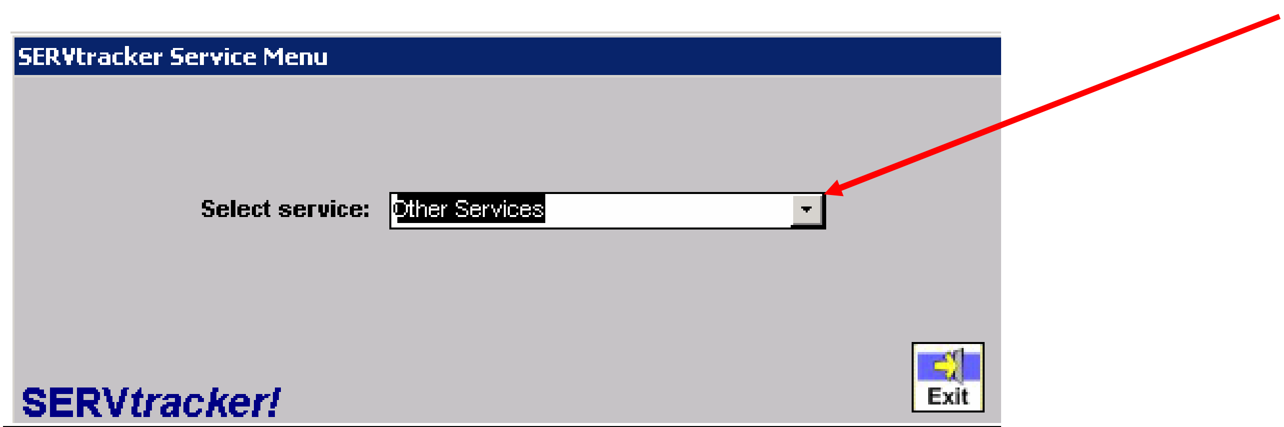


VERIFYING SERVICE UNITS FOR OTHER SERVICES

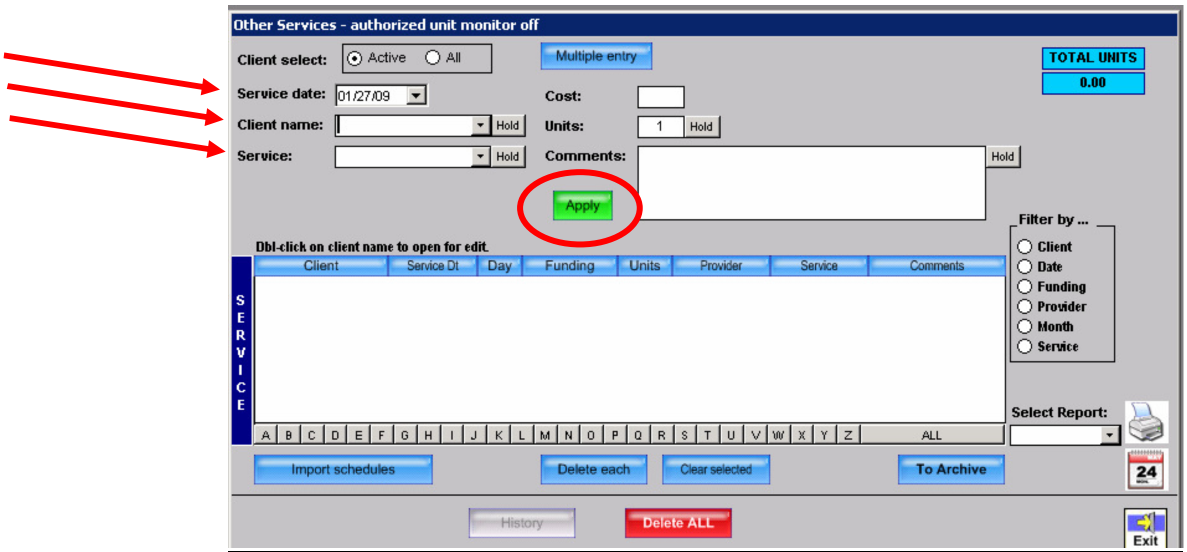
Included in **Other Services** are the Emergency Alert Response, Consumable and Durable Medical Supplies, and Pest Control. In this module, you will be verifying service units and the "archiving" or sending the service units to a reporting system for billing.

- Starting at the **'Main Menu'** screen, click on the **'Service Units'** module:

- In the following screen, click the drop down arrow and select **'Other Services.'**



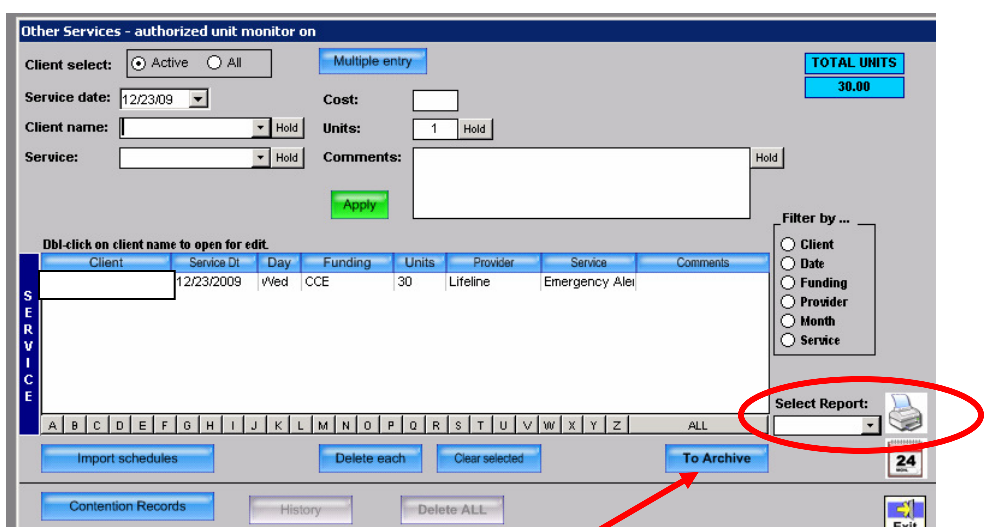
You will now see the **'Other Services – authorized unit monitor off'** screen:



You have the option of bringing client names into the **'Service Window'** either individually or 'multiple' groups of clients.

