

HC Plus Nurse Assessment

User Manual

Version 4.24

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This Manual is a reference tool for **Sandata's HC Plus Nurse Assessment** software product.

If you have any questions regarding the contents of this manual, please contact Sandata Client Relations at 516-484-4400.

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About this Manual

The HC Plus Nurse Assessment User Manual contains detailed information about using the HC Plus Nurse Assessment program. (The program is also known simply as Nurse Assessment.) Each section will give you an overview of the Nurse Assessment features, step-by-step instructions, and descriptions of fields where applicable.

The contents of this manual and related documentation is proprietary to Sandata Technologies, Inc., and can not be copied or otherwise reproduced or disclosed to any third party. It is solely for use in connection with the Sandata HC Plus Nurse Assessment system and software and must be returned upon request or termination of services.

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INTRODUCTION

ABOUT NURSE ASSESSMENT

The Nurse Assessment program provides home health care professionals with the means to create and manage a comprehensive database for task-based-care clients. The Nurse Assessment system has flexibility through multiple functions and reports available from the pull down menus.

Important features of the system include:

- ◇ Store and Print Forms for
 - Nurse Assessment Visit
 - Supervisory Visit
 - Plan of Care (2 versions available)
 - Task Based Plan of Care
 - P.E.R.S.
 - Initial Nurse Assessment
 - Emergency Kardex
- ◇ Archive Forms
- ◇ Laptop Export of Client Data
- ◇ Automatic Nightly Updates from HC Plus
- ◇ Optional Automatic Nightly Transfer to Santrax
- ◇ Various Report Options
- ◇ HIPAA Compliant User Security

SYSTEM TYPES

There are three types of installations for the Nurse Assessment program. Here is a summary of the three types.

- | | |
|----------|---|
| Server: | This is the copy of the program that runs from our servers when you login through the website. (This was also known as “Main”.) |
| Laptop: | This is a copy of the program that is run from a laptop computer. This copy of the program contains data that was exported from the server so a user can work on client forms while not connected to the Internet. |
| On Call: | This is a copy of the program that contains a copy of the data from the server. The data gets copied from the server onto a laptop computer, where a nurse who is on call outside of normal business hours can access it. |

Every agency will have access to the Server installation of Nurse Assessment. Laptop and On Call are optional features.

STARTING NURSE ASSESSMENT

Starting Nurse Assessment on the Server

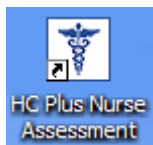
To access the Nurse Assessment program, use your normal HC Plus logon. You should see a shortcut that looks like the following.



Click on the shortcut to start the Nurse Assessment program. A few system messages may pop up on the screen, then the program will come up with the login screen.

Starting Nurse Assessment for *Laptop* or *On Call* versions

A Nurse Assessment icon will be on the Windows desktop on the laptop computer that has the Nurse Assessment program properly installed.



Double-click the HC Plus Nurse Assessment icon to start the Nurse Assessment Program. The program will come up with the login screen.

Login Screen

A screenshot of the "Login Screen" dialog box. It has a blue title bar with the text "Login Screen". The main area is light gray and contains three input fields: "User Name", "Password", and "Select Nurse (Optional)". The "Select Nurse (Optional)" field is a dropdown menu with "Supervisor" selected. At the bottom are "OK" and "Cancel" buttons. Two callout boxes provide instructions: one points to the "User Name" and "Password" fields with the text "Enter the assigned User Name and Password to gain access to the Nurse"; the other points to the "Select Nurse (Optional)" dropdown with the text "Click on the arrow button and a drop down box will appear with a list of nurses. Selecting a specific nurse will allow the user to work with only those clients assigned to that nurse. Selecting Supervisor allows the user to work with any client regardless of the nurse assignment. Clients who are not assigned to a specific nurse can only be accessed by selecting Supervisor".

Enter the assigned User Name and Password to gain access to the Nurse

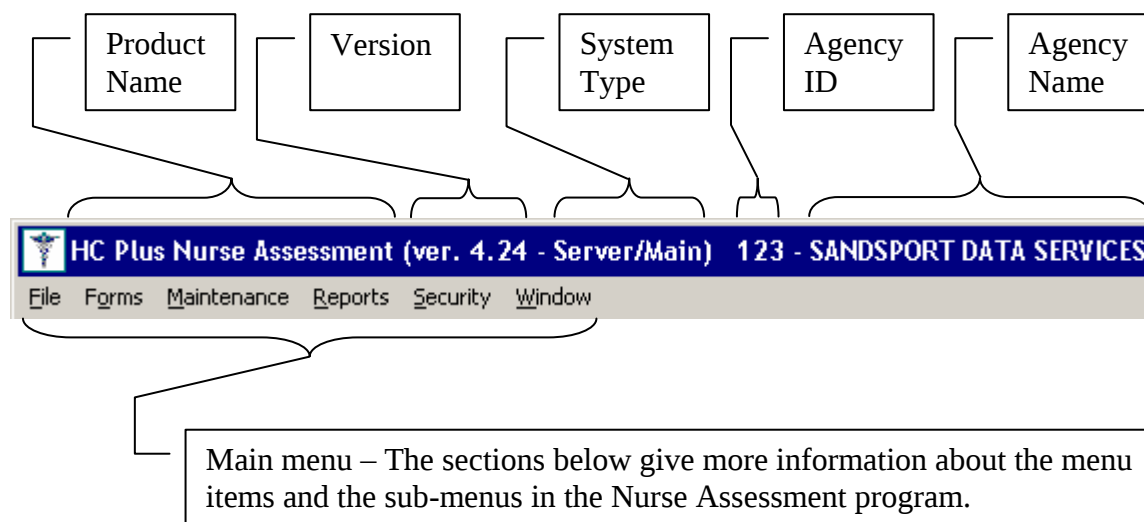
Click on the arrow button and a drop down box will appear with a list of nurses. Selecting a specific nurse will allow the user to work with only those clients assigned to that nurse. Selecting Supervisor allows the user to work with any client regardless of the nurse assignment. Clients who are not assigned to a specific nurse can only be accessed by selecting Supervisor

Users may be assigned different access rights to the program. This may be used to restrict users from seeing or accessing various parts of the program. Information about setting up user access can be found later in this manual.

MAIN MENU OVERVIEW

TITLE BAR/MAIN MENU

The title bar shows the name of the product, current version, system type and the agency ID and name. Under the title bar is the main menu. This document shows all of the menu options in the program. When a user logs into the program, certain features may be hidden or disabled based on the users access rights and whether your agency uses certain optional features.



Keyboard use for menus

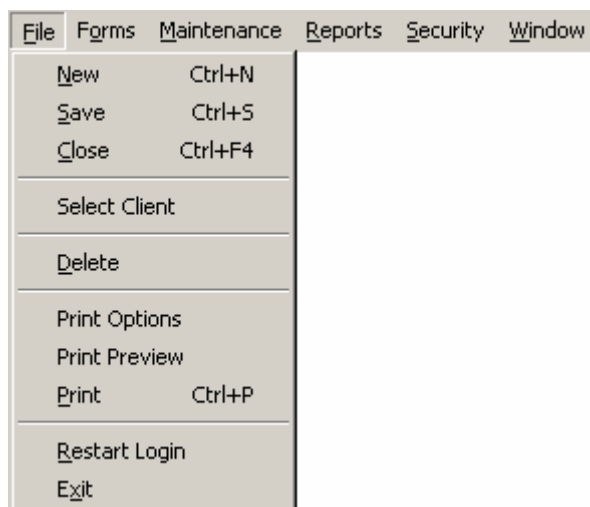
While many find it easy enough to use the mouse to make selections from the menu, some users prefer to use the keyboard. Many of the menu commands can be accessed using a keyboard instead of a mouse.

To access the menu hold down the Alt key, then press the underlined letter in the item you want to select from the main menu. To make a selection from one of the drop down menus, press the underlined letter from that menu. For example, to open the File menu and select New, the user can press <Alt-F> then <N>.

Some commands have shortcut keys assigned to them. The shortcut key appears on the menu to the right of the option. For example pressing <Ctrl-N> is another way to select New from the File menu. You can use a shortcut key from any screen that allows that function. The menu does not have to be opened to use it.

FILE MENU

The File menu provides several functions for working with records in a form. It also has the options for Restart Login and Exit.

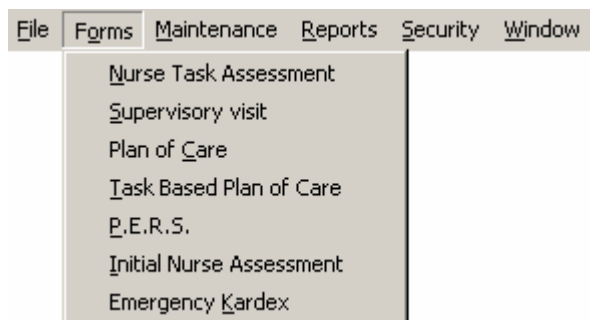


Important Note: Make sure that the Nurse Assessment program is shut down properly to prevent damage to data files, which can result in a loss of data.

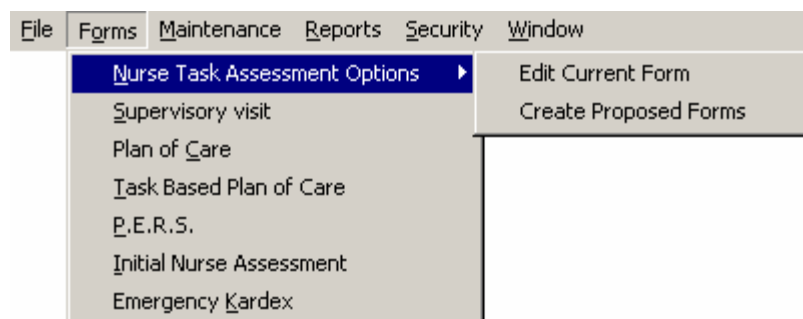
- New:** This will allow you to enter a new record in most forms.
- Save:** This allows the user to save the information in the current screen.
- Close:** This will close the active screen.
- Select Client:** This will bring you to the client list where you can select a different client to use. This is only available when working with client forms.
- Delete:** This will delete the active record.
- Print Options:** This provides options for selecting a printer, setting the number of copies, and setting how the printing should be queued on a network printer.
- Print Preview:** This will allow you to preview a report or form associated with the active screen.
- Print:** This will allow you to print a report or form associated with the active screen.
- Restart Login:** This will cause the program to restart at the login screen. This can be useful on a shared computer so one user can logout and allow another user to login.
- Exit:** Use this menu option to exit the Nurse Assessment program. You can also click the “X” in the upper right corner to exit.

FORMS MENU

This menu lists all of the forms available for the user.



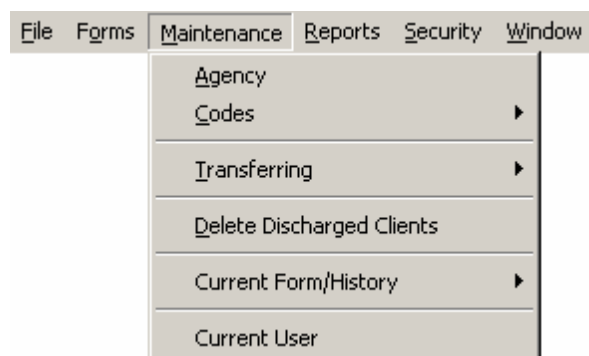
If the option for “proposed forms” is enabled, then the forms menu will display additional options for the Nurse Task Assessment form.



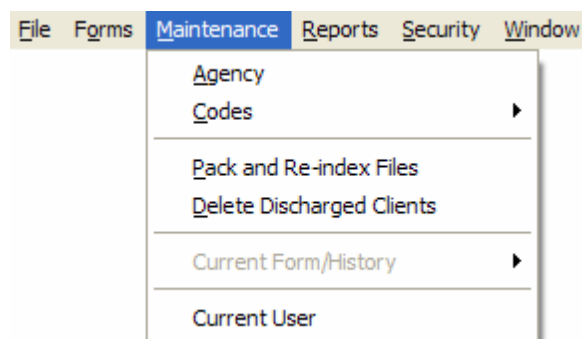
MAINTENANCE MENU

This menu provides access to various maintenance functions. This menu is different depending on the system type of the installation.

On the Server/Main program, the Maintenance menu displays these options.



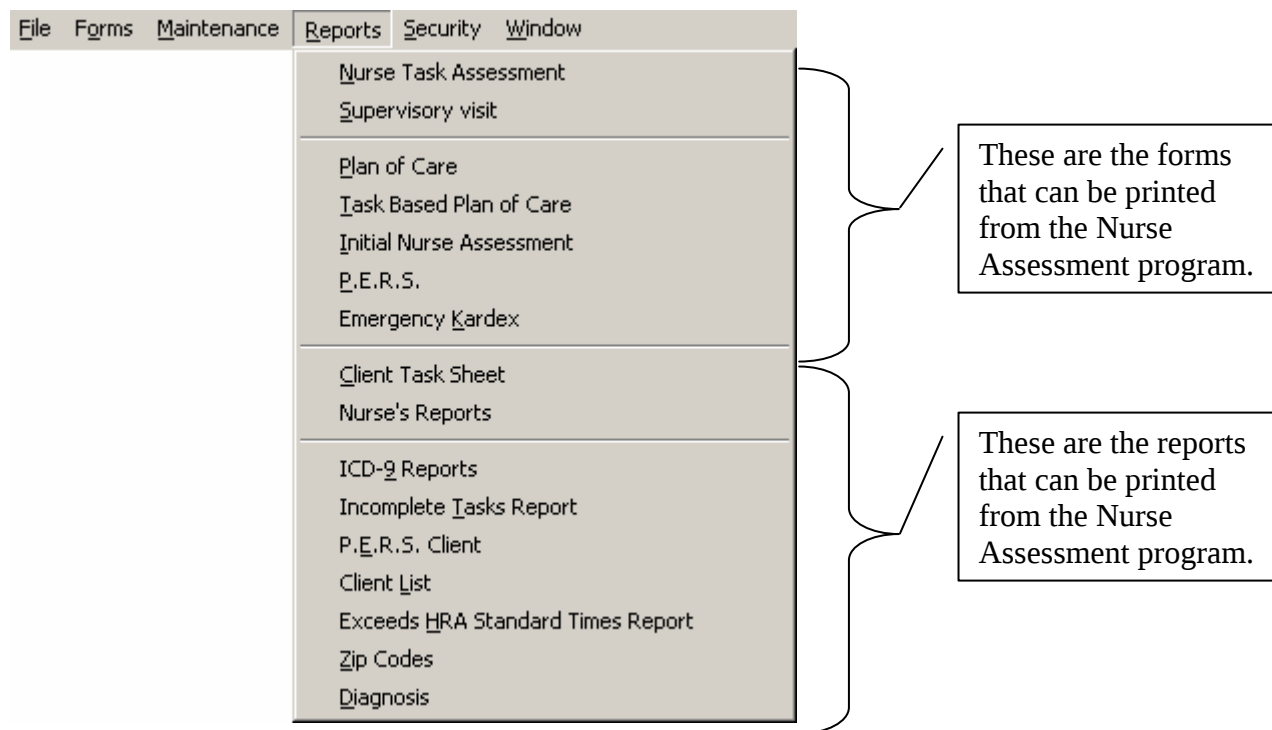
On a Laptop or On Call installation, the Maintenance menu displays these options.



Some of the options on the Maintenance Menu have additional sub-menus. These will be described later when the corresponding maintenance function is described in further detail.

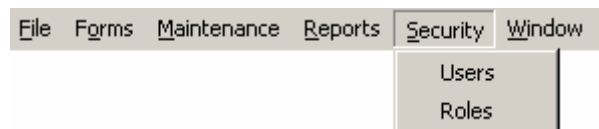
REPORTS MENU

The reports menu provides options for printing the various forms and reports that are available in the Nurse Assessment program.



SECURITY MENU

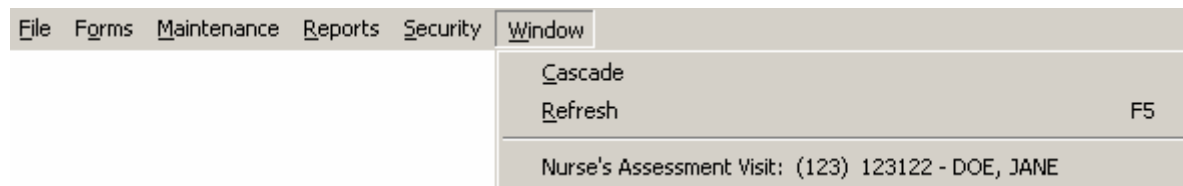
This menu should only be available to administrative users. It provides access for setting up passwords, and access rights for users and roles.



This manual does not give details about setting up security. The person who handles administration of the Nurse Assessment program should contact Client Relations to get a copy of the security manual.

WINDOW MENU

This menu gives options to organize multiple windows or refresh the current window and it will list any forms that you have open.

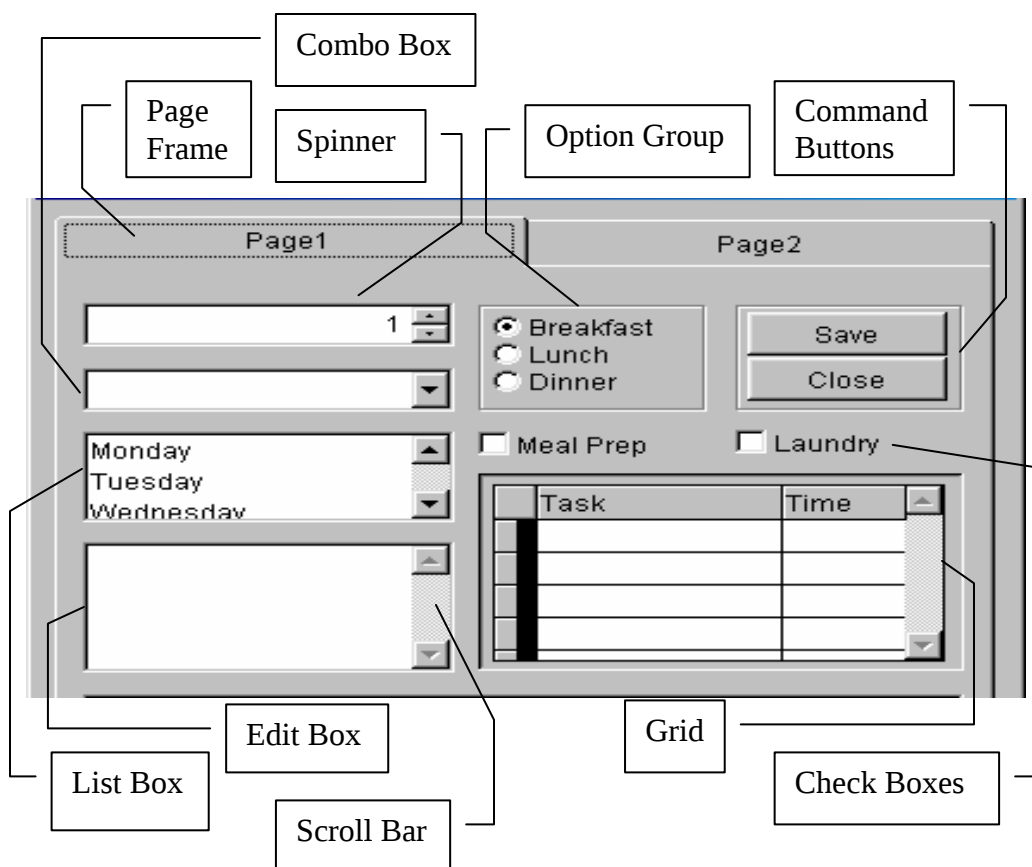


Although it is sometimes helpful to have multiple forms opened at the same time, working with multiple forms can get confusing for most users. It is recommended that you only open one form at a time then close it before going into another form.

