ANASAZI SOFTWARE®

Homepage Products User Manual

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Companies, names, and other data used as examples throughout the manual are fictitious (unless otherwise noted).

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THE FLYING TOUR

The Homepage Products provide a wide array of components in a flexible display. The Homepage Products interface displays and organizes data from other Anasazi Products (e.g., Scheduler, Assessment, Treatment Plan, Client Data) in real time, allowing for streamlined quality of care. In most situations, Staff may choose the Anasazi data they wish to display, and may make changes to this display on-the-fly.

Broad functionality is included that provides Staff with ready access to information regarding the Client to aid him/her in preparing for a session, including:

- A means to readily view Client Overview information in the Caseload List, Appointments List (which displays scheduled Services from the Scheduler Product), and To Do Panes.
- A means to quickly launch the Client Panel for Clients displayed in the Caseload List, Appointments List, and To Do Panes.
- A means to easily launch a number of external views (e.g., the Client Chart View) for Clients displayed in the Caseload List, Appointments List, and To Do Panes, as well as in the Client Panel.

This User Manual covers functionality that is common to all of the Homepage Products. Details specific to particular Products are included in separate User Manuals.

Privacy/Security

The Homepage Products adhere to the existing Anasazi Central Privacy/Security controls, except as noted otherwise. For complete Privacy/Security details, refer to the Anasazi System Administrator Manual.

Navigation

Launching

Launching the Homepage Products is accomplished as with any other Anasazi View - they can be launched from the Menu, from Quick View, or via the Shortcut Bar. One of the Homepage Products may also be designated as the Default Launch View (in the General section of the Options Dialog in Anasazi Central - refer to the Anasazi Products Navigation Guide for more information).

Launching the Client Chart & Forms

The Homepage Products provide for launching the Client Chart View in numerous scenarios. As a general rule, the Client Chart View cannot be launched in the following conditions:

- The Logged In Staff does not have appropriate Categories of Treatment (COT) Access to the form (if the Staff has Show Only COT Access, the form will generally be launched in Show Mode).
- The Client is currently checked-out to a Laptop (in this case, the form will generally be launched in Show Mode).

- The Client Chart View is already displayed and not in Home Folder mode (i.e., the Staff is in the middle of doing something on this view). In this case, the focus goes to the open document in the Client Chart.

- The Logged In Staff does not have appropriate View Access.

Ribbon Bar

The Ribbon Bar on the Main Panel consists of three 'Tabs': 'Home', 'Menu/Security' and 'View', each of which include Ribbon Buttons that accommodate various functions. A simple Ribbon Bar is sometimes provided on Dialogs (e.g., the Medications Dialog). The Ribbon Buttons have a primary label as well as a more detailed Tool Tip that presents upon mouse-over. A Ribbon Button is shadowed when its associated function is unavailable. Ribbon Buttons are presented in a Ribbon Button Group, which presents like Ribbon Buttons together. In some cases, clicking on the Ribbon Button Group initiates an associated function; these are denoted by a small down arrow graphic in the bottom right corner.

There are four different Ribbon Button Types:

- **Button** - Most Ribbon Buttons are simple buttons.

- **Drop Down** - Some Ribbon Buttons include a drop-down menu that includes a variety of available selections. Drop Down Buttons include a small down arrow graphic as an indicator.

- **Split Ribbon Buttons** - Some Ribbon Buttons are split. That is, the top half of the Ribbon Button performs one function, and the bottom half performs a different function. Split Ribbon Buttons include a small Splitter Bar that appears on mouse-over.

- **Checkboxes** - Some Ribbon Buttons are presented as a group of checkboxes.

Ribbon Bar Tabs

An noted earlier, the Ribbon Bar consists of three Tabs - Home, Menu/Security and View Tabs. Each Tab contains Ribbon Buttons that pertain to the Tab, as noted below.

Home Tab

- Refresh

- Show Client Panel

- Break The Glass

- External Views (which launch Views contained in external Anasazi Products)

  - Scheduler Single Day View

  - Scheduler Multi Day View

  - Assessment and Treatment Plan Group Progress Notes

- Preferences
- Panel Layouts
  - Save Panel Layout and Filters Preferences
  - Restore Panel Layout
  - Restore Panel Filters
- Exit Application

Menu/Security Tab

- Menu System
  - Main Menu (launch a View using the Main Menu as it is presented in Anasazi Central)
  - Client Profile (launch a View using the Client Profile Menu as it is presented in Anasazi Central)
  - History (launch a View using the History Menu as it is presented in Anasazi Central)
  - Shortcuts (launch a View using the Staff-defined Shortcut Bar as it is presented in Anasazi Central)
- Security
  - Lock Session
  - Change Password

View Tab

- Show/Hide Staff Panes
- Show/Hide Client Panes

Panels

The Homepage Products consists of three Panels: the Main Panel, the Staff Panel and the Client Panel. Panels may include a number of different Panes and Dialogs, including Client Maintenance Dialogs (e.g., the Medications Dialog), Client Detail Dialogs (the Client Overview Dialog), Client Activity Dialogs (e.g., the Query Medications Topics Dialog), General Maintenance Dialogs (e.g., the Staff Preferences Dialog), Lookup Dialogs, Multi-Select Dialogs, Filter Dialogs, Floating Text Dialogs, and more. Panels can be moved and resized as desired by individual Staff.

Main Panel

When a Homepage is launched, the Main Panel appears, which includes a Staff Panel (which is always exposed) and may contain a Client Panel (which overlays the Staff Panel).

Staff Panel

The Staff Panel defaults with the Logged In Staff selected and displays information pertinent to the Staff, including Caseload, To Do items, and scheduled Services from the Scheduler Product.

Client Panel

The Client Panel displays information related to a selected Client, and can include Appointments (scheduled Services from the Scheduler Product), Assessments, Services, Progress Notes and more. The display of these items can be customized.

