Program of All-inclusive Care for the Elderly

(PACE)

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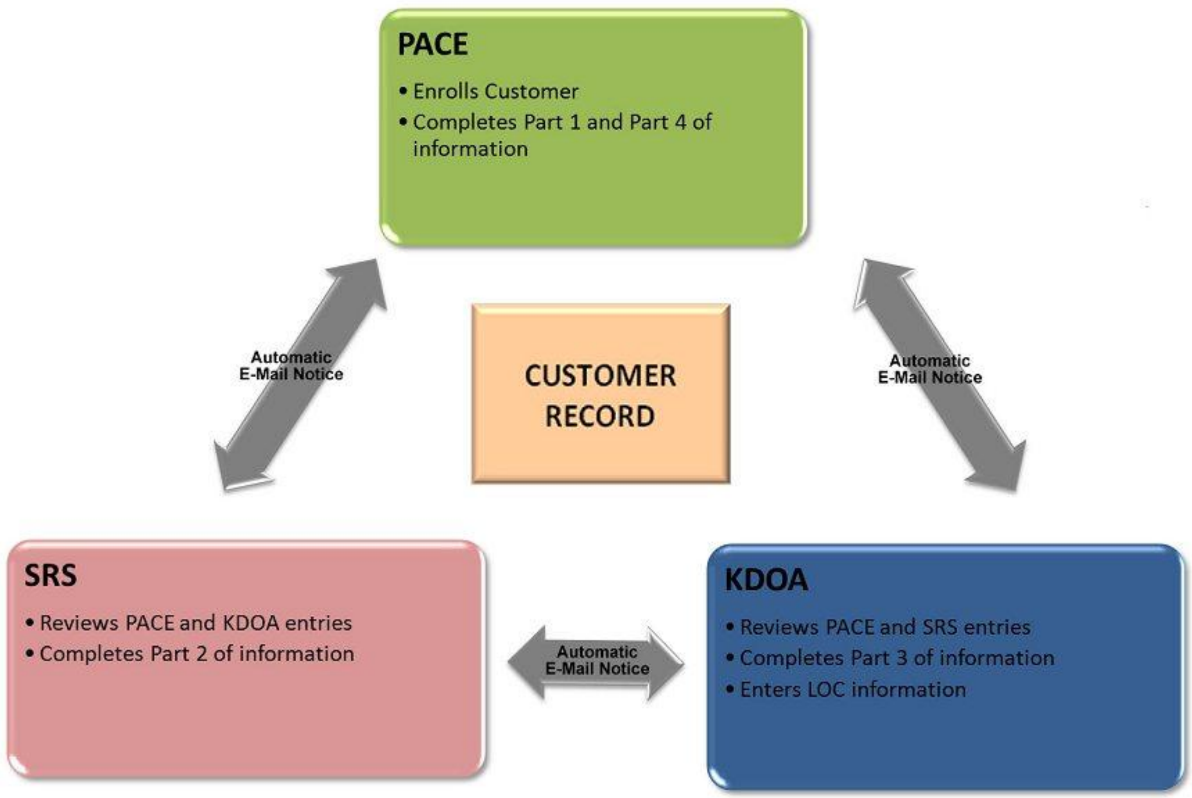
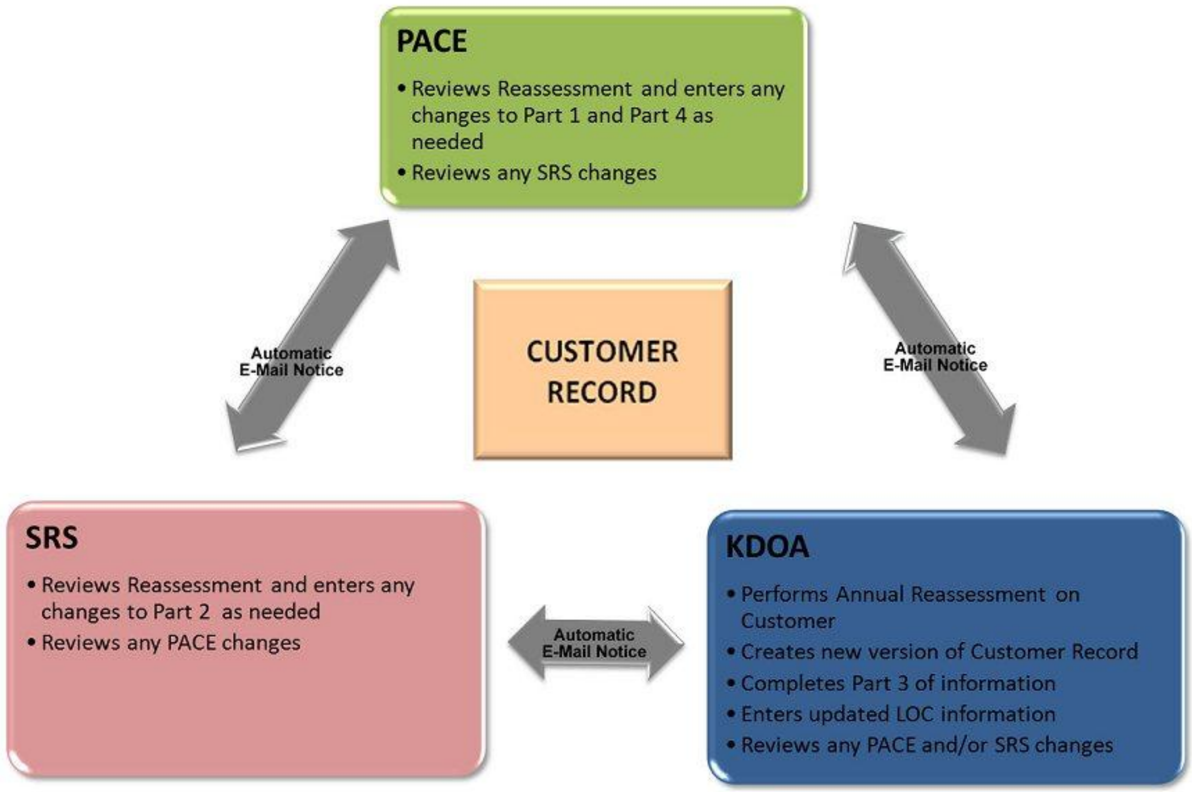
PACE Information Work Flow Process

NEW CUSTOMER



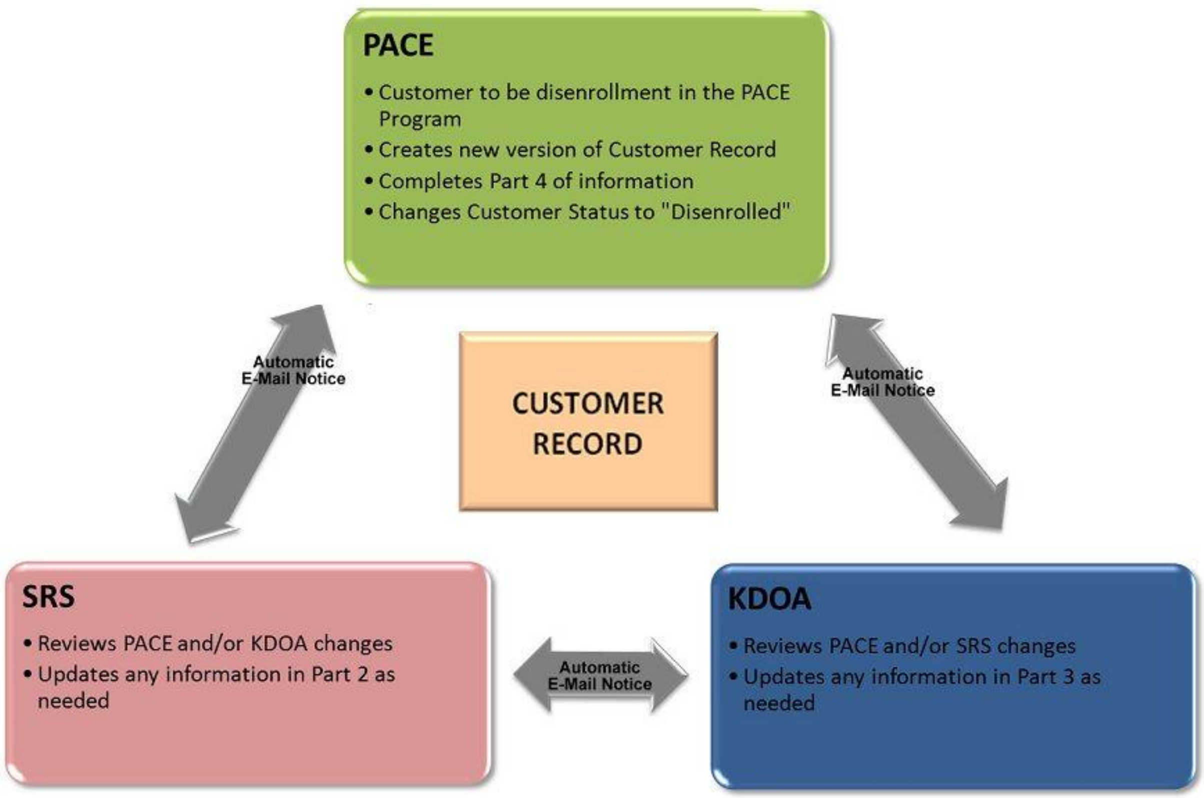
PACE Information Work Flow Process (continued)

REASSESSMENT



PACE Information Work Flow Process (continued)