GENERAL FORMS OVERVIEW

ITEMS IN A FORM

The following is an example of all functional items that may be in a form:



- Page Frames:** Allows the user to go from page to page for additional information. Click on the page tab to change from page to another.
- Spinners:** This is used for numbers, to increase or decrease the number presented. You can either key the number or use the arrow buttons.
- Combo Box:** Most Combo boxes allow the user to type in a value or the user can use the arrow button to display a list of options that can be assigned to that field.
- List Box:** The List box can be used in two ways. It will display a list of similar information to be assigned. Generally you can double click an item to bring up a window where you can edit information about that specific item. The second way is to display a list of items available for selection. Generally, double click on an item in the list box you want to select.
- Edit Box:** Use the Edit box for typing in information. It may have a limit in the amount of information that can be entered or it may hold a large amount of

information. In PC Sharp, you can usually double-click on the Edit box or press F3 to bring up an Edit window.

Option Group: The Option Group will let you choose only one of the options listed.

Command Buttons: Click on a Command button to perform an action.

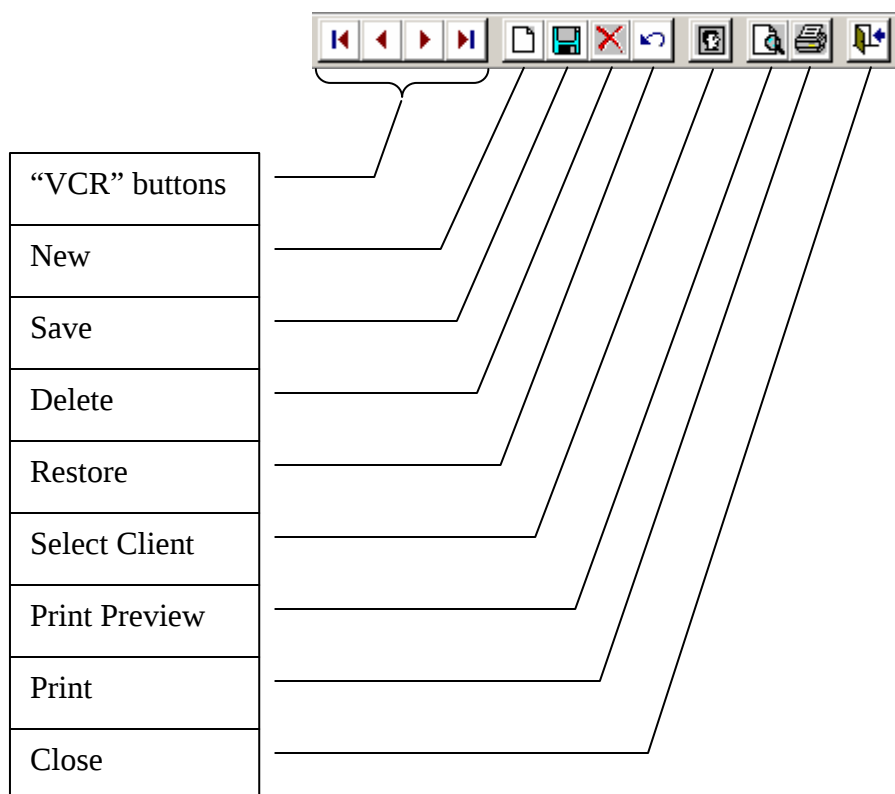
Check Boxes: Click on the Check box to select or deselect that item. In some cases, clicking on a Check box can enable or disable related options. In other cases, some Check boxes will automatically turn off other Check boxes when those items are mutually exclusive.

Grid: A Grid displays information in rows and columns. Each box inside the Grid is referred to as a cell. The user can change the information in any selected cell.

Scroll Bar: A List box, Edit Box, or a Grid may contain a Scroll Bar. This will allow the user to scroll up and down to see more information than what will fit in the available space. The arrow buttons can be used to scroll the list up or down.

USING THE TOOL BAR

When a form is opened the toolbar may appear directly below the main menu at the top of the screen. Many of the buttons correspond with functions on the File menu. Generally it is easier to use the toolbar button than to make a selection from the menu.



- ◇ “VCR” Buttons – These are similar to the buttons on a VCR for going forward and backward through a group of records. When available these buttons will do the following.
 - First – This will bring you to the first record.
 - Prior – This will bring you to the prior record.
 - Next – This will bring you to the next record.
 - Last – This will bring you to the last record.
- ◇ New – This will allow you to enter a new record.
- ◇ Save – This allows the user to save the information in the current screen.
- ◇ Delete – This will delete the active record. The Delete button is not available while working in a client form. This will reduce the chance of accidentally deleting a client. If you need to delete a client, use Delete from the File menu.
- ◇ Restore – This allows the user to cancel any changes since the last time the information was saved. **WARNING:** If the user selects Restore, any changes made will be lost.
- ◇ Select Client – This will bring you to the client list where you can select a different client to use. This is only available when working with client forms.
- ◇ Preview – This will allow you to preview a report or form associated with the active screen.
- ◇ Print – This will allow you to print a report or form associated with the active screen.
- ◇ Close – This will close the active screen.

SETTING UP NURSE ASSESSMENT

AGENCY SCREEN

The agency screen gives administrators the ability to configure certain options in the Nurse Assessment program. A password is required to access the configuration settings. The person responsible for the Nurse Assessment program can get the password by contacting Sandata's Client Relations.

General Agency Data

The General Agency Data tab shows general information about the agency and the system. It also prompts for a password to provide access to the rest of the configuration options. Enter the password for the Agency screen to enable the other tabs.

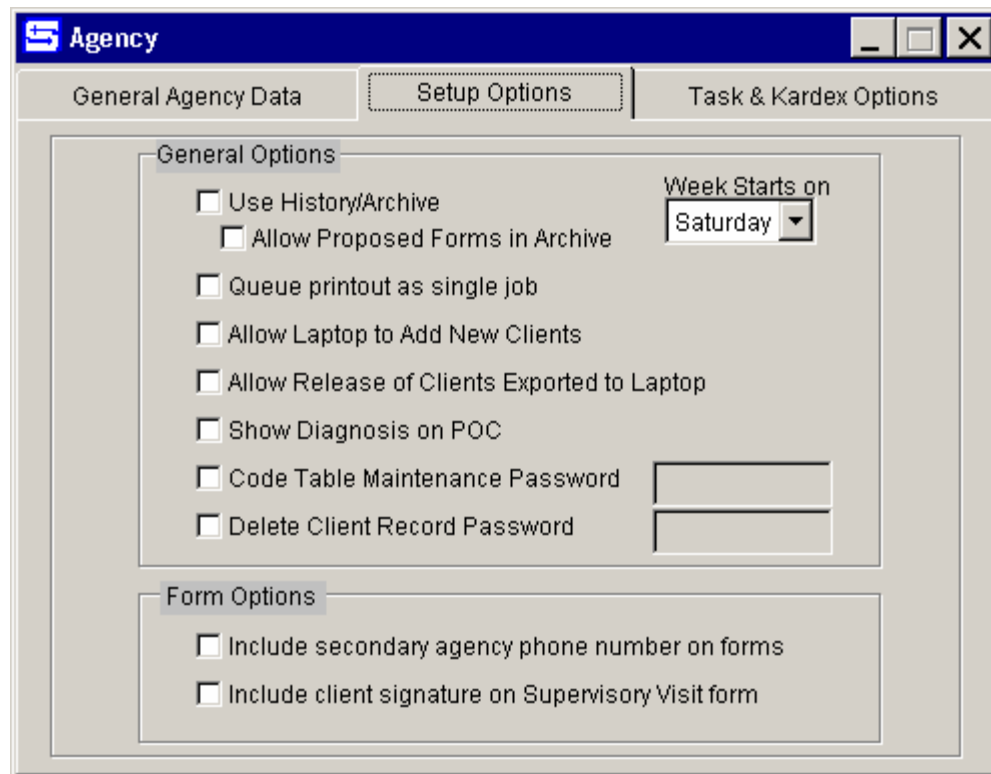
The screenshot shows a software window titled "Agency" with a blue header bar. Below the header are three tabs: "General Agency Data" (selected), "Setup Options", and "Task & Kardex Options". The main content area has a light gray background. At the top, it says "Please enter password to view or change the other option pages:" followed by a text input field. Below this, there are several fields for agency information: "Main Agency No." with value "123", "Agencies" with a dropdown menu showing "123", "Agency Name" with value "SANDSPORT DATA SERVICES", "Address" with value "26 Harbor Park Drive", "City" with value "Port Washington", "State" with value "NY", "Zip Code" with value "11050-", "Primary Phone" with value "(718) 932-4050", "Secondary Phone" with value "() -", "Fax" with value "() -", "Data Version" with value "4.24", and "Type of System" with a dropdown menu showing "Main".

If your agency has multiple vendor numbers, click on the Agencies drop-down box to see all of the vendors. The name, address and phone number information for the vendor selected in the Agencies box will display on this screen.

The data version and type of system are shown in the lower right corner of the screen. Data version is also displayed in the title bar of the program. The type of system will indicate if you are running a copy of the Nurse Assessment program that was installed as Server (Main), Laptop, or On Call.

Setup Options

The Setup Options tab contains several general options that you can use to configure the Nurse Assessment program. There are also form options, which control the way certain forms will print.



The screenshot shows a Windows-style dialog box titled "Agency". It has three tabs: "General Agency Data", "Setup Options" (which is selected), and "Task & Kardex Options". The "Setup Options" tab is divided into two sections: "General Options" and "Form Options".

General Options:

- ☐ Use History/Archive
- ☐ Allow Proposed Forms in Archive
- ☐ Queue printout as single job
- ☐ Allow Laptop to Add New Clients
- ☐ Allow Release of Clients Exported to Laptop
- ☐ Show Diagnosis on POC
- ☐ Code Table Maintenance Password
- ☐ Delete Client Record Password
- Week Starts on: Saturday (dropdown menu)

Form Options:

- ☐ Include secondary agency phone number on forms
- ☐ Include client signature on Supervisory Visit form

General Options

- ◇ Use History/Archive – This will turn on Current Form/History option on the Maintenance menu and allow users to Archive forms.
- ◇ Allow Proposed Forms In Archive – This will allow the user to store and create proposed forms in Archive. Use History/Archive must be enabled to use this feature.
- ◇ Week Starts on – Allows the agency to set the day that will be used as the start of the week for that agency. Click on the drop-down arrow to select the day from the list.
- ◇ Queue printout as single job – This feature is useful for agencies that have several users sharing the same printer. It effects how the program sends forms to the printer.
 - With this feature turned OFF the program sends each page to the printer individually as it is ready to print. For users that have their own printer this will result in slightly faster printing. But if two users try to print to the same printer at the same time, their pages will be intermixed.
 - With this feature turned ON, the program will store each page until all of the pages are ready to print. Then it will send them all to the printer at the same time. So, if two users try to print at the same time all of the pages from one user will print together before all of the pages from the second user will print.

- ◇ Allow Laptop to Add New Clients – This setting determines whether clients can be added on a Laptop version of PC Sharp. Although we still support this feature, it is recommended that clients be added into HC Plus first then sent to Nurse Assessment through the automatic nightly transfer.
- ◇ Allow Release of Clients Exported to Laptop – Turning on this option will allow a one-time use of the feature to release exported clients.
- ◇ Show Diagnosis on Plan of Care – Turning on this option will cause the diagnosis information from the Nurse Task Assessment form to appear on the Plan of Care form. If this option is turned off then the user can manually enter information on the Plan of Care form.
- ◇ Code Table Maintenance Password – Turning on this option will require users to enter a password before they will be allowed to update code tables. When this option is turned on, set the password by entering it in the box to the right.
- ◇ Delete Client Record Password – Turning this option on will require the user to enter a password before they will be allowed to delete a client record. When this option is turned on, set the password by entering it in the box to the right.

Form Options

- ◇ Include secondary agency phone number on forms – This option will print a second phone number on the Plan of Care form labeled, “After Hours Emergency Telephone”
- ◇ Include client signature on Supervisory Visit form – This will add a line for Client’s Signature and Date in the box under the agency name.

Task and Kardex Options

The Task and Kardex Options tab contains options that apply to tasks in the Nurse Task Assessment for and option for the source of the comment field in the Kardex form.

Agency

General Agency Data | Setup Options | **Task & Kardex Options**

Tasks

Display Tasks Times as:

☐ Hours and Minutes

☐ Minutes Only

☐ Enable HC Plus Nurse Assessment to Santrax Transfers

Password:

☐ Enable Priority Code

Default Range

01:00

Default Provider

4

Kardex

☐ Link Comments for Kardex (Contact Sandata Client Relations to change this setting)

If enabled, include the following fields in the Kardex comment:

☐ Medication Comments (Page 3 of Nurse Task Assessment)

☐ Task Comments (Page 4 of Nurse Task Assessment)

☐ Comments (Page 7 of Nurse Task Assessment)

☐ Special Instructions (Plan of Care, if used by Agency)

Tasks

- ◇ Display Task Times as – Determines how task times should appear. Selecting Hours and Minutes would display an hour and a half as 1:30. Selecting Minutes Only would display an hour and a half as 90.
- ◇ Default Range – Enter the default value to be used for a range for tasks.
- ◇ Default Provider – Enter the default provider for tasks in Nurse Assessment.
- ◇ Enable HC Plus Nurse Assessment to Santrax Transfers – This turns on fields in the task entry screen that contain additional data that can be sent to Santrax. Contact Sandata Client Relations to arrange to have the transfers activated for your agency.

Kardex

This section deals with the options for the comment field in the Kardex form.

If Link Comments for Kardex is already turned on for your agency, then use this screen to choose which comments should appear on the Kardex form. If you contact Client Relations, we can arrange to have the comments for all clients updated to the current settings.

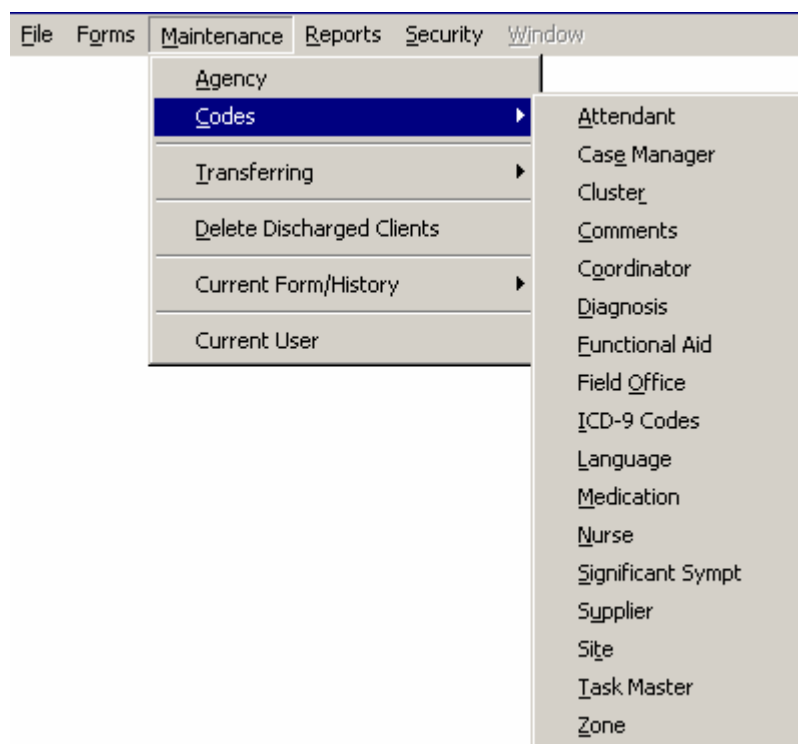
If Link Comments for Kardex is not turned on for your agency, then you will need to contact Client Relations to have this feature turned on. Before calling, use this screen to set the options

to choose which comments should appear on the Kardex form. Changing these options has no effect on the program until Link Comments for Kardex is turned on. When we turn on the Link Comments for Kardex option, we can optionally update the comments for all clients updated to the current settings.

If you are configured to use Link Comments for Kardex, but no longer want to use that option, contact Client Relations to have this feature turned off. When we turn off the Link Comment for Kardex option, we can optionally remove the comments for all clients.

CODE TABLES

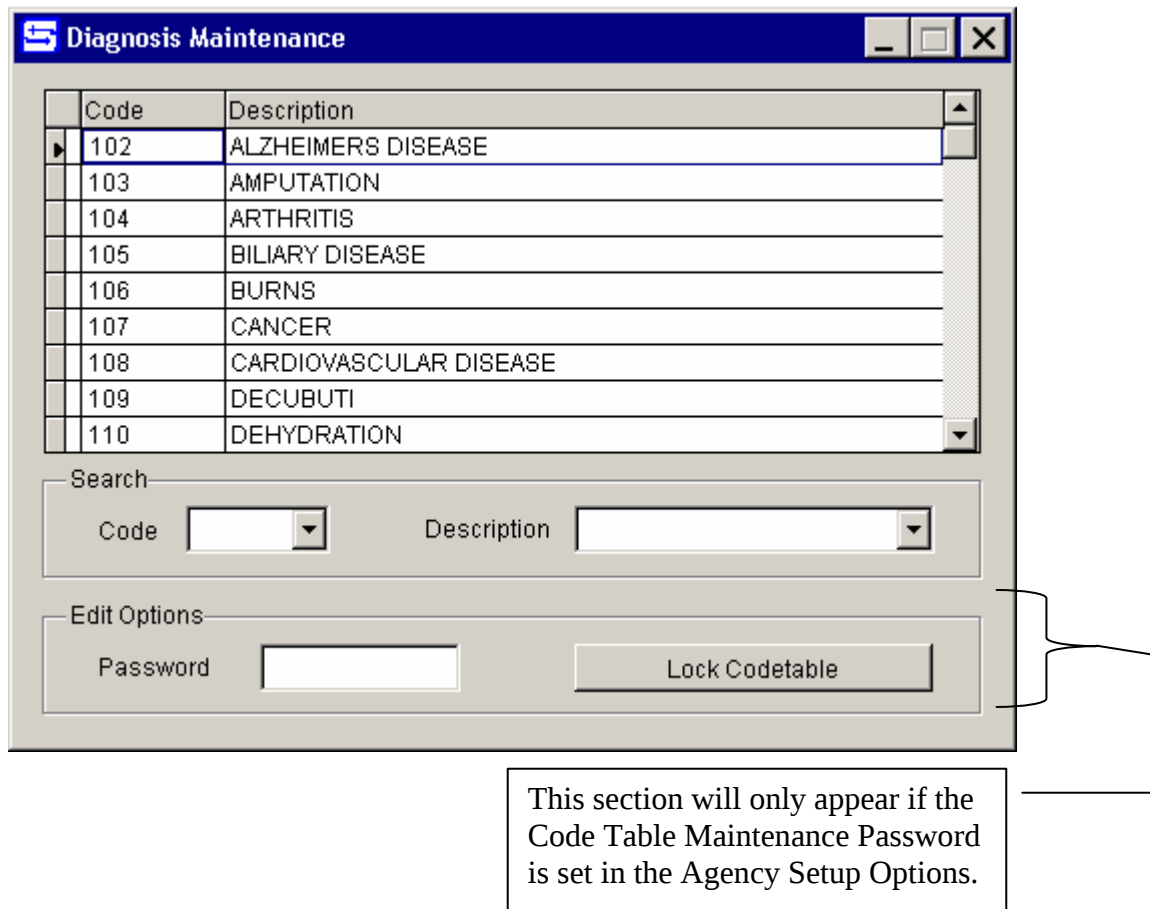
By selecting Codes from the Maintenance Menu, the user has access to all Code Tables where current information can be entered. The code tables are used to store common data that can easily be assigned to appropriate fields in the Nurse Assessment program.