Panes

Both the Staff and Client Panels can be set to display Panes, which can be arranged within the Panel. Following is a brief list of the capabilities of Panes:

- Panes can be moved within the Panel.
- Panes can be moved off of the Panel.
- Panes can be resized.
- Panes can be maximized and restored.
- Panes can be ‘pinned’ to the side, top or bottom of the Panel.
- Panes can be arranged as Tab Pages within other Panes.
- In some cases, Panes can be hidden.

Panes typically include Menus, accessed by clicking a down arrow that appears in the right-most column of a Pane or by right-clicking on an item in the Pane, that provides quick access to a number of functions, such as launching Dialogs.

Many Panes also contain a Filters Dialog, which provide one or more Filters that can be used to constrain the information that is displayed in the Pane. For example, the Caseload Pane includes a single filter option that allows for including or excluding the extended Caseload, and the Treatment Plans Pane provides a number of filter options.

Some Panes can be displayed in a Collapsed state, which displays minimal content (e.g., when the Assignment Pane is Collapsed, it displays only the Client’s Primary Assignment) or an Expanded state, which displays data comprehensively (e.g., all of the Client’s Assignments).

Some Panes allow for displaying more detailed information about a single item in the Pane.

Staff Panel Panes

The Staff Panel includes the following Panes for the Selected Staff:

- Caseload Pane
- To Do Pane
- Appointments Pane

Client Panel Panes

The Client Panel includes the following Panes for the Selected Client:

- Appointments Pane
- Assessments Pane
- Assignments Pane
- Authorizations Pane
- Client Overview Pane
- Diagnoses Pane
- Emergency Contact Pane
- GAF Pane
- Insurance Coverage Pane
- Lab Results Pane
- Medications Pane
- Medical Conditions Pane
- Notifications Pane
- Primary Care Physician Pane
- Responsible Party Pane
- Scheduled Actions Pane
- Services Pane

- Substance Abuse Pane
- Treatment Plans Pane

Lists

The Homepage Products include a number of different Lists and List Types, as follows:

- **Array Lists with Column Headings -** In Array Lists, all of the data is loaded into memory prior to displaying the list, providing extensive capabilities to manipulate the presentation than traditional Lists. Array lists include the following features:
  - **Resizing Columns** - The width of columns may always be resized.
  - **Column Order** - Columns may be reordered from left to right and vice-versa.
  - **Displaying Columns** - Staff can select which columns to display.
  - **Sorting** - Sorting (ascending and descending) is accommodated in all Columns, although the sort order for some Columns is pre-defined and cannot be changed. Sorting is not sensitive to character case (i.e., upper/lower).
  - **Grouping Rows** - The ability to group rows is accommodated, except in some cases where the grouping is pre-defined and cannot be changed.
  - **Subtext** - The presentation of Subtext, which is additional textual information associated with a row on the list, is sometimes available.
- **Array Lists without Column Headings -** Array Lists that do not include Column Headings do not provide as much custom capabilities as those with Column Headings, as noted below:
  - **Resizing Columns** - The Column widths may not be resized.
  - **Column Order** - Columns may not have their order changed from left to right.
  - **Displaying Columns** - Staff may not customize which Columns to display.
  - **Sorting** - Sorting is always pre-defined and can not be changed. Sorting is not sensitive to character case (i.e., upper/lower).
  - **Grouping Rows** - Row grouping is always pre-defined and can not be changed.
  - **Subtext** - Subtext is not accommodated.
- **Non-Array Lists** - Non-Array Lists are the same as those used in the Anasazi Central Product and are used infrequently (i.e., only when there is a specific need, such as on Multi-Select Dialogs). In brief, on Non-Array Lists:
  - **Resizing Columns** - The width of columns may always be resized.
  - **Column Order** - Columns may not have their order changed from left to right.

- **Displaying Columns** - Staff may not customize which Columns to display.
- **Sorting** - Sorting is always pre-defined and can not be changed. Sorting is sensitive to character case (i.e., upper/lower).
- **Grouping Rows** - Functionality for grouping rows is not accommodated.
- **Subtext** - Subtext is not accommodated.

Trees

The Homepage Products include a number of different Trees and Tree Types, as follows:

- **No Column Heading Trees** - These Trees are the same as those used in the Anasazi Central Product and are used most frequently throughout the Homepage Product. On No Column Heading Trees there are two columns; the first is typically a label (e.g., 'Home Phone'), and the second is typically a value (e.g., the Client's Phone #'). The sort order of the branches on No-Column Heading Trees is pre-defined and cannot be changed, nor can the Display Level (e.g., Branch 2) be customized.
- **Column Heading Trees** - This Tree Type is used infrequently, but brings significant value when it is used. Column Heading Trees present multiple Columns on each Branch and provide far more capabilities to customize the presentation than traditional Trees. Following are some features of Column Heading Trees:
  - **Resizing Columns** - The width of columns may always be resized.
  - **Column Order** - Columns may be reordered from left to right and vice-versa.
  - **Displaying Columns** - Staff can select which columns to display.
  - **Sorting** - Sorting (ascending and descending) is accommodated in all Columns, although the sort order for some Columns is pre-defined and cannot be changed. Sorting is not sensitive to character case (i.e., upper/lower).
  - **Grouping Rows** - The ability to group rows is accommodated, except in some cases where the grouping is pre-defined and cannot be changed.
  - **Subtext** - The presentation of Subtext, which is additional textual information associated with a branch on the tree, is sometimes available.

Notes on Sorting and Grouping: ***Sorting and Grouping is relative to Branch 1 only. That is, the first Branch of the tree will be sorted/grouped - but all subordinate branches will remain subordinated to their respective parent branches. For example, in the Progress Notes Pane, a Multi Service Progress Note (in Branch 1) includes a date. Likewise, the subordinated services each include a date, which may be different from the date in the parent branch. If this date column is used for sorting/grouping, the Progress Notes will be sorted/grouped based on the date of the parent Progress Notes, and the subordinated services would remain grouped under their respective Progress Note without regard to the service dates.***

Fields

The Homepage Products support a variety of field types, including drop-down fields, lookup fields, radio fields, text fields and more.