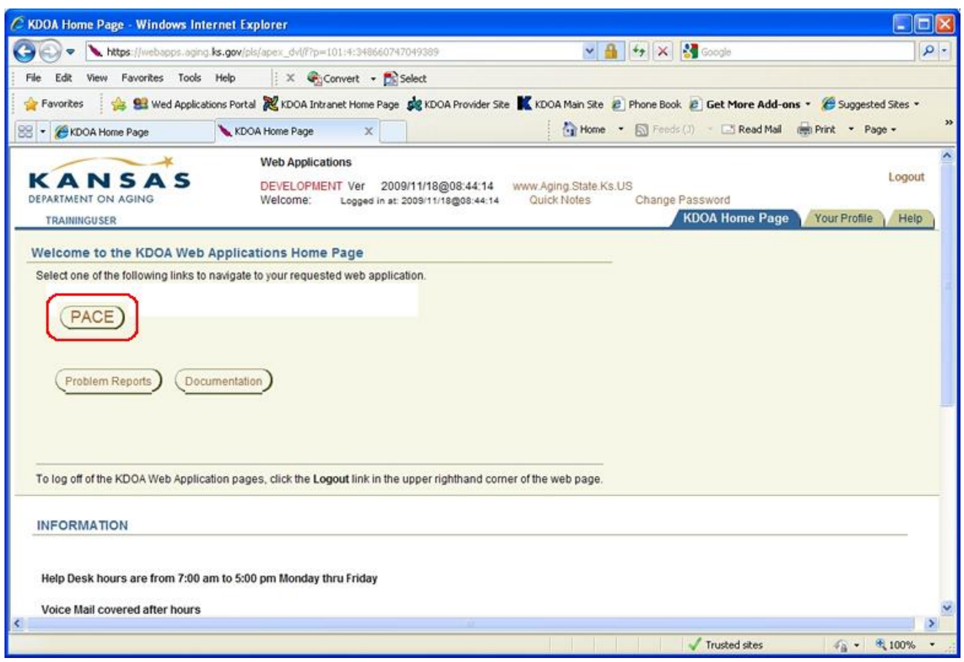
DISENROLLMENT



Accessing the Application

Introduction The PACE Application is a KDOA web application. Use Microsoft Internet Explorer browser to access the KDOA web application site. All KDOA web Applications are secured and encrypted.

How to The following are the steps to access the Main Menu of the PACE Web Application.

<table>
<tr><th>Step</th><th>Action</th><th>Results</th></tr>
<tr><td>1.</td><td>Sign-on to KDOA Web Applications with your username and password.</td><td>KDOA Home Page is displayed.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>2.</td><td>Click the "PACE" button.</td><td>The PACE Directory Listing will be displayed.</td></tr>
</table>

Directory Listing

Introduction The first page that you will be directed to is the Directory Listing. The customers that are listed on this directory are associated with your individual organization.

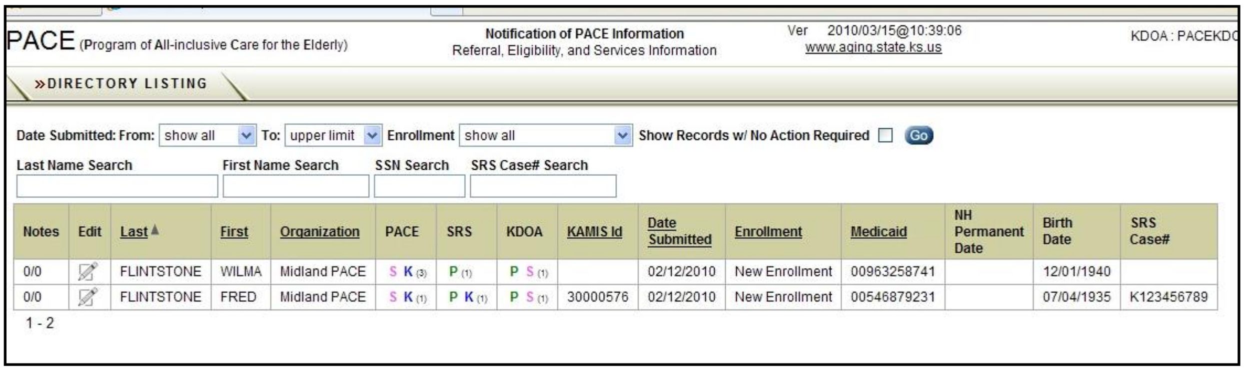


Table Columns	Action
Notes	Additional notes have been made
Edit	Opens the detailed customer information window
Last	Customers last name
First	Customers first name
Organization	The Organization that added the customer. PACE Organizations will see only their customers. SRS and KDOA will see all customers.
PACE	Indicates the organization that needs to review recent information on a customer. The indicators are divided into organizational groups. • **P = PACE** • **S = SRS** • **K = KDOA**
SRS	
KDOA	
KAMIS ID	Viewable to KDOA only
Date Submitted	Date PACE Application was submitted
Enrollment	Enrollment type – New Enrollment, Disenrollment, etc.
Medicaid	Medicaid ID number
NH Permanent Date	Date customer was placed in a nursing facility permanently.
Birth Date	Customers date of birth
SRS Case #	SRS Case number

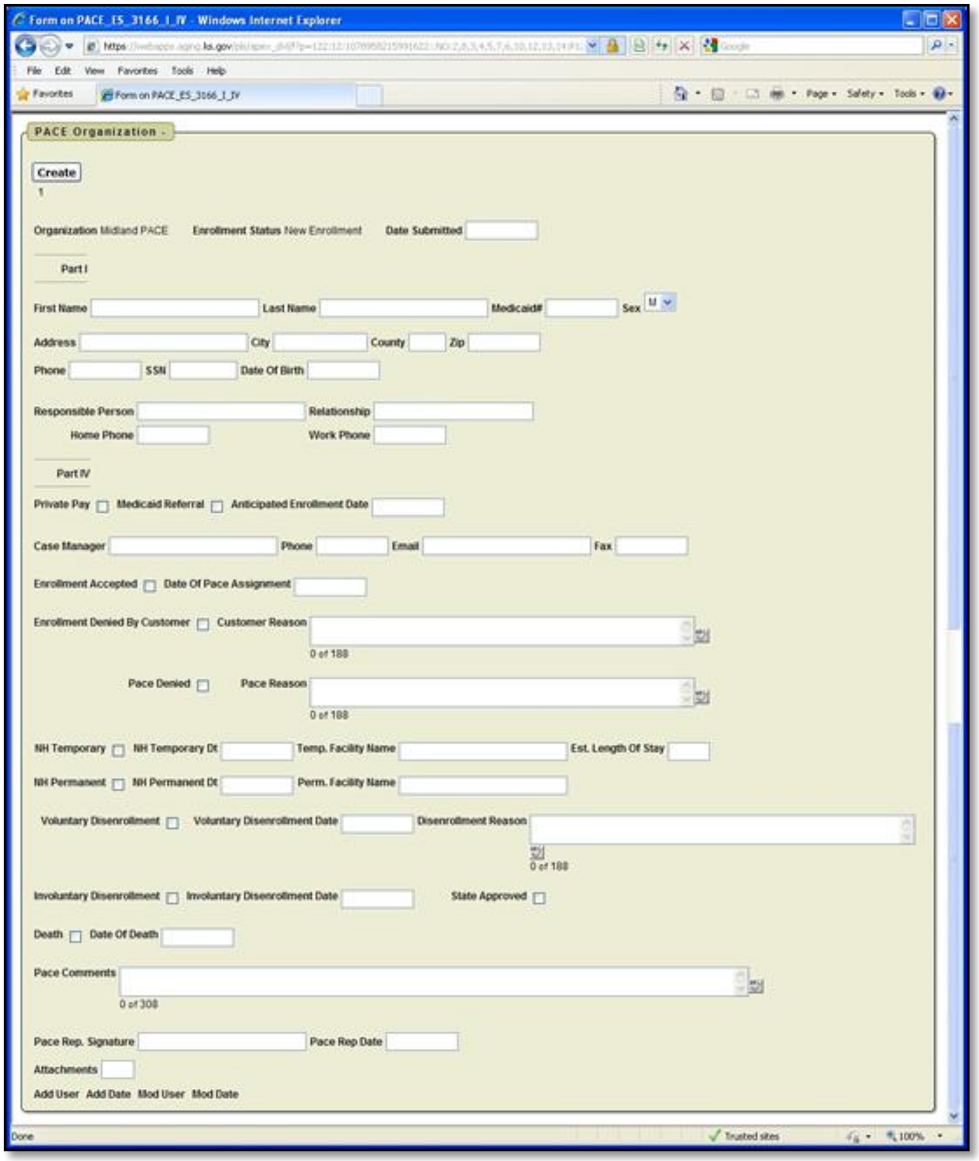
Search Process

Introduction The search process will only return customers that are associated with the users PACE organization. SRS and KDOA will be able to access all customers.

Criteria Selection Fields	Action
Date Submitted From	Show all – default. Or select a date. The dates listed in the drop down list are the application submission dates.
Date Submitted To	Upper limit – default. Or select a date. The dates listed in the drop down list are the application submission dates.
Enrollment	Enrollment Types: • Show all - default • New enrollment • Annual Re-assessment • Dis-enrollment
Show Records w/No Action Required	• **Unchecked** – will return only the customers that require action for the users organization. • **Checked** – will return all Customers associated with for the users organization.
Search by: • Last Name • First Name • SSN • SRS Case #	To search all customers be sure to click on the Show Records w/No Action Required checkbox.

