

# Program of All-inclusive Care for the Elderly (PACE)

## Table of Contents

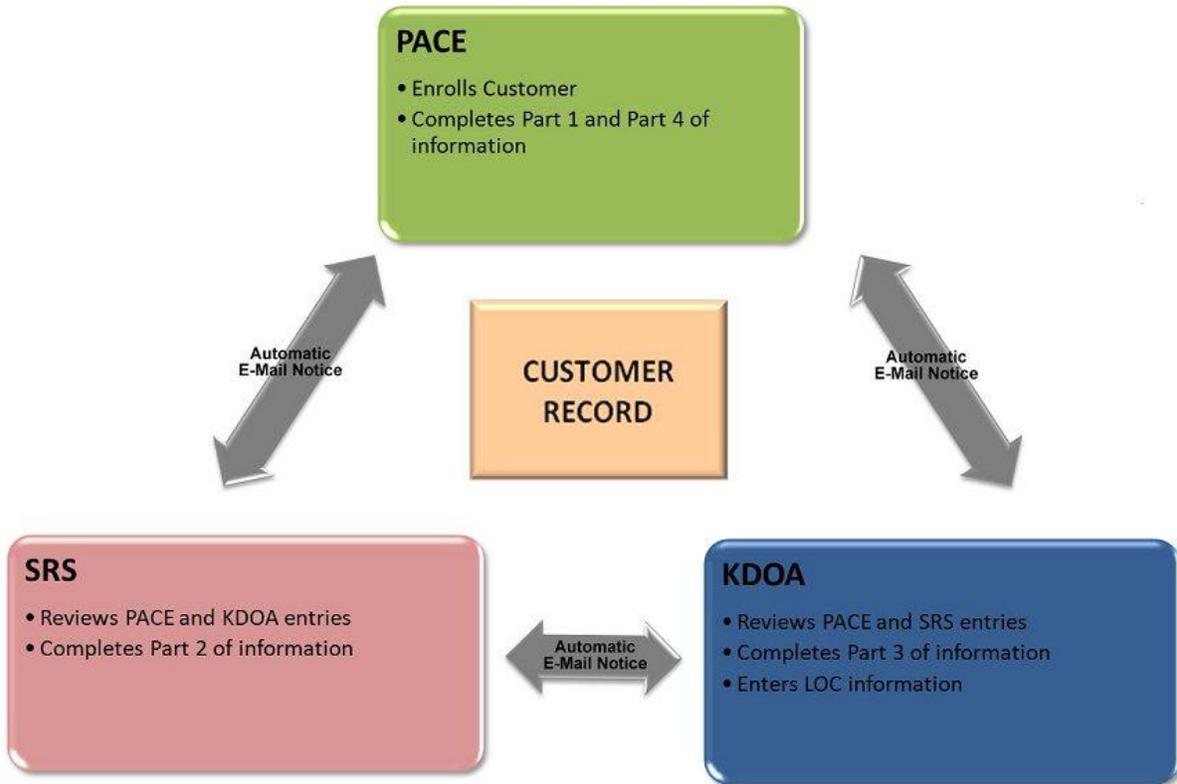
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PACE Information Work Flow Process .....	1
Accessing the Application .....	4
Directory Listing .....	5
Search Process .....	6
PACE Organization – Create Customer .....	7
PACE Disenrollment .....	9
SRS Information .....	10
KDOA Information.....	12
Annual Reassessment – KDOA Only.....	14
Delete This Record – KDOA Only .....	15
Level of Care (LOC).....	16
Editing Information .....	19
Reviewing Information.....	20
Comparing Information Versions.....	23
File Upload – Attaching File .....	25
File Upload – Viewing File .....	28
File Upload – Deleting File .....	30
Additional Notes .....	31
Print View.....	33
Closing the Application .....	34

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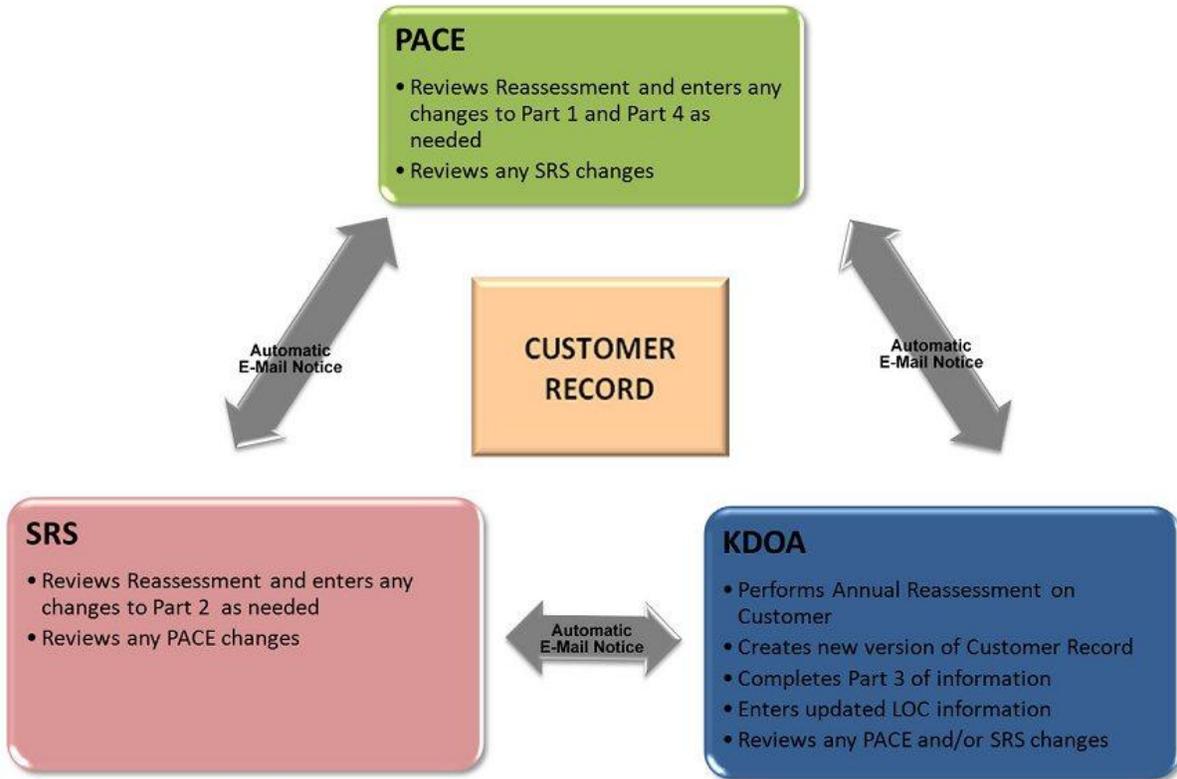
# PACE Information Work Flow Process

## NEW CUSTOMER



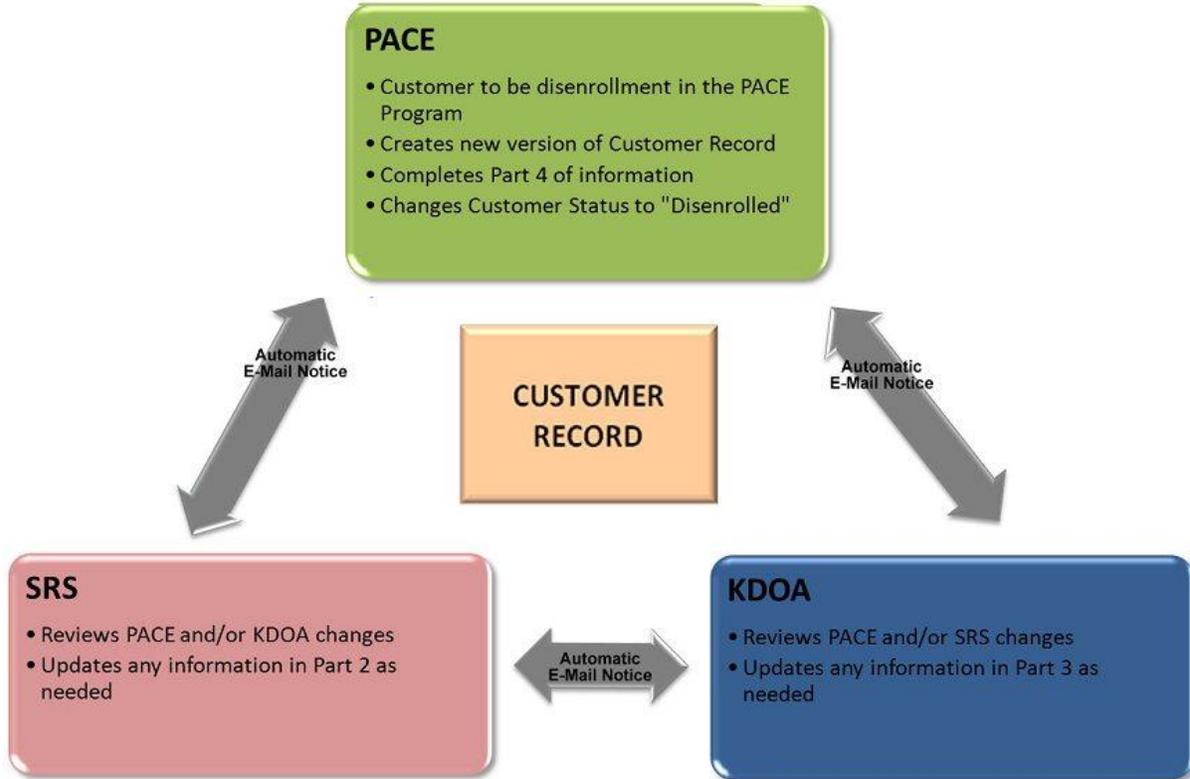
# PACE Information Work Flow Process (continued)