1. **<u>Individual Clients</u>**: To add clients to the **'Service Window'** <u>individually</u>, click the drop down arrows in each field and make the appropriate selections. Click on the green **'Apply'** button. The client's name will transfer to the **'Service Window.'** Enter the correct number of units taking in to consideration clients who did not receive a full month of service. Continue this process until your list of clients is complete.

To see, and/or print a report of clients in the **'Service Window'** <u>before</u> you post to archive, select a report in the **'Select Report:'** drop down field. Click the printer icon.

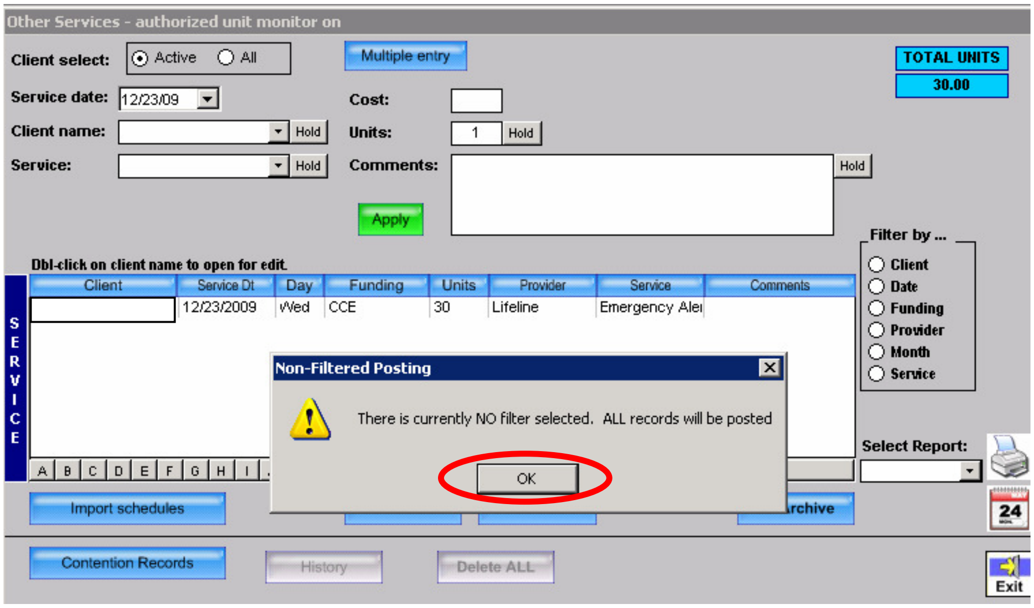


You can post the verified units to the archive system individually or when you have entered your full list of clients.

- Click the blue **'To Archive'** button.

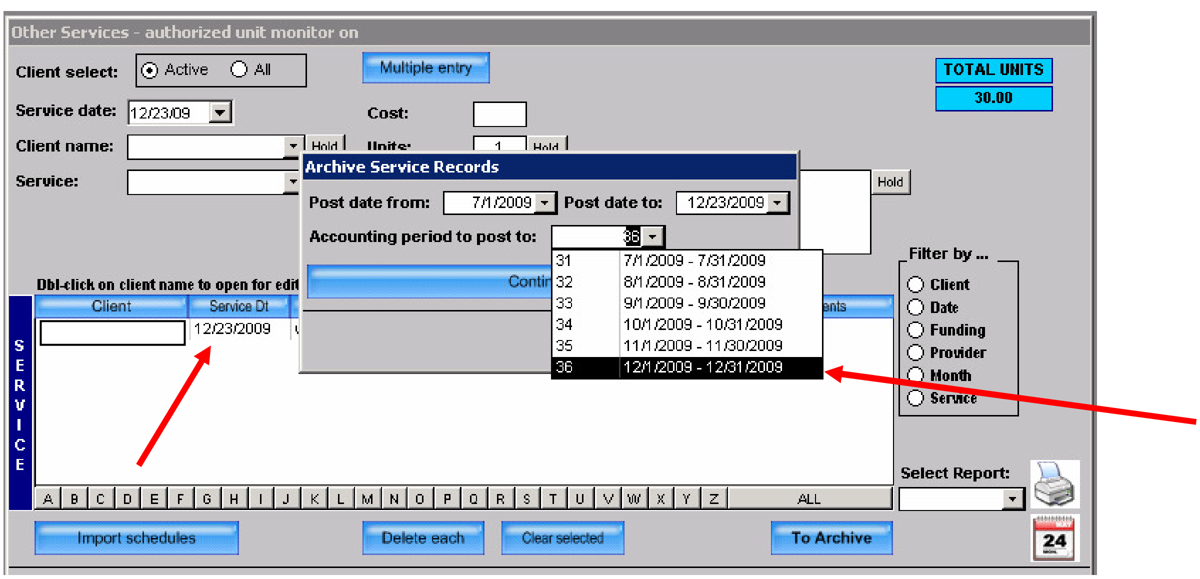
You will see the following pop up message when there are no filters selected:

- Click **'Ok'** to proceed.