PACE Organization – Create Customer

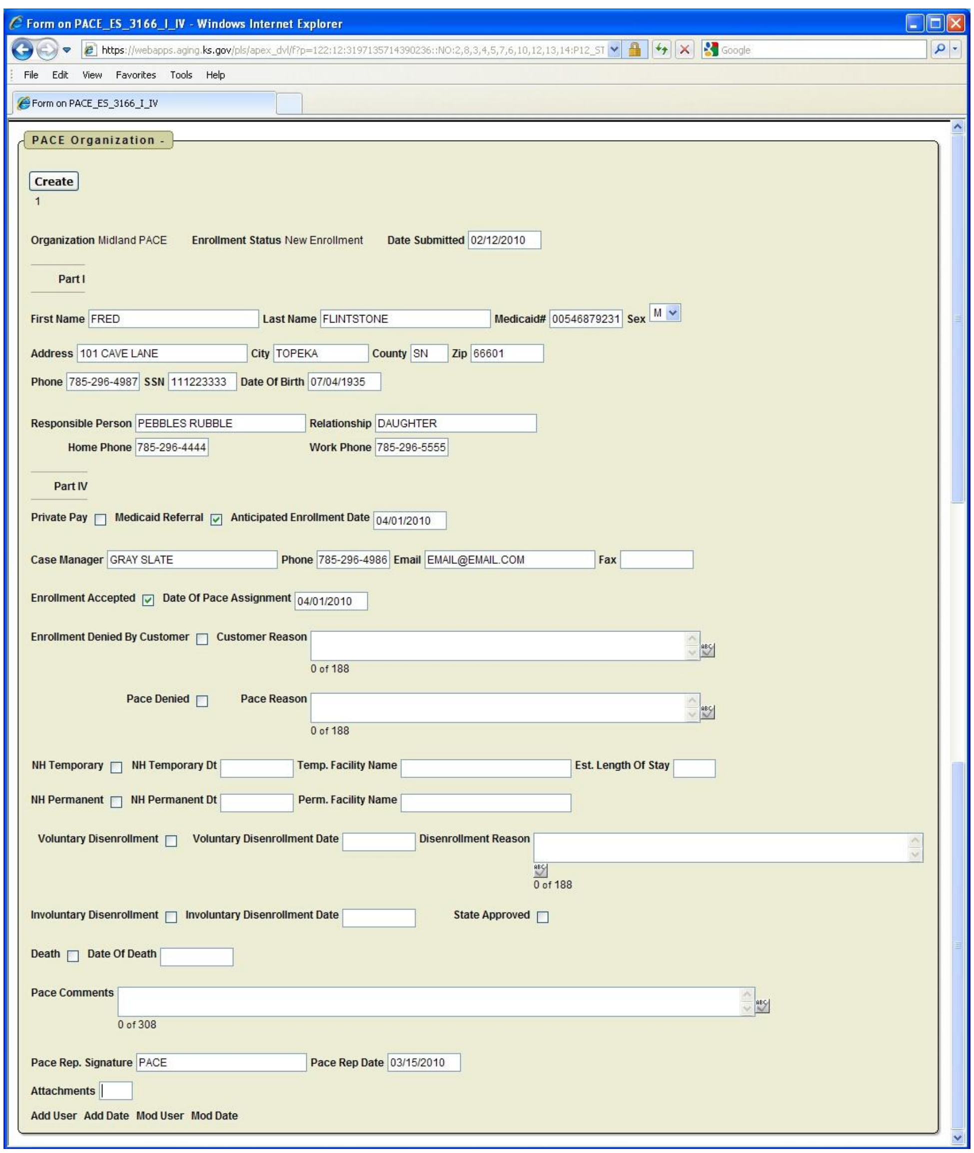
Introduction The below screenshot is the Customer Information Page.



PACE Organization – Create Customer (continued)

How to The following are the steps to create a new PACE customer.

Step	Action	Results
1.	Click on the **Create New Entry** button on the Directory Listing	Opens the PACE Organization section of the application.
2.	Data enter the customers information.	
3.	Click on the **Create** button.	Customer is added with an e-mail notification being sent to the SRS and KDOA contacts.

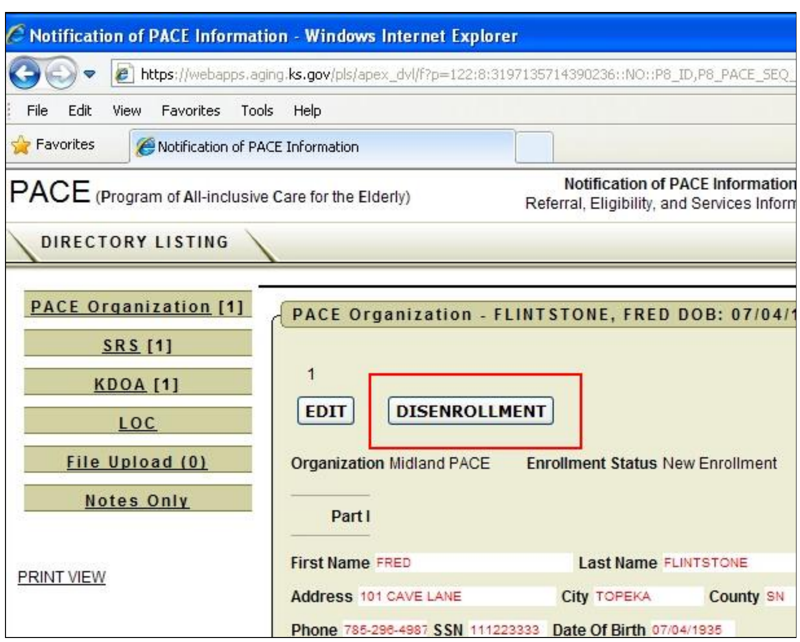


PACE Disenrollment

Introduction The PACE organization is the only one that can disenroll a customer from the program.

How to The following are the steps to disenroll

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	PACE Organization page is displayed.
2.	Click on the **Edit** button.	Fields become available.
3.	Change the appropriate information regarding the disenrollment.	
4.	Click on the **Apply** button.	Information is saved.
5.	Click on the **Disenrollment** button.	Changes the customer status to Disenrollment with an e-mail notification being sent to the SRS and KDOA contacts.



SRS Information

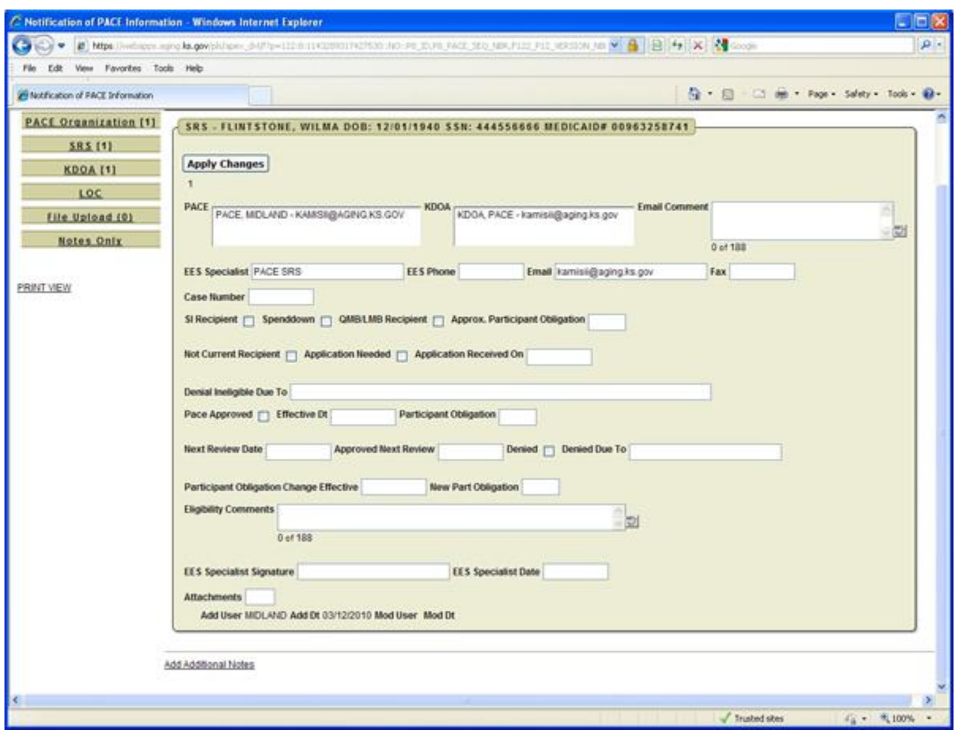
Introduction

Once the SRS contact is notified of the new customer or updated information, SRS's appropriate information will need to be either added or updated.

How to

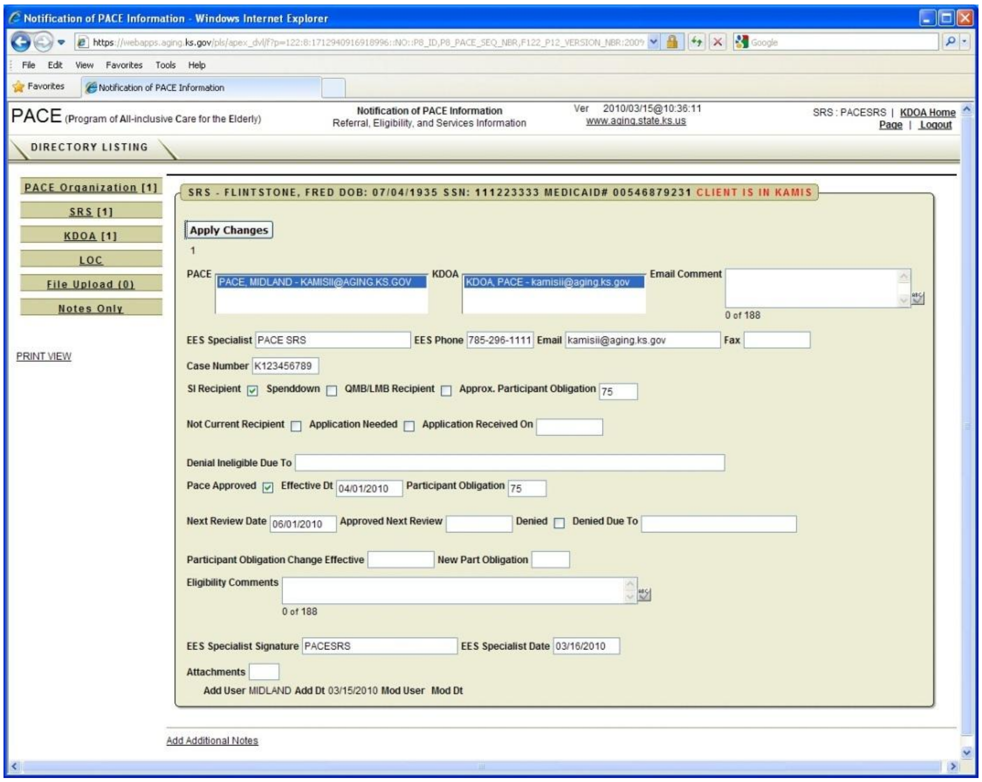
The following are the steps to add SRS information to the customers record.