## REASSESSMENT



# PACE Information Work Flow Process (continued)

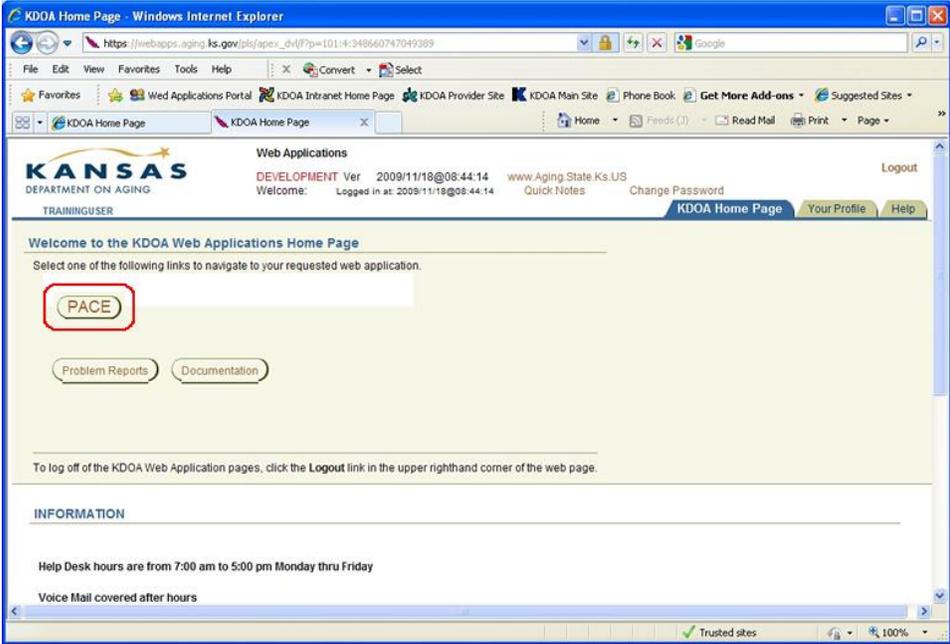
## DISENROLLMENT



# 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.

Step	Action	Results
1.	Sign-on to KDOA Web Applications with your username and password.	KDOA Home Page is displayed.
		
2.	Click the "PACE" button.	The PACE Directory Listing will be displayed.

# 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. <ul style="list-style-type: none"> <li>● <b>P = PACE</b></li> <li>● <b>S = SRS</b></li> <li>● <b>K = KDOA</b></li> </ul>
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: <ul style="list-style-type: none"> <li>• Show all - default</li> <li>• New enrollment</li> <li>• Annual Re-assessment</li> <li>• Dis-enrollment</li> </ul>
Show Records w/No Action Required	<ul style="list-style-type: none"> <li>• <b>Unchecked</b> – will return only the customers that require action for the users organization.</li> <li>• <b>Checked</b> – will return all Customers associated with for the users organization.</li> </ul>
Search by: <ul style="list-style-type: none"> <li>• Last Name</li> <li>• First Name</li> <li>• SSN</li> <li>• SRS Case #</li> </ul>	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.

The screenshot shows a web browser window titled "Form on PACE\_15\_3166\_1\_IV - Windows Internet Explorer". The address bar shows a URL from "https://webapps.agno.la.gov/pace...". The page content is a form titled "PACE Organization".

**Form Fields:**

- Create** (button)
- Organization Midland PACE Enrollment Status New Enrollment Date Submitted
- Part I**
  - First Name Last Name Medicaid Sex
  - Address City County Zip
  - Phone SSN Date of Birth
  - Responsible Person Relationship
  - Home Phone Work Phone
- Part IV**
  - Private Pay Medicaid Referral Anticipated Enrollment Date
  - Case Manager Phone Email Fax
  - Enrollment Accepted Date Of Pace Assignment
  - Enrollment Denied By Customer Customer Reason (0 of 188)
  - Pace Denied Pace Reason (0 of 188)
  - NH Temporary NH Temporary Dt Temp. Facility Name Est. Length Of Stay
  - NH Permanent NH Permanent Dt Perm. Facility Name
  - Voluntary Disenrollment Voluntary Disenrollment Date Disenrollment Reason (0 of 188)
  - Involuntary Disenrollment Involuntary Disenrollment Date State Approved
  - Death Date Of Death
  - Pace Comments (0 of 308)
  - Pace Rep. Signature Pace Rep Date
  - Attachments
  - Add User Add Date Mod User Mod Date

# 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 <b>Create New Entry</b> button on the Directory Listing	Opens the PACE Organization section of the application.
2.	Data enter the customers information.	
3.	Click on the <b>Create</b> button.	Customer is added with an e-mail notification being sent to the SRS and KDOA contacts.

The screenshot shows a web browser window titled "Form on PACE\_ES\_3166\_I\_IV - Windows Internet Explorer". The address bar shows a URL starting with "https://webapps.aging.la.gov/pls/apex...". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The main content area displays a form titled "PACE Organization -" with a "Create" button and a "1" indicator. The form is divided into several sections:

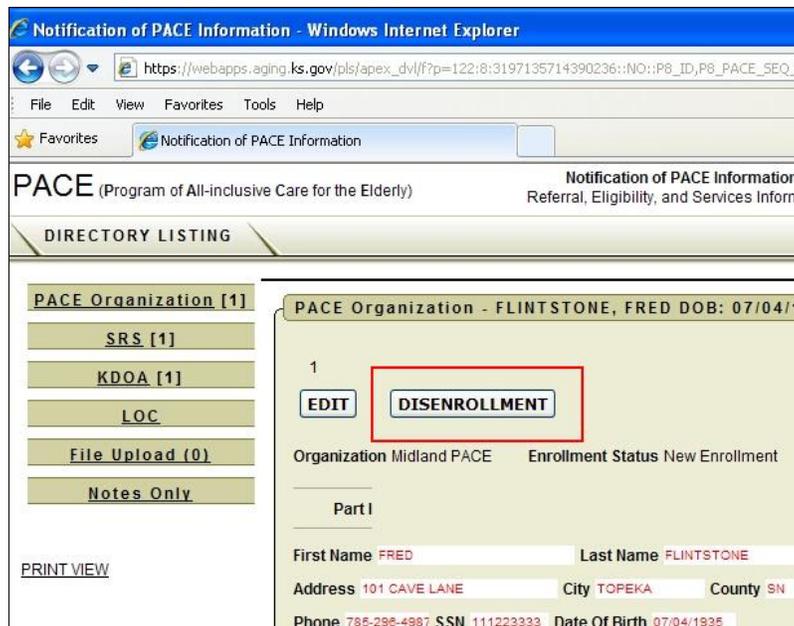
- Organization Information:** Organization Midland PACE, Enrollment Status New Enrollment, Date Submitted 02/12/2010.
- Part I (Customer Information):**
  - First Name: FRED, Last Name: FLINTSTONE, Medicaid#: 00546879231, Sex: M
  - Address: 101 CAVE LANE, City: TOPEKA, County: SN, Zip: 66601
  - Phone: 785-296-4987, SSN: 111223333, Date Of Birth: 07/04/1935
  - Responsible Person: PEBBLES RUBBLE, Relationship: DAUGHTER
  - Home Phone: 785-296-4444, Work Phone: 785-296-6555
- Part IV (Enrollment and Disenrollment):**
  - Private Pay:  Medicaid Referral:  Anticipated Enrollment Date: 04/01/2010
  - Case Manager: GRAY SLATE, Phone: 785-296-4986, Email: EMAIL@EMAIL.COM, Fax: [empty]
  - Enrollment Accepted:  Date Of Pace Assignment: 04/01/2010
  - Enrollment Denied By Customer:  Customer Reason: [empty] (0 of 188)
  - Pace Denied:  Pace Reason: [empty] (0 of 188)
  - NH Temporary:  NH Temporary Dt: [empty] Temp. Facility Name: [empty] Est. Length Of Stay: [empty]
  - NH Permanent:  NH Permanent Dt: [empty] Perm. Facility Name: [empty]
  - Voluntary Disenrollment:  Voluntary Disenrollment Date: [empty] Disenrollment Reason: [empty] (0 of 188)
  - Involuntary Disenrollment:  Involuntary Disenrollment Date: [empty] State Approved:
  - Death:  Date Of Death: [empty]
  - Pace Comments: [empty] (0 of 308)
  - Pace Rep. Signature: PACE, Pace Rep Date: 03/15/2010
  - Attachments: [empty]
- Footer:** Add User Add Date Mod User Mod Date