General Code Tables

Most Code Tables behave the same way. The example shown below shows the Diagnosis Table. The following code tables behave the same way:

- | | | |
|----------------|------------------|------------------------|
| ◇ Attendant | ◇ Diagnosis | ◇ Medication |
| ◇ Case Manager | ◇ Functional Aid | ◇ Significant Symptoms |
| ◇ Cluster | ◇ Field Office | ◇ Supplier |
| ◇ Comments | ◇ ICD-9 Codes | ◇ Site |
| ◇ Coordinator | ◇ Language | ◇ Zone |



Diagnosis Maintenance

Code	Description
102	ALZHEIMERS DISEASE
103	AMPUTATION
104	ARTHRITIS
105	BILIARY DISEASE
106	BURNS
107	CANCER
108	CARDIOVASCULAR DISEASE
109	DECUBITI
110	DEHYDRATION

Search

Code Description

Edit Options

Password

This section will only appear if the Code Table Maintenance Password is set in the Agency Setup Options.

You can sort the list by clicking on the code or description headings.

To edit an entry, just position the cursor to where you want to make the change then type or delete characters.

To create a new code, click the New button on the toolbar or choose New from the File menu or use the shortcut key <Ctrl-N>

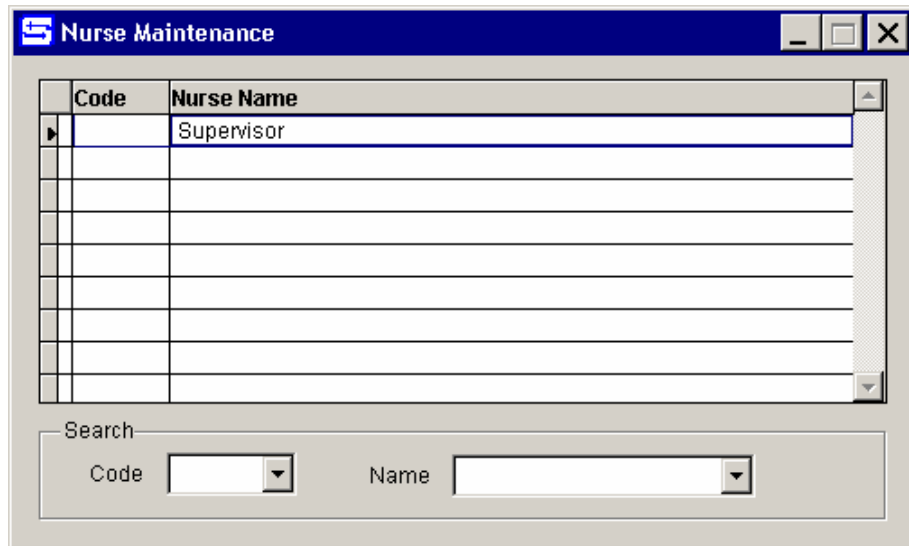
To delete an entry, click the Delete button or choose Delete from the File menu.

You can print or preview a report of all of the codes by clicking the Print or Preview buttons on the toolbar or choosing Print or Print Preview from the menu. You can also print by using the shortcut key <Ctrl-P>.

If the Edit Options section is visible, you must enter the password before you can do any editing or deleting. When the password is entered it will unlock all code tables for editing. (This only unlocks the password at the workstation the password was entered. This does not affect other work -stations) Click on Lock Codetable and the Code Table can no longer be edited until the password is re-entered.

Nurse Table

The Nurse Table will be populated from the data in HC Plus by a nightly transfer. The nurse information should be entered into HC Plus then it should appear in Nurse Assessment the next day. You cannot edit the nurse information through the Nurse Assessment program.



The screenshot shows a window titled "Nurse Maintenance". It contains a table with two columns: "Code" and "Nurse Name". The first row is highlighted and contains the text "Supervisor". Below the table is a search section with labels "Search", "Code", and "Name", each followed by a text input field and a dropdown arrow.

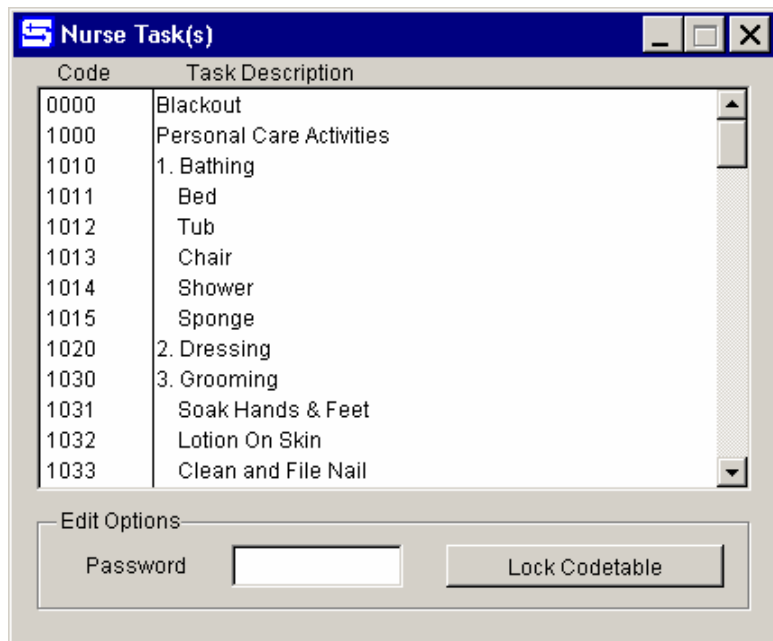
Code	Nurse Name
	Supervisor

Search
Code Name

You can sort or print the code table. Editing and using the New and Delete functions are prohibited.

Task Master Table

The Task Master table contains a list of tasks from pages 4, 5 and 6 of the Nurse Task Assessment form. Double-click on a task to edit the information for that task. You can also use Print or Print Preview to print the task list. You cannot add or delete tasks.



The screenshot shows a window titled "Nurse Task(s)". It contains a list of tasks with two columns: "Code" and "Task Description". The tasks are listed as follows:

Code	Task Description
0000	Blackout
1000	Personal Care Activities
1010	1. Bathing
1011	Bed
1012	Tub
1013	Chair
1014	Shower
1015	Sponge
1020	2. Dressing
1030	3. Grooming
1031	Soak Hands & Feet
1032	Lotion On Skin
1033	Clean and File Nail

Below the list is an "Edit Options" section with a "Password" label and a text input field, and a "Lock Codetable" button.

When you double-click on a task, the task information will be displayed. You cannot change the Task ID, Task Name or the Short Name. You can edit the default information for the task.

Important Note: The Duration Code and Total and Partial times should be set to the HRA standard times for those tasks. These values will be used to determine if the task should print on the Exceeds HRA Standard Times report.

The task data in this table may be reset when upgrading to a new version

Task

Task ID: 1032 Task Name: Lotion On Skin Short Name: Lotion

Duration Code: Daily Total: 00:00 Partial: 00:00 Category: PC Priority: All Day

Frequency 01X7

1 Times / Day 7 Days / Week

Days / Month

Every

Days

- ☒ Saturday
- ☒ Sunday
- ☒ Monday
- ☒ Tuesday
- ☒ Wednesday
- ☒ Thursday
- ☒ Friday

Time	Range

NURSE ASSESSMENT FORMS

CLIENT FORMS OVERVIEW

Client Selection List

When you first choose the specific form you want to access, the Client Selection screen will appear. From this list you can select any client. After you select a client the Nurse Assessment program will remember that client until you select another.

Last Name	First	Client #	SSN	Vend	Exp.	Disch. Code	Archive	Nurse Asmnt Visit Date
ANDREWS	MARY	515422	075-26-5623	123		1	09/11/06	03/11/04
ARZUAGA	NARCISA	515699	075-26-6473	123			09/11/06	12/22/01
AU	YEUNG YUNG	516146	118-40-1389	123			09/11/06	06/15/02
Adams	Joyce	369258	022-22-3333	123			09/11/06	04/28/04
BARSON	BARBARA	645187	123-52-7945	123			09/11/06	01/21/03
BASS	CARL	100001	100-00-0001	123			09/11/06	11/22/02
BASS2	CARL2	200002	200-00-0002	123			09/11/06	/ /
BAUSCH	CHARLOTTE	516985	090-10-5041	123			09/11/06	04/19/96
BECKER	SONIA	645080	122-30-0526	123			09/11/06	06/30/04
BELLA	FLEYSHNAN	321387	081-84-7865	123			09/11/06	/ /
BELLA	FLEYSHNAN	852853	081-84-7866	123			09/11/06	05/21/97
BELLEMARE	GERARD	645058	117-03-3326	123			09/11/06	05/15/96
BERMINGHAM	LOUIS	645020	061-16-6019	123			09/11/06	03/28/85
BERMINGHAM	MARY	645019	073-12-5993	123			09/11/06	/ /
RISSETTA	LORETTA	645124	082-14-3615	123			09/11/06	06/21/05

Filter Status: Filter is off - All clients shown

Select New Filter/Search Clear Filter Cancel

- ◇ The client list shows Last Name, First Name, Client ID, Social Security Number, Vendor Number, Discharge Code, Last Archive Date and Last Visit Date.
- ◇ You can change the order of the list to sort by Name, Client # or SSN by clicking on the corresponding bolded heading.
- ◇ The Visit Date column will change to reflect the visit date appropriate for the selected form. The following table shows which date will display as visit date for each form.

Form	Source for Visit Date
Nurse Task Assessment	Date Of This Visit – Bottom of page 7
Supervisory Visit	Date of this visit – Bottom of page
Plan of Care (01)	Date – Next to Status near upper right corner of page
Plan of Care (02)	Date – Above Date of Birth near upper right corner of page

Form	Source for Visit Date
Task Based Plan of Care	Begin Date – Top of form
Initial Nurse Assessment	Visit Date – Top center of page
P. E. R. S.	Date of PERS Review – Near bottom of page
Kardex	Most recent of the visit dates for Nurse Task Assessment or Supervisory Visit.

- ◇ To select a client, highlight that client on the list, then press <Enter> or click the Select button.
- ◇ When the list is sorted on Last Name, you can type the first couple of letters to get to that specific client quicker. Also, if the list is sorted by Client # or SSN, you can type the first few digits to get closer to the one you want to find.
- ◇ To add a new client, click on the New button.
- ◇ The Filter/Search button allows the user to narrow down the list of clients on the Client Selection screen to those clients who match the specified criteria. The Clear Filter button will clear the Filter/Search criteria and cause all clients to display on the list. The Filter Status will display under the client list.

New Clients

Generally new clients will come from the transfer from HC Plus. It is best to enter the clients in HC Plus first then wait until the client appears in Nurse Assessment the next day. However, if you cannot wait and need to enter a client into Nurse Assessment, you can do so in several ways.

- ◇ From the Client Selection list, click the New button.
- ◇ From within a form, click the New button on the toolbar.
- ◇ From within a form go to the File menu then choose New.
- ◇ From within a form type <Ctrl-N>.

The screenshot shows a 'New Client' dialog box with the following fields and controls:

- Vendor:** A dropdown menu.
- Client ID:** A text input field.
- Social Security Number:** A text input field containing two dashes.
- Last Name:** A text input field.
- First Name:** A text input field.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

You must enter all of the required data in the New Client form. Be careful to enter this data correctly. Click the Save button to create the new client or click the Cancel button to exit this form without creating a new client.

Filter/Search

The Filter/Search screen, which is also available on the Print Options form, allows the user to narrow down the list of clients to those clients who match the specified criteria.

Enter the criteria in the forms shown below. Click Reset to clear the search criteria. Click Set to set the criteria to the current entries. Click Cancel to exit this form without changing the criteria from the previous setting.

The screenshot shows the 'Client Filter/Search' window with two tabs: 'General Filters' and 'Client Data'. The 'General Filters' tab is active. It contains several sections: 'Vendor' with radio buttons for 'All' (selected) and 'Selected', and a dropdown menu; 'Laptop Exp.' with radio buttons for 'Checked in', 'Checked out', and 'Both' (selected); 'P.E.R.S.' with radio buttons for 'With PERS', 'Without PERS', and 'Both' (selected); 'Status' with radio buttons for 'Any Status' (selected), 'All Active', 'Discharged', and 'Select', and a dropdown menu set to 'New Client'; 'Nurse' and 'Supervisor' dropdown menus; 'Assessment Visit' with a date picker set to 'Any Visit Date'; and 'Supervisory Visit' with a date picker set to 'Any Visit Date'. At the bottom are 'Reset', 'Set', and 'Cancel' buttons.

The screenshot shows the 'Client Filter/Search' window with two tabs: 'General Filters' and 'Client Data'. The 'General Filters' tab is active. It contains several sections: 'Client #' text box; 'Last Name', 'First Name', 'City', 'Zip Code', and 'Phone #' text boxes; 'Soc. Sec. #' text box with dashes; 'Priority' text box; 'Clustering Data' section with 'Cluster', 'Site', and 'Zone' dropdown menus; and 'Reset', 'Set', and 'Cancel' buttons at the bottom.

You may enter criteria of one item or several, depending on how you want to narrow the search.

For Vendor, Status, Laptop Export and P.E.R.S. click the option you want to use. A dot will appear in the circle to the left of the option that has been chosen.

For Nurse, Assessment Visit, Supervisory Visit, and Clustering Data click the button to the right of the box to display a drop-down list of options.

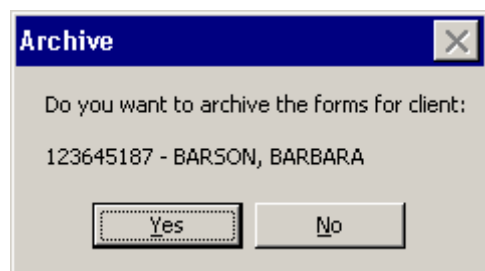
If you choose an option for Assessment or Supervisory Visit, then type in the appropriate information underneath the option.

For the text entry fields on the Client Data page, you can type the first character (letter or number) or first few characters to match any clients where that field starts with those letters. For example, entering “ba” in the Last Name field will match “Barson”, “Bass” and “Bausch”.

Archiving

When selecting a client, agencies that have the archiving feature turned on will get a prompt to archive the forms for the selected client. You should choose yes if you are beginning a new form for a client or anytime you want the current state of the form saved before making changes.

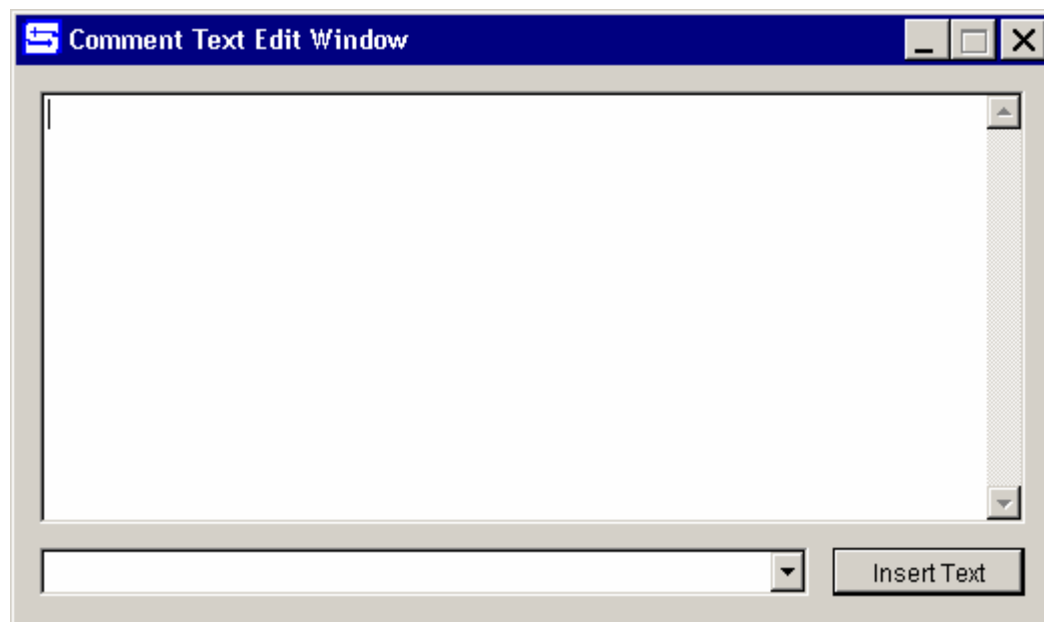
When you archive the data for all forms will be copied into the archive area. See the section on Archive for more information about how to view archived forms.



Comment Entry

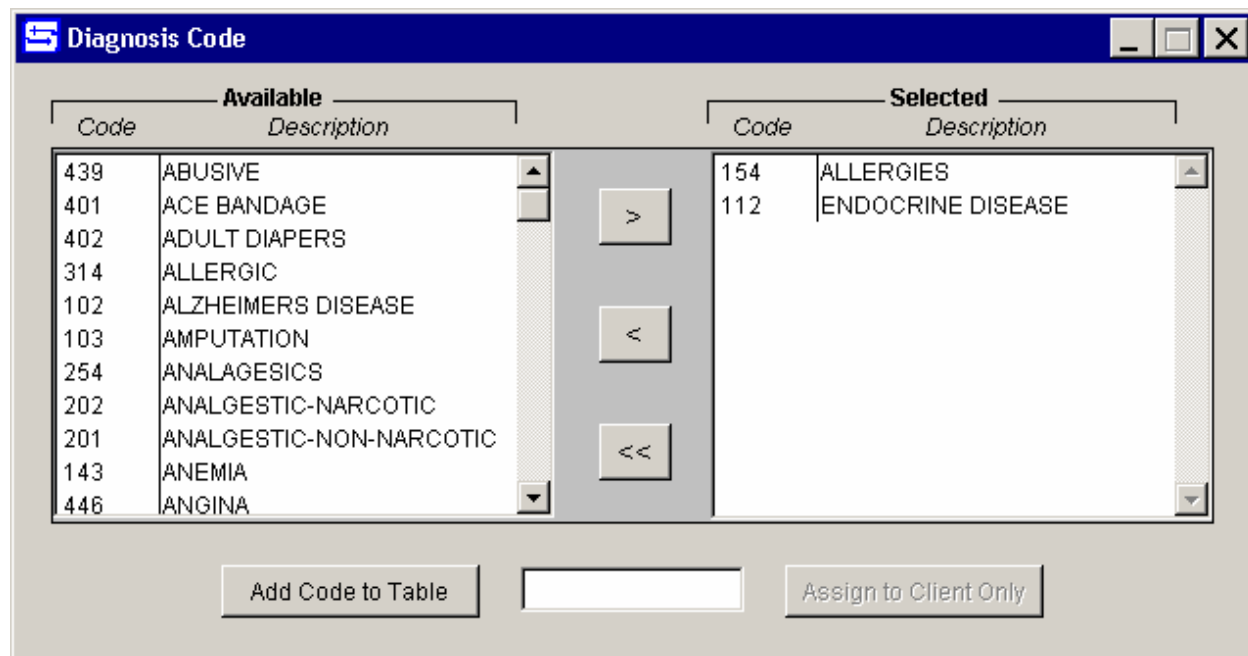
Some of the fields allow entry of more data than will fit on the screen. Most of these fields are linked to the Comment Text Edit Window. Double-click on a comment field or press the <F3> key to bring up the comment entry field.