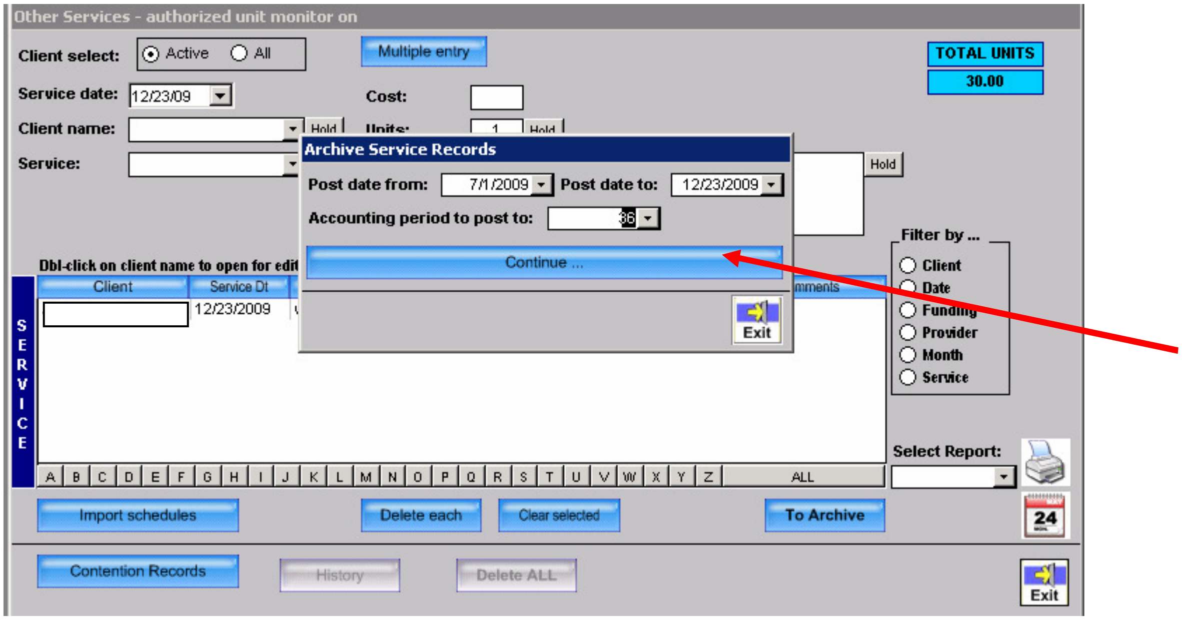


*** It is important to post units to the correct **'Accounting Period.'** If you had <u>multiple months</u> in the **'Service Window'** then you should **'Exit'** the screen and return to the window and filter the units by the month. ***

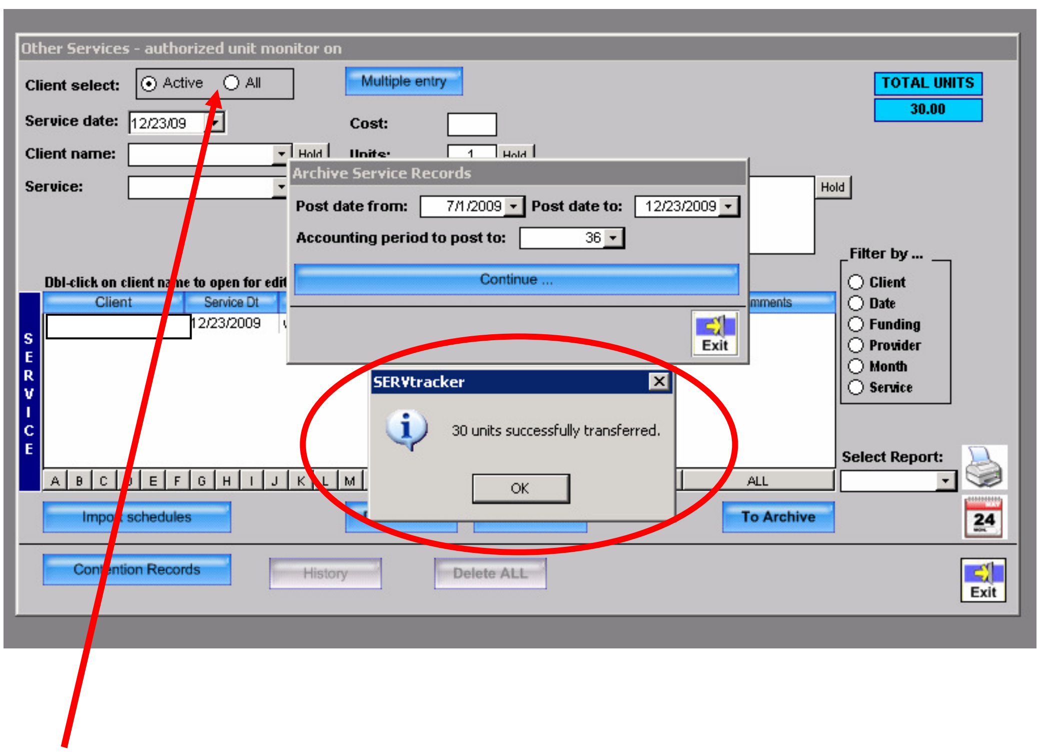
- Select the appropriate **'Accounting Period'** according to the dates you are posting.



- Click the blue **'Continue'** button:

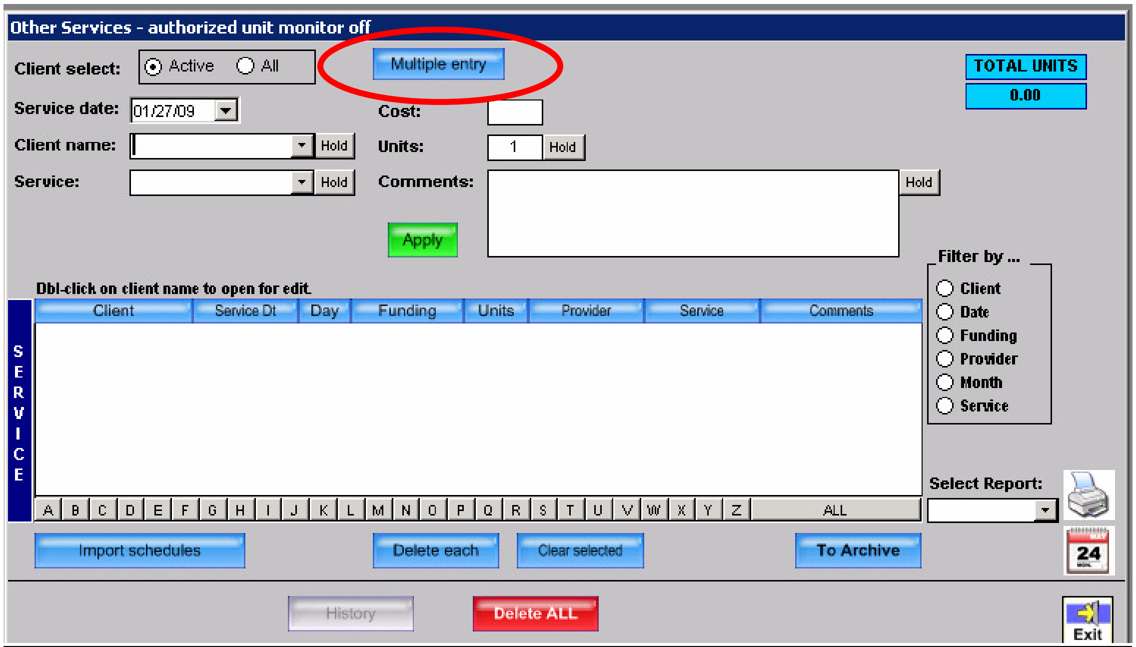


The following screen will pop up to let you know how many units you posted:



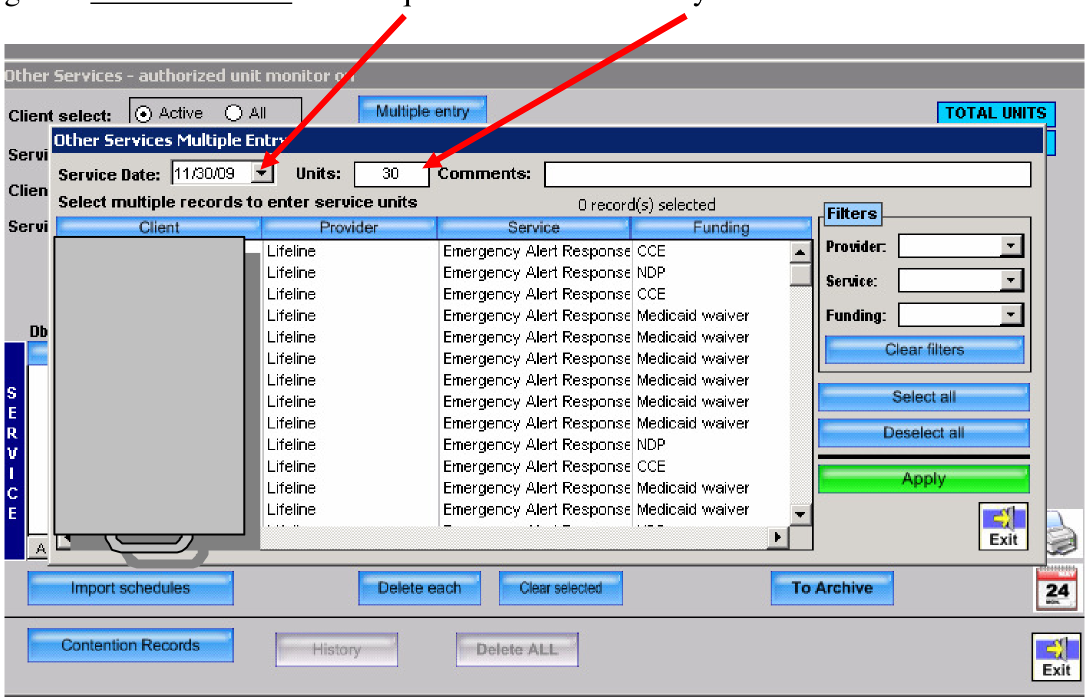
☺ **TIP** If a client was terminated, you will have to change the client status button from **'Active'** to **'All'** before the client's name will appear in the drop down list.

2. **<u>Multiple Clients</u>**: If you want to select several clients or your entire client list to enter into the **'Service Window,'** click the blue **'Multiple entry'** button.



Clicking the **'Multiple entry'** button brings up the following screen with the current date:

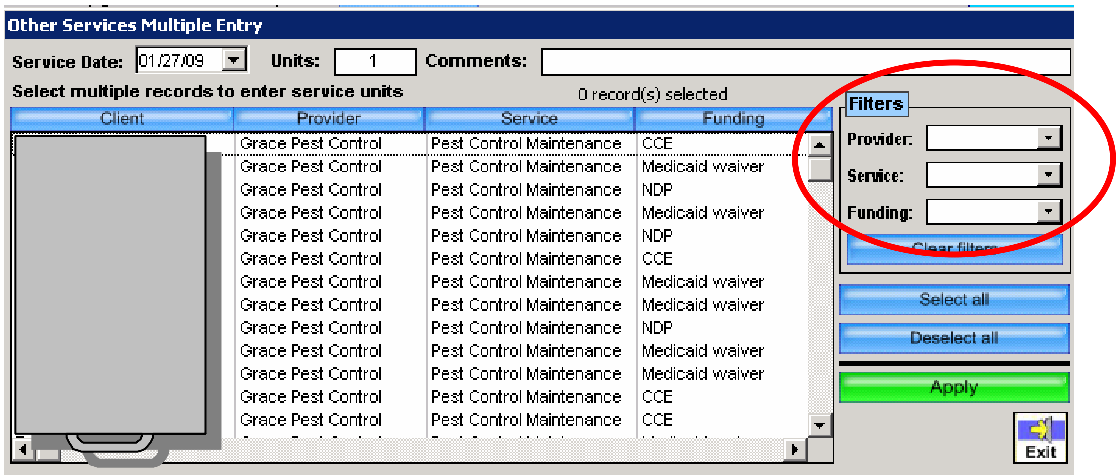
*** If you are processing units for the <u>entire month</u>, enter the <u>last day</u> of the month and change the <u>number of units</u> to the equivalent number of days in the month. ***



All your client names will be in the window, however the names have been blocked out in this manual to be in compliance with HIPAA regulations.

In the **'Multiple entry'** screen you will be choosing the client names that you want to transfer back to the **'Service Window'** in the previous **'Other Services – authorized unit monitor off'** screen.

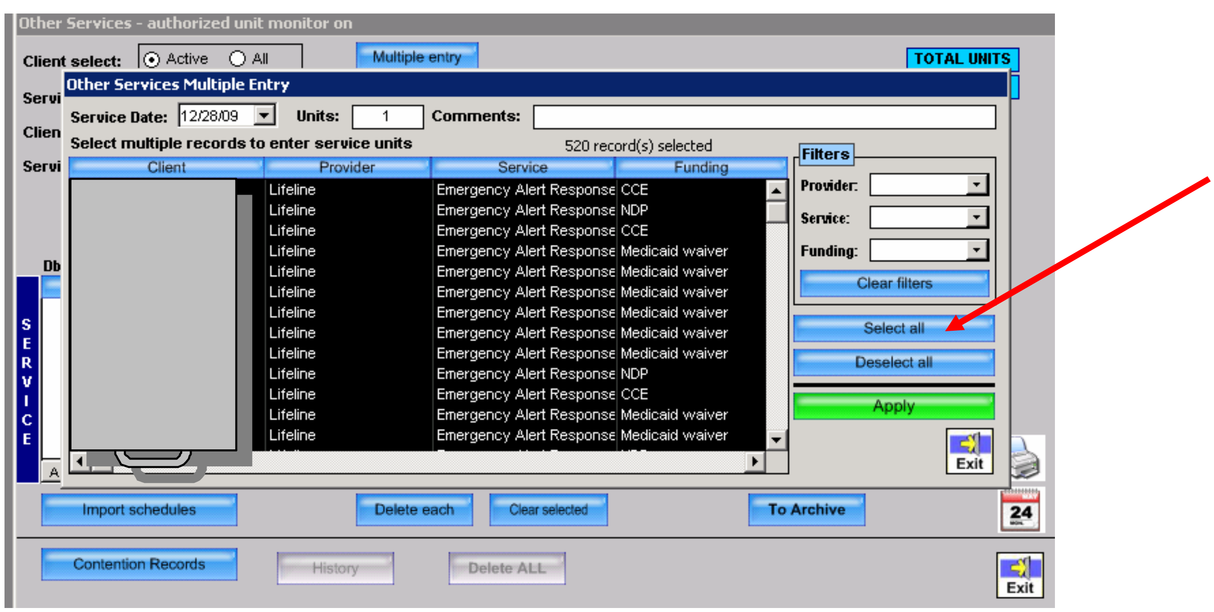
In this screen you will see a filter which allows you to refine your choice of clients by service or funding.