<table>
<tr><th>Step</th><th>Action</th><th>Results</th></tr>
<tr><td>1.</td><td>Select the customer from the Directory.

May need to click on the Show Records w/No Action Required checkbox.</td><td></td></tr>
<tr><td>2.</td><td>Click on SRS menu link</td><td>Opens the SRS section of the application.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>3.</td><td>Select the PACE and KDOA contacts who will be notified of the information to be reviewed.</td><td></td></tr>
</table>

SRS Information (continued)

Step	Action	Results
4.	Data enter the customers information.	



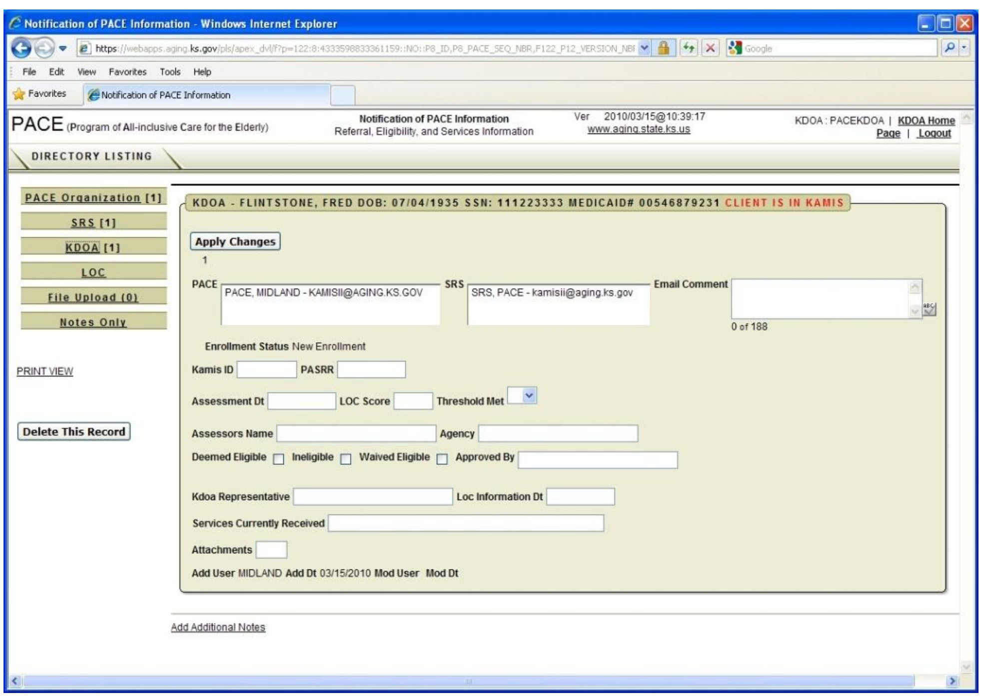
5.	Click on the **Apply Changes** button.	Information is added with an e-mail notification being sent to the PACE and KDOA contacts.

KDOA Information

Introduction Once the KDOA contact is notified of the new customer or updated information, KDOA's appropriate information will need to be either added or updated.

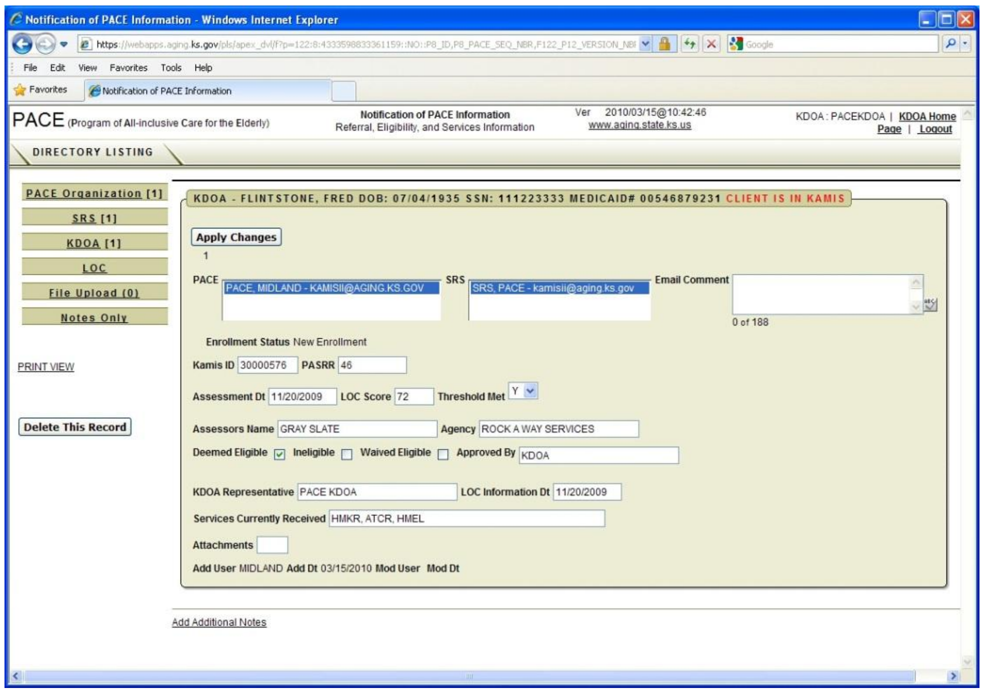
How to The following are the steps to add KDOA information to the customers record.

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	
2.	Click on **KDOA** menu link	Opens the KDOA section of the application.



3.	Select the PACE and SRS contacts who will be notified of the information to be reviewed.	

KDOA Information (continued)

Step	Action	Results
4.	Data enter the customers information.	
		
5.	Click on the **Apply Changes** button.	Information is added with an e-mail notification being sent to the PACE and SRS contacts.

Annual Reassessment – KDOA Only

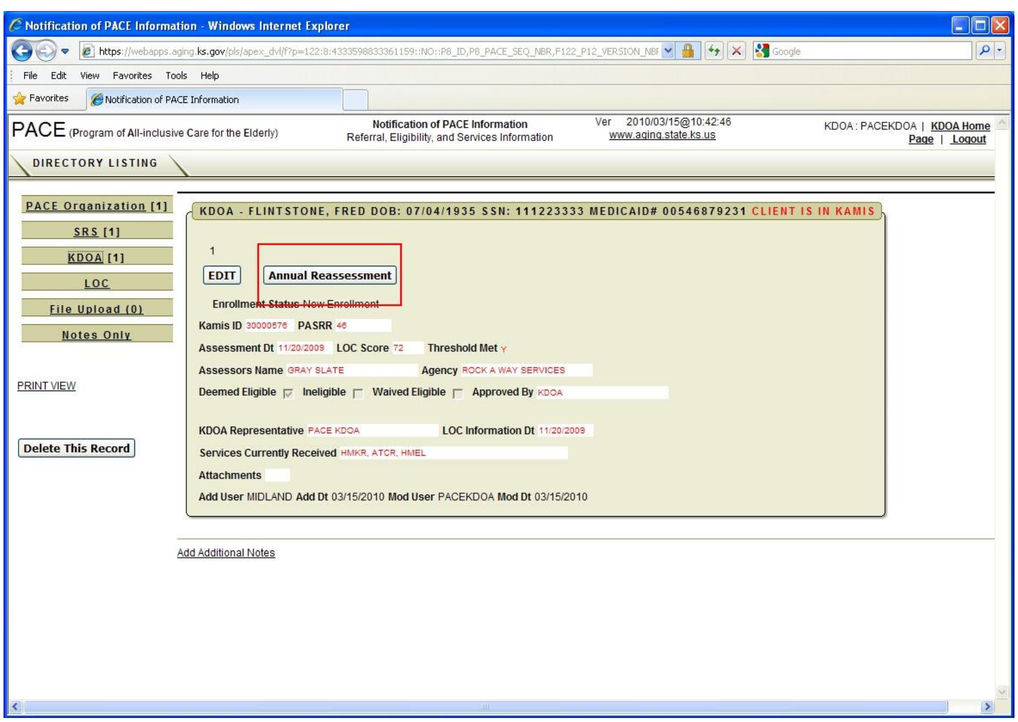
Introduction

Every year a new assessment is performed. At that time, the updated information can be added into the PACE application.

How to

The following are the steps to enter the customers annual reassessment information.

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	
2.	Click on the **KDOA** page on the menu.	KDOA information page is displayed.
3.	Click on the **Annual Reassessment**.	A new version of the KDOA Information page is created.
4.	Enter the new assessment information.	
5.	Click on the **Save** button.	Continue to the LOC page.



Delete This Record – KDOA Only

Introduction

KDOA has the ability to delete a customer record. Caution should be used, as this will permanently delete all the customer information. If the customer is deleted in error, the information will need to be recreated through the PACE Organization.

How to

The following are the steps to delete a customer record.

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	
2.	Click on the **KDOA** menu item.	KDOA information page is displayed.
3.	Click on the **Delete This Record** button located under the menu items.	Customer record is permanently deleted.

Level of Care (LOC)

Introduction

The level of Care information is from the assessment that KDOA performs. As this information is entered into the Kansas Aging Management Information System (KAMIS), the information can be automatically transferred into the PACE Application to the LOC page.