Super Drop Downs

Super Drop Downs allow for the selection of an option from a drop down list, free form entry, or for leaving the field blank. In addition, drop down functionality supports abbreviations. For example, if ‘TID’ is selected for the ‘Frequency’ field, it is populated with ‘3 times a day after meals’.

Number Selector

Numeric fields typically include a Number Selector control. For example, a Number Selector is available for the ‘Qty to Dispense’ field on the Medications Maintenance Dialog in the Doctor’s Homepage Product.

Staff Preferences

The Preferences defined in the Staff Preferences Dialog (accessible via the ‘Preferences’ button on the Home Tab of the Ribbon Bar) control the content that is displayed to the various Panes. Preferences are set by the individual Staff Members and pertain only when they are the Logged In Staff. Note that Preferences do not copy when the Staff Template Copy Utility is run. (Refer to the Homepage Products System Administrator Manual for information on the Staff Template Copy Utility.)

Auto Restore

Auto Restore options specify the manner in which the Panel Layout is to be restored any time a new Staff or Client is selected.

Client Panes Preferences

Appointments Pane

- Controls how far in the future to display Services from the Scheduler Product. Staff may not want to initially see Services that are scheduled far in the future.

Assessments Pane

- Controls the preferred Assessments to be initially displayed. Staff may want to initially see only certain Assessments.

- Controls the display of Assessments in the past ## months. Staff may not want to initially see Assessments that were performed far in the past.

Diagnoses Pane

- Controls the Assessments to be displayed in the Diagnoses Pane. This establishes the list of Assessment Types that include the Diagnosis Review Page as a Tab Page. Staff do not have the option of controlling the Assessments displayed once the Client Panel is launched.

GAF Pane

- Controls the display of GAF Assessments in the past ## months. Staff may not want to initially see GAF Assessments that were performed far in the past.

- Controls the Assessments to be displayed in the GAF Pane. This establishes the list of Assessment Types that include the GAF score.

Lab Results Pane

- Controls the display of Lab Results Assessments in the past ## months. Staff may not want to initially see Lab Results that were recorded far in the past.

- Controls the Assessments to be displayed in the Lab Results Pane. This establishes the list of Assessment Types that are to be considered to be Lab Result Assessments.

Medications Pane

- Controls the default Dose Unit for oral liquids (e.g., cubic centimeter, milliliter or teaspoon). This establishes the Sig Dose Unit that is to be defaulted when entering a new Medication record for an oral liquid (i.e., some doctors prefer to specify dosage in teaspoons; others prefer CC's).

- Controls the 'Default Action for Injections', which establishes the Sig Action that is to be defaulted when entering a new Medication record for an Injection (i.e., some doctors prefer to specify 'Administer'; others prefer 'Inject'.

- *Note: this option is only available in the Doctor's Homepage Product.*

Progress Notes Pane

- Controls the display of preferred Service Codes. Staff may want to initially only see certain Service Codes.

- Controls the display of Progress Notes in the past ## months. Staff may not want to initially see Progress Notes that were performed far in the past.

- *Note: this option is only available in the Doctor's Homepage Product.*

Services Pane

- Controls the display of Services in the past ## months. Staff may not want to initially see Services that were performed far in the past.

Substance Abuse Pane

- Controls the Assessments to be shown in the Substance Abuse Pane. This establishes the list of Assessment Types that are to be considered to be Substance Abuse Assessments (i.e., contain the Drug Use Multiple Entry Window).

Treatment Plans Pane

- Controls the display of Treatment Plans in the past ## months. Staff may not want to initially see Treatment Plans that were completed far in the past.

New Assessments

Controls the list of commonly performed Assessments. This establishes the list of Assessment Types that are to be initially displayed to the Lookup when initiating a New Assessment (i.e., this is the short list of Assessments that a Staff Member typically performs).

Pharmacies

Controls the Preferred Pharmacy Search defaults (e.g., Name, City, State and Zip). This establishes the search defaults that are used any time the Pharmacy Lookup is launched.

Note: this option is only available in the Doctor's Homepage Product.

Staff Panel

Selected Staff

The Selected Staff is selected/displayed in a lookup field on the top left Tab of the Staff Panel.

Staff Panel Panes

The Staff Panel displays three Panes - the Caseload Pane, the To Do Pane, and the Appointment Pane. Each of these Panes have both common and specific functionality, described below.

Caseload Pane

The Caseload Pane includes the following columns:

- Type
- Name
- Case Number

The Selected Staff's Caseload includes the following:

- Clients who have an Open Assignment for which the Selected Staff is or was the Primary Server at any point within the Latency Period or a Member of the Assignment's indicated Treatment Team at any point within the Latency Period.

- Clients who have a Closed Assignment that was closed within the Latency Period for which the Selected Staff was the Primary Server at any point within the Latency Period or a Member of the Assignment's indicated Treatment Team at any point within the Latency Period.

Foreign Clients will be listed on the Caseload List even though they are not officially on the Selected Staff's Caseload. To distinguish them, they are preceded with a Foreign Client Graphic. 

- **Guest Access:** Client to which the Selected Staff has been granted Client Guest Access.

- **Pre-Intake:** Clients who are in a Pre-Intake Status with the Selected Staff.

- **Glass Broken:** Clients for which the Selected Staff has Broken the Glass.

Extended Caseload Filter: The Caseload Pane includes a filter to include or exclude the Selected Staff's Extended Caseload (i.e., Treatment Team Clients). If the Staff elects to exclude the Extended Caseload, processing time will be reduced and the Caseload List will be built faster. Note that this setting also pertains to the To Do Pane - if the Staff has elected to exclude the Extended Caseload, Notifications for Clients on the Selected Staff's Extended Caseload are not displayed to the To Do Pane.

Single Contact Assignments

The general rules of Single Contact Assignments are:

- **Caseload:** A Single Contact Assignment will not put a Client on a Staff's Caseload.

- **Client Access:** Staff whose Client Access is based on the Units/SubUnits to which they have access will be granted Client Access to Clients with an applicable Single Contact Assignment. Staff whose Client Access is based on their Caseload will not be granted Client Access to Clients based on a Single Contact Assignment.