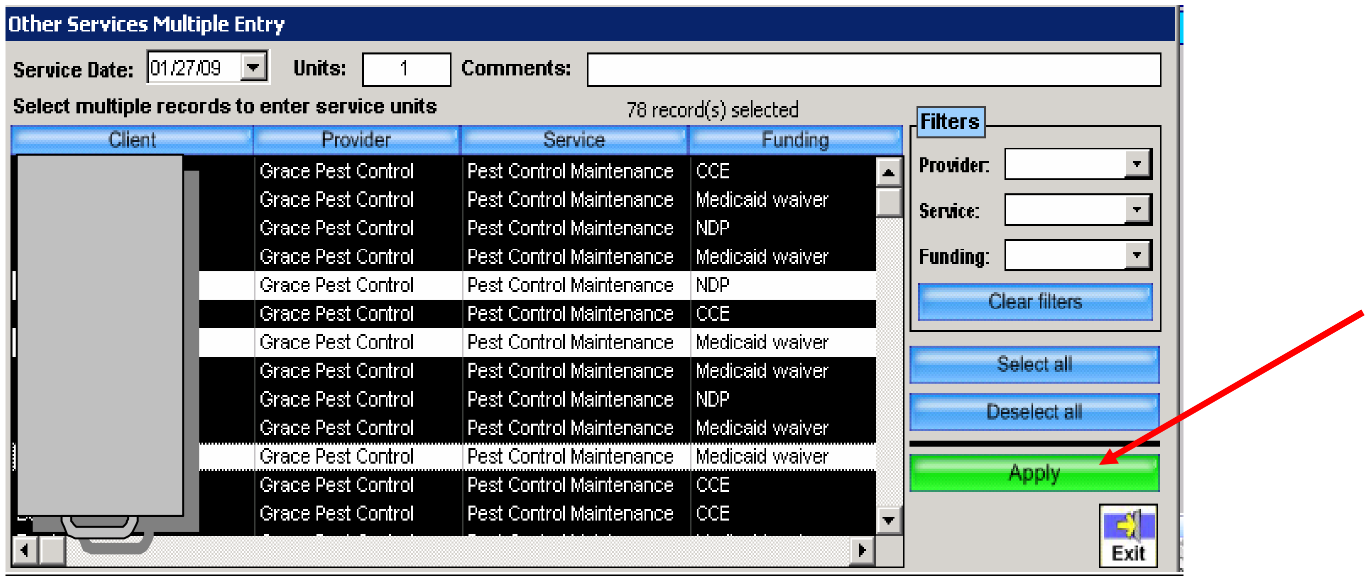
If you only want specific client names to transfer from the **'Other Services Multiple Entry'** screen, you have a choice of two different ways to select specific names:

1. Click on each individual name that you want to transfer. The name will be highlighted in black. When you have completed your selections, click the green **'Apply'** button. Only the names highlighted will transfer.

2. Or, if you click on the blue **'Select all'** button, all names will be highlighted in black, then you can **'de-select'** clients by clicking on the names you do not want to transfer.



The names you have **'de-selected'** will now have a white background:

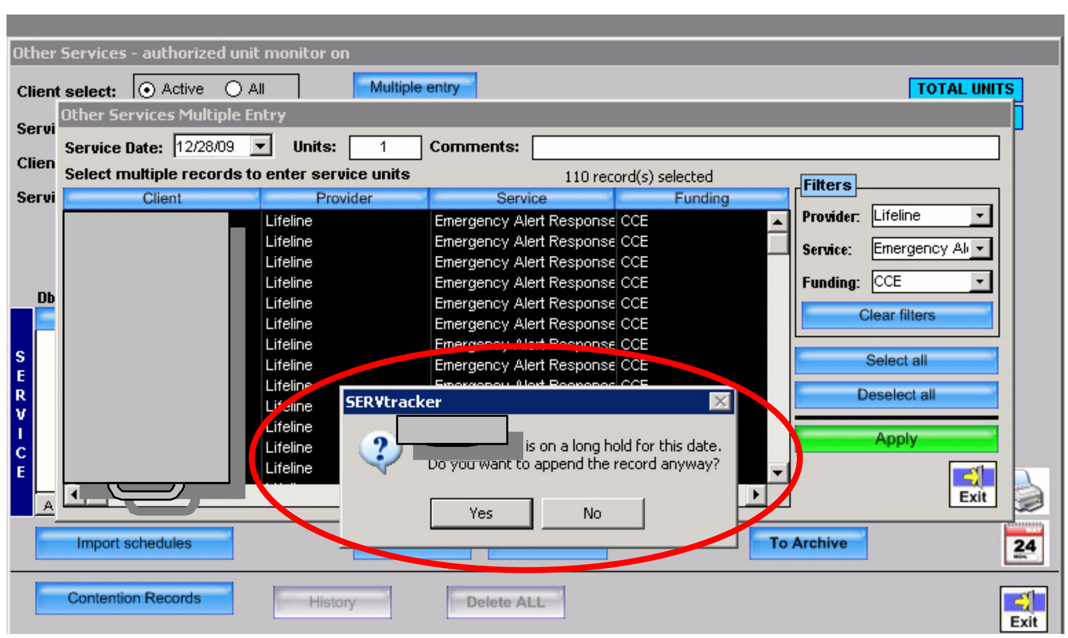


- Click the green **'Apply'** button, and <u>all</u> the clients who are **highlighted** in this window will transfer back to the **'Service Window.'**