If you have comment text entered into the comment code table, you can insert text from there by using the drop-down box at the bottom of the screen.



Assigning Codes

Some of the fields allow the selection of codes. When this occurs a window similar to this example appears.



The available codes appear on the left. The codes that have been assigned are on the right.

Use the mover buttons to move codes from one side to the other. The single arrow buttons (“<” and “>”) will move one code. The double arrow buttons (“<<” and “>>”), when available, will move all codes.

If you want to use something that is not in the code table, type the description in the blank box near the bottom. You can add this code to the table where it will be available in the future or you can add the code for this client only.

General Client Data

The first tab of every client form contains the same general data about the client. It provides a quick reference for the name, address and certain other information about the client.

The layouts of the screens for all of the forms match the layout of the printed forms as closely as possible. Some of the information in the general client data is also in the appropriate fields within the form.

Nurse's Assessment Visit: (123) 515422 - ANDREWS, MARY

4,5,6 Recommended Plan of Care		7.1 Environment		7.2 Comments	
2.2 Mental Status		2.3 Judgement		3.1 Functional Aids	
2.2 Mental Status		2.3 Judgement		3.2 Additional Services / Meds	
General Client Data		1.1 Assessment		1.2 Purpose of Visit/Diagnosis	
1.1 Assessment		1.2 Purpose of Visit/Diagnosis		1.3 Impairments	
1.3 Impairments		2.1 Mobility		2.1 Mobility	

General Client Data Client # 515422 Vendor 123			Client Discharge Status Code 1 Date 03/11/04 Description Died		
Client Name Last ANDREWS First MARY			Clustering Data Cluster Site Zone		
Address 10 CATHERINE SLIP Apt. 1122 Floor 11 NEW YORK NY 10038-1347			Language ENGLISH Priority		
Phone # (212) 227-7536 Social Security 075-26-5623 Date of Birth 03/19/1924					

NURSE TASK ASSESSMENT FORM

The Nurse Task Assessment form is divided into 12 tabs, which represent the different page sections for each of the 7 pages of the printed form. The tabs are numbered and located at the top of the form. The tabs follow the order of the assessment layout

Proposed Forms

Some agencies have a need to update the Nurse Task Assessment (M27r) form to request a change of hours, but do not want to affect the Plan of Care data sent over to Santrax. To accommodate this request, the ability to create “proposed forms” has been added to the program. A proposed form will be created as a special archived form that will allow the user to edit the form.

This is an optional feature. It can be enabled on the agency configuration screen. “Use History/Archive” must be enabled to use the proposed forms. To turn on this feature, check the box for “Use History/Archive” then check the box for “Allow Proposed Forms in Archive”.

When you create a “Proposed Form”, the program will prompt you to select a client. After you select the client, the program will confirm that you want to create a proposed form for that client. Clicking “Yes” will cause the current form for to be copied into Archive. The form will be flagged as “Proposed”. The “Proposed” copy of the form will open, allowing the user to make any changes. Those changes can be saved and printed. Changes to the “Proposed Form” will not affect the current form for the client.

The proposed form will exist in Archive. After closing the proposed form, if you wish to make further changes or print it again, you can switch to Archive from the Maintenance menu by choosing “Current Form/History” then “Multiple Forms per Client”.

1.1 Assessment

This screen contains the data on the top of page 1 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA

4,5,6 Recommended Plan of Care		7.1 Environment		7.2 Comments	
2.2 Mental Status		2.3 Judgement		3.1 Functional Aids	
3.2 Additional Services / Meds		1.1 Assessment		1.2 Purpose of Visit/Diagnosis	
General Client Data		1.3 Impairments		2.1 Mobility	

Field Office: [Dropdown] Case Manager: [Dropdown]

IA. Client's Name Birth Date: [05/22/1913] ☐ If Mutual Case, Other Client's Name: [] S.S.#: [000-00-0000]

Address: [851 E 162 ST] Apt. [] Soc. Sec. #: [123-52-7945] Medicaid #: []
 [APT 1H] Floor [] Medicare ☐ Yes ☐ No MCR #: []
 [BRONX] NY [] 10452-5187

Assessment Agency
☒ Home Attendant
☐ Housekeeper
☐ Home Health Agency
☐ Other []

Billable Hours per Week: [] Authorized Hours per Week: [040]

Recommendation for Authorization of Service (in Hours): [19:25]
☐ Start ☒ Continue ☐ Increase Tasks
☐ Deny ☐ Decrease Tasks ☐ Discontinue

Present at Interview
☒ HA ☐ HK ☐ HHA ☒ Relative/Friend
 Source of Information: [client/h/a]

Recommended Level of Care:
☒ Home Attendant ☐ Home Health Aid
☐ Housekeeper ☐ Other []

For a 24-hour case, enter the appropriate value. Otherwise, this field is calculated from the total task times from pages 4, 5 and 6.

1.2 Purpose of Visit/Diagnosis

This page contains the data found in the middle of page 1 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA

4,5,6 Recommended Plan of Care		7.1 Environment		7.2 Comments	
2.2 Mental Status		2.3 Judgement		3.1 Functional Aids	
3.2 Additional Services / Meds		1.1 Assessment		1.2 Purpose of Visit/Diagnosis	
General Client Data		1.3 Impairments		2.1 Mobility	

Contact Person Phone #
 (718) 154-5456
 () -

Diagnosis
 Primary: ENDOCRINE DISEASE, ALLERGIES
 Secondary: ICD-9 Code If Available: 002.0, 083.1

Client - Primary Medical Provider
 Name: DR CANTANA Phone #: () -

Purpose of Visit:
☐ Initial ☐ Reassessment ☐ Change

Significant Symptoms: ALERT ORIENT 4GETFUL, ARTHRITIC PAIN, HEADACHES

Vital Signs: 120/70 18 65

Regularly Scheduled Appointments

	Day	Time	Frequency
dral	2200	00X3	
eye	1000	Q06M	

Diagnosis (Primary, Secondary and ICD-9 code), Significant Symptoms and Scheduled appointments bring up their own entry screens. The ones for the diagnosis fields and significant symptoms are similar, so only the Diagnosis Code screen is shown from that group.

Diagnosis Code

Available		Selected	
Code	Description	Code	Description
439	ABUSIVE	154	ALLERGIES
401	ACE BANDAGE	112	ENDOCRINE DISEASE
402	ADULT DIAPERS		
314	ALLERGIC		
102	ALZHEIMERS DISEASE		
103	AMPUTATION		
254	ANALGESICS		
202	ANALGESTIC-NARCOTIC		
201	ANALGESTIC-NON-NARCOTIC		
143	ANEMIA		
446	ANGINA		

Buttons: > < <<

Buttons: Add Code to Table Assign to Client Only

Here is the Schedule Appointment screen

Use the buttons on the toolbar or options from the File menu to add or delete appointment records.

1.3 Impairments

This page contains the data found on the bottom of page 1 of the Nurse Assessment Visit form.

2.1 Mobility

This page contains the data found on the top of page 2 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA					
4,5,6 Recommended Plan of Care		7.1 Environment		7.2 Comments	
2.2 Mental Status		2.3 Judgement		3.1 Functional Aids	
General Client Data		1.1 Assessment		1.2 Purpose of Visit/Diagnosis	
				1.3 Impairments	
2.1 Mobility					
III. A. Mobility		Can Indep	Can w/ Mech Aid	Can w/Aid of Person	Can not
Walk	☒		☒	☐	☐
Wheel	☐		☒	☐	☐
Get Up From Seated Position	☒		☐	☐	☐
Get Up From Bed	☒		☐	☐	☐
Transfer to Commode	☐		☐	☐	☐
Transfer to Wheelchair	☐		☐	☐	☒
Use Bedpan	☐		☐	☐	☒
B. Client Endurance					
☐ Tolerates Distances (250 Ft +)					
☒ Needs Intermittent Rest					
☐ Barely Tolerates Short Activities					
☐ No Tolerances					
Telephone Usage					
Is Client Able to Use Telephone		☒ Yes ☐ No, Explain			
Does Client Have Personal Emergency response System		☐ Yes ☐ No			
C. Client Preferences for Services Hours And Activities:		Use 24:00 Hour Clock			
Rise Time	0800	Lunch	1300		
Breakfast	0900	Dinner	1630		
Bathing	0930	Bedtime	2130		
D. Client Status Variations During Day		Include Any Peak Periods of Functioning (E.G. Early or Later in Day.)			

2.2 Mental Status

This page contains the data found in the middle of page 2 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA			
4,5,6 Recommended Plan of Care		7.1 Environment	
7.2 Comments			
General Client Data		1.1 Assessment	
1.2 Purpose of Visit/Diagnosis		1.3 Impairments	
2.1 Mobility			
2.2 Mental Status		2.3 Judgement	
3.1 Functional Aids		3.2 Additional Services / Meds	
IV A. Mental Status			
	Yes	No	Comments
Oriented to Time, Person, Place	☐	☐	
Alert	☐	☐	
Able to Learn	☐	☐	
Able to Direct Worker	☐	☐	
Able to Manage Affairs	☐	☐	
Impaired Recent Memory	☐	☐	
Agitated	☐	☐	
Wanders if Unsupervised	☐	☐	
Depressed	☐	☐	
Anxious	☐	☐	

2.3 Judgement

This page contains the data found on the bottom of page 1 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA				
4,5,6 Recommended Plan of Care		7.1 Environment	7.2 Comments	
General Client Data	1.1 Assessment	1.2 Purpose of Visit/Diagnosis	1.3 Impairments	2.1 Mobility
2.2 Mental Status	2.3 Judgement	3.1 Functional Aids	3.2 Additional Services / Meds	
B. Judgement				
			Appropriate	Fair
What If Your Home Attendant Could Not Get Here?			☐	☐
What Would You Do If There Was a Fire When You Were Alone?			☐	☐
What Would You Do If You Were Alone And You Got Chest Pains That Would Not Go Away?			☐	☐
If Someone Rings Your Bell, What Do You Do?			☐	☐
If Any Evidence of the Following, Please Describe. Include Source of Information and Indicate Action Taken and Recommended Follow-up.				
☐ Verbally Abusive				
☐ Physically Assaultive				
☐ Suicidal Ideation				
☐ Self-Endangering Behavior				
☐ Known Psychiatric Disorder				

3.1 Functional Aids

This page contains the data found on the top of page 3 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA				
4,5,6 Recommended Plan of Care		7.1 Environment	7.2 Comments	
General Client Data	1.1 Assessment	1.2 Purpose of Visit/Diagnosis	1.3 Impairments	2.1 Mobility
2.2 Mental Status	2.3 Judgement	3.1 Functional Aids	3.2 Additional Services / Meds	
V. Functional Aids				
What Functional Aids Does Client Have?				
Are Functional Aids Being Used Correctly? ☐ Yes ☐ No If No, Specify				
What Functional Aids Does the Client Need and Not Have?				
Have They Been Ordered? ☐ Yes ☐ No				
Name of Supplier:				
VI. A. Skilled Needs				
Does Client Need Any of the Following? ☐ Yes ☒ No If Yes, Specify Frequency and Provider				
	Frequency	Provider		Frequency
Decubitis Care			Oxygen Administration	
Sterile Dressings			Respiratory Therapy	
ROM/Therapeutic Exercises			Catheter Irrigation/Insertion	
Enema			Tube Irrigation	
Ostomy Care			Tube Feeding	
			Suctioning	
			Monitor Vital Signs	
			Other	

The sections for the functional aids that the client has or needs and the section for the supplier bring up screens similar to the one for Diagnosis as shown in the section for tab 1.2

3.2 Additional Services/Meds

This page contains the data found on the bottom of page 3 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA

4,5,6 Recommended Plan of Care		7.1 Environment		7.2 Comments	
General Client Data		1.1 Assessment		1.2 Purpose of Visit/Diagnosis	
2.2 Mental Status		2.3 Judgement		3.1 Functional Aids	
				3.2 Additional Services / Meds	

B. Additional Services/Referral:
Indicate Whether The Client Should Be Referred For, Or Is Receiving The Following:

	Referral Needed		Receiving Services		Other:
	Yes	No	Yes	No	
Psychiatric Evaluation	☐	☐	☐	☐	OT
Rehabilitation Therapy	☒	☐	☒	☐	

C. Current Medications

Medication	Dosage	Freq	Route	Can Client Self Administer?		Comments
				Yes	No	
AXID	150mg	QD	PO	☐	☐	

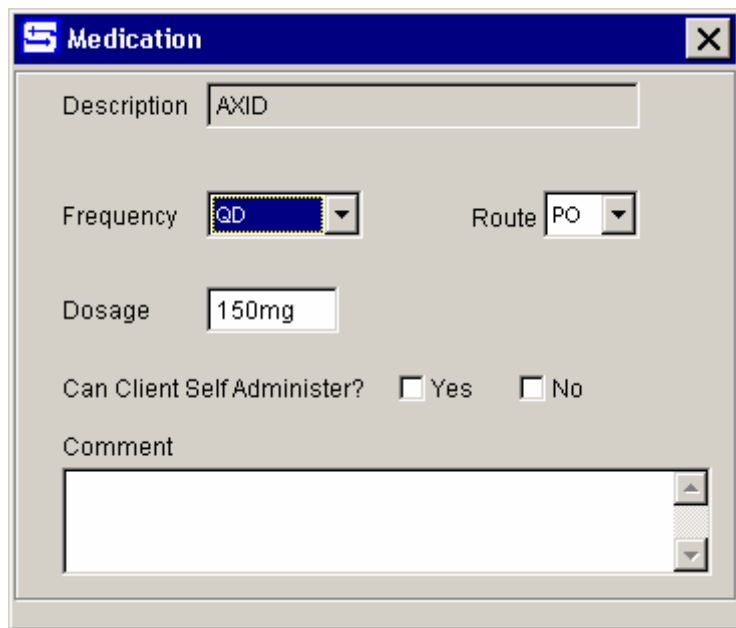
Do Medications Need To Be Prepared For Client? ☐ Yes ☐ No
If Yes, Who Will Prepare? _____

Medications will bring up the following screen.

Medications

Available		Selected						
Code	Description	Code	Medication	Dosage	Freq	Route	Yes	No
001	ACETAMINOPHEI	225	AXID	150mg	QD	PO	☐	☐
003	ALDOMET							
226	ALOMIDE							
004	ALUPENT INH							
102	AMBUTROL SULF							
127	AMITRIPTYLINE							
005	ANTIVERT							
006	ASPIRIN							
007	ATARAX							
008	ATROPINE							
225	AXID							

This is similar to the other screens for assigning codes, but with a few added features. When medications are selected, an additional screen comes up asking for further information about the medication being assigned. After a medication is assigned, you can get this screen by clicking the Edit Medication button.



Medication

Description:

Frequency: Route:

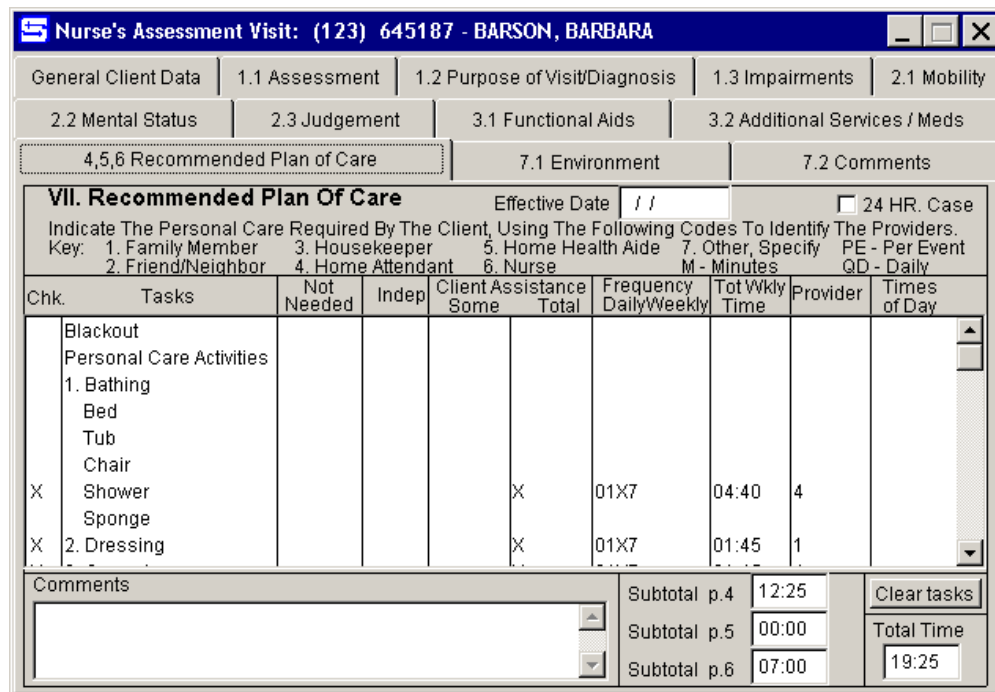
Dosage:

Can Client Self Administer? ☐ Yes ☐ No

Comment:

4, 5, 6 Recommended Plan of Care

This page contains the tasks for pages 4, 5 and 6 of the Nurse Assessment Visit form.



Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA

General Client Data | 1.1 Assessment | 1.2 Purpose of Visit/Diagnosis | 1.3 Impairments | 2.1 Mobility

2.2 Mental Status | 2.3 Judgement | 3.1 Functional Aids | 3.2 Additional Services / Meds

4,5,6 Recommended Plan of Care | 7.1 Environment | 7.2 Comments

VII. Recommended Plan Of Care Effective Date:

Indicate The Personal Care Required By The Client, Using The Following Codes To Identify The Providers.
 Key: 1. Family Member 3. Housekeeper 5. Home Health Aide 7. Other, Specify PE - Per Event
 2. Friend/Neighbor 4. Home Attendant 6. Nurse M - Minutes QD - Daily

Chk.	Tasks	Not Needed	Indep	Client Assistance Some	Total	Frequency Daily/Weekly	Tot Wkly Time	Provider	Times of Day
	Blackout								
	Personal Care Activities								
	1. Bathing								
	Bed								
	Tub								
	Chair								
X	Shower			X		01X7	04:40	4	
	Sponge								
X	2. Dressing			X		01X7	01:45	1	

Comments:

Subtotal p.4: 12:25
 Subtotal p.5: 00:00
 Subtotal p.6: 07:00

Total Time: 19:25

Clear tasks

The list shows all of the tasks on the Nurse Task Assessment form pages 4, 5 and 6. Double-click on a task to add or edit information for that task. The Task Assignment screen is shown below.