- **'Not Open to Treatment':** This literal message on the Client Overview indicates that the Client has never been open to treatment. For this purpose, a Single Contact Assignment will not open a Client to treatment.

- **'Prior Treatment Closed':** This literal message on the Client Overview indicates that the Client was previously open to treatment but no longer is. As above, a Single Contact Assignment will not open a Client to Treatment.

To Do Pane

The To Do Pane includes the following columns:

- Type (Caseload-SAI, Caseload, or Foreign Client)
- Name
- Case #
- Meds - This column indicates whether there is a Notification for either Pre-Approved Medication(s) Pending or a Refill Request Pending (i.e., something pertaining to Medications is pending). The To Do List can be sorted/grouped on this column (i.e., such that these items can be at the top of the list). Note that information only displays to this column in the Doctor's Homepage Product.

The To Do Pane displays a list of Clients who have at least one Notification that is relative to the Selected Staff. Notifications do not display for Assessments, Interim Service Logs, Interim Treatment Plans and Treatment Plans if the Staff does not have appropriate Category of Treatment (COT) Access to the form (refer to the Anasazi System Administrator for details on COT Access). The Notifications that are the most likely and that can be ascertained the fastest are examined first. Specifically, Notifications are examined in the following order:

- Pre-Approved Medication(s) Pending
- Refill Request Pending
- Form Pending Final Approval
- Assessment Requested
- UnPlanned Progress Note
- Target Date Approaching/Past
- Client Action Schedules
- Diagnosis Review

Notification Detail

The Notification Detail Dialog for each listed Client can be displayed by selecting 'Notification Detail' from the Right-click Menu, and lists all Notifications for the Client relative to the Selected Staff. Notifications allow for launching the item such that it can be viewed and potentially attended to. Once an item has been attended to, it is removed from the list. Some Notifications include an 'Acknowledge' button that acknowledges the Notification and removes it from the list (i.e., it was a notification only; no action was required).

Notification Types

Notification Types:

- Form Pending Final Approval - If a Client has a Form that is not yet Final Approved and the selected Staff is the Client's SAI (for Assessments, ISLs, ITPs, and TPs, this only applies if the Logged In Staff has COT Access to the Assessment). This also displays for Staff who is a signer on the Form until such time as they enter and save their electronic signature. Displays as one of the following:
  - 'Assessment Pending Final Approval'
  - 'Interim Treatment Plan Pending Final Approval'
  - 'Treatment Plan (may be appended with 'Revision' or 'Review') Pending Final Approval'
  - 'Informational Note Pending Final Approval'
  - 'Narrative Progress Note Pending Final Approval' (if Planned, appended with the description of the service specified for the Intervention; if Unplanned, appended with 'Unplanned')
  - 'Individual Progress Note Pending Final Approval' (appended with the description of the single Client service, and if Unplanned, appended with 'UnPlanned')
  - 'Multi-Service Progress Note Pending Final Approval' (if Planned, appended with the description of the service specified for the Intervention; if UnPlanned, appended with 'UnPlanned')
  - 'Group Progress Note Pending Final Approval' (if Planned, appended with the description of the service specified for the Intervention; if UnPlanned, appended with 'UnPlanned')

  If the Notification is relative to an Assessment or Treatment Plan, the Assessment/Treatment Plan is displayed in the Client Chart View. If the Notification is relative to a Progress Note (except for Group Progress Notes), the Progress Note is displayed in the Doctor's Homepage. If the Notification is relative to a Group Progress Note, the Group Progress Note Dialog is launched in the Client Chart View.

- *{Name of Assessment}* has been Final Approved *{Final Approved on date}* - CA Customers - When an Assessment of the type entered in the 'Diagnosis Notification Assessment' field on the Main (1) Tab Page of California System Setup is Final Approved. The Notification appears on the Homepage of each Staff Member for each Assignment that is open for the Client at the time the Assessment is Final Approved. The Notification is cleared by double-clicking on the Notification from the Homepage. For example, Server A clears the Notification in his Homepage. The Notification continues to appear on Server B's Homepage until she clears it from her Homepage. In addition, a Notification appears only once. For example, if an Assessment is completed on 10/1/2009, the Homepage Notification has not been cleared, and the Assessment is completed again on 10/3/2009, only the 10/3/2009 Notification is displayed, as it is the most recently Final Approved Assessment. When a Diagnosis Review Notification is launched, the Assessment displays in the Client Chart View.

- Assessment Requested - If a Client has a pending Requested Assessment and the selected Staff is the Client's SAI. This only applies if the Logged In Staff has COT access to the Assessment. If this Notification is launched, the Assessment is displayed in the Client Chart View.

- Target Date Approaching/Past - For all current Final Approved Full Treatment Plans that have a date entered in the PGO 'Target' field that is approaching/past the 'Notify of PGO Target Dates in the next ## Days' entered in Assessment System Parameters Maintenance, whose 'Status' is 'A - Active' and the selected Staff is the Client's SAI. This only applies if the Logged In Staff has COT access to the Assessment. If this Notification is launched, the Treatment Plan is displayed in the Homepage.

- UnPlanned Progress Note - A Client with a TP (not an ISL or ITP) has an UnPlanned Progress Note entered that is Final Approved, the Selected Staff is the Client's SAI, and the UnPlanned Note has not yet been acknowledged.

- Glass Broken - The selected Staff is the Clinician who Broke the Glass; the Expiration Date is greater than or equal to the current date; and the Dialog was not canceled after having entered information into the top container (a Client was selected).

- Pre-Intake in Process - There are three ways in which a Pre-Intake Client can be included on a Staff Member's Homepage:
  - Foreign Clients who have an Open Pre-Intake at a Unit/SubUnit to which the selected Staff is a Pre-Intake Worker.
  - Foreign Clients who have an Open Pre-Intake that was initiated by the selected Staff.
  - Foreign Clients who have an Open Pre-Intake that is referred to the selected Staff.

- Pre-Approved Medication(s) Pending - displays if:
  - There is a staged Medication entry for the Client.
  - The Selected Staff is the Prescriber (based on the assignment to the Prescriber).