<u>Clients On Long Hold</u>

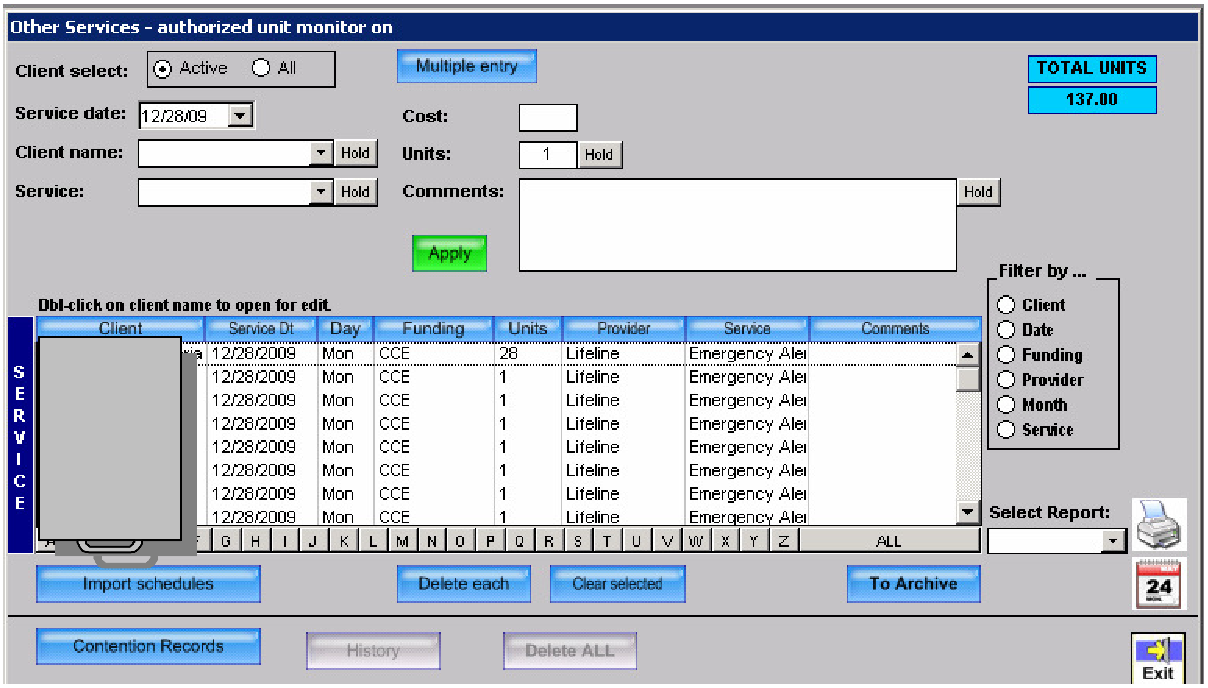
Clients' names that are on **'long hold'** will pop up individually. If the client did not receive service for the <u>entire month</u>, click the **'No'** button.

If the client received service in the month, even if only a limited number of days, click the **'Yes'** button to transfer the name back to the **'Service Window.'**

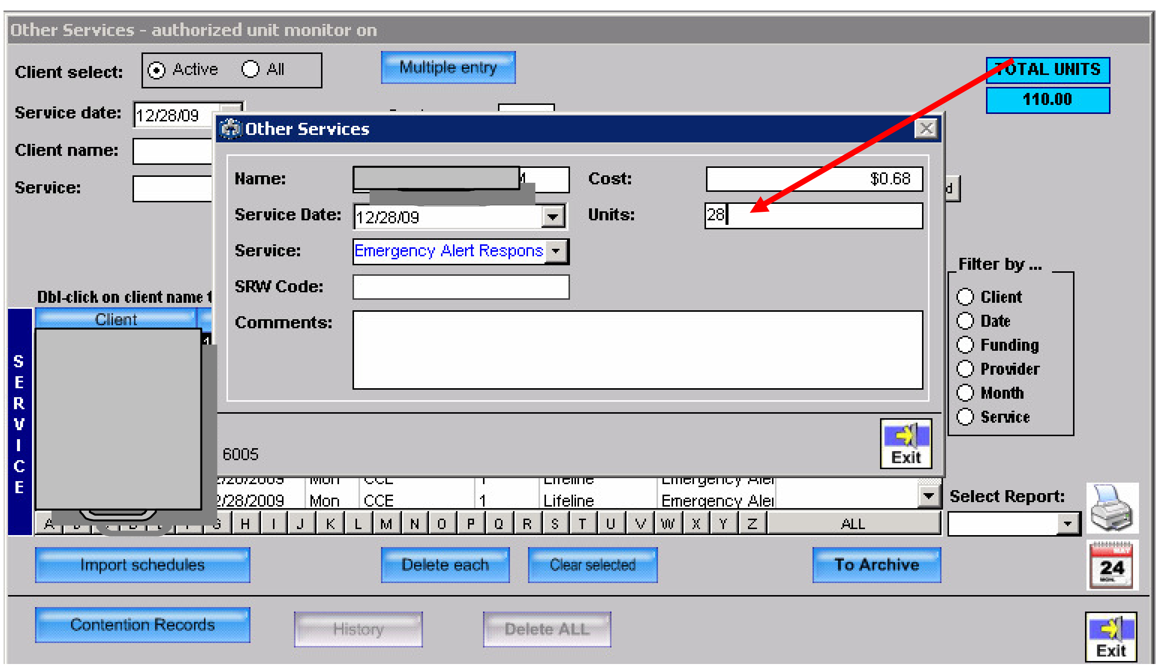


Editing A Line Of Service

Clients' names will now be transferred back to the **'Service Window'** and you will be able to **edit** the line of service to reflect the correct number of days the client received service.