# 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

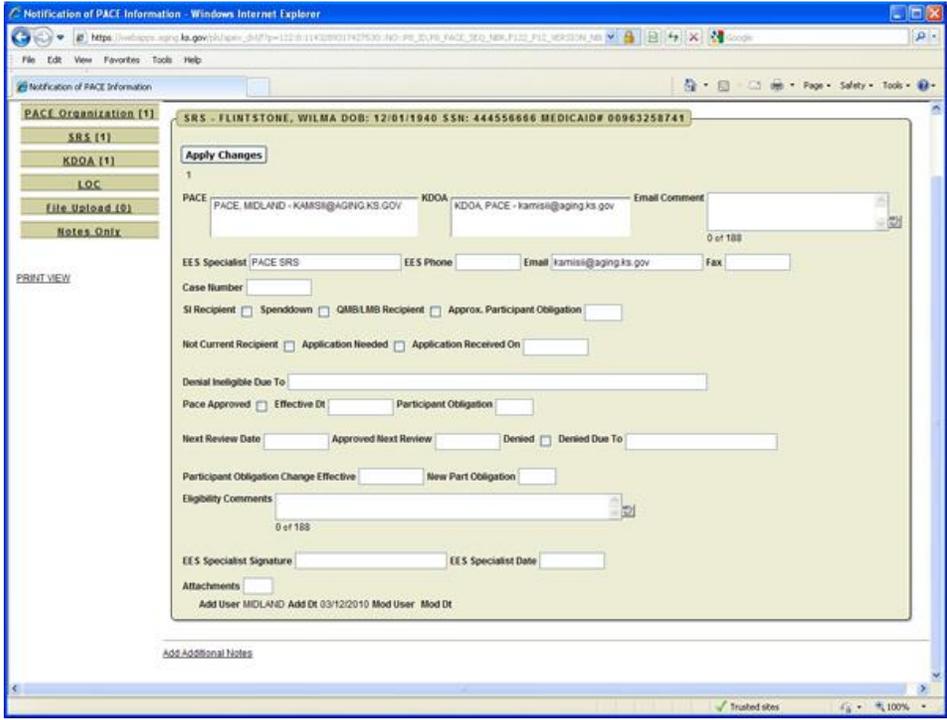
Step	Action	Results
1.	Select the customer from the Directory.  May need to click on the Show Records w/No Action Required checkbox.	PACE Organization page is displayed.
2.	Click on the <b>Edit</b> button.	Fields become available.
3.	Change the appropriate information regarding the disenrollment.	
4.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



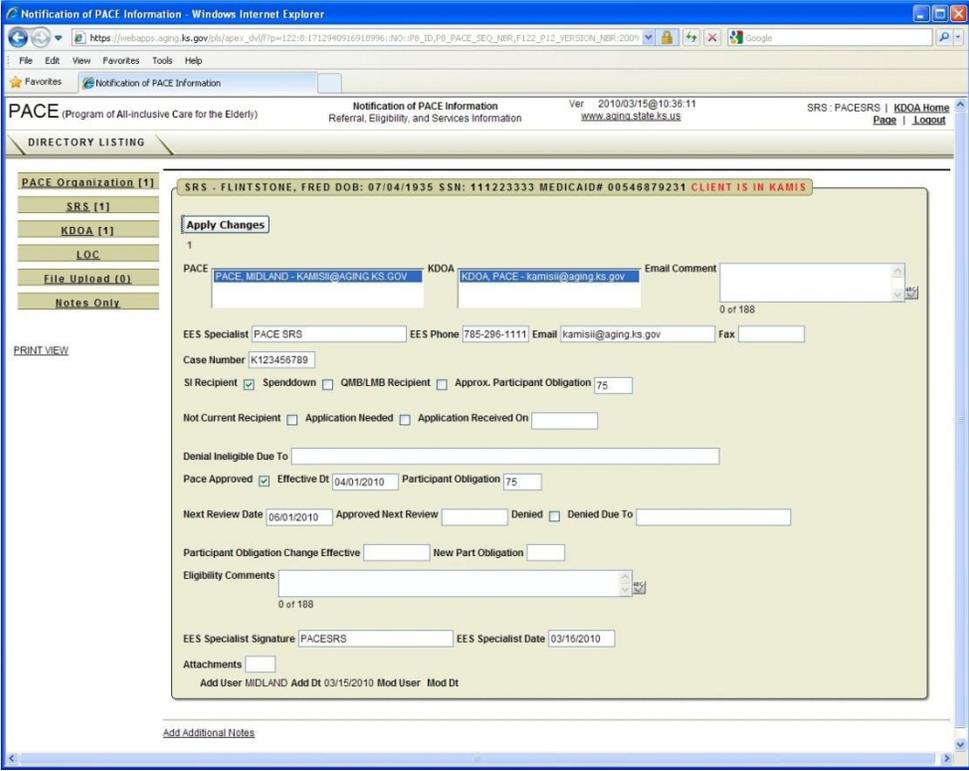
# SRS Information

**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.

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 <b>SRS</b> menu link	Opens the SRS section of the application.
		
3.	Select the PACE and KDOA contacts who will be notified of the information to be reviewed.	

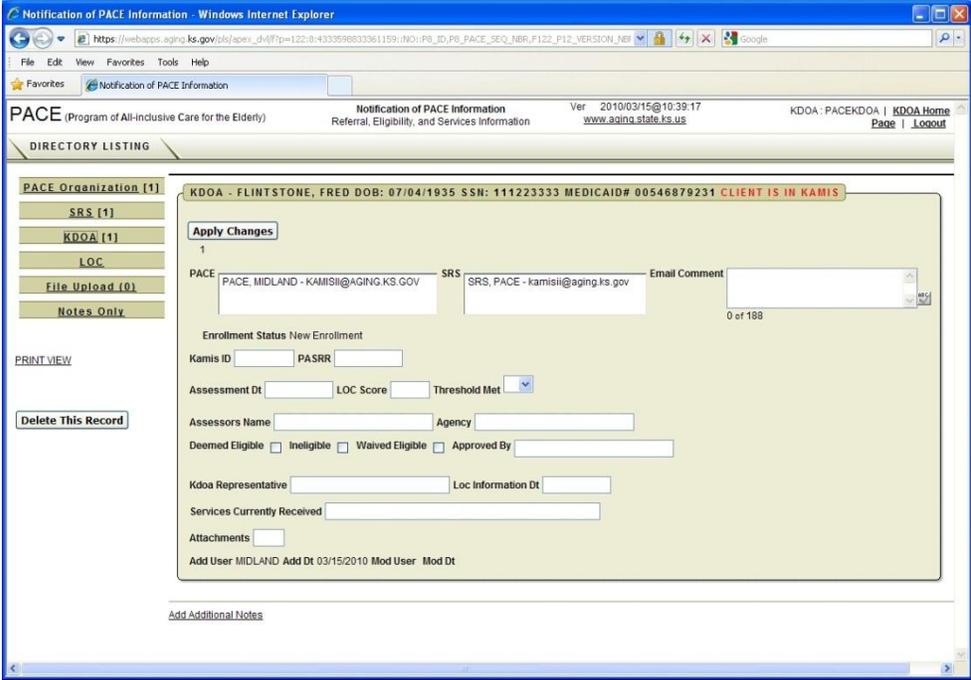
## SRS Information (continued)