The subtotals and total task times appear on the bottom right side of the screen.

In the upper right corner is a checkbox for 24-hour case. If this is checked then the total weekly time, subtotals and total time will be blank.

If you want to clear all current tasks and reenter the tasks from scratch, you can use the Clear tasks button in the lower right corner. This will remove all task assignments for this client. This feature can be helpful when there are significant changes in the Plan of Care, but be careful about using this feature by mistake since all tasks will then have to be reentered.

Here is the task assignment screen.

The screenshot shows the 'Task Assignment' window with the following fields and options:

- Task ID:** 1014
- Task Name:** Shower
- Short Name:** Shower
- Client Assistance:** ☐ Not Needed, ☐ Independent, ☐ Some, ☒ Total
- Duration Code:** Daily
- Duration:** 00:20
- Priority:** All Day
- Provider:** 4
- Frequency:** 01X7
- Days:** ☒ Saturday, ☒ Sunday, ☒ Monday, ☒ Tuesday, ☒ Wednesday, ☒ Thursday, ☒ Friday
- Santrax Options:** ☐ Freq: As Needed, **Shift:** [dropdown]
- Exceeds HRA Standard Time:** ☐
- Default Settings:** [button]

Time	Range
	0

To use the Default Setting, choose either “Some” or “Total” for client assistance, then click the Default Settings button. This will set the task to any default values that were setup in the Task Master file.

The Santrax Options (Frequency and Shift) will only appear if that option was turned on in the agency configuration screen.

The Exceeds HRA Standard Time checkbox and comment entry field will become available if the duration exceeds the standard duration set in the Task Master file.

7.1 Environment

This page contains the data found on the top of page 7 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA				
General Client Data	1.1 Assessment	1.2 Purpose of Visit/Diagnosis	1.3 Impairments	2.1 Mobility
2.2 Mental Status	2.3 Judgement	3.1 Functional Aids	3.2 Additional Services / Meds	
4,5,6 Recommended Plan of Care		7.1 Environment	7.2 Comments	
VIII. A. Environment Are There Any Environmental Problems In The Apartment? ☐ No ☐ Yes If Yes, Explain Do Environmental Problems Affect Task Time? ☐ No ☐ Yes If Yes, Explain 				
B. Sleep-In Facilities Describe Facilities For A Sleep-In Home Attendant				
Sleeping:				
Cooking:				
Space For Personal Belongings:				
Privacy:				

7.2 Comments

This page contains the data found on the bottom of page 3 of the Nurse Assessment Visit form.

Nurse's Assessment Visit: (123) 645187 - BARSON, BARBARA				
General Client Data	1.1 Assessment	1.2 Purpose of Visit/Diagnosis	1.3 Impairments	2.1 Mobility
2.2 Mental Status	2.3 Judgement	3.1 Functional Aids	3.2 Additional Services / Meds	
4,5,6 Recommended Plan of Care		7.1 Environment	7.2 Comments	
C. 1. Can The Client Ever Be Safely Left Alone In The Home? ☐ Yes ☐ No If No, Explain 2. Can The Client Provide Access To The Home? ☐ Yes ☐ No If No, Who Will Provide Access? 3. Is The Client Appropriate For Home Care? ☐ Yes ☐ No If No, Explain 4. Is The Client Appropriate For Inclusion In A Home Care Cluster? ☐ Yes ☐ No If No, Explain 5. Is The Client Currently Included In A Home Care Cluster? ☐ Yes ☐ No				
D. Comments, Special Instructions, Plans Or Goals For Continued Service: 				
Month Next Visit To Be Made:	Nurse Name		Date Of This Visit	
			/ /	

When you enter the Date of This Visit, the Month Next Visit To Be Made will be calculated as 6 months.

Nurse Name is required. You must choose a nurse that has a code assigned or the program will give you a message when you try to save.

SUPERVISORY VISIT FORM

1.1 Assessment

This page contains the data found on the top of the Supervisory Visit form.

The screenshot shows a software window titled "Supervisory Visit Report: (123) 645187 - BARSON, BARBARA". The window has four tabs: "General Client Data", "1.1 Assessment", "1.2 Comments", and "1.3 Evidence". The "1.1 Assessment" tab is active. The form contains the following fields and data:

- Field Office:** [Dropdown menu]
- Client Name:** BARBARA BARSON
- Address:**
 - 851 E 162 ST Apt. []
 - APT 1H Floor []
 - BRONX NY [] 10452-5187
- Case Manager:** [Dropdown menu]
- ☐ If Mutual Case, Primary's Name: []
- Social Security:** 123-52-7945
- Medicaid:** []
- Agency Name:** SANDSPORT DATA SERVICES
- Agency I.D. No.:** 123
- Nurse's Name:** [Dropdown menu]
- Current Service Plan:** H/A
- Hours Per Week:** 040
- Present at Interview:**
 - ☐ HA/HK/HHA
 - ☐ Relative/Friend
- Home Attendant's Name:** [Dropdown menu]

Nurse Name is required. You must choose a nurse that has a code assigned or the program will give you a message when you try to save.

1.2 Comments

This page contains the data found in the middle of the Supervisory Visit form.

The screenshot shows the 'Supervisory Visit Report: (123) 645187 - BARSON, BARBARA' window with the '1.2 Comments' tab selected. The form contains three sections with text boxes and checkboxes:

- Section 1:** "Since the last nursing assessment, have there been any changes in the health status of the client? If yes, describe and indicate follow-up actions taken." with checkboxes for Yes and No.
- Section 2:** "Are services being provided according to the plan of care?" with checkboxes for Yes and No. Below it, "If no, please describe problems and action taken." with a text box.
- Section 3:** "Is home attendant able to:" followed by two questions: "Relate effectively to client and client's family?" and "Accept direction and supervision?", each with Yes/No checkboxes. Below these is "If no, describe problems and actions." with a text box.

1.3 Evidence

This page contains the data found on the top of the Supervisory Visit form.

The screenshot shows the 'Supervisory Visit Report: (123) 645187 - BARSON, BARBARA' window with the '1.3 Evidence' tab selected. The form contains several sections:

- Check if evidence of:** A list of checkboxes for various conditions: Bedsores/Skin Lesions, Skin Rashes, Poor Nutrition, Emaciation, Dehydration, Obesity, Recent Falls, Contractures, Abuse of Alcohol, Abuse of Drugs, Bruises/Injuries, and Problematic Environment. There is also an 'Other' checkbox with a text box.
- Describe items checked and follow-up actions taken.** (See previous visit report if necessary.) with a text box.
- For which task was on-the-job training needed? Describe O. J. T. provided.** with a text box.
- Bottom Section:** Three fields: "Month next visit to be made" (a dropdown menu), "Nurse's Signature" (a text box), and "Date of this visit:" (a date field showing //).

When you enter the Date of this visit, the Month next visit to be made will be calculated as 3 months.

PLAN OF CARE FORM

This form is optional. There are two variations of the form. Contact Sandata Client Relations to enable or disable this form for your agency or to change which form is selected for your agency.

Plan of Care (01)

Below are the screens for the Plan of Care (01) form.

POC (01) Client

The screenshot shows a software window titled "Plan of Care (01): (123) 645187 - BARSON, BARBARA". The window has a tabbed interface with the following tabs: "General Client Data", "Client" (which is the active tab), "Impairment", "Personal Care I", "Personal Care II", and "Household Chores". The "Client" tab contains the following fields:

- Coordinator: [Dropdown menu]
- Case Manager: [Dropdown menu]
- Service Schedule: [Text field]
- Status: [Text field]
- Date: [Text field with slashes]
- Last: [Text field with value "BARSON"]
- First: [Text field with value "BARBARA"]
- Sex: [Dropdown menu]
- Language: [Text field with value "SPANISH"]
- Address:
 - Line1: [Text field with value "851 E 162 ST"]
 - Apt.: [Text field]
 - Floor: [Text field]
 - Tel.: [Text field with value "() 542-1959"]
 - Line2: [Text field with value "APT 1H"]
 - City: [Text field with value "BRONX"]
 - ST.: [Dropdown menu with value "NY"]
 - Zip: [Text field with value "10452-5187"]
- Contact Name:
 - [Text field with value "mary doe"]
 - Relationship: [Text field]
 - Tel.: [Text field with value "(718) 154-5456"]
- Medical Providers:
 - [Text field with value "DR CANTANA"]
 - Tel.: [Text field with value "() -"]
 - [Text field]
 - Tel.: [Text field with value "() -"]
- Pharmacy: [Text field]
- Tel.: [Text field with value "() -"]

POC (01) Impairment

Plan of Care (01): (123) 645187 - BARSON, BARBARA

General Client Data | Client | **Impairment** | Personal Care I | Personal Care II | Household Chores

Primary Hospital

 -

Nearest Hospital

 -

Phone # () -

Hearing
 (Lt) ☐ OK ☐ Partial Loss ☐ Deaf ☐ Hearing Aid
 (Rt) ☐ OK ☐ Partial Loss ☐ Deaf ☐ Hearing Aid

Speech
☐ OK ☐ Impaired

Telephone
☐ OK ☐ Unable ☐ Long time to answer

Sight
 (Lt) ☐ OK ☐ Poor ☐ Blind ☐ Glasses
 (Rt) ☐ OK ☐ Poor ☐ Blind ☐ Glasses

Ability to Direct
☐ Self ☐ With Help ☐ Family

Pets

Main Problems

Allergies

POC (01) Personal Care I

Plan of Care (01): (123) 645187 - BARSON, BARBARA

General Client Data | Client | Impairment | **Personal Care I** | Personal Care II | Household Chores

Personal Care	Self	Partial Assist	Total Assist	Description (Check As It Applies)
Bathing	☐	☐	☐	☐ Tub ☐ Shower ☐ Bed ☐ Sponge ☐ Chair ☐ Tubseat ☐ Grab Bars
Grooming	☐	☐	☐	☐ Brush Hair ☐ Shave ☐ Clean/File Finger Nails ☐ Do Not Cut Toenails ☐ Podiatrist
Mouth Care	☐	☐	☐	☐ Dentures ☐ Brush Teeth
Shampoo	☐	☐	☐	☐ In Bath ☐ In Sink ☐ In Bed ☐ Beauty Parlor
Dressing	☐	☐	☐	
Skin Care	☐	☐	☐	☐ Lotion ☐ Do Not Massage ☐ Report Breakdown Immediately
Toileting	☐	☐	☐	Bowel: ☐ Continent/ ☐ Incontinent Bladder: ☐ Continent/ ☐ Incontinent ☐ Colostomy ☐ Toilet ☐ Commode ☐ Bedpan ☐ Urinal ☐ Diapers ☐ Chux ☐ Catheter Bag
Positioning	☐	☐	☐	☐ Turn Every 2 Hours

POC (01) Personal Care II

Plan of Care (01): (123) 645187 - BARSON, BARBARA						
General Client Data		Client	Impairment	Personal Care I	Personal Care II	Household Chores
Personal Care	Self	Partial Assist	Total Assist	Description (Check As It Applies)		
Transfer	☐	☐	☐	☐ Bed to Chair ☐ Wheelchair ☐ Pivotal ☐ Hoyer Lift ☐ Sliding Board		
Walking	☐	☐	☐	☐ Walker ☐ Cane ☐ Unable Weight Bearing: ☐ Full ☐ Partial ☐ None ☐ Accompany Outdoors ☐ Safety Supervision		
Reminders	☐	☐	☐	☐ Date & Time ☐ Who people are ☐ Place		
Eating	☐	☐	☐	☐ Cut up food ☐ Supervise ☐ Tube feeding ☐ Encourage fluids		
Cooking	☐	☐	☐	Diet ☐ Breakfast ☐ Lunch ☐ Dinner ☐ Snack		
Medications	☐	☐	☐	☐ Remind ☐ Open ☐ Family / VNS Prepares		
Smoking	☐	☐	☐	☐ Does Not ☐ Use Precautions		
Special Instructions: *Practice Universal Precautions at All Times* *PERS Instruction *						

POC (01) Household Chores

Plan of Care (01): (123) 645187 - BARSON, BARBARA									
General Client Data		Client	Impairment	Personal Care I	Personal Care II	Household Chores			
Household Chores	Daily	Weekly	Monthly	As Needed	Household Chores	Daily	Weekly	Monthly	As Needed
Marketing	☐	☐	☐	☐	Clean Bathroom	☐	☐	☐	☐
Laundry	☐	☐	☐	☐	Clean Kitchen	☐	☐	☐	☐
Make Bed	☐	☐	☐	☐	Clean Refrigerator	☐	☐	☐	☐
Change Bed	☐	☐	☐	☐	Defrost Refrigerator	☐	☐	☐	☐
Ironing Clothes	☐	☐	☐	☐	Assist Home Budget	☐	☐	☐	☐
Dust/ Vacuum/Mop	☐	☐	☐	☐	Escort to Appt.	☐	☐	☐	☐
Client / Family Sig. _____					R.N. Sig. _____				
Reviewed By					R.N. Date Reviewed				

Plan of Care (02)

Below are the screens for the Plan of Care (02) form.

POC (02) General Info

Plan of Care (02): (123) 645187 - BARSON, BARBARA						
General Client Data		General Info	Health Info	Personal Care I	Personal Care II	Household Chores
General Information:						
First Name	Last Name	Date	D.O.B.	Sex		
BARBARA	BARSON	/ /	05/22/1913			
Address:						
Line1		Line2				
851 E 162 ST		APT 1H				
City	State	Zip	Apt.	Floor	Tel.	
BRONX	NY	10452-5187			() 542-1959	
Directions To House:						
Contact Name				Tel.	() -	
Doctor	DR CANTANA			Tel.	(718) 154-5456	
Pharmacy				Tel.	() -	

POC (02) Health Info

Plan of Care (02): (123) 645187 - BARSON, BARBARA						
General Client Data		General Info	Health Info	Personal Care I	Personal Care II	Household Chores
Primary Hospital		Nearest Hospital				
Phone #		Phone #				
() -		() -				
Health Problems:						
Allergies:						
Schedule		Holiday Coverage		Replacement Code		
Impairments:						
Speech	☐ OK	☐ Impaired	Hearing	☐ OK	☐ Partial Loss	☐ Deaf
Telephone	☐ OK	☐ Unable	Sight	☐ OK	☐ Poor	☐ Blind
Mental Status	☐ Can Direct	☐ Needs Help		☐ L	☐ R	☐ Glasses
		☐ Family Directs				

POC (02) Personal Care I

Plan of Care (02): (123) 645187 - BARSON, BARBARA

General Client Data | General Info | Health Info | **Personal Care I** | Personal Care II | Household Chores

Pets

Goals For Attendant Care:

Personal Care	Self	Partial Assist	Total Assist	Description (Check As It Applies)
Bathing	☐	☐	☐	☐ Tub ☐ Shower ☐ Bed ☐ Tubseat ☐ On Commode/Toilet ☐ Safety Bars
Mouth Care	☐	☐	☐	☐ Dentures ☐ Brush Teeth
Shampoo	☐	☐	☐	☐ Beauty Parlor ☐ In Bed
Shave	☐	☐	☐	
Nail Care	☐	☐	☐	☐ Do Not Cut Toenails ☐ Podiatrist
Skin Care	☐	☐	☐	☐ Lotion to Red/Dry Areas ☐ Do Not Massage ☐ Turn Every 0 Hours

POC (02) Personal Care II

Plan of Care (02): (123) 645187 - BARSON, BARBARA

General Client Data | General Info | Health Info | Personal Care I | **Personal Care II** | Household Chores

Personal Care	Self	Partial Assist	Total Assist	Description (Check As It Applies)
Dressing	☐	☐	☐	
Toileting	☐	☐	☐	☐ Toilet ☐ Commode ☐ Bedpan ☐ Chux ☐ Diapers ☐ Catheter By
Transfers	☐	☐	☐	☐ Bed To Chair ☐ Wheelchair ☐ Bedbound ☐ Safety Supervision ☐ Assistance ☐ Weightbearing ☐ Full ☐ Partial ☐ None
Walking	☐	☐	☐	☐ Safety Supervision ☐ Stair Climbing ☐ Accompany Outdoors ☐ Walker ☐ Cane
Reminders	☐	☐	☐	☐ Date & Time ☐ Who People Are ☐ Place
Cooking	☐	☐	☐	☐ Special Diet ☐ Breakfast ☐ Lunch ☐ Dinner ☐ Snacks
Eating	☐	☐	☐	
Smoking	☐	☐	☐	☐ Does Not ☐ Safety Supervision
Medication	☐	☐	☐	☐ Remind ☐ Open ☐ Family Prepares

POC (02) Household Chores

Plan of Care (02): (123) 645187 - BARSON, BARBARA

General Client Data | General Info | Health Info | Personal Care I | Personal Care II | **Household Chores**

☐ CLEAN KITCHEN ☐ sink stovetop, countertops daily ☐ oven monthly ☐ wash kitchen floor daily ☐ COVER AND REMOVE GARBAGE daily ☐ DEFROST REFRIGERATOR monthly ☐ CLEAN REFRIGERATOR ☐ weekly ☐ monthly ☐ CLEAN LIVINGROOM, HALL, DININGROOM, ETC. ☐ weekly ☐ every 2 weeks ☐ CLEAN BATHROOM ☐ sink and tub as needed ☐ floors and toilet weekly ☐ WET OR DRY MOP ☐ weekly ☐ as needed ☐ VACUUM, SWEEP, DUST ☐ weekly ☐ daily ☐ as needed ☐ WASH DISHES after every meal ☐ MAKE BEDS daily, CHANGE ☐ weekly ☐ daily ☐ as needed	☐ CLEAN BEDROOM ☐ weekly ☐ daily ☐ as needed ☐ LAUNDRY (MACHINE ONLY) ☐ weekly ☐ daily ☐ HAND WASH (LINGERIE ONLY) ☐ daily ☐ IRONING AND MENDING as needed ☐ MARKETING IN NEIGHBORHOOD ☐ twice weekly ☐ once weekly ☐ as needed ☐ ERRANDS IN NEIGHBORHOOD as needed ☐ ESCORT ☐ to doctor or clinic ☐ shopping ☐ outside ☐ ASSIST WITH HOME MANAGEMENT ☐ budgeting money ☐ paying bills ☐ cooperate with, involve the family SPECIAL INSTRUCTIONS
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TASK BASED PLAN OF CARE

The Tasked Based Plan of Care form is based on the Plan of Care tasks in Santrax. The data entered into this form can be sent to Santrax. Contact someone from Sandata Client Relations to arrange to have this data transfer setup for your agency.