  If this Notification is launched, the Medications Maintenance Dialog displays in the Homepage. Note that it cannot be launched if another Staff Member already has the Medications Maintenance Dialog open for the Client.

- Refill Request Pending - displays if:
  - There is a Refill Request for the Client.
  - The Selected Staff is the Prescriber (based on the assignment to the Prescriber).

  If this Notification is launched, the Refill Request Response Dialog displays in the Homepage. Note that it cannot be launched if the Logged In Staff is a Non-Prescriber, if another Staff Member already has the Medications Dialog open for the Client, or if the Client has Pre-Approved Medication entry pending Final Approval.

- Client Action Notification - displays as one of the following (details follow):
  - '1st' Client Action Due
  - '2nd' Client Action Due
  - 'Ongoing' Client Action Due
  - 'Final' Client Action Due
  - 'Action Schedule Audit Pending'

  - <u>Assessment Due on</u> - If the Scheduled Client Action Type is Assessment, the Notification displays as: the Sequence of the Scheduled Client Action; Assessment Due on; the Due Date of the Client Action; the name of the Assessment and the ID of the Action Schedule Template.

    Privacy Note: This Notification only displays if the Logged In Staff has COT Access to the Assessment.

- Assessment Page Due on - If the Scheduled Client Action Type is Assessment Page, the Notification displays as: the Sequence of the Scheduled Client Action; Assessment Page Due on; the Due Date of the Client Action; the name of the Assessment Page and the ID of the Action Schedule Template.

  Privacy Note: This Notification only displays if the Logged In Staff has COT Access to the Assessment Page.

- ISL Due on - If the Scheduled Client Action Type is an Interim Service Log, the Notification displays as: the Sequence of the Scheduled Client Action; ISL Due on; the Due Date of the Client Action; the name of the ISL and the ID of the Action Schedule Template.

  Privacy Note: This Notification only displays if the Logged In Staff has COT Access to the ISL.

- ITP Due on - If the Scheduled Client Action Type is an Interim Treatment Plan, the Notification displays as: the Sequence of the Scheduled Client Action; ITP Due on; the Due Date of the Client Action; the name of the ITP and the ID of the Action Schedule Template.

  Privacy Note: This Notification only displays if the Logged In Staff has COT Access to the ITP.

- TP Due on - If the Scheduled Client Action Type is a Treatment Plan, the Notification displays as: the Sequence of the Scheduled Client Action; Treatment Plan Due on; the Due Date of the Client Action; the name of the Treatment Plan and the ID of the Action Schedule Template.

  Privacy Note: This Notification only displays if the Logged In Staff has COT Access to the TP.

- Financial Review Due on - If the Scheduled Client Action Type is a Client Financial Review, the Notification displays as: the Sequence of the Scheduled Client Action; Financial Review Due on; the Due Date of the Client Action and the ID of the Action Schedule Template.

- Action Schedule Audit Pending - This Notification displays if the Action Schedule Audit flag is active for the Client. This flag indicates that a Staff Member should audit the Client's Action Schedule to affirm that it is appropriate, or update it such that it is appropriate. This occurs when the system determines that there is no clear call as to what Client Action Schedule a completed Client Action should be linked to. The system either updates the Client's Action Schedule based on a reasonable guess as to what is appropriate or it does not update the Client's Action Schedule because the system cannot reasonable determine what is appropriate.

  When the Audit flag is set for a Client, only the 'Action Schedule Audit Pending' Notification displays on the Homepage; no other Client Action Notifications display. (Note: the Client Schedule Audit flag is cleared via Client Action Schedules Maintenance.)

If a Notification is relative to an Assessment or Treatment Plan, the Assessment/Treatment Plan is displayed in 'Add Mode' in the Client Chart View. Note that launching Financial Reviews is not accommodated.

Appointments Pane

The Appointments Pane displays a list of Services for the current date that have been scheduled via the Scheduler Product, and includes the following columns (refer to the Scheduler Product User Manual for details on scheduled Services):

- Type - displays the Service Type.
- Status - displays the Service Status.
- Start - displays the scheduled start time of the Service.
- End - displays the scheduled end time of the Service.
- Client - displays the Client the Appointment is for.
- Case # - displays the Client's Case Number.
- Service - displays the ID of the Service.

Client Panel

As noted earlier, the Client Panel displays a number of Panes that include information relative to the selected Client. The Client Panel can be launched from the Caseload, Appointments, or To Do List Panes for a selected Client, or can be launched empty, in which case any Client can be selected (subject to Privacy/Security).

Client Access

Client Access controls the Client that can be selected in the Client Panel, as well as the Clients that are displayed on the Client Lookup. Client Access information is detailed in the Anasazi System Administrator Manual.

Client Lookup Dialogs

There are two Client Lookup Dialogs in the Homepage Products: Common Lookup and Advanced Lookup.

Common Lookup

The Common Lookup is analogous to the Client Lookup in the Anasazi Central Suite of Products. This Lookup is a Non-Array List and displays 10 Clients at a time. This Lookup can be sorted by Client Name, Case #, Date of Birth, Social Security Number, Primary Unit ID or SAI ID.

This Lookup is reasonably fast if the Logged In Staff has Client Access to a medium to high percentage of Clients (e.g., if the Logged In Staff has Client Access to 1 out of 10 Clients, the system only needs to spin through 100 records on average in order to find 10 Clients to display). This Lookup is slower if the Logged In Staff has Client Access to a low percentage of Clients (e.g., if the Logged In Staff has Client Access to 1 out of 100 Clients, the system needs to search through 10,000 records on average in order to find 10 Clients to display).

Advanced Lookup

The Advanced Lookup is an Array List, and may be sorted on any column. This Lookup is used when the 'Use the Advanced Client Lookup' field is active in Staff Maintenance for the Staff and the Client Access of the Staff is one of the following:

- 'B - Only Clients that are currently open to a Unit/SubUnit to which the Staff Member has access (sensitive to Latency)'
- 'C - Only Clients that are currently or were previously open to a Unit/SubUnit to which the Staff Member has access'
- 'E - Only Clients on the Staff Member's current and past Caseload'
- 'F - Only Clients on the Staff Member's current Caseload (sensitive to Latency)

Note: The Lookup Button on the Client Panel is shadowed and unavailable if the 'Disable the Client Lookup' field is active on the Menu Group Dialog (refer to the Anasazi System Administrator Manual for information on Menu Groups).