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

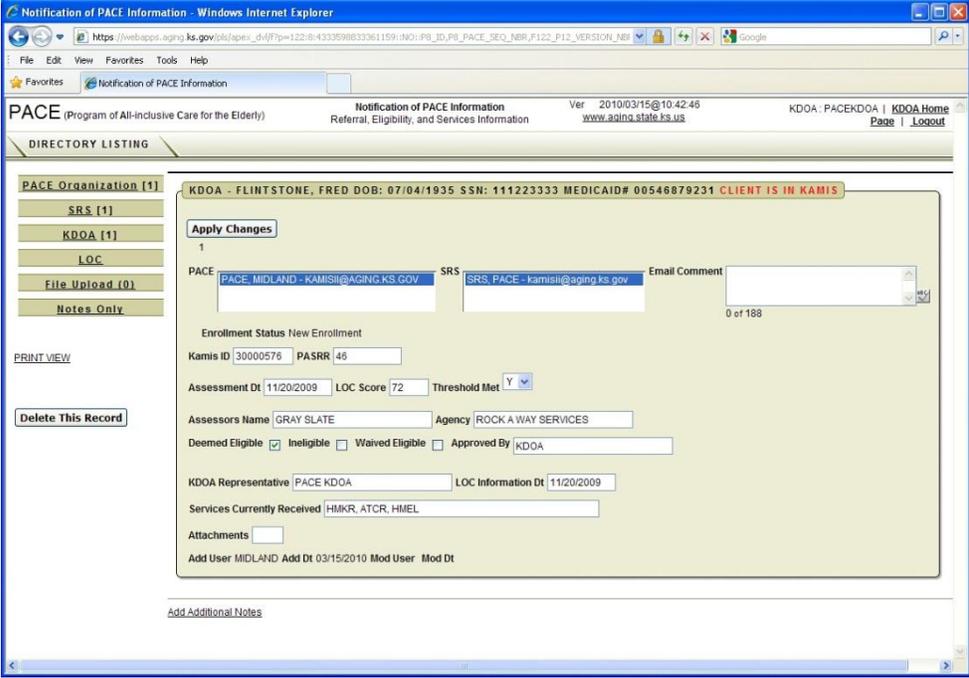
# KDOA Information

**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 <b>KDOA</b> 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)

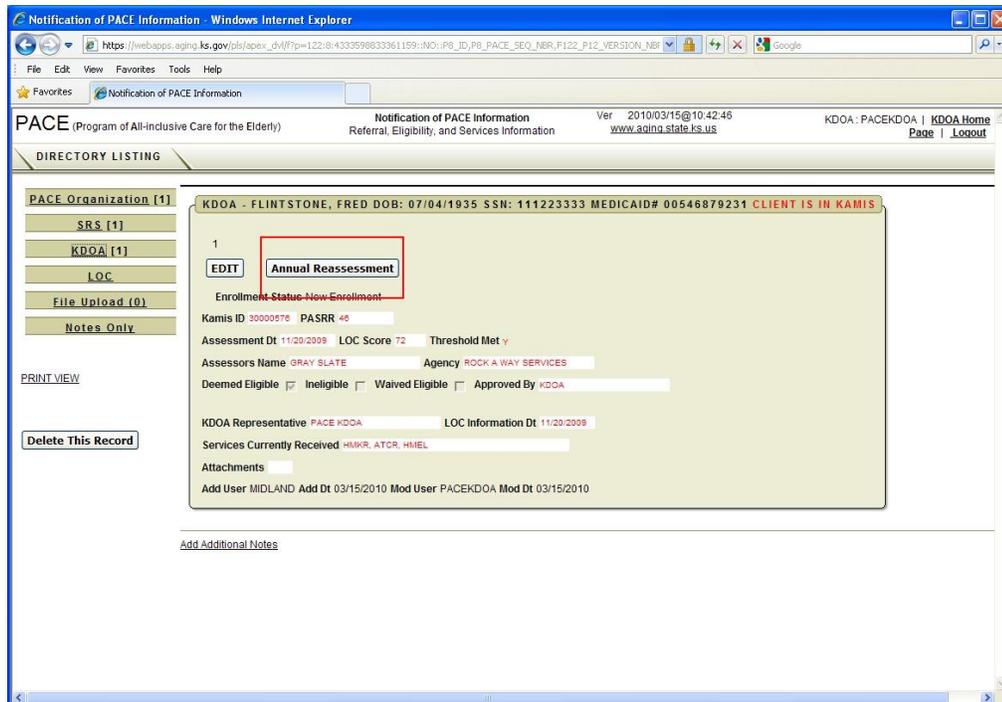
Step	Action	Results
4.	Data enter the customers information.	
 <p>The screenshot shows a web browser window titled "Notification of PACE Information". The page displays a directory listing for a customer named "KDOA - FLINTSTONE, FRED". The record includes the following details:</p> <ul style="list-style-type: none"> <li><b>PACE Organization:</b> KDOA (1)</li> <li><b>SRS:</b> KAMISLI (1)</li> <li><b>Enrollment Status:</b> New Enrollment</li> <li><b>Kamis ID:</b> 30000576   PASRR: 46</li> <li><b>Assessment Dt:</b> 11/20/2009   <b>LOC Score:</b> 72   <b>Threshold Met:</b> Y</li> <li><b>Assessors Name:</b> GRAY SLATE   <b>Agency:</b> ROCK A WAY SERVICES</li> <li><b>Deemed Eligible:</b> <input checked="" type="checkbox"/> Ineligible <input type="checkbox"/> Waived Eligible <input type="checkbox"/> Approved By: KDOA</li> <li><b>KDOA Representative:</b> PACE KDOA   <b>LOC Information Dt:</b> 11/20/2009</li> <li><b>Services Currently Received:</b> HMKR, ATCR, HMEL</li> <li><b>Attachments:</b> (empty)</li> <li><b>Add User:</b> MIDLAND   <b>Add Dt:</b> 03/15/2010   <b>Mod User:</b> Mod Dt</li> </ul> <p>An "Apply Changes" button is located at the top left of the form area. A red banner at the top of the record states "CLIENT IS IN KAMIS".</p>		
5.	Click on the <b>Apply Changes</b> 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 <b>KDOA</b> page on the menu.	KDOA information page is displayed.
3.	Click on the <b>Annual Reassessment</b> .	A new version of the KDOA Information page is created.
4.	Enter the new assessment information.	
5.	Click on the <b>Save</b> button.	Continue to the LOC page.



# Delete This Record – KDOA Only

## Introduction

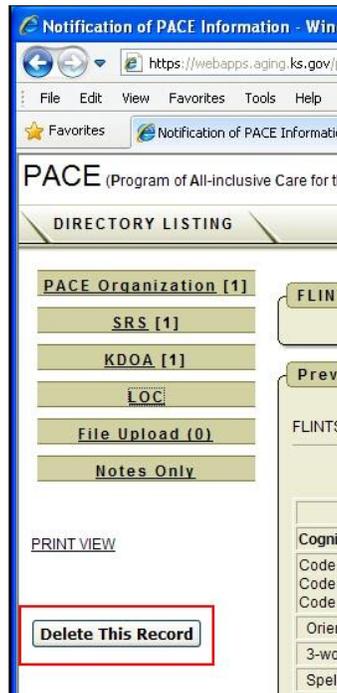


KDOA has the ability to delete a customer record. Caution should be used, as this will permanently delete all the customer information. If the customer is deleted in error, the information will need to be recreated through the PACE Organization.

## 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 <b>KDOA</b> menu item.	KDOA information page is displayed.
3.	Click on the <b>Delete This Record</b> 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.

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**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.

The screenshot displays the PACE web application interface. The main content area shows the Level of Care (LOC) information for a client named FLINTSTONE, FRED. The interface includes a navigation menu on the left, a main content area with various assessment tables, and a sidebar with utility links.