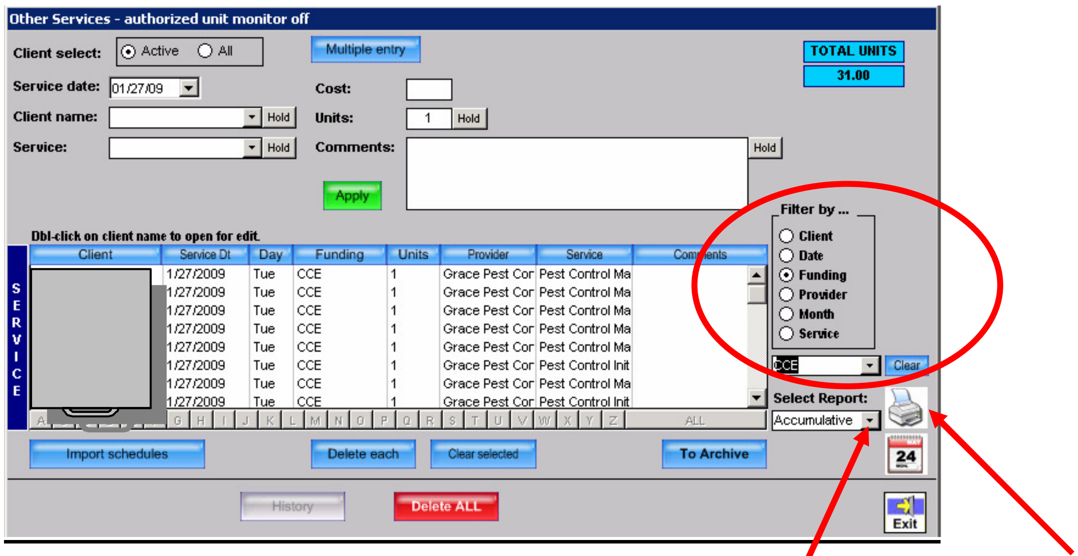


- Double click on the line of service that needs to be edited and you will see the following screen:



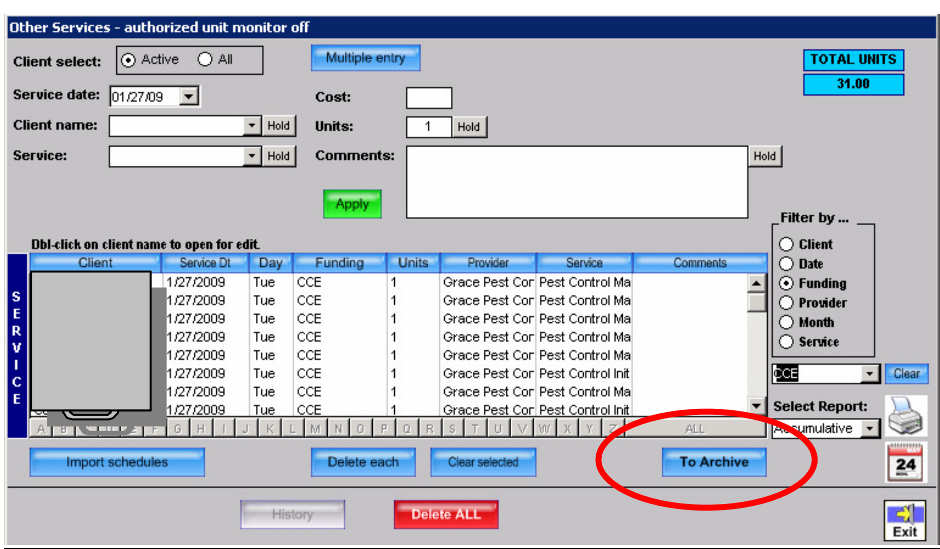
- Place your cursor in the **'Units'** field and enter the correct number of units.

Before posting to archive, you can filter the client list in the **'Service Window.'** You can also review and/or print reports. When you make a selection, a drop down field will appear below the filter box. Make your selection in the drop down field and when finished, click the blue **'Clear'** button to return to the full list.



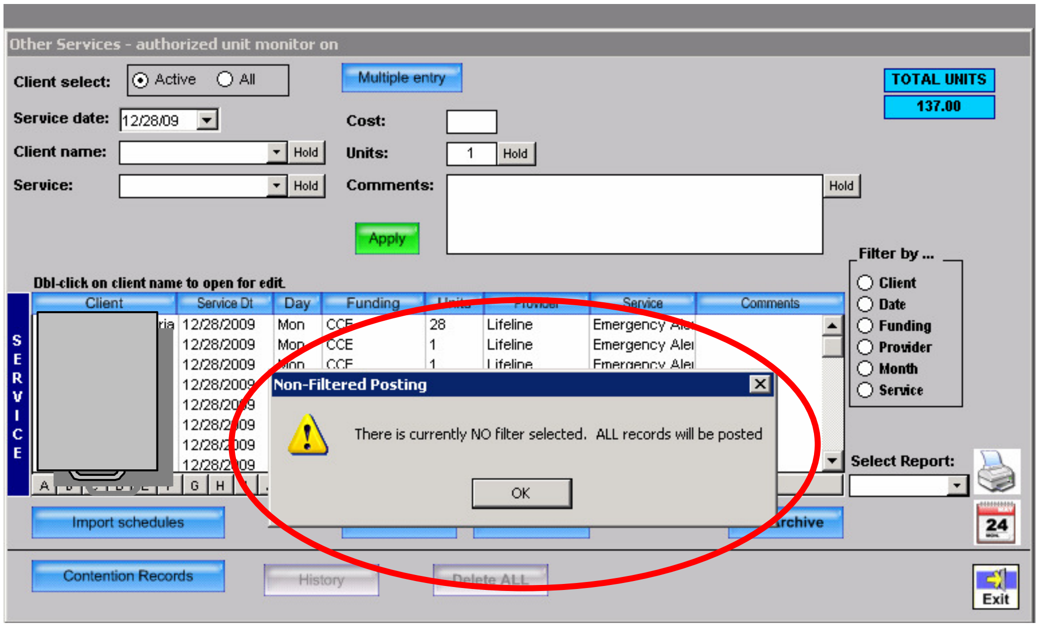
To print reports before they are archived, select the report and click the printer icon.