This Lookup must first find all of the Clients to which the Logged In Staff has Client Access before populating the Lookup. As such, this Lookup is reasonably fast if the Logged In Staff has Client Access to a small number of Clients (a few hundred or less).

There is no precise answer to which Lookup will be faster for a given Staff Member because there are many factors involved (e.g., how many records are in the Agency's Client File, how many Clients are open to the target Units/SubUnits, how many Clients used to be open to the target Units/SubUnits, how many Clients are on the Staff's current Caseload, how many Clients used to be on the Staff's Caseload, whether or not Treatment Teams are being used, etc.).

Global Client

When a Client is selected in the Clinician's Homepage or the Doctor's Homepage, that Client is automatically populated in the Global Client field Anasazi Products (e.g., Anasazi Central, Client Data, etc.). Conversely, if a Global Client is selected in an Anasazi Product, it does not populate the Client Panel in the Clinician's Homepage or Doctor's Homepage. For details on Global Client functionality, refer to the Anasazi Products Navigation Guide.

Client Overview Dialog

The Ribbon Bar includes a 'Client Overview' button that launches the Client Overview Dialog for the selected Client. The Client Overview Dialog can contain the following information:

- **Not on Staff's Caseload** - The Client is Foreign to the Selected Staff.
- **Guest Access** - The Selected Staff has Client Guest Access to the Client.
- **Glass Broken** - The Selected Staff has Broken the Glass for the Client.
- **Pre-Intake** - The Client is in a Pre-Intake Status with the Selected Staff.
- **Not Open to Treatment** - The Client has never had any non-Single Contact Assignments.

- **Prior Treatment Closed** - The Client has at least one non-Single Contact Assignment, but all of the Client's Assignments are currently closed (subject to Latency).
- **Home Phone**
- **Work Phone**
- **Episode of Care** - The Open/Close date of the Treatment Session. If the Client is closed, the Treatment Session associated with the Client's most recent Primary Assignment is displayed.
- **Primary Assignment** - Displays Opened or Closed, the SAI's name, phone numbers and e-mail address.
- **Treatment Team** - Displays the description of the Treatment Team, the Team Leader and Team Member names, phone numbers and e-mail addresses.
- **Pharmacy of Choice** - Displays the pharmacy name as a link that allows for selecting or changing the Client's pharmacy of choice, including the address, phone numbers, fax numbers, and e-mail addresses.

Broadcast Alert

The Ribbon Bar includes a 'Broadcast Alert' button that allows for initiating a Broadcast Alert for a Client. Once initiated, the Broadcast Alert will be displayed any time a Client is launched to the Client Panel for which a Broadcast Alert was initiated in the past 30 days and that has not been acknowledged by the Logged In Staff. Once the Logged In Staff clicks the 'Acknowledge' button on the Broadcast Alert Dialog, it will not display again. Broadcast Alerts are automatically flagged as acknowledged by the Staff who initiated them.

Note: The Broadcast Alert functionality in the Homepage Products is not linked with the Client Note functionality on the Client Abstract in Anasazi Central. Broadcast Alerts only occur within the Homepage Products.

Client Panel Panes

Appointments Pane

The Appointments Pane displays the Client's scheduled Appointments from the Scheduler Product.

Assessments Pane

The Assessments Pane displays the Client's Assessments.

Assignments Pane

The Assignments Pane displays the Client's Assignments as managed in Client Assignments Maintenance in Anasazi Central, including the Client's Primary Assignment.

Authorizations Pane

The Authorizations Pane displays Client Authorizations from Client Authorizations Maintenance in Anasazi Central.

Client Overview Pane

The Client Overview Pane displays the same information as the Client Overview Dialog.

Diagnoses Pane

The Diagnoses Pane displays the Client's Primary Diagnosis from his or her most recently Final Approved Assessment that contains the Diagnosis Tab Page, provided all Assessments that include the Diagnosis Review Tab Page, both as a stand-alone Assessment and where it has been added as a Tab Page to another Assessment, have been identified through Staff Preferences.

Emergency Contact Pane

The Emergency Contact Pane displays emergency contact information from the Client's most recently Final Approved Assessment that contains the applicable questions.

Axis V GAF Scores Pane

The Axis V GAF Scores Pane displays the Client's GAF Score from their most recently Final Approved Assessment where a GAF Score has been recorded, provided all of the Assessments that contain the GAF Score have been identified through Staff Preferences.

Insurance Coverage Pane

The Insurance Coverage Pane displays the Client's Insurance Coverages from Client 3rd Party Coverages in Anasazi Central.

Lab Results Pane

The Lab Results Pane displays information regarding any Assessments that have had Lab Results recorded, provided that all Assessments that contain Lab Results have been identified in Staff Preferences. The Assessment(s) must be launched in order for the information to be displayed, which includes the Date, Description and Final Approved flag.

Medical Conditions Pane

The Medical Conditions Pane displays the most current information from the Medical Conditions Review in the Doctor's Homepage, which is accessible via the 'Perform a Medical Conditions Review' button in this Pane in the Doctor's Homepage.

Medical Conditions Review

All of a Client's medical conditions, including vital signs, liver/renal conditions, medical conditions and medication allergies are entered through the Medical Conditions Review. Medication queries can present alerts regarding drug interactions with the medication being queried and the medical conditions and medication allergies specified in the Medical Conditions Review. The Final Approved Medical Conditions Review can be printed from the Show Medical Conditions View within the Assessment Product.

Medications Pane

The Medications Pane displays Client Medications that have been entered and Final Approved via the Medications Dialog in the Doctor's Homepage. This Pane does not display Medications that have been staged for approval or have been Pre-Approved.