**Navigation Menu:**

- PACE Organization (1)
- SRS (1)
- KDOA (1)
- LOC
- File Upload (0)
- Notes Only

**Client Information:** FLINTSTONE, FRED DOB: 07/04/1935 SSN: 111223333 MEDICAID# 00546879231 CLIENT IS IN KAMIS

**Previous KAMIS LOC:** FLINTSTONE, FRED - UAI dated 11/20/2009

**UAI - Functional Reliability**

Uniform Assessment Instrument Scoring				Long-term Care Threshold Guide			
Code 0 - no impairment							
Code 1 - impairment with the tested area							
Code 9 - unable to test							
Orientation (day of the week, month, year, President):	0	0	x	2	=	0	
3-word recall (pen, car, watch):	0	0	x	2	=	0	
Spelling backward (table):	1	1	x	2	=	2	2
Clock Draw (all #s, spacing of #s, hands at 11:10):	0	0	x	2	=	0	

**Definition of Code for ADL/IADL**

Code	Multiplier for Threshold Guide
1	0
2	1
3	1
4	2

**Enter the code in the box to indicate the customer's level of self-performance**

**Activities of Daily Living**

UAI Code	Multiplier	x	Weight	=	Total	Sum of ADL scores	
Bathing	3	1	x	4	=	4	
Dressing	3	1	x	3	=	3	
Toileting	2	1	x	5	=	5	
Transferring	1	0	x	5	=	0	
Walking, Mobility	1	0	x	3	=	0	12
Eating	1	0	x	4	=	0	

**Instrumental Activities of Daily Living**

UAI Code	Multiplier	x	Weight	=	Total	Sum of IADL scores	
Meal Preparation	4	2	x	5	=	10	
Shopping	4	2	x	3	=	6	
Money Management	4	2	x	4	=	8	
Transportation	4	2	x	3	=	6	
Telephone	1	0	x	3	=	0	
Laundry, Housekeeping	4	2	x	3	=	6	46
Medication Management, Treatment	4	2	x	5	=	10	

**RISKS: Current or Recent Problems (check all that apply)**

Code	Multiplier	x	Weight	=	Total	Sum of RISKS scores	
Falls (Last 1 month <u>1</u> ) (Last 6 months total <u>3</u> )	✓	1	x	3	=	3	
Neglect, Abuse, and/or Exploitation - By others		1	x	5	=	0	
Informal Support - check appropriate choice							
Yes - there is support (do not multiply out)							
Inadequate	X	Multiplier	x	Weight	=	Total	
No - there is no support		1	x	4	=	4	
Behavior - check the appropriate choice(s) if any difficulty							
Wandering	X	Multiplier	x	Weight	=	Total	
Socially Inappropriate/Disruptive		1	x	5	=	5	12
Decision Making/Judgement							
Total Score of all Cognition, ADL, IADL and RISKS for Threshold Guide =							72

Was this person on HCBSFE prior to 7-1-00?  Is this a HCBS/SPD transfer customer?

Comments:

**Copy LOC from KAMIS**

**Cognition Threshold Scoring Guide**

Code 0 - no impairment  
Code 1 - impairment with the tested area  
Code 9 - unable to test

**(I)ADL Threshold Scoring Guide**

Definition of Code for Assessments	Code	Multiplier for Threshold Guide
Independent	1	0
Supervision Needed	2	1
Physical Assistance Needed	3	1
Unable to Perform	4	2

Enter Customer's Self-Performance Level Long-Term Care Threshold Scoring

Add Additional Notes

## Level of Care (LOC) (continued)

Step	Action	Results
2.	Click on the <b>Copy LOC from KAMIS</b> button.	Information is copied.

The screenshot shows a software interface for Level of Care (LOC) assessment. At the top, there is a section for 'Decision Making/Judgement' with a score of 5. Below this, a summary line states 'Total Score of all Cognition, ADL, IADL and RISKS for Threshold Guide = 72'. There are two checkboxes: 'Was this person on HCBS/FE prior to 7-1-00?' and 'Is this a HCBS/PD transfer customer?'. A 'Comments' field is present, and a button labeled 'Copy LOC from KAMIS' is highlighted with a red rectangular box. Below the form are two scoring guides: 'Cognition Threshold Scoring Guide' and '(I)ADL Threshold Scoring Guide'. The ADL guide includes a table with columns for 'Definition of Code for Assessments', 'Code', and 'Multiplier for Threshold Guide'.

Definition of Code for Assessments	Code	Multiplier for Threshold Guide
Independent	1	0
Supervision Needed	2	1
Physical Assistance Needed	3	1
Unable to Perform	4	2

At the bottom of the form, there is a link that says 'Add Additional Notes'.

3.	Click on the <b>Save</b> button.	Completes the saving of the information to the customer record.
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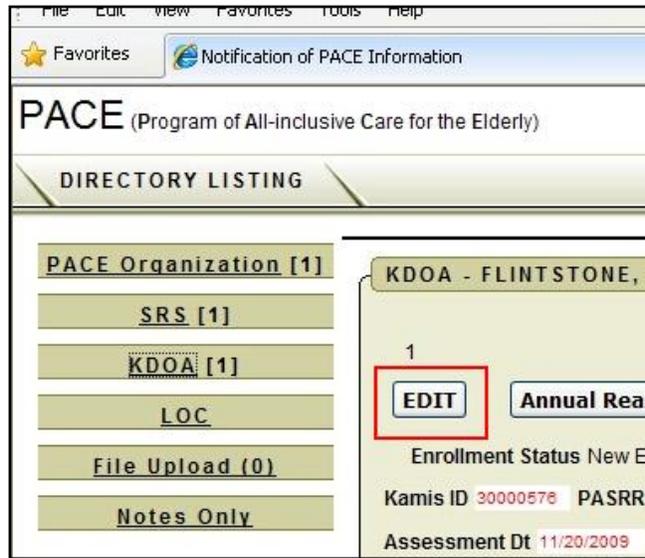
The screenshot shows the 'Behavior' section of the Level of Care (LOC) form. It includes a section for 'Informal Support - check appropriate choice' with three radio button options: 'Yes - there is support', 'Inadequate' (which is selected), and 'No - there is no support'. Next to the 'No' option is a calculation: '1 X 4 = 4'. Below this is a section for 'Behavior - check appropriate choice(s) if any difficulty' with three checkboxes: 'Wandering' (checked), 'Socially Inappropriate/Disruptive' (unchecked), and 'Decision Making/Judgment' (unchecked). To the right of the 'Decision Making/Judgment' checkbox is a calculation: '1 X 5 = 5'. At the bottom of this section, there are two summary fields: 'Sum of Risks Scores' with a value of 12, and 'Sum of Cognition, ADL, IADL and Risks Scores' with a value of 72. A 'Save' button is highlighted with a red rectangular box. At the bottom of the form, there is a link that says 'Add Additional Notes'.

# 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 <b>Edit</b> .	A new version of the KDOA Information page is created.

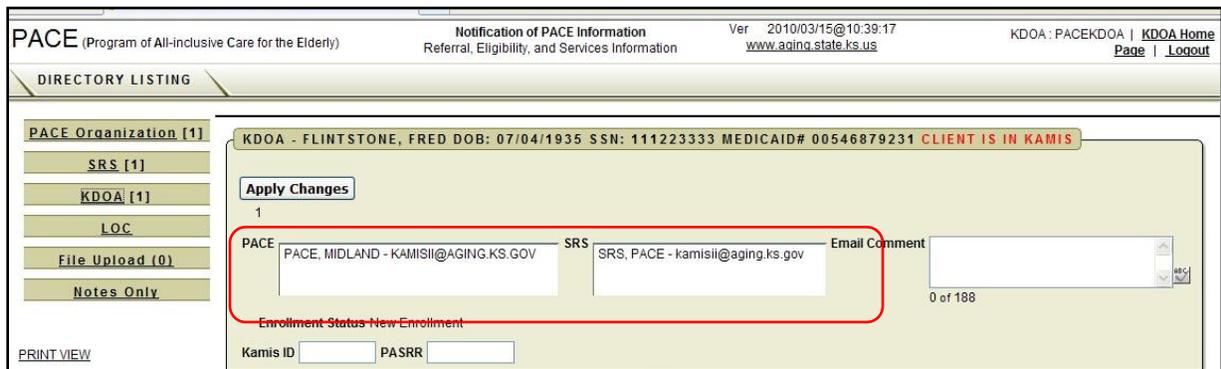


4.	Enter the new, updated, corrected information.	
5.	Click on the <b>Save</b> button.	

# Reviewing Information

**Introduction** In the course of information sharing between the PACE Organization, PACE, 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
- 

Organization	PACE	SRS	KDOA	KAMIS Id	Date Submit
Midland PACE	S K (3)	P (1)	P S (1)		02/12/2
Midland 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.

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**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.