Posting To Archive

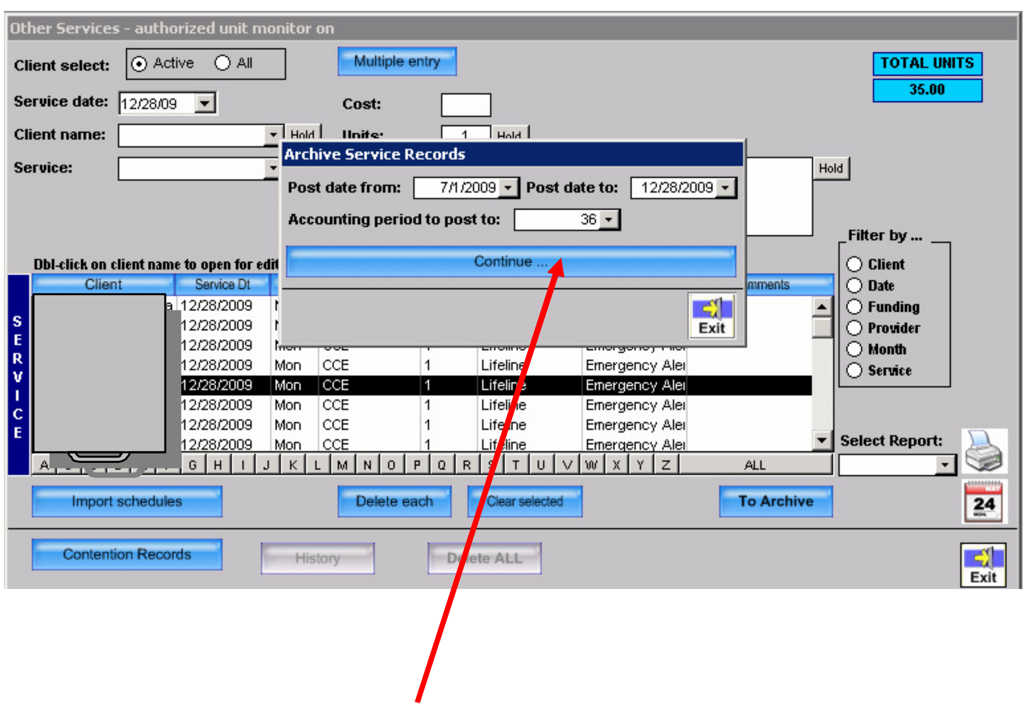


- Click the blue **'To Archive'** button.

The following screen pops up if you have not filtered the list:

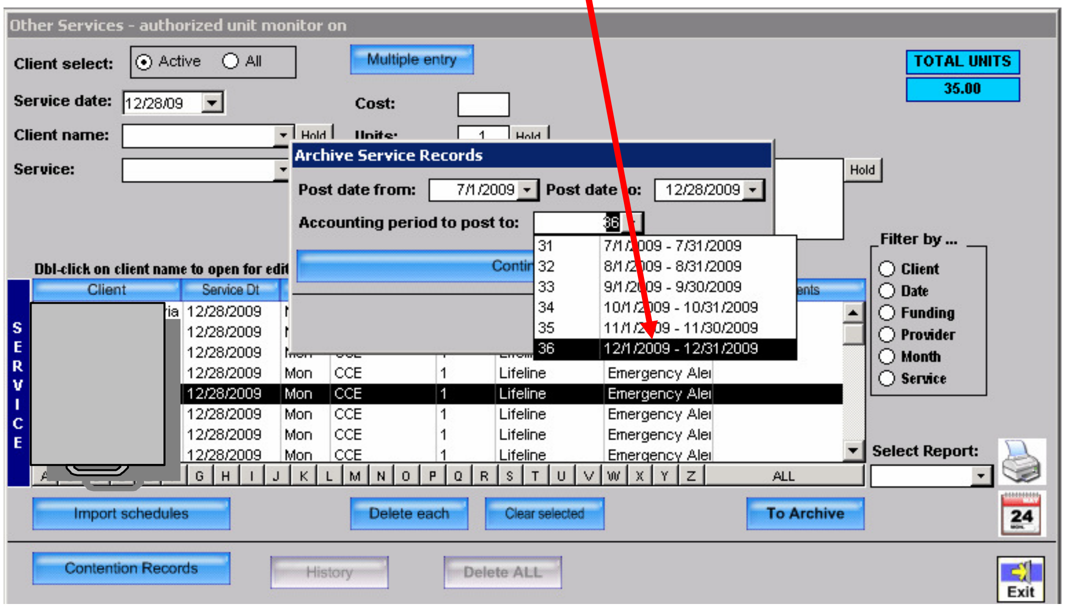


- Click **'Ok'**

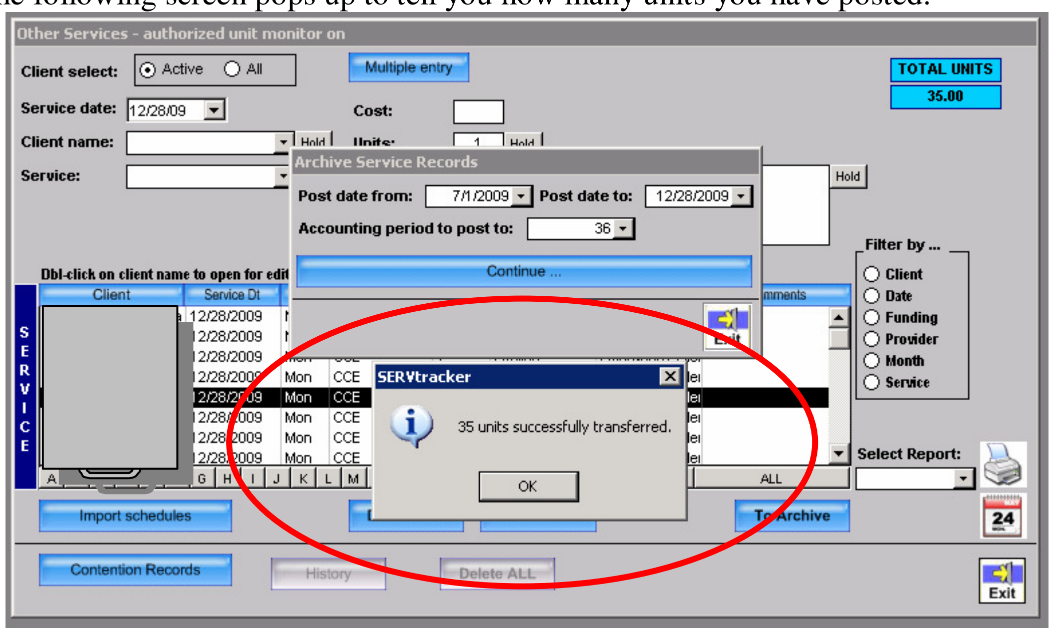


- Click the blue **'Continue'** button.

- Select the appropriate **'Accounting Period.'**



The following screen pops up to tell you how many units you have posted:



To print reports after they have been archived, you must go back to the **'Main Menu'** screen and select the **'Reports Module.'** **Follow instructions on page 46 – 50.**

If you review your archived reports and find an error, please call Quality Assurance. (see Table of Contents page) Corrections will be made so that you will have accurate invoice summaries.