Task Based Plan of Care: (123) 645187 - BARSON, BARBARA

General Client Data | **Task Based Plan of Care**

Client # First Name Last Name

Begin Date End Date Type of Service

Days/Wk Hrs/Day Tot. Hrs

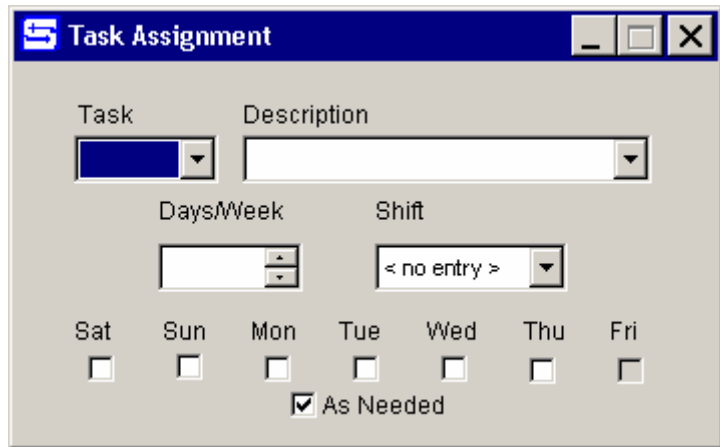
Sat ☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐

Task ID	Task Description	Shift	Days /Week	Days
				S S M T W T F

The top section of the Task Based Plan of Care form will allow you to enter the effective dates for the plan of care (Begin Date and End Date) and Type of Service (New, Replacement,

Resumption of Care). Below that are Days per Week, Hours per Day, Total Hours and check boxes for days of the week. If you use the check boxes, the Days per Week will automatically be calculated based on the number of boxes checked. When you enter a value in the Hours per Day field, Total hours will automatically be calculated as Days per Week times the Hours per Day. Begin date is a required field and must be entered before you can save the form.

Click the “Add New Task” button to enter a new task. If you are editing an existing Plan of Care, then double-click on any of the tasks listed to bring up the task assignment screen.

The image shows a Windows-style dialog box titled "Task Assignment". It has a blue title bar with a task icon, a minimize button, a maximize button, and a close button. The main area is light gray and contains several controls: a "Task" dropdown menu with a blue selection, a "Description" text box with a dropdown arrow, a "Days/Week" spinner box, a "Shift" dropdown menu showing "< no entry >", and a row of seven checkboxes for the days of the week: Sat, Sun, Mon, Tue, Wed, Thu, and Fri. All these checkboxes are currently unchecked. Below the day checkboxes is a checkbox labeled "As Needed" which is checked.

Click on the entry box for Task or Description to get a list of available tasks. Only tasks that have not already been assigned will appear on the list. If you use the check boxes, the Days per Week will automatically be calculated based on the number of boxes checked. Only the days checked on the main form will be enabled on the Task Assignment form. Checking the “As Needed” box will uncheck all of the individual days.

PERSONAL EMERGENCY RESPONSE SYSTEM (P.E.R.S.) FORM**Questions 1 & 2**

This page contains the data found on the top of the P.E.R.S. form.

The screenshot shows a software window titled "Personal Emergency Response System (P.E.R.S.): (123) 645187 - BARSON, BARBA...". The window has four tabs: "General Client Data", "Questions 1 & 2", "Questions 3 & 4", and "Questions 5 & 6". The "Questions 1 & 2" tab is selected. The form contains the following fields and questions:

- Client's Last Name:
- Client's First Name:
- Social Security #:
- Field Office:
- 1. Does the client have a functioning telephone with a private line?
☐ Yes ☐ No If YES, continue; If NO, STOP HERE - Client NOT appropriate for PERS.
- 2. Is the client alert and self-directing, (i.e., he/she is capable of making choices about the activities of daily living, understands the impact of these choices and assumes responsibility for the results of these choices) and mentally capable of understanding when to activate the PERS, knowing how to activate the PERS and capable of activating the PERS? After evaluating the appropriate sections of the assessment documents, would the client be able to activate the PERS equipment effectively?
☐ Yes ☐ No If YES, continue; If NO, STOP HERE - Client NOT appropriate for PERS.

Questions 3 & 4

This page contains the data found in the middle of the P.E.R.S. form.

The screenshot shows the same software window as before, but with the "Questions 3 & 4" tab selected. The form contains the following questions and fields:

- 3. Does the client have sufficient informal caretakers such as family and friends that are directly and continuously available to monitor his/her health and safety?
☐ Yes ☐ No If YES, STOP HERE. -- Client NOT appropriate for PERS.
- 4. Can the client communicate his or her need for help to the PERS monitoring agency? The following questions help determine whether the client meets these eligibility criteria.
 - a. Can the client verbally communicate with the PERS monitoring agency by speaking basic English?
☐ Yes ☐ No
 - b. If NO, can the client verbally communicate with the PERS monitoring agency by use of a language translation service (e.g. Language Line) if such service is available to the client?
☐ Yes ☐ No If a and b are NO, STOP HERE
 - c. Does the client have a physical impairment (review the appropriate sections of the assessment documents) which may impede the ability to hear the speaker device, speak audibly into the PERS speaker, or reach or push the PERS button?
☐ Yes ☐ No If YES, describe this impairment.

Questions 5 & 6

This page contains the data found on the bottom of the P.E.R.S. form.

Personal Emergency Response System (P.E.R.S.): (123) 645187 - BARSON, BARBA...

General Client Data | Questions 1 & 2 | Questions 3 & 4 | **Questions 5 & 6**

5. Does the client have a medical condition, disability or impairment that may require the client to summon emergency assistance if unattended? Exclude those situations where an aide would meet the needs of the client. (Review the appropriate sections of the assessment documents.)
☐ Yes ☐ No If YES is checked, describe the medical condition.

6. After evaluating the client's physical, emotional and cognitive capacities, can the client activate a PERS?
☐ Yes ☐ No

Name and Title of PERS Reviewer

Date of PERS Review / / Telephone # (718) 932-4050

Agency of Reviewer 123 SANDSPORT DATA SERVICES

INITIAL NURSE ASSESSMENT FORM

History

This page contains the data found on the top of the Initial Nurse Assessment form.

Initial Nurse Assessment: (123) 645187 - BARSON, BARBARA

General Client Data | **History** | General | Mouth | Musculo- | Breast | Psycho- | Environ. | Hazards

Client # 645187 Visit Date / /

Last Name BARSON First Name BARBARA

Chief Complaints

Significant Past History

Major illnesses

Operations

Last Hospitalization

Accidents-Falls

Vital Signs:

Temp ☐ O ☐ R ☐ A Pulse ☐ A ☐ R

Resp. BP Lungs ☐ R ☐ L Weight 0

General

This page contains the data found in the middle of the Initial Nurse Assessment form.

The screenshot shows a software window titled "Initial Nurse Assessment: (123) 645187 - BARSON, BARBARA". It has a tabbed interface with "General Client Data", "History", "General", "Mouth", "Musculo-", "Breast", "Psycho-", "Environ.", and "Hazards". The "General" tab is active. It contains several sections with dropdown menus and text input fields:

- GENERAL**
 - Communication
 - Fatigue / Weight Change
 - Overweight / Underweight
 - Allergies
 - Dizziness / Headache
- SKIN**
 - Lesions/Turgor
- EYES - Last Exam**
 - Vision / Glasses
 - Pain / Inflammation/Dis
- EARS - Last Exam**
 - Hearing / Hearing Aid

Mouth

This page contains the data found in the middle of the Initial Nurse Assessment form.

The screenshot shows the same software window, but with the "Mouth" tab active. It contains several sections with dropdown menus and text input fields:

- MOUTH - Last Exam**
 - Chewing / Swallowing
- G.U.- Last Pap Test**
 - Dysuria / Polyur / Hematur
 - Frequency / Urgency / Noct
 - Control of Bladder
- EXTREMITIES**
 - Temperature / Color
 - Pain / Tremors
 - Edema / Parasthesias
 - Pedal / Puls / Varic Veins

Musculo-

This page contains the data found in the middle of the Initial Nurse Assessment form.

The screenshot shows a software window titled "Initial Nurse Assessment: (123) 645187 - BARSON, BARBARA". The window has a tabbed interface with the following tabs: General Client Data, History, General, Mouth, Musculo- (selected), Breast, Psycho-, Environ., and Hazards. The "Musculo-" tab is active, displaying two sections: "MUSCULO - SKELETAL" and "CARDIOPULMONARY". Each section contains a list of assessment items, each with a dropdown arrow and a corresponding text input field.

Section	Assessment Item	Input Field
MUSCULO - SKELETAL	Pain / Deformities	
	Balance / Gait	
	ROM LU / RU	
	ROM LL / RL	
CARDIOPULMONARY	Pain (Location / RX)	
	Dyspnea (c or s exert)	
	Cough / Sputum	
	Freq. URI's	
	PND / Orthopnea	
	Palpitations	
	Hypertension	

Breast

This page contains the data found in the middle of the Initial Nurse Assessment form.

The screenshot shows the same software window as above, but with the "Breast" tab selected. The "Breast" tab is active, displaying two sections: "BREAST" and "G.I.". Each section contains a list of assessment items, each with a dropdown arrow and a corresponding text input field.

Section	Assessment Item	Input Field
BREAST	Pain / Lumps	
G.I.	Freq. of B.M.	
	Use of Cathartics	
	Hemorrhoids / Bleed / Pain	
	Ostomy	
	Control of Bowel	
	Nausea / Vomiting	

Psycho-

This page contains the data found in the middle of the Initial Nurse Assessment form.

The screenshot shows a software window titled "Initial Nurse Assessment: (123) 645187 - BARSON, BARBARA". The window has a tabbed interface with tabs for "General Client Data", "History", "General", "Mouth", "Musculo-", "Breast", "Psycho-", "Environ.", and "Hazards". The "Psycho-" tab is currently selected. The main content area is titled "PSYCHO - SOCIAL" and contains eight rows of data entry fields. Each row has a small square icon with a downward arrow to its left, followed by a text label and a text input box. The labels are: "Orientation (T, P, P)", "Mood", "Behavior", "Memory", "Judgement", "Ability to Direct Work", "Use of Alcoh, Drugs, Tob", and "Home Attendant / Client Relationship".

Icon	Label	Input Field
☐	Orientation (T, P, P)	
☐	Mood	
☐	Behavior	
☐	Memory	
☐	Judgement	
☐	Ability to Direct Work	
☐	Use of Alcoh, Drugs, Tob	
☐	Home Attendant / Client Relationship	

Environ.

This page contains the data found in the middle of the Initial Nurse Assessment form.

The screenshot shows the same software window as above, but with the "Environ." tab selected. The main content area is titled "ENVIRONMENTAL ASSESSMENT - General Description" and contains five rows of data entry fields. Each row has a text label followed by one or more checkboxes and a text input box. The labels and checkboxes are: "Access to Living Unit" (no checkboxes), "Furnishings:" (checkboxes for "Adequate" and "Inadequate"), "Kitchen Equipment:" (checkboxes for "Adequate" and "Inadequate"), "Bathroom Facilities:" (checkboxes for "Adequate" and "Inadequate"), and "Maintenance:" (checkboxes for "Good", "Poor", and "Fair").

Label	Checkboxes	Input Field
Access to Living Unit		
Furnishings:	☐ Adequate ☐ Inadequate	
Kitchen Equipment:	☐ Adequate ☐ Inadequate	
Bathroom Facilities:	☐ Adequate ☐ Inadequate	
Maintenance:	☐ Good ☐ Poor ☐ Fair	

Hazards

This page contains the data found on the bottom of the Initial Nurse Assessment form.

Initial Nurse Assessment: (123) 645187 - BARSON, BARBARA

General Client Data | History | General | Mouth | Musculo- | Breast | Psycho- | Environ. | **Hazards**

HAZARDS

Floors: Wet / Polished, Scatter Rugs

Lighting Fixtures

Infestation

Locks: ☐ Adequate ☐ Inadequate

Smoke Detector ☐ Yes ☐ No

ADDITIONAL COMMENTS:

EMERGENCY KARDEX FORM

Most of the data on the Emergency Kardex form comes from other parts of the program. Data that comes from the Nurse Task Assessment or Supervisory Visit forms cannot be changed directly in the Emergency Kardex form.

There is an option in for the comments at the bottom of the page to be user entered or calculated by combining comments from other places in the program. See the agency configuration section for more information about this.

Client

This page contains the data found on the top of the Emergency Kardex form.

Emergency Kardex: (123) 645187 - BARSON, BARBARA

General Client Data | **Client** | Medical History | Medical Providers | Medications

Priority Coordinator

Client Name Client #

Address Apt. Phone #

Floor Date of Birth

Lang.

Contact Person Lives With Relationship Phone # Keys

Medical History

This page contains the data found in the middle of the Emergency Kardex form.

Emergency Kardex: (123) 645187 - BARSON, BARBARA

General Client Data | Client | **Medical History** | Medical Providers | Medications

Medical History

Diagnosis

ENDOCRINE DISEASE, ALLERGIES

Supplier:

DME

Allergies

Ambulation Ability

	Indep	Mech Aid	Aid of Person	Can- not	n/a
Walk ☒ or Wheel ☐ Inside	☐	☒	☐	☐	☐
Walk ☒ or Wheel ☐ Outside	☐	☒	☐	☐	☐
Get Up From Seated Position	☒	☐	☐	☐	☐
Get Up From Bed	☒	☐	☐	☐	☐
Transfer to Commode	☐	☐	☐	☐	☒
Transfer to Wheelchair	☐	☐	☐	☐	☒
Use Bedpan	☐	☐	☐	☐	☒

Skilled Care

Medical Providers

This page contains the data found in the middle of the Emergency Kardex form.

Emergency Kardex: (123) 645187 - BARSON, BARBARA

General Client Data	Client	Medical History	Medical Providers	Medications
Nurse's Name Home Attendant's Name Physician(s) DR CANTANA Phone # () - Phone # () -		Hospitals Primary - Phone # () - Nearest - Phone # () - Pharmacy Phone # () -		

Medications

This page contains the data found on the bottom of the Emergency Kardex form.

Emergency Kardex: (123) 645187 - BARSON, BARBARA

General Client Data	Client	Medical History	Medical Providers	Medications																																													
<table border="1"> <thead> <tr> <th colspan="3">Current Medications</th> </tr> <tr> <th>Medication</th> <th>Dosage</th> <th>Freq</th> </tr> </thead> <tbody> <tr> <td>AXID</td> <td>150mg</td> <td>QD</td> </tr> <tr> <td colspan="3" style="height: 100px;"></td> </tr> </tbody> </table>		Current Medications			Medication	Dosage	Freq	AXID	150mg	QD				<table border="1"> <thead> <tr> <th>Mental Status</th> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr><td>Oriented (time, person, place)</td><td>☐</td><td>☐</td></tr> <tr><td>Alert</td><td>☐</td><td>☐</td></tr> <tr><td>Able to Learn</td><td>☐</td><td>☐</td></tr> <tr><td>Able to Direct Worker</td><td>☐</td><td>☐</td></tr> <tr><td>Able to Manage Affairs</td><td>☐</td><td>☐</td></tr> <tr><td>Impaired Recent Memory</td><td>☐</td><td>☐</td></tr> <tr><td>Agitated</td><td>☐</td><td>☐</td></tr> <tr><td>Wanders if Unsupervised</td><td>☐</td><td>☐</td></tr> <tr><td>Depressed</td><td>☐</td><td>☐</td></tr> <tr><td>Anxious</td><td>☐</td><td>☐</td></tr> </tbody> </table>			Mental Status	Yes	No	Oriented (time, person, place)	☐	☐	Alert	☐	☐	Able to Learn	☐	☐	Able to Direct Worker	☐	☐	Able to Manage Affairs	☐	☐	Impaired Recent Memory	☐	☐	Agitated	☐	☐	Wanders if Unsupervised	☐	☐	Depressed	☐	☐	Anxious	☐	☐
Current Medications																																																	
Medication	Dosage	Freq																																															
AXID	150mg	QD																																															
Mental Status	Yes	No																																															
Oriented (time, person, place)	☐	☐																																															
Alert	☐	☐																																															
Able to Learn	☐	☐																																															
Able to Direct Worker	☐	☐																																															
Able to Manage Affairs	☐	☐																																															
Impaired Recent Memory	☐	☐																																															
Agitated	☐	☐																																															
Wanders if Unsupervised	☐	☐																																															
Depressed	☐	☐																																															
Anxious	☐	☐																																															
Can Client Self Administer? Comments		Diet Advanced Medical Directives: ☐ DNR (Bring to Shelter) ☐ Health Care Proxy																																															

REPORTS

The items on the Reports Menu can be grouped into two different categories: Forms and Reports.

Forms use a common selection screen. Reports have their own individual options.

PRINTING FORMS

The top part of this form is the client selection area. Use the mover buttons to move clients from one side to the other. The single arrow buttons (“<” and “>”) will move one client. The double arrow buttons pointing to the left (“<<”) will remove all clients from the selected list. The double arrow buttons pointing to the right (“>>”) will move all clients to the selected list. You should only use this button in conjunction with the filter/search when only a small number of clients are on the available list.

The Visit Date column will reflect the visit date appropriate for the form initially selected from the Reports menu. Just under the Available list is a comment indicating the source of the visit date.

The Filter/Search can Clear Filter buttons can be used to filter which clients appear in the Available list. They work the same as the corresponding buttons on the Client Selection form. These buttons only affect the Available list. The filter does not affect the Selected list. You can set the filter, choose clients from that selection, and then change the filter to select additional clients.

In the lower right corner are the forms that can be printed. You may check any one or more forms to be printed at the same time.

There is a check box for Blank Form(s). When this box is checked, blank copies of the forms will print. You do not have to select any clients to print blank forms. If clients are selected, then the blank for will print in addition to the forms for the selected clients.

Use the Setup button to set printer options, such as the number of copies or to temporarily change the setting for queue printout as a single job.

When you have made your selections, click the Print button to send the selected forms to the printer.

PRINTING REPORTS

Client Task Report

Incomplete Task Report

Exceeds HRA Standard Times Report

These three reports will display the same type of selection screen.

The screenshot shows a window titled "Client Task Sheet" with a standard Windows interface (minimize, maximize, close buttons). The window is divided into two main sections: "Available" and "Selected".

Available Section: Contains a table with the following columns: Last, First, Client ID, Ven, History, Date. The data rows are:

Last	First	Client ID	Ven	History	Date
ANDREWS	MARY	515422	123	//	
ARZUAGA	NARCISA	515699	123	//	
AU	YEUNG YU	516146	123	//	
Adams	Joyce	369258	123	//	
BARSON	BARBARA	645187	123	//	
BAUSCH	CHARLOTT	516985	123	//	
BECKER	SONIA	645080	123	//	
RELI A	FI EYSHNA	652853	123	//	

Between the two lists are five buttons: ">>", ">", "<", "<<", and a vertical scroll bar.

Selected Section: An empty table with the same column headers as the Available section.

At the bottom of the window are three buttons: "Setup", "Preview", and "Print".

The Available list will only display clients that have data to print for the selected report. Choose from the available list and use the mover buttons to bring clients over to the Selected list. You can preview or Print these reports.

Nurse Reports

The Nurse Reports print various reports of clients assigned to a Nurse. The report can include all clients assigned to a Nurse or selected clients that had a visit on a particular date or clients who are due for a visit in a particular month.

The screenshot shows the 'Nurse Reports' dialog box. The 'Report by:' section has three radio buttons: 'Nurse' (selected), 'Last Visit Date', and 'Next Visit Date'. The 'Client Status' section has three radio buttons: 'Active' (selected), 'Inactive', and 'Both'. The 'Nurse' section is a large empty list box. The 'Vendor' section has two radio buttons: 'All' (selected) and 'Selected', followed by a dropdown menu. At the bottom are four buttons: 'Print', 'Preview', 'Setup', and 'Close'.