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## Reviewing Information (continued)

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

<b>PACE</b> (Program of All-inclusive Care for the Elderly)	<b>Notification of PACE Information</b> Referral, Eligibility, and Services Information	Ver 2010/03/15@10:39 <a href="http://www.aging.state.ks.us">www.aging.state.ks.us</a>
DIRECTORY LISTING		
<b>PACE Organization [1]</b>	<b>PACE Organization - FLINTSTONE, FRED DOB: 07/04/1935 SSN: 111223333 MEDICAL</b>	
<b>SRS [1]</b>	1	
<b>KDOA [1]</b>	SRS 03/15/2010 10:36:26 AM PACE SRS <b>Reviewed by KDOA</b>	
<b>LOC</b>	Organization Midland PACE Enrollment Status New Enrollment Date Submitted 02/12/2010	
<b>File Upload (0)</b>	Part I	
<b>Notes Only</b>		

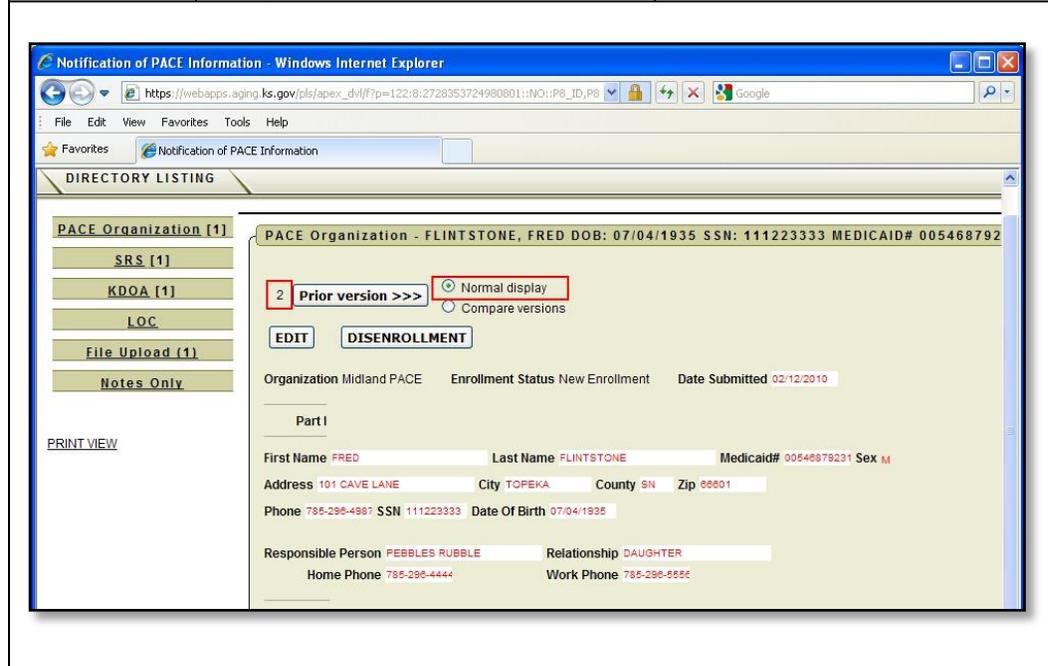
<b>PACE</b> (Program of All-inclusive Care for the Elderly)	<b>Notification of PACE Information</b> Referral, Eligibility, and Services Information	Ver 2010/03/15@10:39 <a href="http://www.aging.state.ks.us">www.aging.state.ks.us</a>
DIRECTORY LISTING		
<b>PACE Organization [1]</b>	<b>PACE Organization - FLINTSTONE, FRED DOB: 07/04/1935 SSN: 111223333 MEDICAL</b>	
<b>SRS [1]</b>	1	
<b>KDOA [1]</b>	SRS 03/15/2010 10:36:26 AM PACE SRS KDOA 03/15/2010 10:39:31 AM PACE KDOA MANAGER	
<b>LOC</b>	Organization Midland PACE Enrollment Status New Enrollment Date Submitted 02/12/2010	
<b>File Upload (0)</b>	Part I	
<b>Notes Only</b>		

# 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 <b>Compare Versions</b> radio button.	The changed information will display in yellow, with the yellow color representing the previous versions information.

The screenshot shows a web browser window titled "Notification of PACE Information - Windows Internet Explorer". The address bar shows the URL: [https://webapps.aging.ks.gov/pls/apex\\_dv/f?p=122:8:2728353724960801::NO::P8\\_ID,P8](https://webapps.aging.ks.gov/pls/apex_dv/f?p=122:8:2728353724960801::NO::P8_ID,P8). The page content includes a "DIRECTORY LISTING" on the left and a main form area for "PACE Organization - FLINTSTONE, FRED DOB: 07/04/1935 SSN: 111223333 MEDICAID# 005468792".

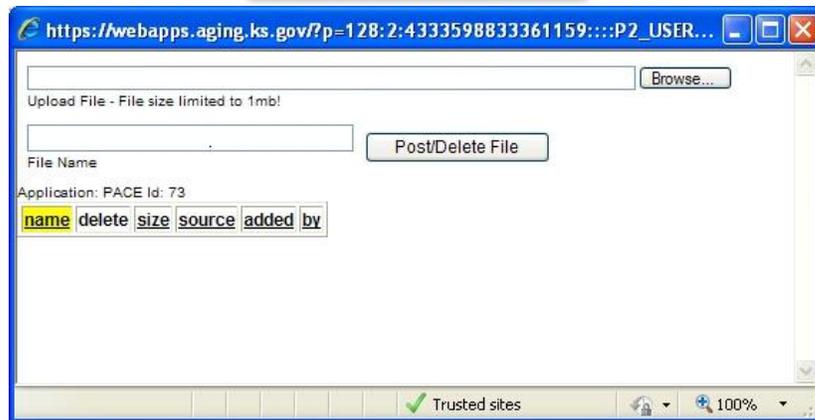
In the form, the "Prior version >>>" radio button is selected, and the "Compare versions" radio button is also selected. The "Date Of Birth" field is highlighted in yellow, indicating a change from a previous version. Other fields include "First Name FRED", "Last Name FLINTSTONE", "Medicaid# 00546879231", "Sex M", "Address 101 CAVE LANE", "City TOPEKA", "County SN", "Zip 66601", "Phone 785-298-4987", "SSN 111223333", "Responsible Person FEBBLES RUBBLE", "Relationship DAUGHTER", "Home Phone 785-298-4444", "Work Phone 785-298-5556", "785-298-5555", "Case Manager GRAY SLATE", "Phone 785-298-4986", "Email EMAIL@EMAIL.COM", "Fax", "Enrollment Accepted", "Date Of PACE Assignment 04/01/2010", "Enrollment Denied By Customer", "Customer Reason", "Pace Denied", and "Pace Reason".

# 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.

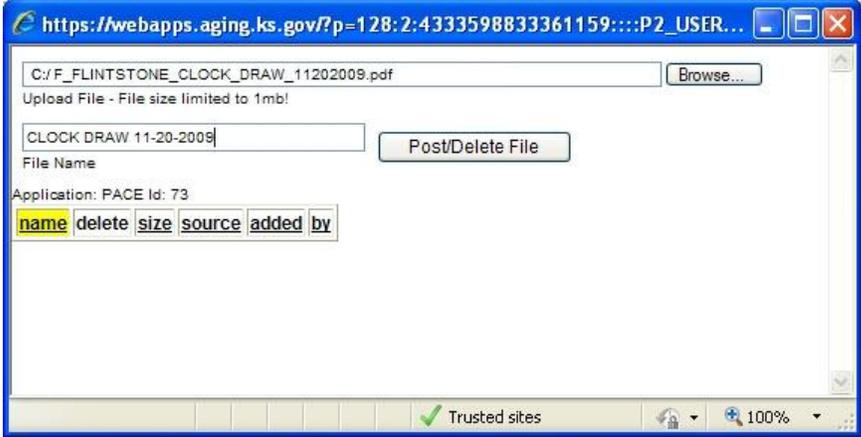
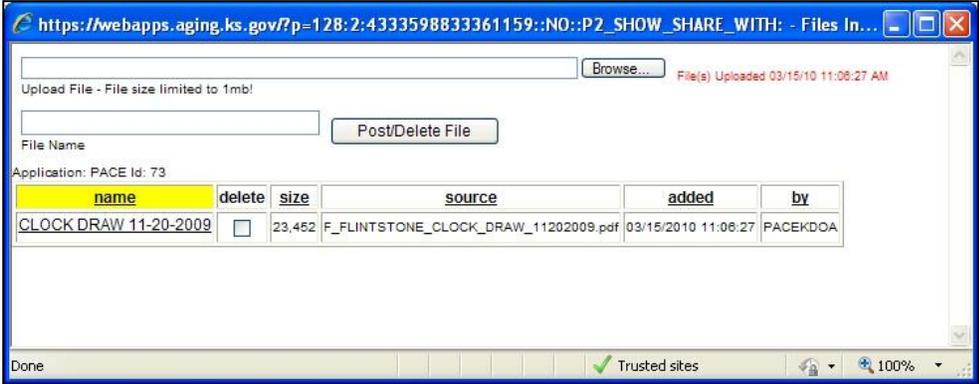
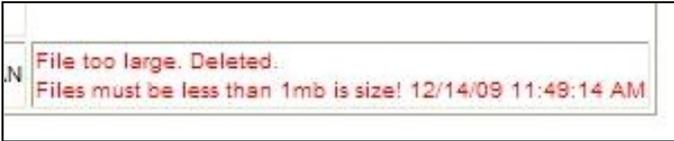
Step	Action	Result
1.	Select the customer from the Directory.  May need to click on the Show Records w/No Action Required checkbox.	
2.	Click on the <b>File Upload</b> menu link	A separate Upload file window will display.