Criteria

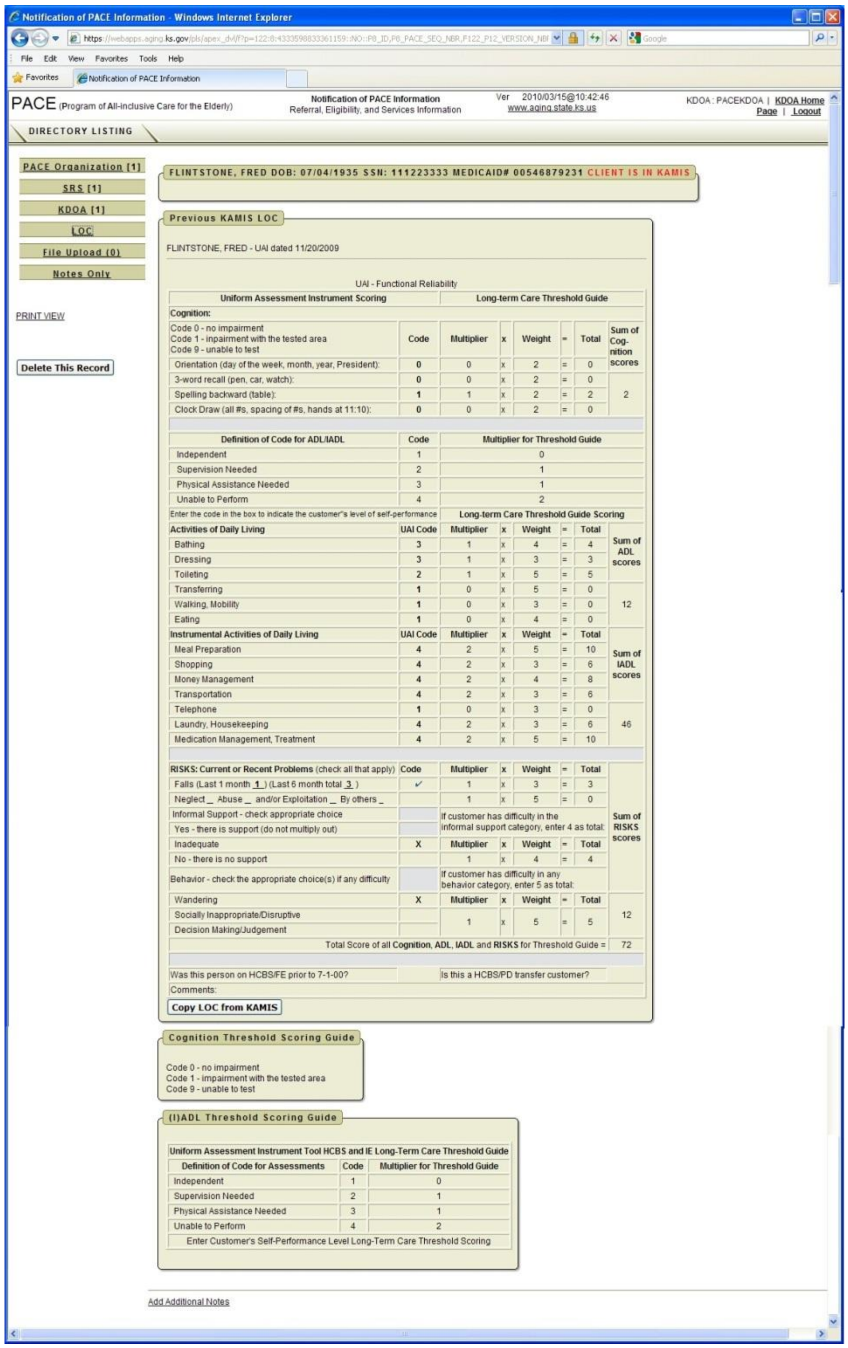
The information will be displayed for transfer to the PACE Application if it meets the following criteria matches:

- KAMIS ID
- Medicaid ID

Level of Care (LOC) (continued)

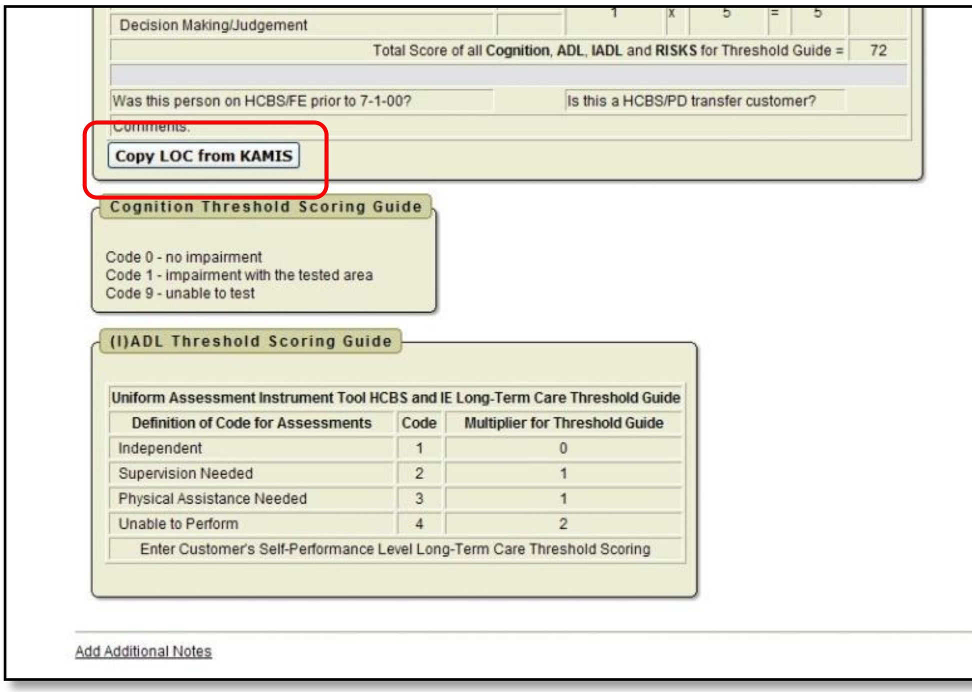
How to The following are the steps to complete the Level of Care information transfer.

Step	Action	Results
1.	Click on the LOC link in the menu.	Level of Care information is displayed.

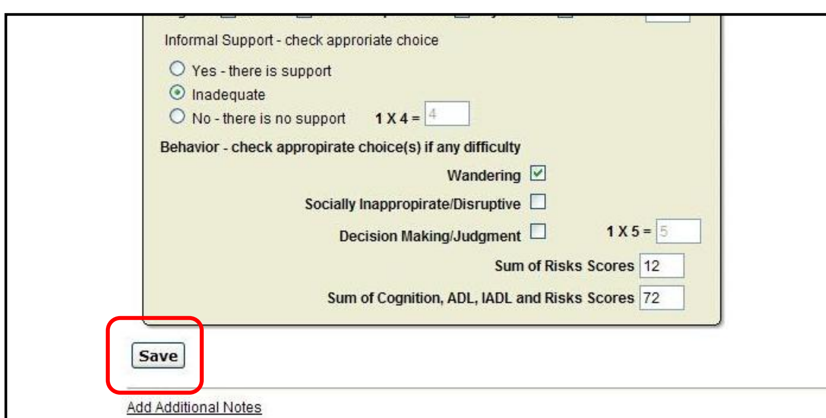


Level of Care (LOC) (continued)

Step	Action	Results
2.	Click on the **Copy LOC from KAMIS** button.	Information is copied.



Step	Action	Results
3.	Click on the **Save** button.	Completes the saving of the information to the customer record.

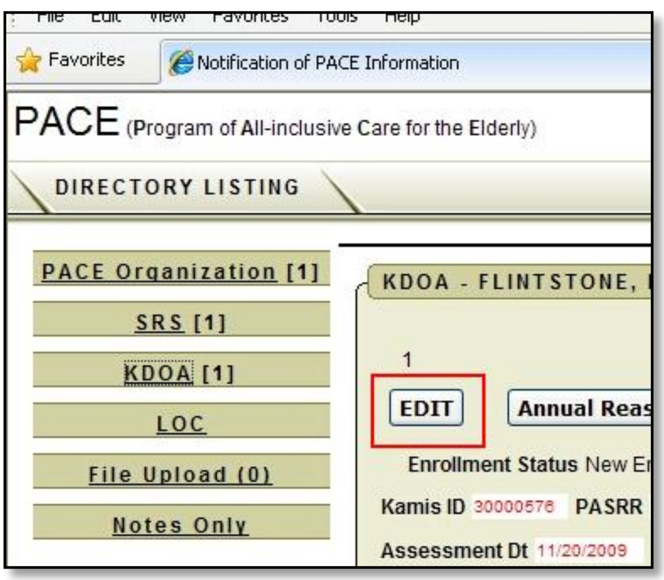


Editing Information

Introduction From time to time, new, updated or corrected information may need to be saved to the customer record. In order to enter this information, the customer information should be edited. When information is edited, a new version is created so that the information can be compared.

How to The following are the steps to edit the customers information.

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	
2.	Click on the KDOA page on the menu.	KDOA information page is displayed.
3.	Click on the **Edit**.	A new version of the KDOA Information page is created.



Step	Action	Results
4.	Enter the new, updated, corrected information.	
5.	Click on the **Save** button.	

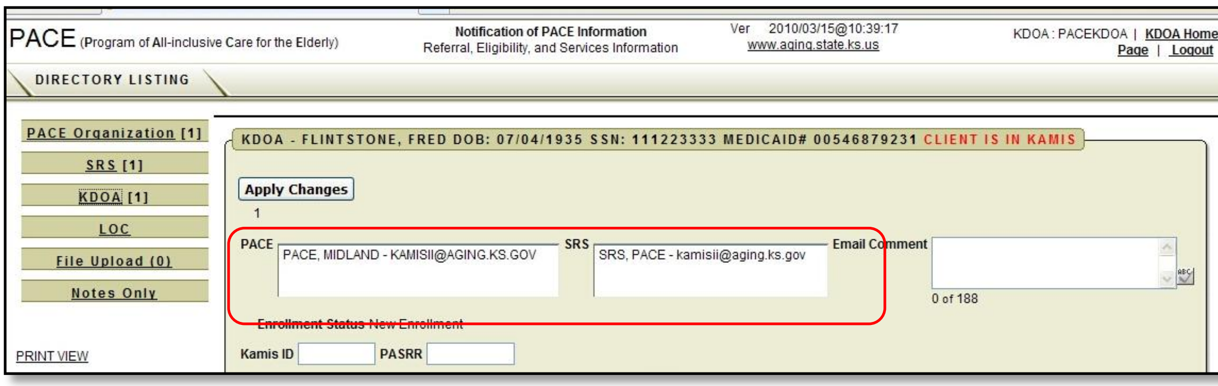
Reviewing Information

Introduction

In the course of information sharing between the PACE Organization, SRS and KDOA the following process has been developed.