Choose the report type in the upper left corner. To select the nurses to include in the report, click on the Nurse box. You must choose at least one nurse to print this report. For the other report types you have a checkbox where you can have it print for all nurses.

The screenshot shows the 'Nurse Reports' dialog box with 'Last Visit Date' selected under 'Report by:'. A 'Date' field contains '11'. The 'Use Date From:' section has two radio buttons: 'Assessment Visit' (selected) and 'Supervisory Visit'. The 'Client Status' section has three radio buttons: 'Active' (selected), 'Inactive', and 'Both'. The 'Nurse' section is labeled 'Nurse' followed by a checkbox 'All Nurses' and a list box. The 'Vendor' section has two radio buttons: 'All' (selected) and 'Selected', followed by a dropdown menu. At the bottom are four buttons: 'Print', 'Preview', 'Setup', and 'Close'.

For Report by Last Visit Date, choose the date for the report and whether you want to print by last assessment visit or last supervisory visit.

The **Nurse Reports** dialog box contains the following elements:

- Report by:** Three radio buttons: **Nurse**, **Last Visit Date**, and **Next Visit Date** (which is selected). A **Month** dropdown menu is positioned to the right of the radio buttons.
- Client Status:** Three radio buttons: **Active** (selected), **Inactive**, and **Both**.
- Nurse:** A checkbox labeled **Nurse** (checked) and **All Nurses** (unchecked), followed by a list box.
- Vendor:** Two radio buttons: **All** (selected) and **Selected** (unchecked), followed by a dropdown menu.
- Buttons:** **Print**, **Preview**, **Setup**, and **Close**.

For Report by Next Visit Date, choose the month for the report.

ICD-9 Reports

These reports provide options for printing report listings either of clients with selected ICD-9 codes or ICD-9 codes within the selected zip code area.

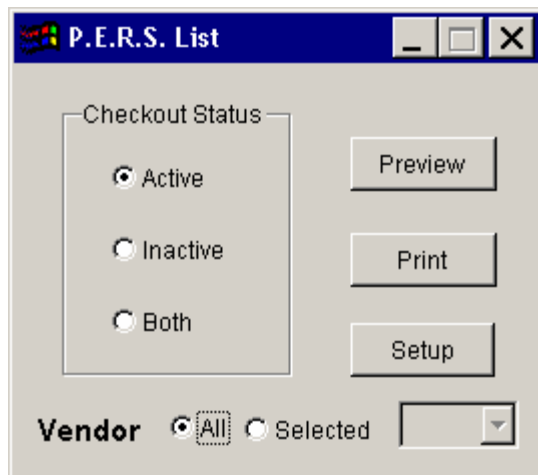
The **ICD9 Report** dialog box contains the following elements:

- Select Type of Report to Print:** Four radio buttons: **All Clients Together** (selected), **Clients Within ICD-9 Code**, **Clients Within Zip Code**, and **All ICD-9 Codes Within Zip Code**.
- Sort Clients by:** Three radio buttons: **Last Name** (selected), **Client ID**, and **Zip Code**.
- ICD-9 Code Filter:** Two radio buttons: **Match Any One Code** (selected) and **Must Match All Codes**.
- Click below to choose ICD-9 Code:** A list box.
- Click below to choose Zip Code:** A checkbox labeled **All Zip Codes** (checked) and a list box.
- Buttons:** **Preview**, **Print**, and **Setup**.
- Vendor:** Two radio buttons: **All** (selected) and **Selected** (unchecked), followed by a dropdown menu.

Choose the report options from the choices on the screen. Double-click on the boxes to bring up the list of available ICD-9 codes or zip codes.

P.E.R.S. Client

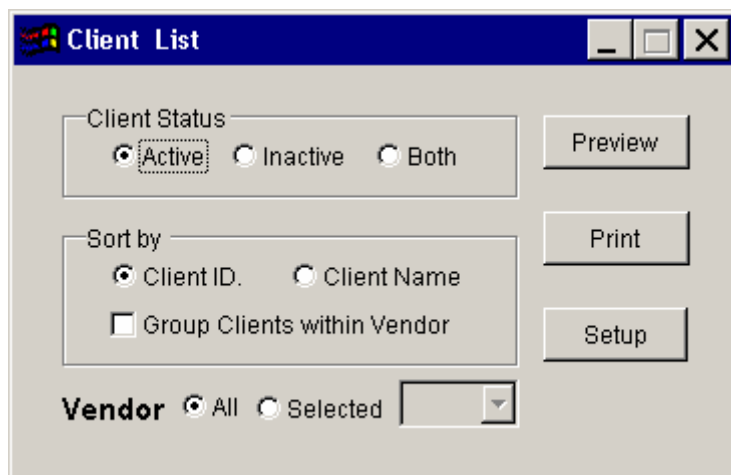
This report prints a list of those clients that have a P.E.R.S. form filled out. For the purposes of this report, a P.E.R.S. form is considered to be filled out if the reviewer field is not empty.



The screenshot shows a dialog box titled "P.E.R.S. List". It contains a group box labeled "Checkout Status" with three radio button options: "Active" (selected), "Inactive", and "Both". To the right of this group box are three buttons: "Preview", "Print", and "Setup". At the bottom, there is a "Vendor" label followed by two radio button options: "All" (selected) and "Selected", and a small dropdown menu.

Client List

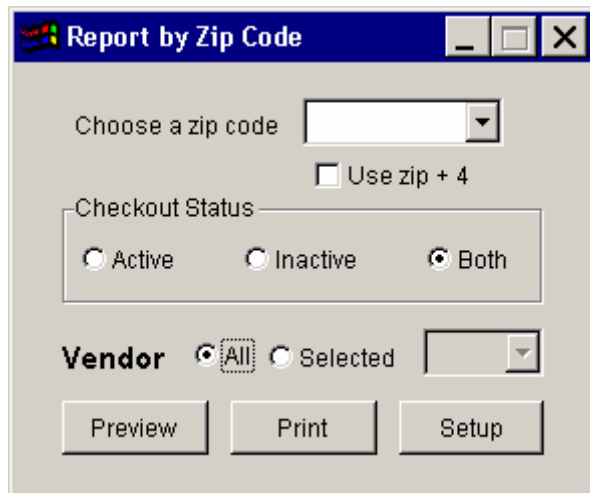
This report will print a client list.



The screenshot shows a dialog box titled "Client List". It contains two group boxes. The first group box, labeled "Client Status", has three radio button options: "Active" (selected), "Inactive", and "Both". The second group box, labeled "Sort by", has two radio button options: "Client ID." (selected) and "Client Name", and a checkbox labeled "Group Clients within Vendor" which is currently unchecked. To the right of these group boxes are three buttons: "Preview", "Print", and "Setup". At the bottom, there is a "Vendor" label followed by two radio button options: "All" (selected) and "Selected", and a small dropdown menu.

Zip Codes

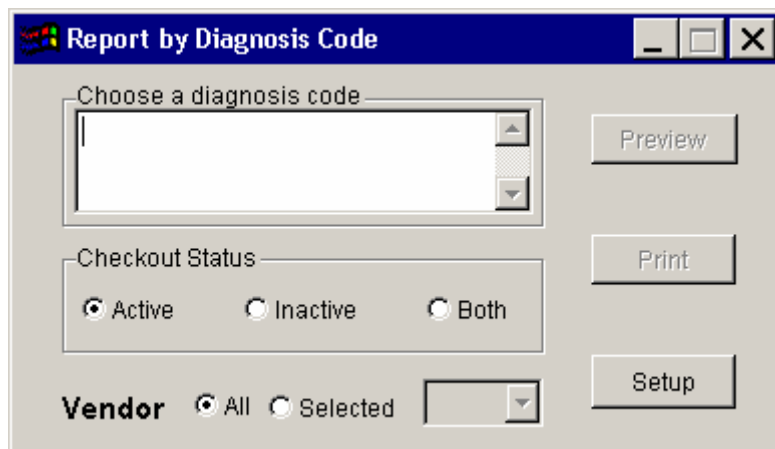
The Zip Code Report is a list of clients associated to a specific Zip Code. Choose one zip code at a time using either the standard 5-digit zip code or the zip+4 code.



The 'Report by Zip Code' dialog box features a title bar with a Windows logo and standard window controls. The main area contains a 'Choose a zip code' text box with a dropdown arrow. Below it is a checkbox labeled 'Use zip + 4'. A 'Checkout Status' section contains three radio buttons: 'Active', 'Inactive', and 'Both', with 'Both' selected. A 'Vendor' section contains two radio buttons: 'All' (selected) and 'Selected', followed by a dropdown menu. At the bottom are three buttons: 'Preview', 'Print', and 'Setup'.

Diagnosis

The Diagnosis Report is a list of clients associated to a specific Diagnosis.

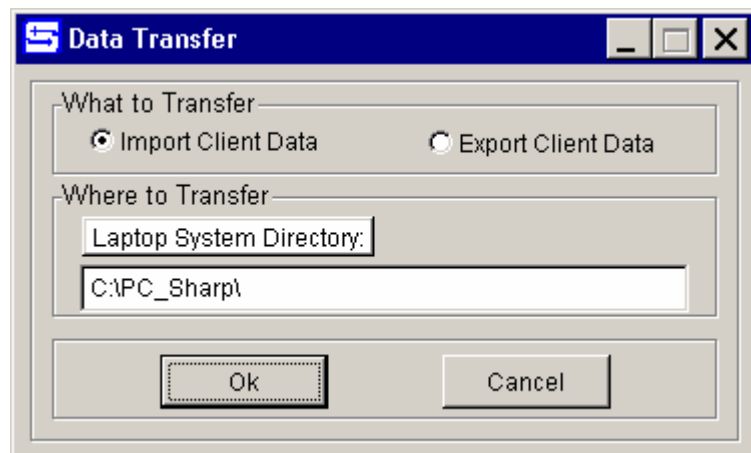


The 'Report by Diagnosis Code' dialog box has a title bar with a Windows logo and standard window controls. It features a 'Choose a diagnosis code' text box with a list box below it for selection. To the right of the list box are three buttons: 'Preview', 'Print', and 'Setup'. Below the list box is a 'Checkout Status' section with three radio buttons: 'Active' (selected), 'Inactive', and 'Both'. At the bottom is a 'Vendor' section with two radio buttons: 'All' (selected) and 'Selected', followed by a dropdown menu.

Double-click in the box for a list of all diagnosis codes.

MAIN/LAPTOP TRANSFERS

The Nurse Assessment program supports the use of laptops for nurses. Client data can be exported onto a laptop. While exported, the client data can be edited on the laptop, but no changes can be made to those clients on the Main Nurse Assessment until they are transferred back.



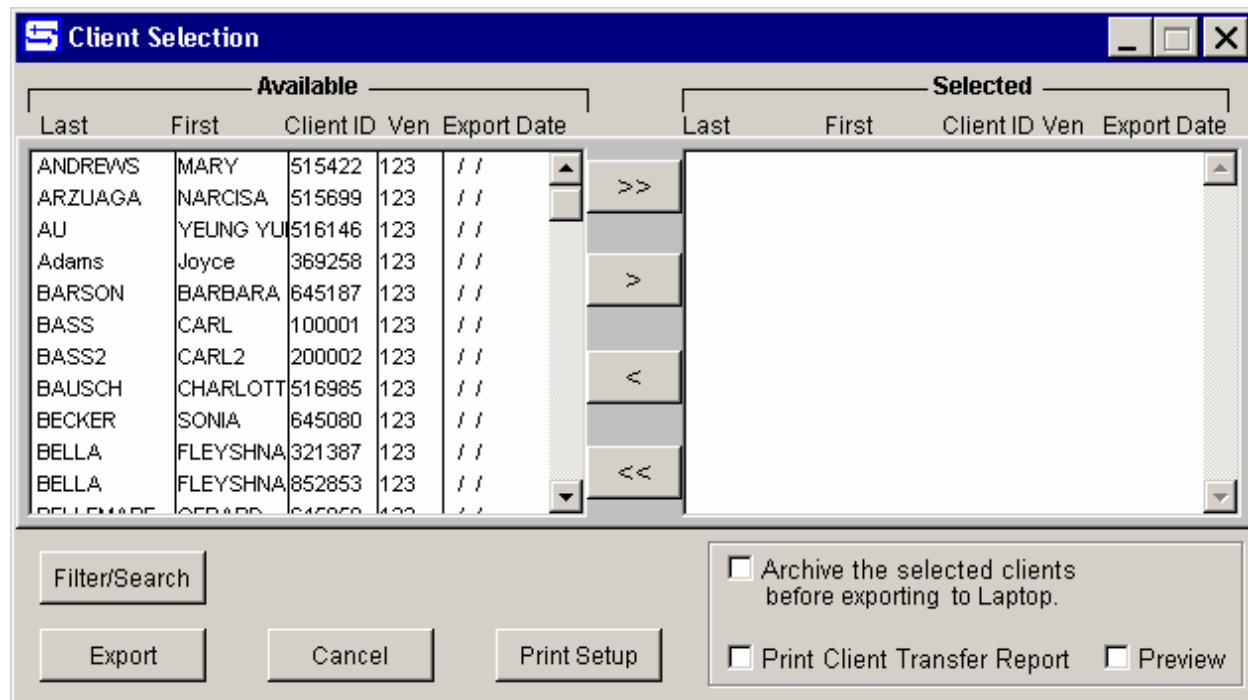
Choose Import Client Data to transfer client data from a laptop back to Main.

Choose Export Client Data to transfer client data from Main onto a laptop.

The "Where to Transfer" section should give the path to the Nurse Assessment on the laptop computer. In most cases this is "C:\PC_Sharp\". The value entered here will be remembered the next time a transfer occurs.

EXPORT CLIENT DATA

When you export client data a list of available clients will appear.



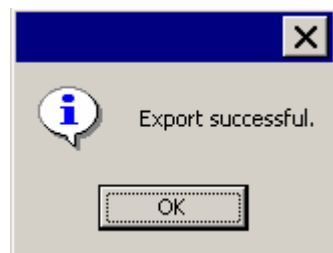
Use the arrow and double-arrow buttons to move clients from the Available list to the Selected list.

You can narrow down the Available list by using the Filter/Search button.

Check the box to Archive the selected clients before exporting to Laptop.

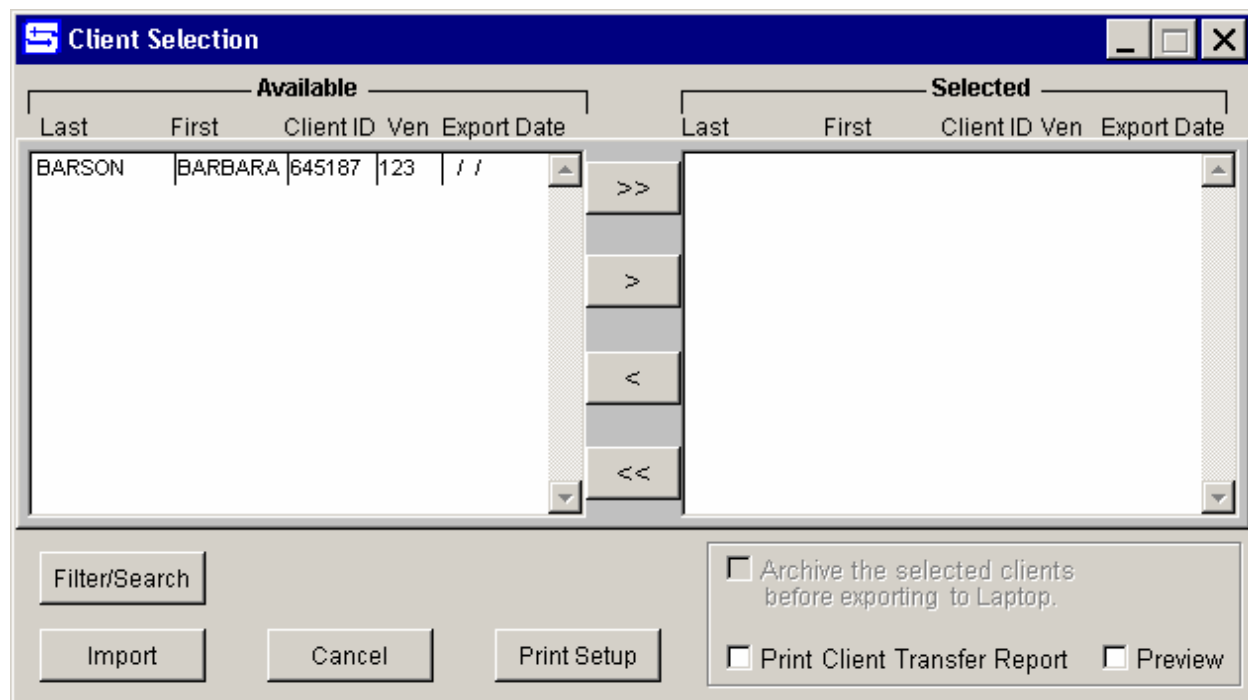
If you want to print or view a report of the clients being transferred, check the appropriate box.

When you click Export, the program will begin transferring data. This may take a few moments. When it is finished you will get a message.



IMPORT CLIENT DATA

When you import client data a list of the clients on the laptop, if any, will appear.



This screen is the same as the export screen, except that Archiving is not allowed on imports.

When you click Export, the program will begin transferring data. This may take a few moments. When it is finished you will get a message.



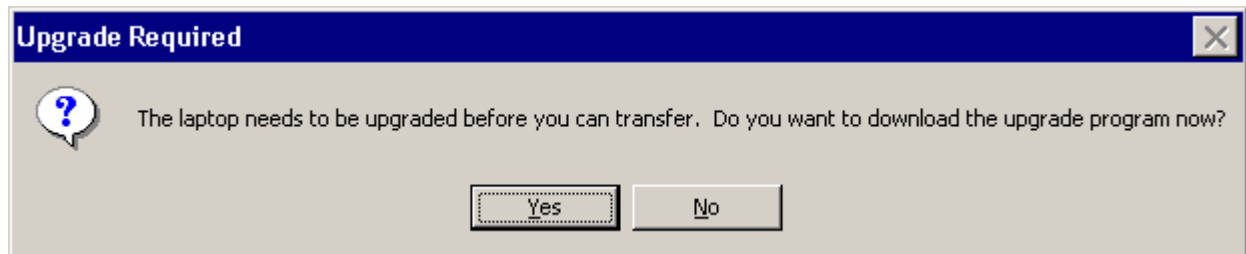
RELEASE EXPORTED CLIENTS

This should only be used when the exported data is completely lost. If you release exported clients then try to import those clients from a laptop at a later date, any changes made to the released clients will be lost.

In order to release exported clients, someone authorized to access the Agency screen needs to turn on the option to Allow Release of Clients Exported to Laptop.