## File Upload – Attaching File (continued)

Step	Action	Result												
3.	Click on the <b>Browse</b> 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:												
	<table border="1"> <thead> <tr> <th>Document Type</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Word</td> <td>Convert documents to pdf before attaching</td> </tr> <tr> <td>Excel</td> <td>Convert documents to pdf before attaching</td> </tr> <tr> <td>PDF (Acrobat)</td> <td>Attach with no additional steps needed</td> </tr> <tr> <td>Graphics</td> <td>Attach JPG or GIF type graphics – do not attach TIF (Electronic FAX) files</td> </tr> <tr> <td>E-Mail</td> <td>Save the document first to the network or desktop.</td> </tr> </tbody> </table>		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.
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E-Mail	Save the document first to the network or desktop.													
5.	On the Choose File to Upload dialog box, click on <b>Open</b> button	File is selected and entered into the Upload File field.												
														

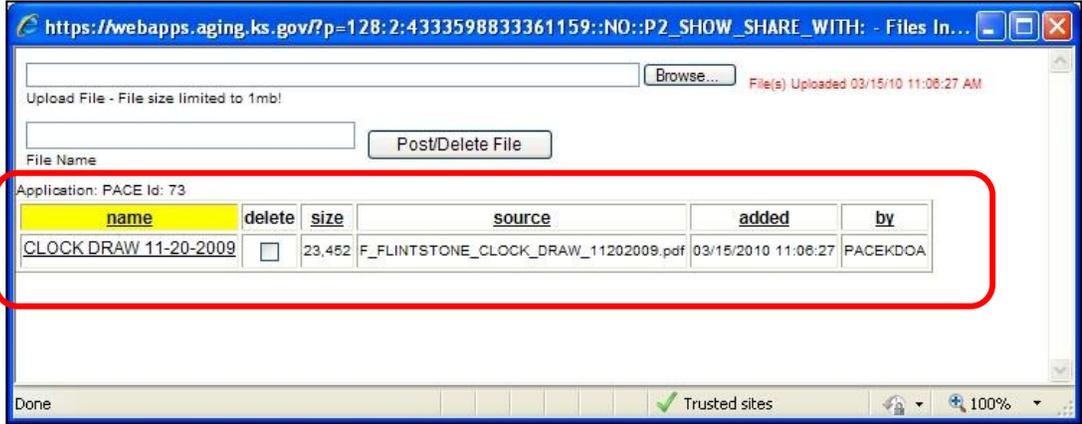
## File Upload – Attaching File (continued)

Step	Action	Result												
6.	Enter a <b>Name</b> in the File Name field.													
7.	Click on <b>Post/Delete File</b> button	Completes the upload. Table of the attached file(s) is displayed.												
		 <table border="1" data-bbox="397 1192 1230 1260"> <thead> <tr> <th>name</th> <th>delete</th> <th>size</th> <th>source</th> <th>added</th> <th>by</th> </tr> </thead> <tbody> <tr> <td>CLOCK DRAW 11-20-2009</td> <td><input type="checkbox"/></td> <td>23,452</td> <td>F_FLINTSTONE_CLOCK_DRAW_11202009.pdf</td> <td>03/15/2010 11:06:27</td> <td>FACEKDOA</td> </tr> </tbody> </table>	name	delete	size	source	added	by	CLOCK DRAW 11-20-2009	<input type="checkbox"/>	23,452	F_FLINTSTONE_CLOCK_DRAW_11202009.pdf	03/15/2010 11:06:27	FACEKDOA
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		<p><b>Note:</b> If the file is too large a warning notice will be displayed that the file was too large and was deleted.</p> 												
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.													

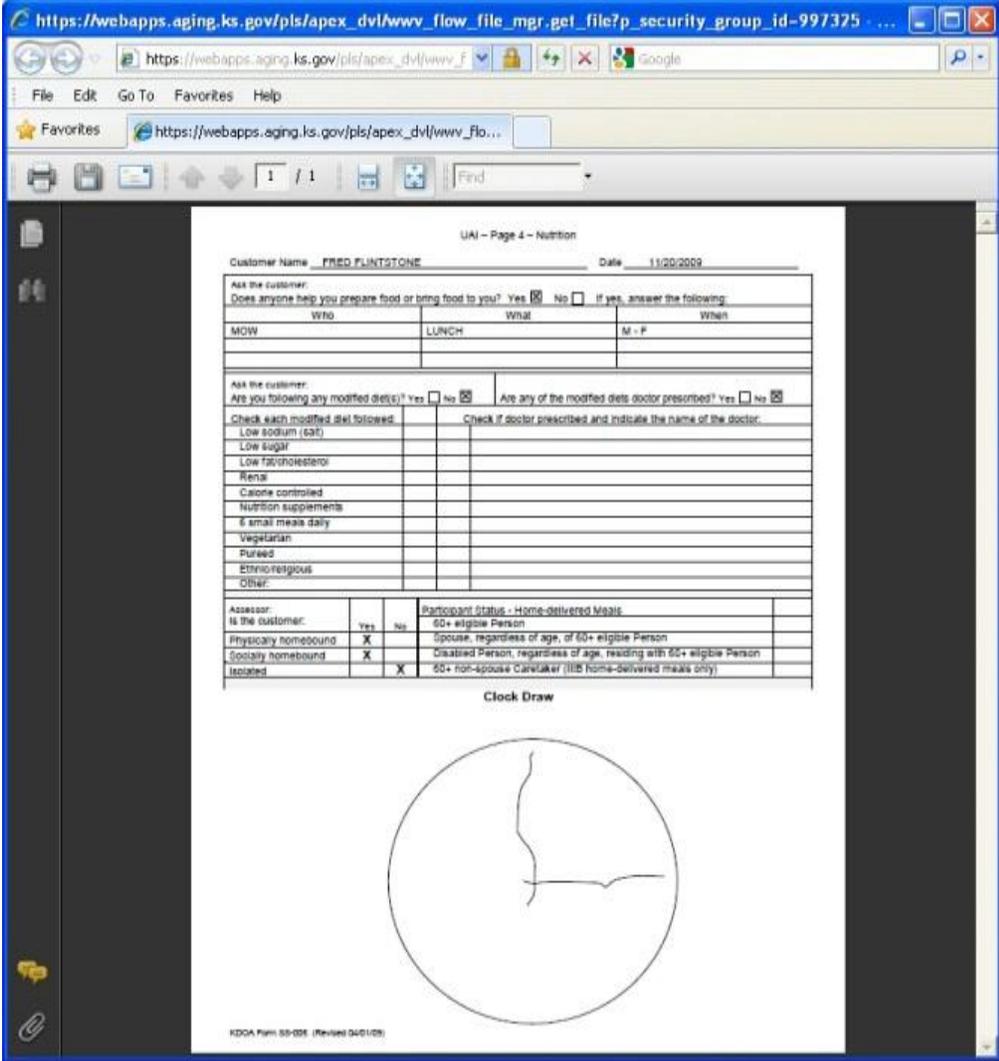
# File Upload – Viewing File

**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 <b>file name</b>	"CLOCK DRAW 11-20-2009" in the above example

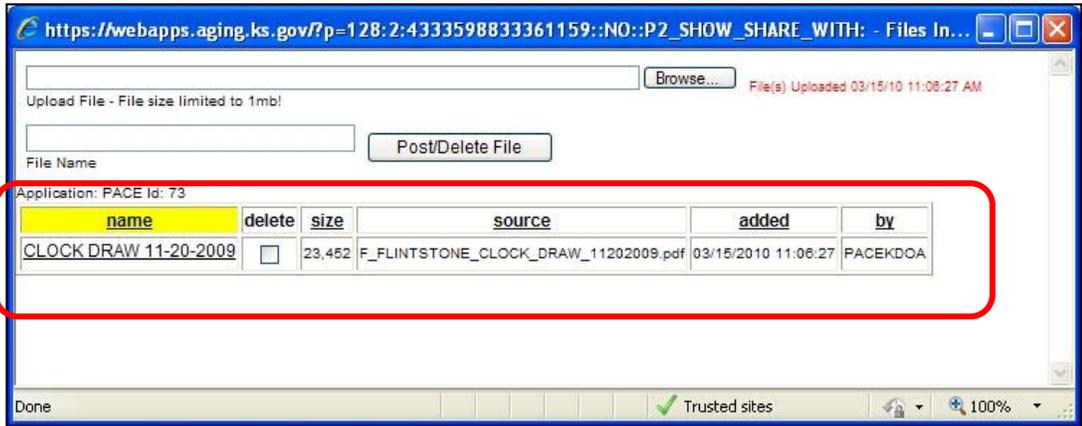
## File Upload – Viewing File (continued)