E-Mail Notification Rank

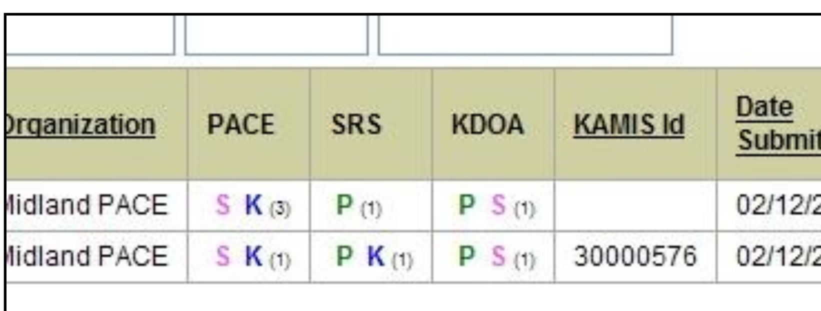
Upon the implementation of the PACE Application, each organization, PACE, SRS and KDOA will have indicated the e-mail notification ranking of the PACE Application users. The users will be listed under the appropriate fields to be selected on the SRS and KDOA pages.



Directory

The Directory will indicate the organization that needs to review recent information on a customer. The indicators are divided into organizational groups.

- P = PACE
- S = SRS
- K = KDOA
-



)rganization	PACE	SRS	KDOA	KAMIS Id	Date Submit
lidland PACE	S K (3)	P (1)	P S (1)		02/12/2
lidland PACE	S K (1)	P K (1)	P S (1)	30000576	02/12/2

Reviewing Information (continued)

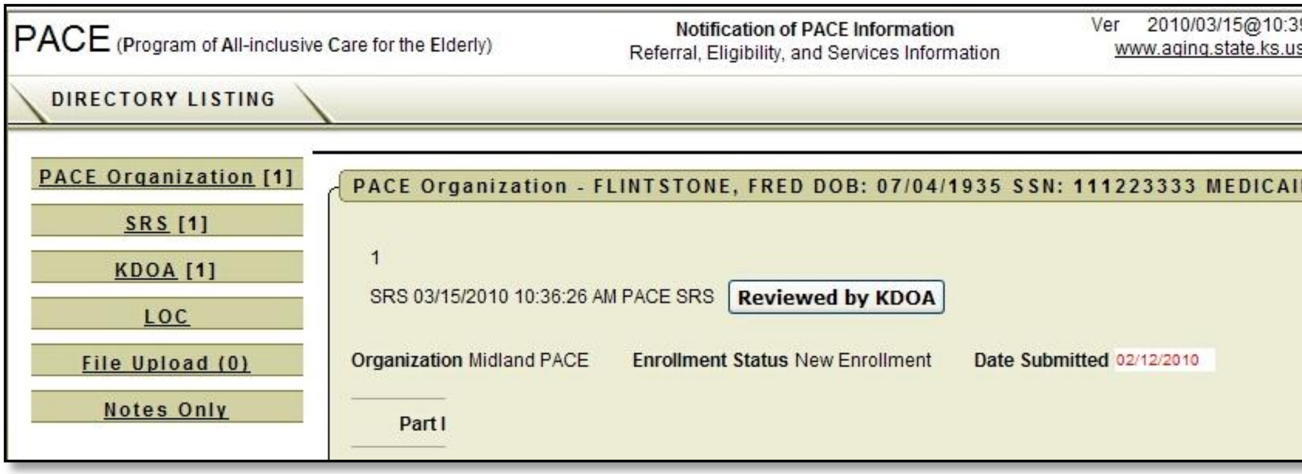
PACE Review When the PACE Organization creates a customer in the application, upon saving an email will be sent to both the default contacts of SRS and KDOA. Once those contacts sign-into the application they will be able to review the information. Once reviewed, the contact should click on the appropriate review button. The record will be time stamped with the date, time, person's name who reviewed the record.

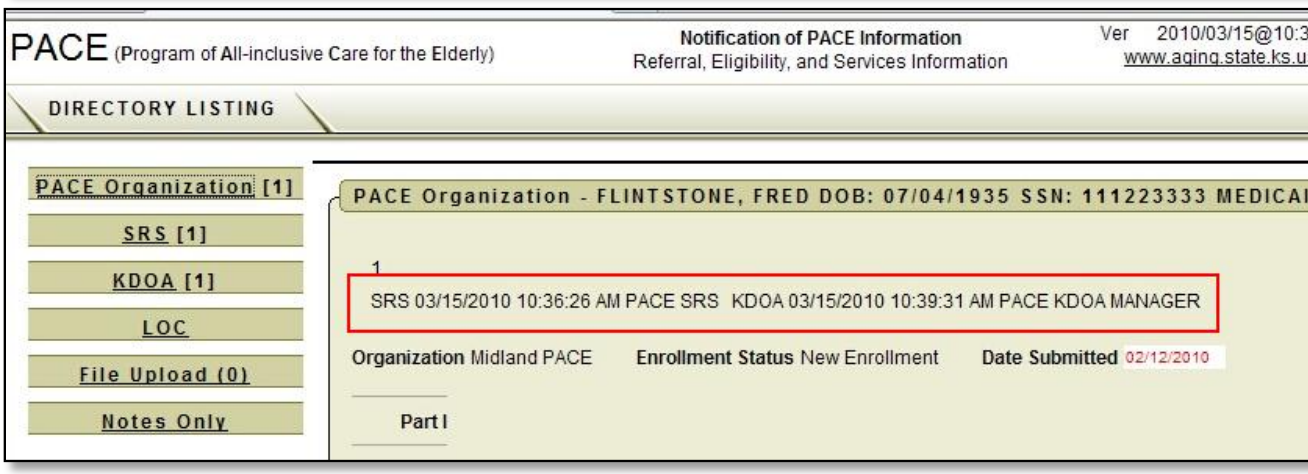
SRS Review When SRS completes or updates the information regarding the customer in the application, they have the option of who to send the e-mail notification to within the PACE Organization and KDOA. Once those contacts sign-into the application they will be able to review the information. Once reviewed, the contact should click on the appropriate review button. The record will be time stamped with the date, time, person's name who reviewed the record.

KDOA Review When SRS completes or updates the information regarding the customer in the application, they have the option of who to send the e-mail notification to within the PACE Organization and SRS. Once those contacts sign-into the application they will be able to review the information. Once reviewed, the contact should click on the appropriate review button. The record will be time stamped with the date, time, person's name who reviewed the record.

Reviewing Information (continued)

Examples Below are examples of the review option and the timestamp of the review.





Comparing Information Versions

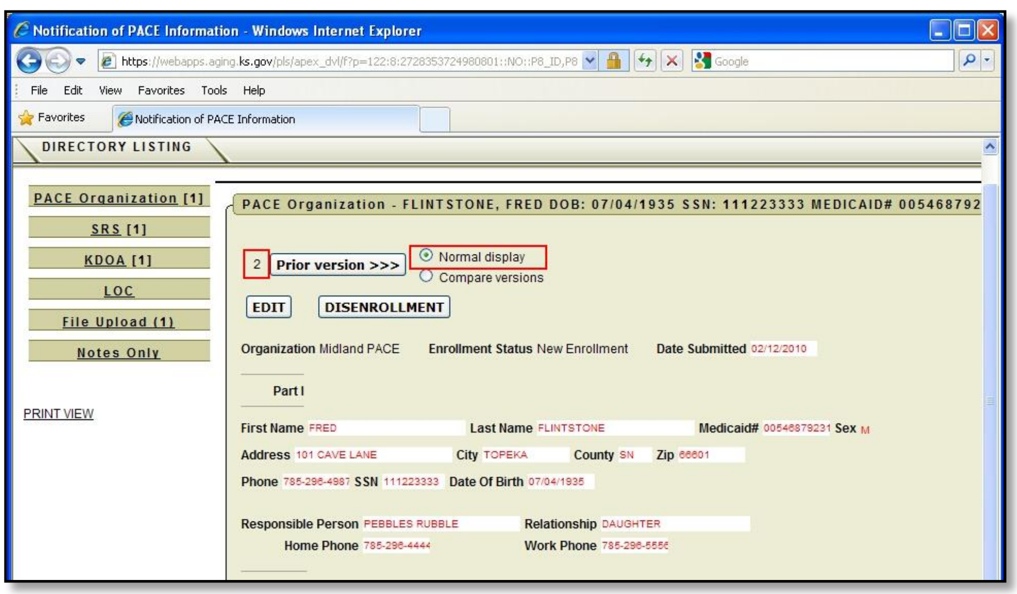
Introduction

After information has been changed it is possible to compare the changes between different versions.