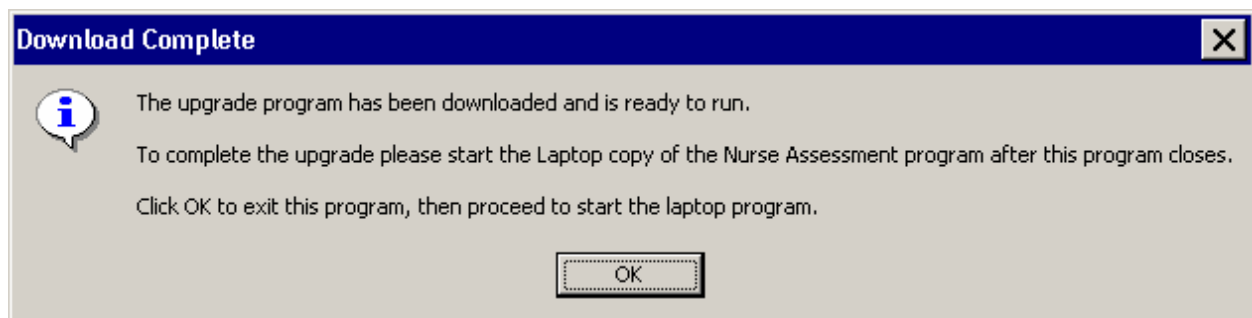
LAPTOP UPGRADES

The laptop must be on the same version as Main. When a transfer is initiated, the program will check the version on the laptop computer. If the version is different, the program will inform the user that an upgrade is required.

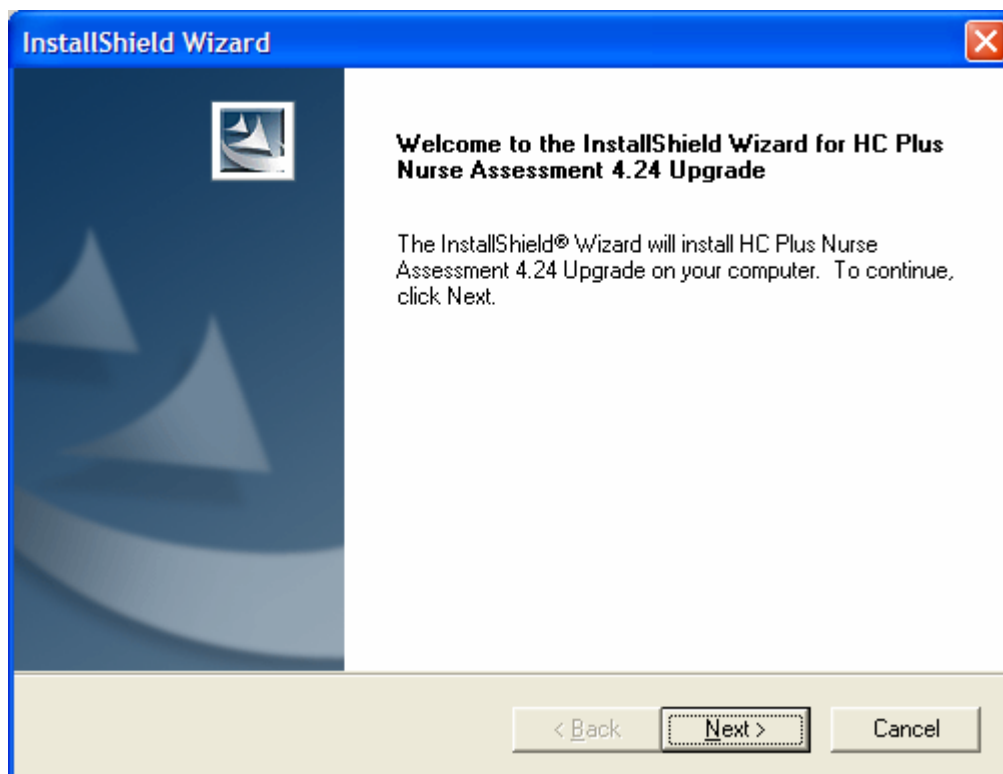


Choosing "No" will cancel both the upgrade and the transfer.

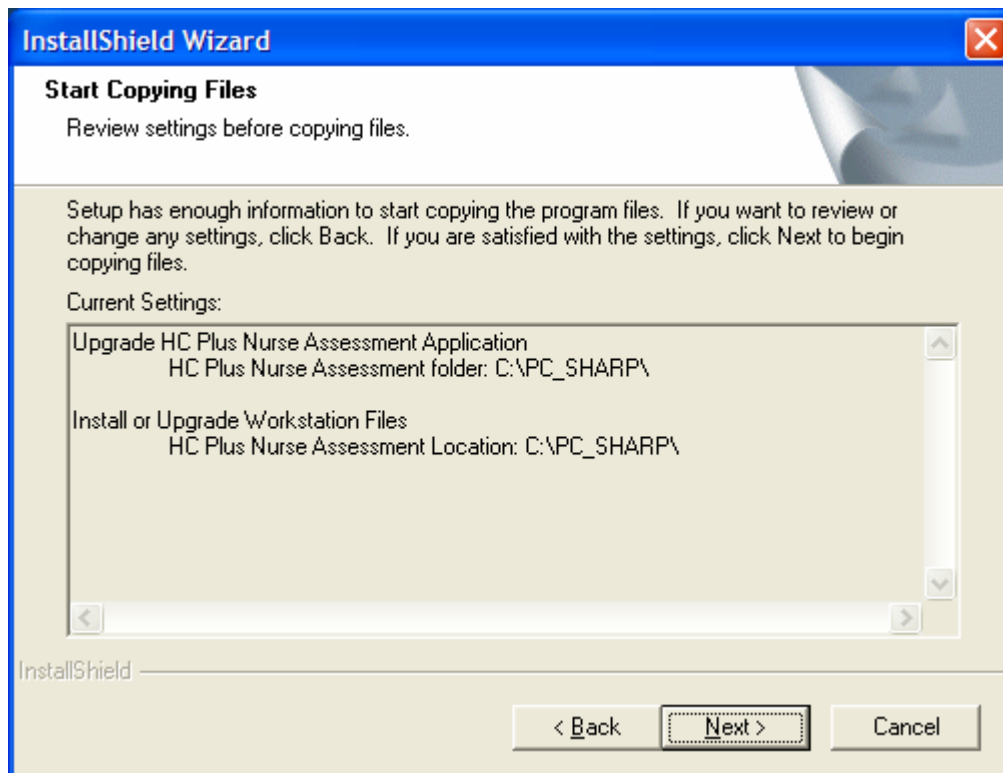
Choosing "Yes" will cause the upgrade program to be downloaded onto the laptop computer. You may see some messages pop up on the screen while this happens. When the download finishes you will get a message informing you that the download is ready to run.



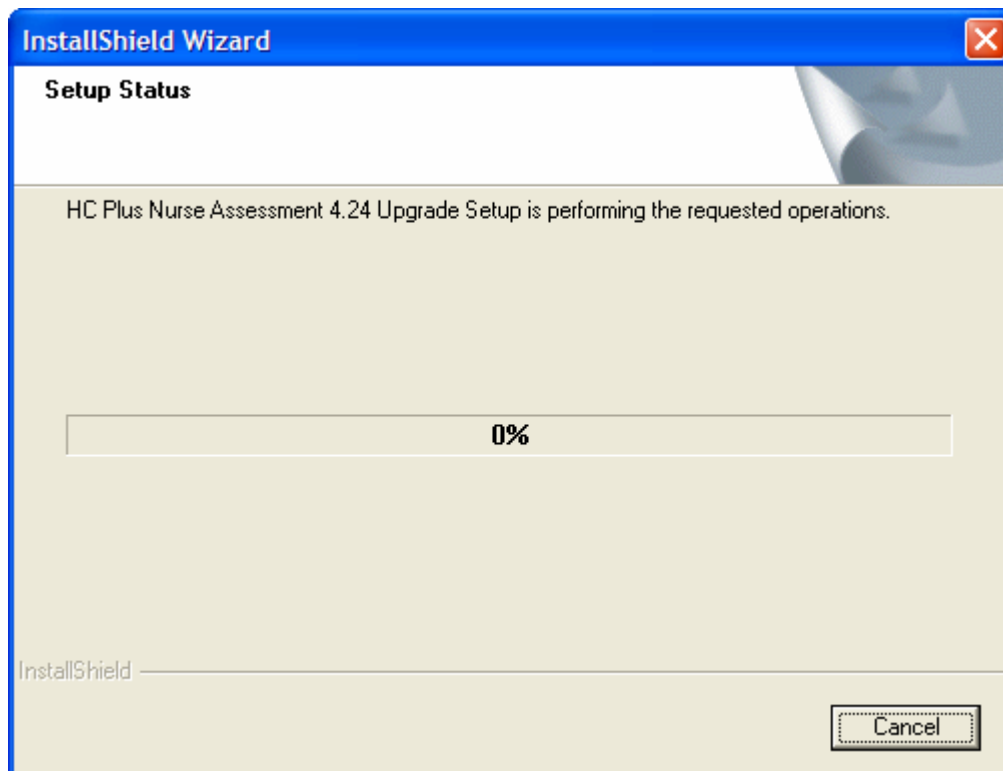
Click the "OK" button to close the Nurse Assessment program. You need to run the laptop copy of the Nurse Assessment program to complete the upgrade process. This will automatically start the InstallShield Wizard to complete the upgrade.



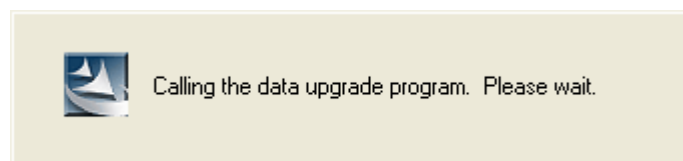
Click Next to continue



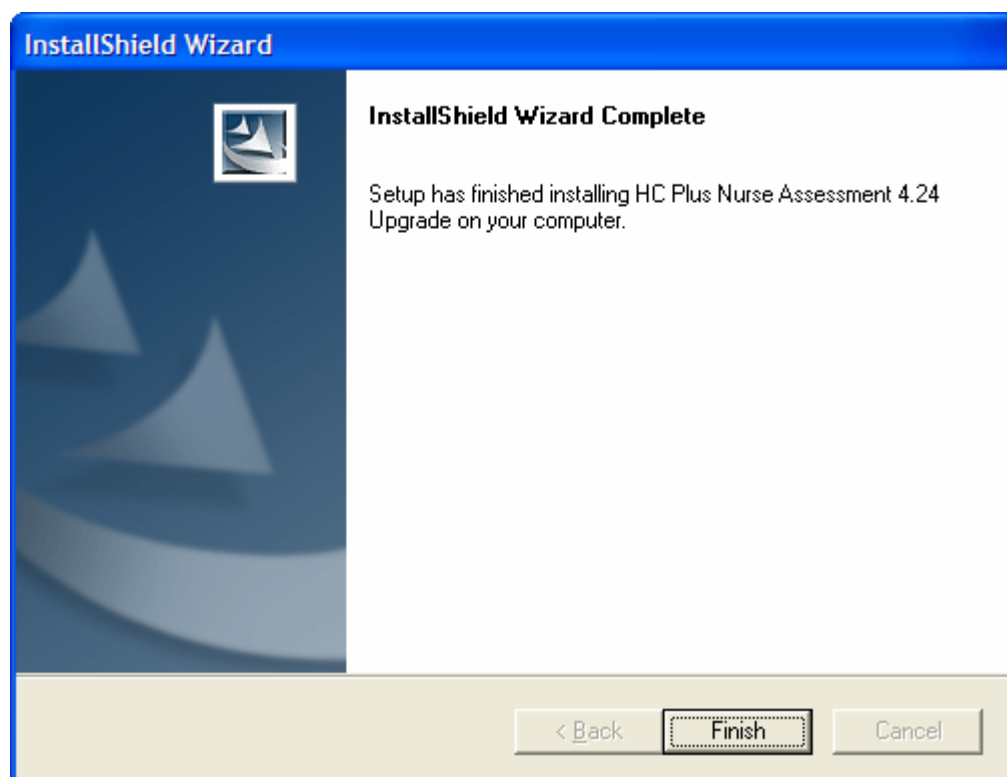
Click Next to continue



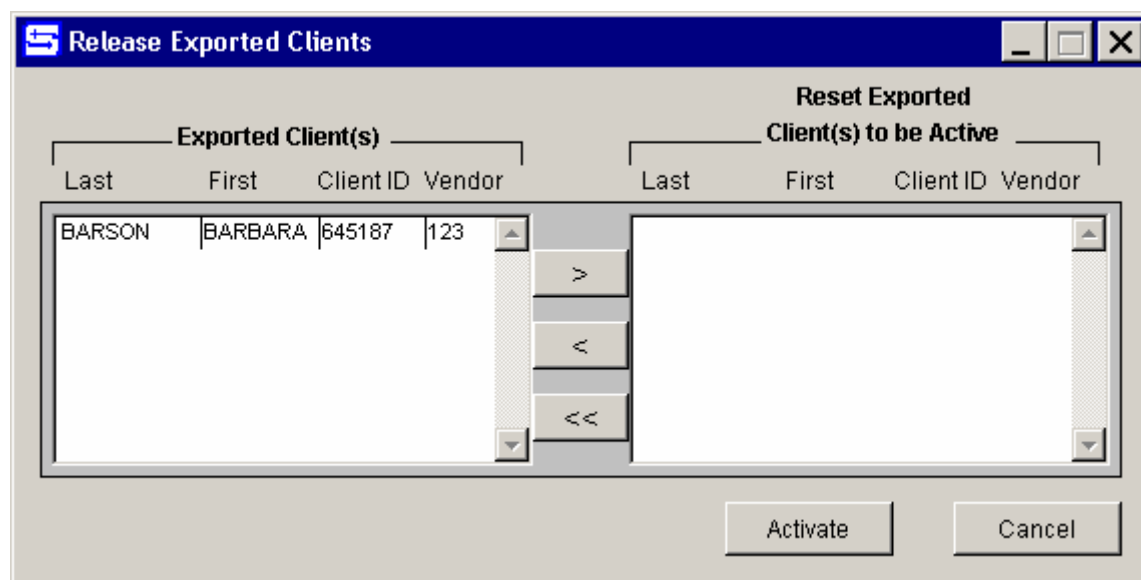
This screen will indicate the progress being made. Don't do anything at this point.



When the updated program files are installed, a program will run to upgrade the data files. This program may flash messages on the screen as it progresses. It will close automatically when it is finished, returning you to the InstallShield Wizard.



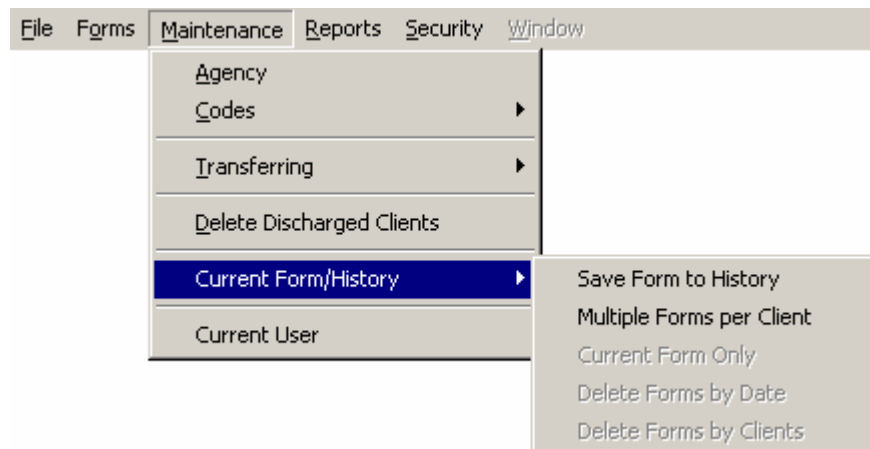
Click Finish to close the InstallShield Wizard and complete the laptop upgrade.



Use the arrow buttons to move clients from one side to the other. Click the Activate button to release any clients that were moved to the right side.

ARCHIVING FUNCTIONS

The Archiving functions can be found on the Maintenance Menu



Save Form to History will archive the current form. Generally it is best to just archive the form when prompted when you go into the form.

Multiple Forms per Client puts you into Archive mode. This will allow you to view any forms stored in Archive. Archived forms cannot be modified. Proposed forms, if that feature is enabled, are also stored in the Archive database. Proposed forms can be modified.

When you go into Archive mode, the above options get disabled and the below options become enabled.

Current Form Only returns you to the main database.

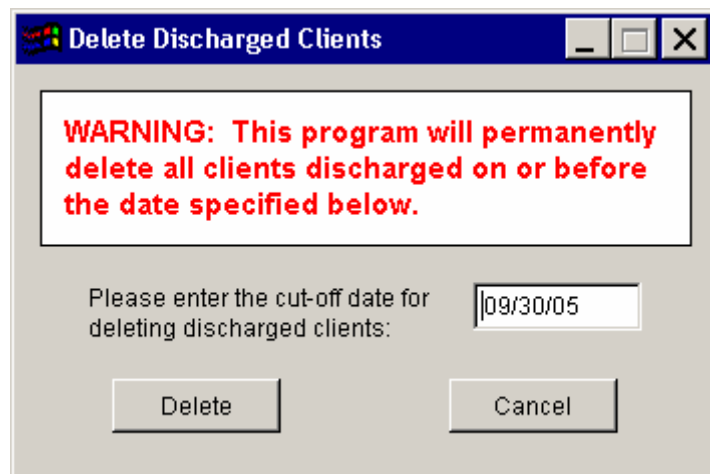
Delete Forms by Date will allow you to delete archived forms that were archived prior to a specified date.

Delete Forms by Clients will allow you to delete all archived forms for specific clients.

OTHER MAINTENANCE FUNCTIONS

DELETE DISCHARGED CLIENTS

This function can be used to clean the main database of clients that have been discharged for more than a year. The cut-off date will default to the end of the previous month in the previous year. The cut-off date can be changed, but it must be at least 1 year in the past.

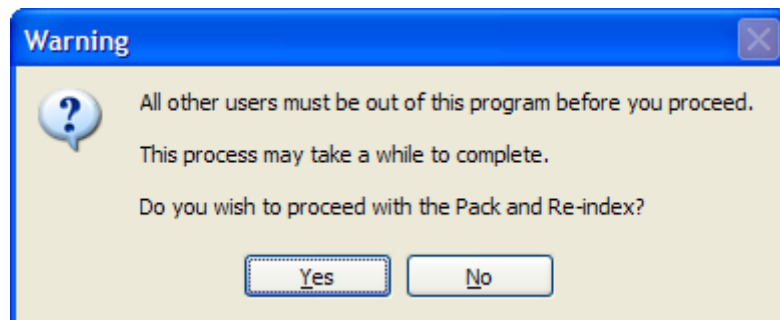


When you delete, all clients that have a discharge code other than 0 and a discharge date that is on or before the date entered will be deleted from the Nurse Assessment database.

PACK AND REINDEX

The Pack and Reindex function is only available on Laptop installations. The Pack and Reindex function occurs automatically at night for the Main installation. It is recommended to run this utility monthly or at least quarterly.

After choosing Pack and Reindex from the Maintenance menu, the following warning will appear to make sure you want to proceed.



CURRENT USER

The current user function allows a user to see what access rights have been assigned and to allow the user to change their password.

Click on the Set Password button to change the current password for this user.

To change the password type the new password in the Password box and retype it in the Confirm Password box. Both boxes must have the same value before the password will be updated.

If the agency requires users to change their password on a regular basis, the duration will show how often a password need to be changed and the current and new expiration dates will be displayed. The current expiration is the date when the current password will no longer be valid, if it is not changed today. The new expiration is the date when the new password will expire if a new password is entered today.