Step	Action	Result																																																		
3.	The document will open in a separate window.																																																			
 <p>The screenshot shows a web browser window with the URL <a href="https://webapps.aging.ks.gov/pls/apex_dvl/www_flow_file_mgr.get_file?p_security_group_id=997375">https://webapps.aging.ks.gov/pls/apex_dvl/www_flow_file_mgr.get_file?p_security_group_id=997375</a>. The page title is "UAI - Page 4 - Nutrition". The form contains the following sections:</p> <ul style="list-style-type: none"> <li><b>Customer Information:</b> Customer Name: FRED FLINTSTONE, Date: 11/20/2009.</li> <li><b>Food Preparation:</b> "Does anyone help you prepare food or bring food to you?" Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>. If yes, answer the following:             <table border="1"> <thead> <tr> <th>Who</th> <th>What</th> <th>When</th> </tr> </thead> <tbody> <tr> <td>MOW</td> <td>LUNCH</td> <td>M - F</td> </tr> </tbody> </table> </li> <li><b>Modified Diets:</b> "Are you following any modified diets?" Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>. "Are any of the modified diets doctor prescribed?" Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>.             <table border="1"> <thead> <tr> <th>Check each modified diet followed</th> <th>Check if doctor prescribed and indicate the name of the doctor.</th> </tr> </thead> <tbody> <tr><td>Low sodium (salt)</td><td></td></tr> <tr><td>Low sugar</td><td></td></tr> <tr><td>Low fat/cholesterol</td><td></td></tr> <tr><td>Renal</td><td></td></tr> <tr><td>Calorie controlled</td><td></td></tr> <tr><td>Nutrition supplements</td><td></td></tr> <tr><td>6 small meals daily</td><td></td></tr> <tr><td>Vegetarian</td><td></td></tr> <tr><td>Purified</td><td></td></tr> <tr><td>Ethnic/religious</td><td></td></tr> <tr><td>Other:</td><td></td></tr> </tbody> </table> </li> <li><b>Assessor Information:</b> <table border="1"> <thead> <tr> <th>Assessor</th> <th>Yes</th> <th>No</th> <th>Participant Status - Home-delivered Meals</th> </tr> </thead> <tbody> <tr> <td>Is the customer:</td> <td></td> <td></td> <td>60+ eligible Person</td> </tr> <tr> <td>Physically homebound</td> <td><input checked="" type="checkbox"/></td> <td></td> <td>Spouse, regardless of age, of 60+ eligible Person</td> </tr> <tr> <td>Socially homebound</td> <td><input checked="" type="checkbox"/></td> <td></td> <td>Disabled Person, regardless of age, residing with 60+ eligible Person</td> </tr> <tr> <td>Isolated</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>60+ non-spouse Caretaker (IEB Home-delivered meals only)</td> </tr> </tbody> </table> </li> <li><b>Clock Draw:</b> A circle with a vertical line and a horizontal line extending from the center.</li> </ul>			Who	What	When	MOW	LUNCH	M - F	Check each modified diet followed	Check if doctor prescribed and indicate the name of the doctor.	Low sodium (salt)		Low sugar		Low fat/cholesterol		Renal		Calorie controlled		Nutrition supplements		6 small meals daily		Vegetarian		Purified		Ethnic/religious		Other:		Assessor	Yes	No	Participant Status - Home-delivered Meals	Is the customer:			60+ eligible Person	Physically homebound	<input checked="" type="checkbox"/>		Spouse, regardless of age, of 60+ eligible Person	Socially homebound	<input checked="" type="checkbox"/>		Disabled Person, regardless of age, residing with 60+ eligible Person	Isolated		<input checked="" type="checkbox"/>	60+ non-spouse Caretaker (IEB Home-delivered meals only)
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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.

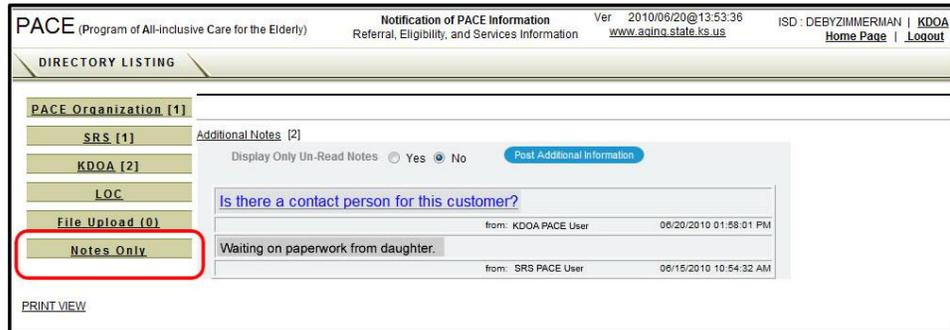
Step	Action	Result
1.	Select the customer from the Directory.  May need to click on the Show Records w/No Action Required checkbox.	A separate Upload file window will display. The table will display all the attached files.
		
2.	Click on the <b>check box</b> under the delete column. Click the Post/Delete File button.	File is deleted from the system.
3.	To return to the PACE Application, click on the "X" to close the separate browser window.	

# 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 <b>Notes Only</b> menu	Notes page is displayed.
3.	Click on the <b>Additional Notes</b> link.	All notes are displayed or a new note can be added.



4.	Click on the <b>Post Additional Information</b> button.	Notes comment box is displayed.
5.	Type comment	
6.	Click on the <b>Post New Entry</b> button.	Note is posted to the Additional Notes listing.

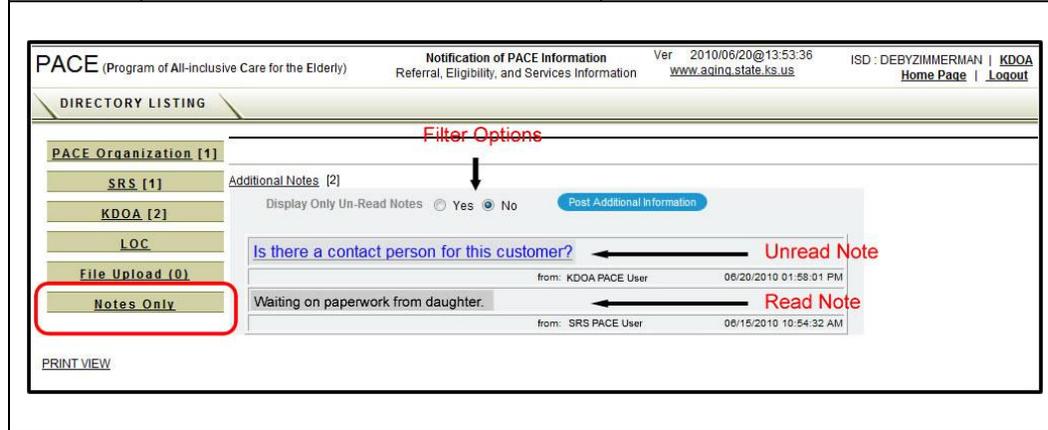


# Additional Notes - Reading<sup>(continued)</sup>

**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.

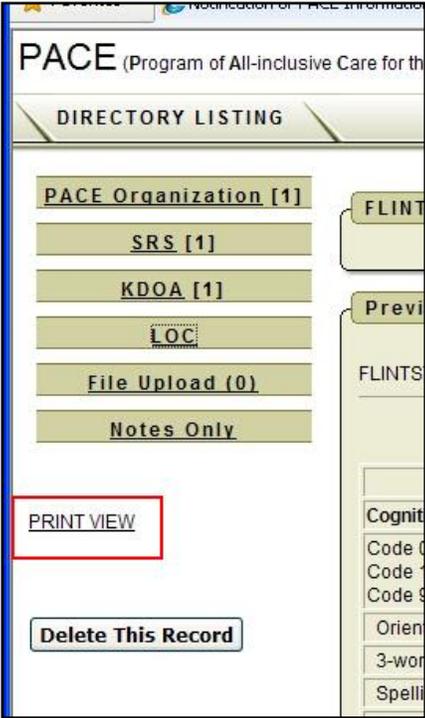
Step	Action	Results
1.	Click on the Notes Only Menu and then click on the <b>Additional Notes</b> link.	All notes are displayed or a new note can be added.
2.	Click on the blue text of a note.	Note format is changed to regular text and is marked as read.



# 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.	<p>Select the customer from the Directory.</p> <p>May need to click on the Show Records w/No Action Required checkbox.</p>	
		
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.

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