Notifications Pane

The Notifications Pane displays Pending Notifications associated with the selected Client for the selected Staff.

Primary Care Physician

The Primary Care Physician Pane displays information about the Client's Primary Care Physician from their most recently Final Approved Assessment that contains the PCP Questions.

Responsible Party Pane

The Responsible Party Pane displays information about the Client's responsible party information from their most recently Final Approved Assessment that contains the applicable questions.

Scheduled Actions Pane

The Scheduled Actions Pane displays scheduled Client Actions from Client Action Schedules Maintenance in Anasazi Central.

Services Pane

The Services Pane displays the Client's Services.

Substance Abuse Pane

The Substance Abuse Pane displays information from the Client's most recently Final Approved Assessment that contains a Drug Use Multiple Entry Window (MEW), provided all of the Assessments that contain the Drug Use Mew have been identified through Staff Preferences.

Treatment Plans Pane

The Treatment Plans Pane displays the Client's Treatment Plans from the Client Chart.

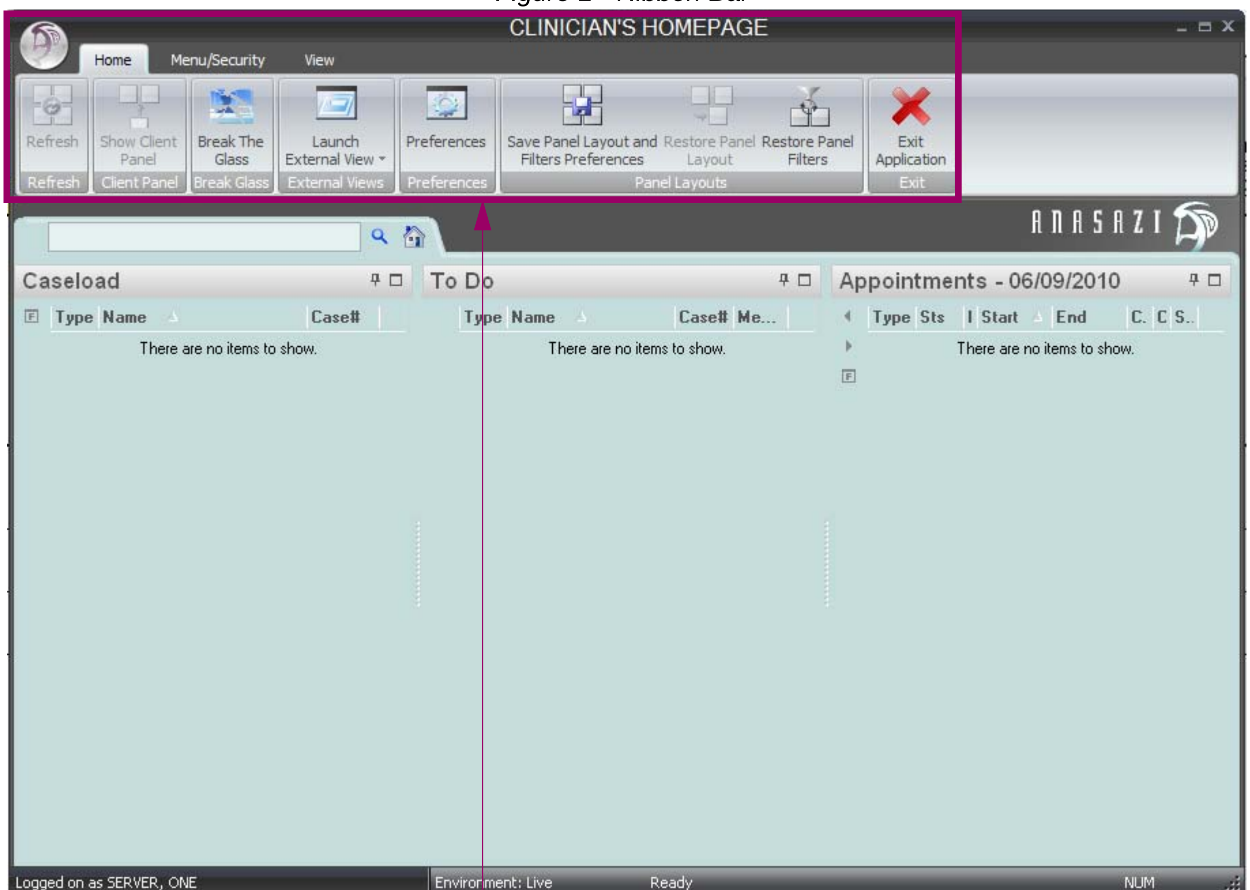
Break the Glass

Breaking the Glass is a means to, in a crisis situation, put a particular Client on a Staff Member's Homepage who ordinarily would not be displayed. The glass can be broken via the 'Break the Glass' icon on the Home Tab Page of the Ribbon Bar. Note that this button is only available in the Clinician's Homepage (v3) Product. For detailed information about breaking the glass, refer to the Assessment Product User Manual.