How to

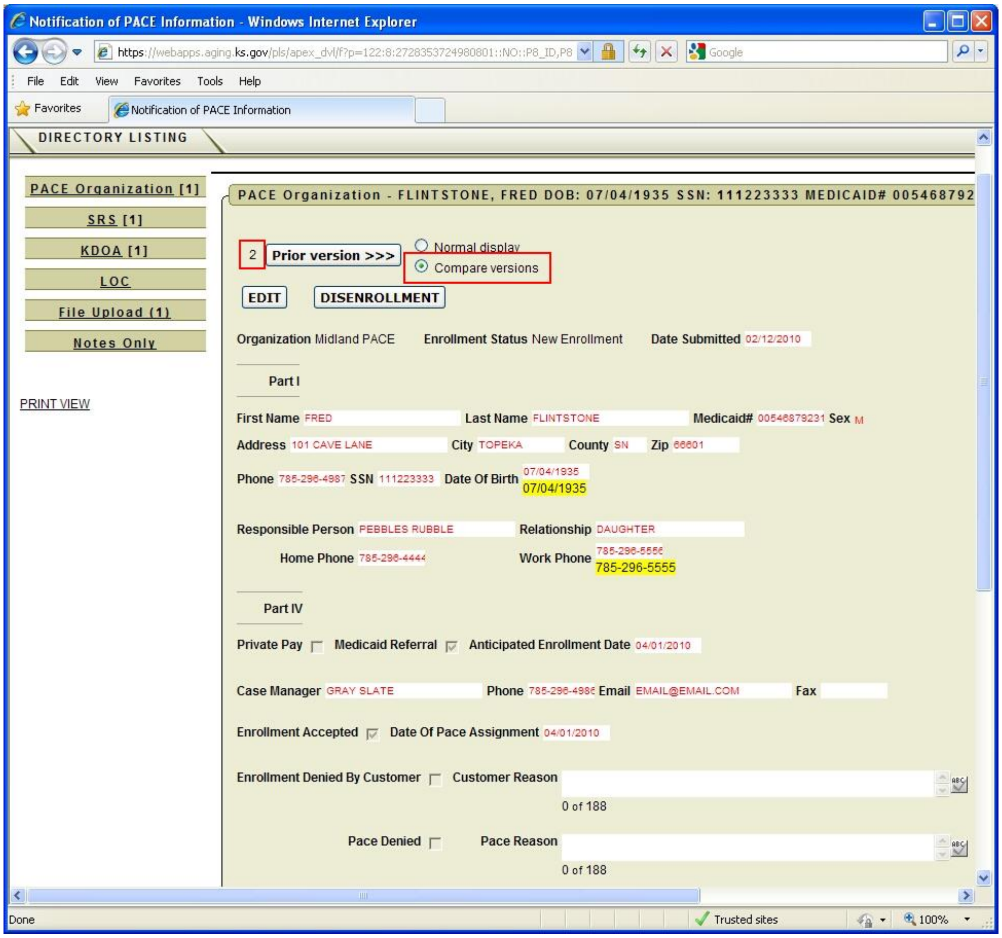
The following are the steps to compare versions of the customers information.

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	
2.	Click the page on the menu where the information is to be compared.	The normal display will be the default view.



Comparing Information Versions (continued)

Step	Action	Results
3.	Click on the **Compare Versions** radio button.	The changed information will display in yellow, with the yellow color representing the previous versions information.

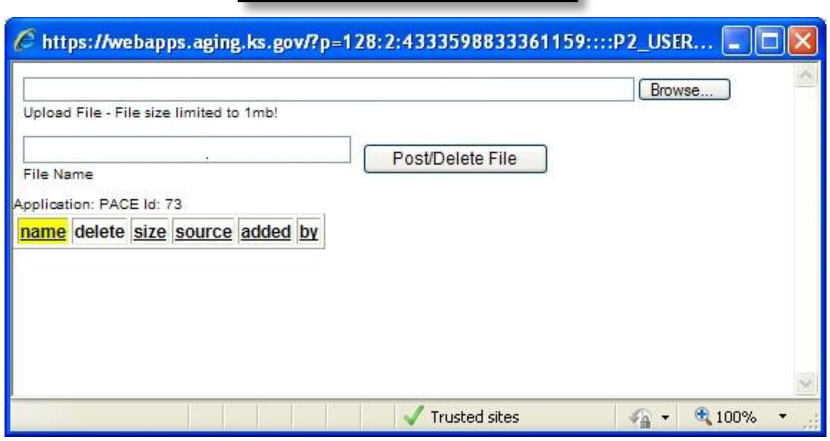


File Upload – Attaching File

Introduction At times, it is necessary for supporting information to be attached to the customers record. Most file types can be attached to a record in the PACE Application. All attached files are saved and located on the system database, therefore they are secured.

How to Follow the steps below to attach a file to a specific customers record.

Step	Action	Result
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	
2.	Click on the **File Upload** menu link	A separate Upload file window will display.



File Upload – Attaching File (continued)

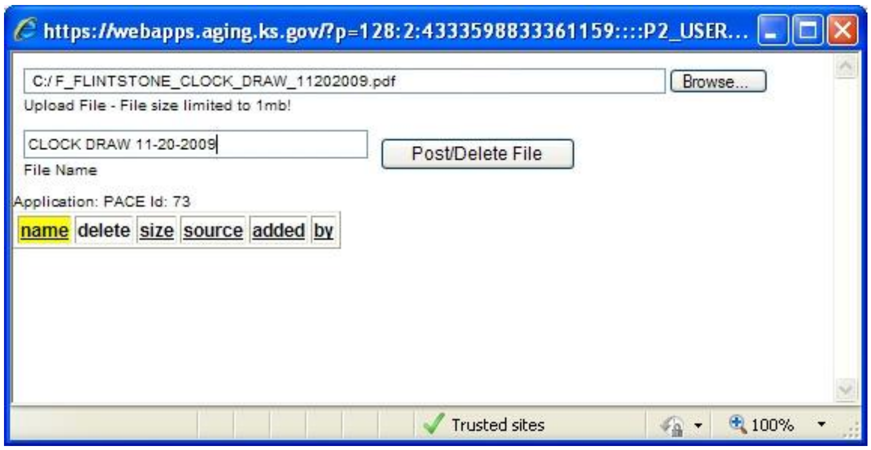
Step	Action	Result
3.	Click on the **Browse** button	Choose File to Upload dialog box displays.
4.	Browse to the saved document to be attached. Documents must be saved first. Either to the network or your desktop. (After upload and verification they can be deleted from the network or desktop)	For best results attach only the following type of documents:

Document Type	Action
Word	Convert documents to pdf before attaching
Excel	Convert documents to pdf before attaching
PDF (Acrobat)	Attach with no additional steps needed
Graphics	Attach JPG or GIF type graphics – do not attach TIF (Electronic FAX) files
E-Mail	Save the document first to the network or desktop.

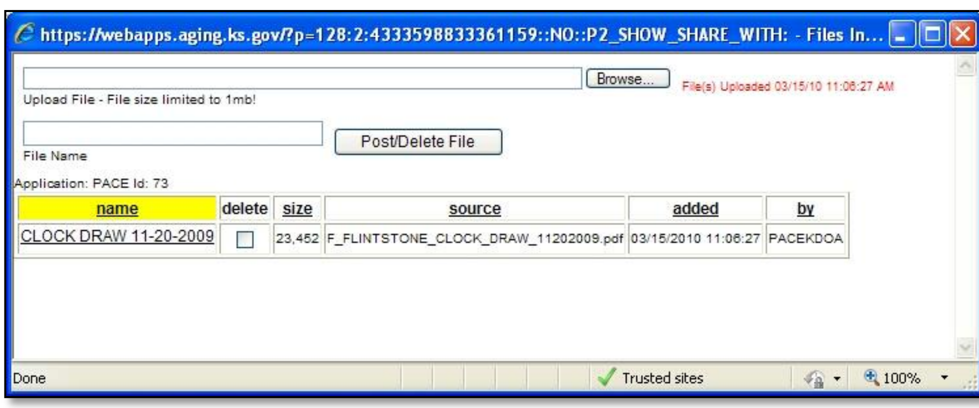
Step	Action	Result
5.	On the Choose File to Upload dialog box, click on **Open** button	File is selected and entered into the Upload File field.

File Upload – Attaching File (continued)

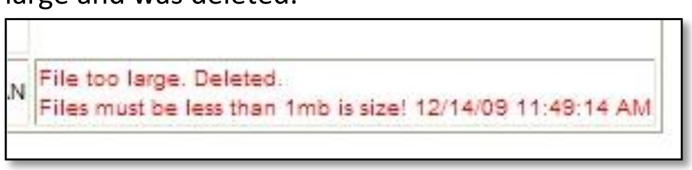
Step	Action	Result
6.	Enter a **Name** in the File Name field.	



Step	Action	Result
7.	Click on **Post/Delete File** button	Completes the upload. Table of the attached file(s) is displayed.



<u>Note</u>: If the file is too large a warning notice will be displayed that the file was too large and was deleted.

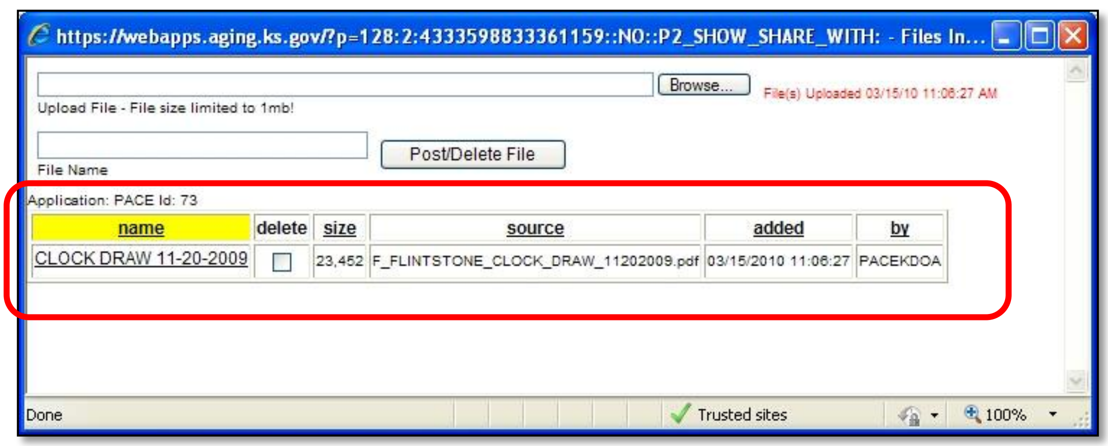


Step	Action	Result
8.	Once a document has been attached a number will display next to the File Upload menu link indicating the number of files that have been attached.	

File Upload – Viewing File

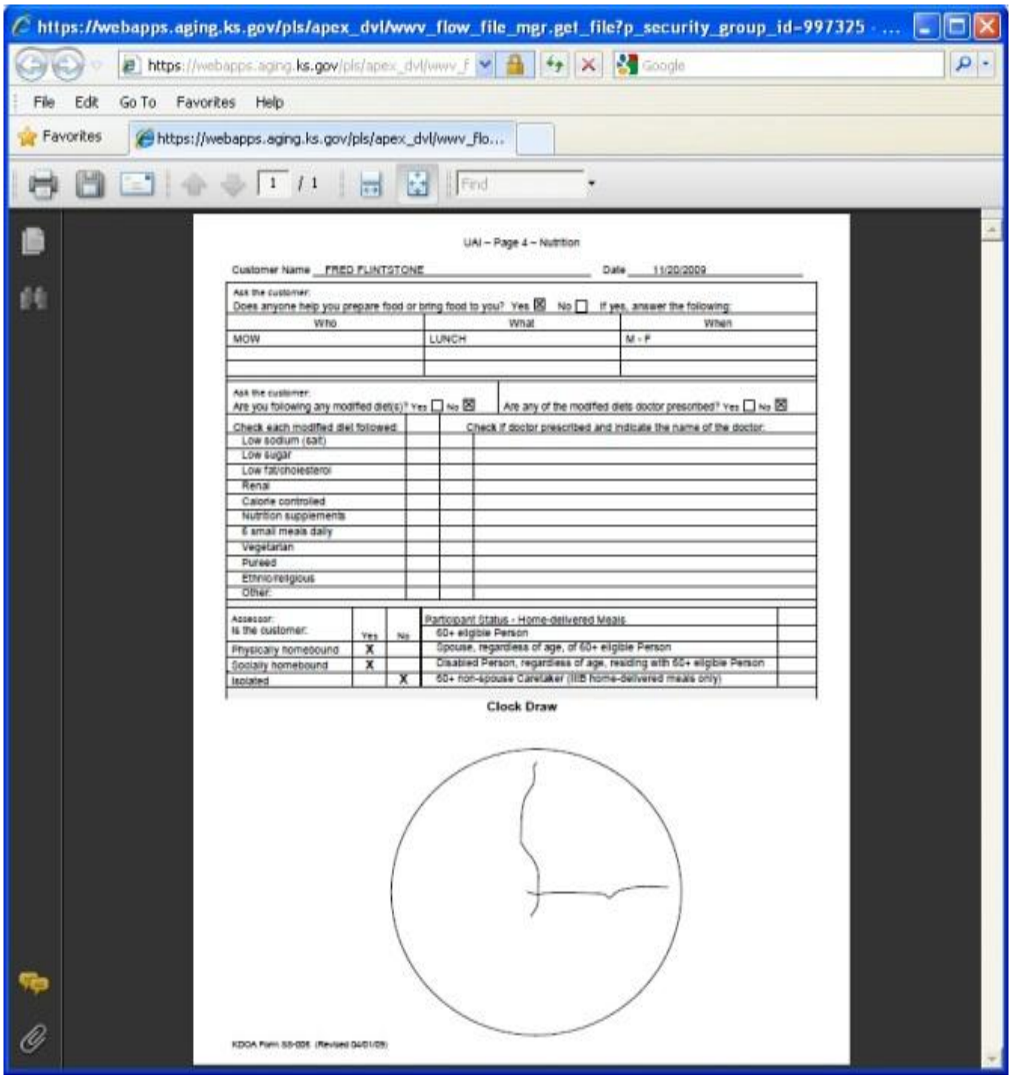
Introduction All attached files can be viewed once posted to the system.

How to Follow the steps below to view an attached file to a specific customers record.

Step	Action	Result
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	A separate Upload file window will display. The table will display all the attached files.
		
2.	Click on the **file name**	"CLOCK DRAW 11-20-2009" in the above example

File Upload – Viewing File (continued)

Step	Action	Result
3.	The document will open in a separate window.	



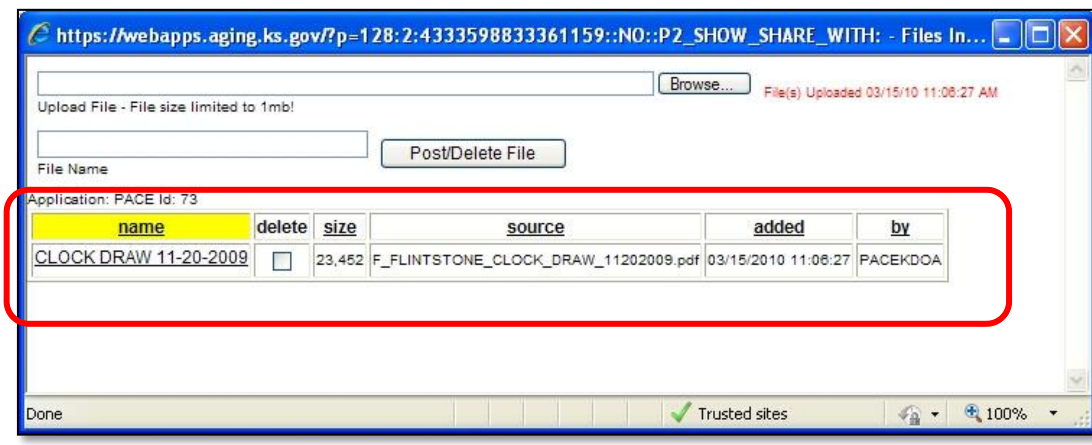
Step	Action	Result
4.	To return to the PACE Application, click on the "X" to close the separate browser window.	

File Upload – Deleting File

Introduction Any attached files can be deleted from the PACE Application by the person who attached the file to the customers record.

How to Follow the steps below to delete an attached file to a specific customers record.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1.</td><td>Select the customer from the Directory.

May need to click on the Show Records w/No Action Required checkbox.</td><td>A separate Upload file window will display. The table will display all the attached files.</td></tr>
<tr><td colspan="3">


</td></tr>
<tr><td>2.</td><td>Click on the check box under the delete column. Click the Post/Delete File button.</td><td>File is deleted from the system.</td></tr>
<tr><td>3.</td><td>To return to the PACE Application, click on the "X" to close the separate browser window.</td><td></td></tr>
</table>

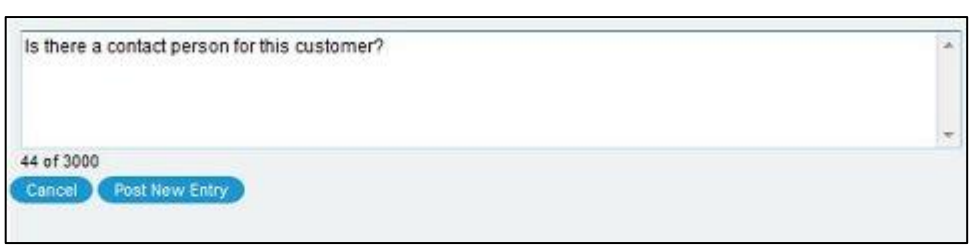
Additional Notes

Introduction The Additional Notes section contains a communication tool to post notations on the specific customers record.

How to The following are the steps to add a note to a customers record.

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	
2.	Click on the **Notes Only** menu	Notes page is displayed.
3.	Click on the **Additional Notes** link.	All notes are displayed or a new note can be added.

Step	Action	Results
4.	Click on the **Post Additional Information** button.	Notes comment box is displayed.
5.	Type comment	
6.	Click on the **Post New Entry** button.	Note is posted to the Additional Notes listing.



Additional Notes - Reading(continued)

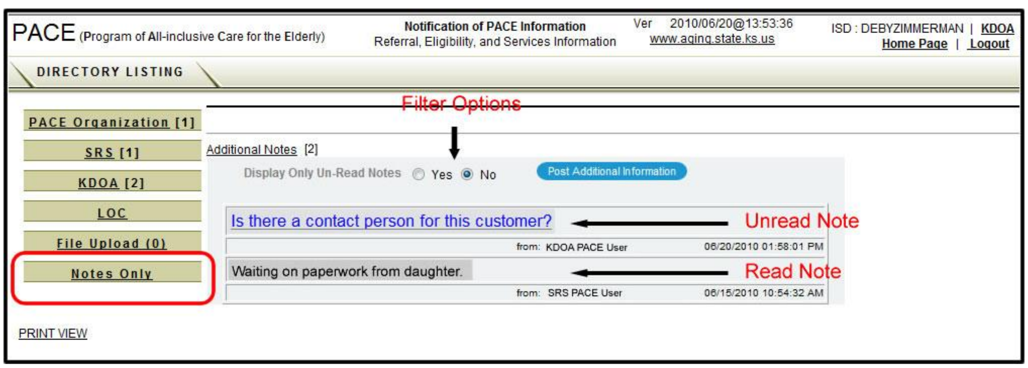
Introduction

Once the note is posted, the note will display in large blue letters which indicates that the note has not been read.

How to

The following are the steps to read a note on a customers record.

Step	Action	Results
1.	Click on the Notes Only Menu and then click on the **Additional Notes** link.	All notes are displayed or a new note can be added.
2.	Click on the blue text of a note.	Note format is changed to regular text and is marked as read.

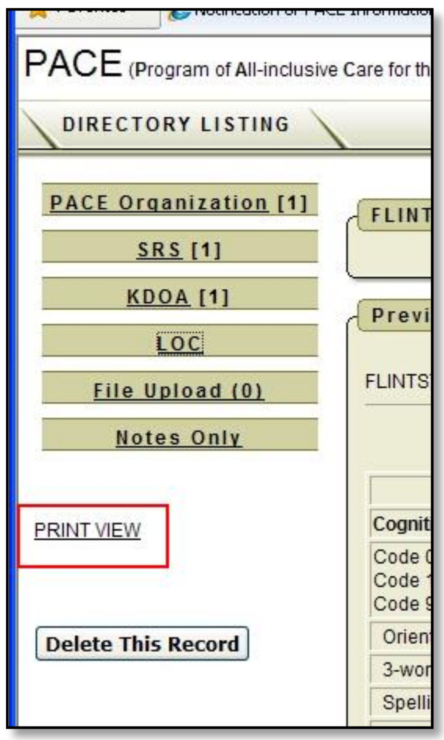


Print View

Introduction It may be necessary to print the customers record information.

How to The following are the steps to print the customers record.

Step	Action	Results
1.	Select the customer from the Directory. May need to click on the Show Records w/No Action Required checkbox.	



Step	Action	Results
2.	Click on the Print View link	A web page listing all pages ready for printing from the browser. Select File – Print.

Closing the Application

Exiting the Application	To exit the application, click on the red "X" button in the upper right corner of the browser window. This will allow the KDOA Web Application Home Page to be displayed.