NAVIGATION

Ribbon Bar

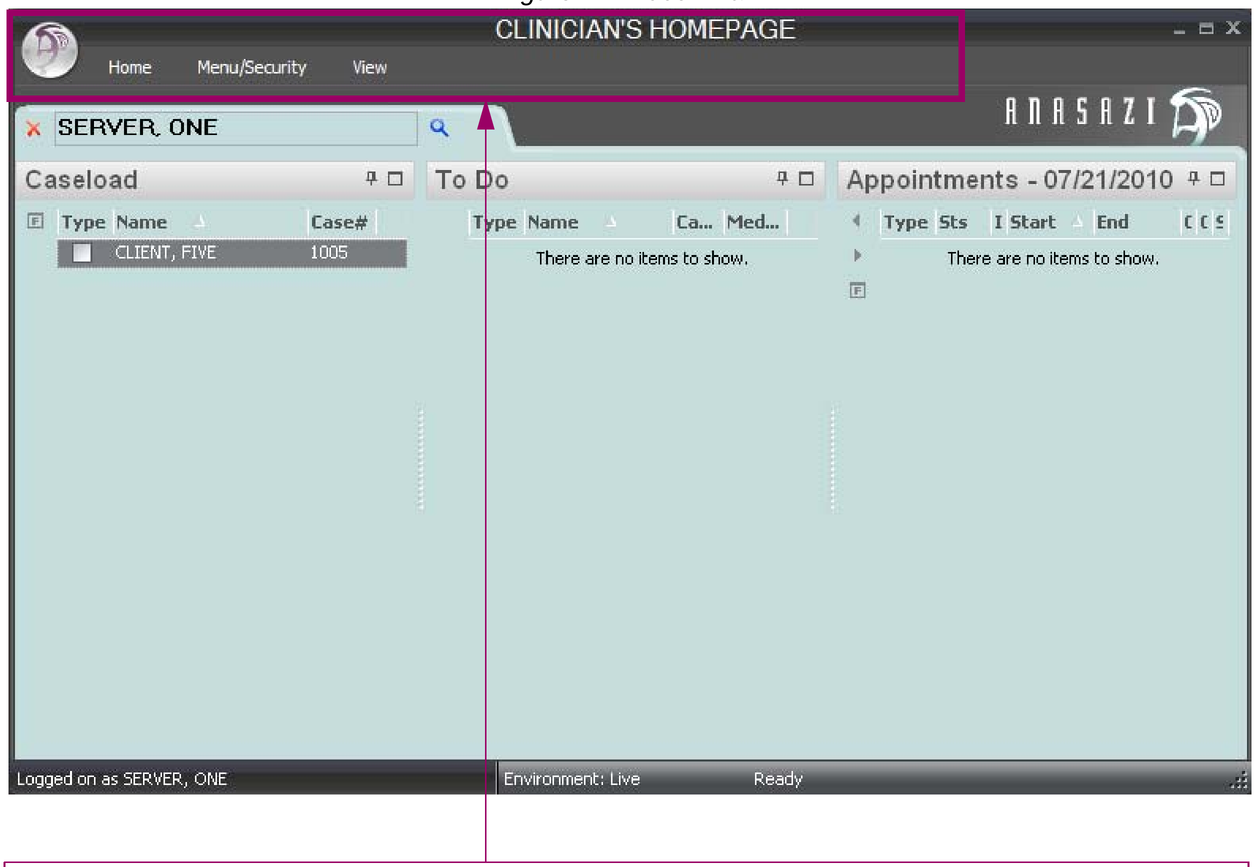
Figure 1 - Ribbon Bar



- The Ribbon Bar initially contains three Tabs - 'Home', 'Menu/Security' and 'View'.
- The Ribbon Bar can be hidden by double-clicking on any one of the Ribbon Bar Tabs (Menu Bar items) - 'Home', 'Client' (when the Client Pane is displayed), 'Menu/Security' or 'View'. The Ribbon Bar can be restored by double-clicking on a Menu Bar item again.

Ribbon Bar - Cont'd

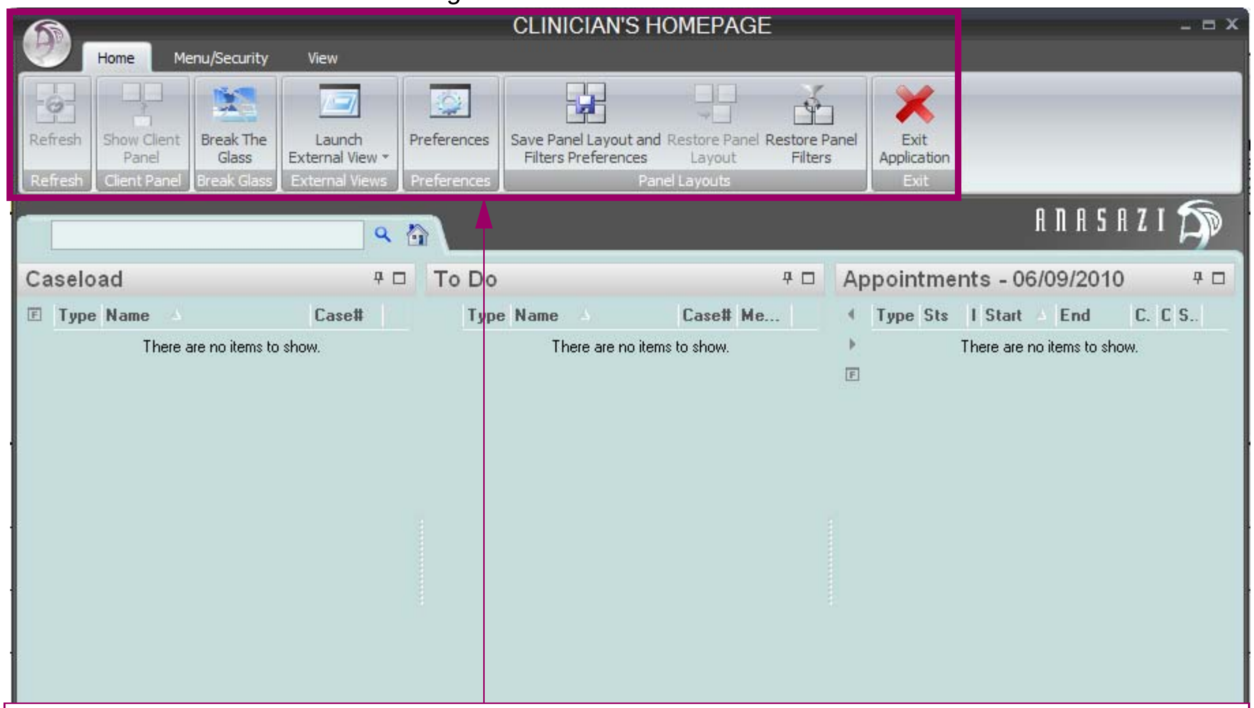
Figure 2 - Ribbon Bar



- The Figure above displays the Clinician's Homepage when the Ribbon Bar is hidden. Double-clicking a Ribbon Bar Tab (Menu Bar item) restores the Ribbon Bar.

Ribbon Bar - Cont'd

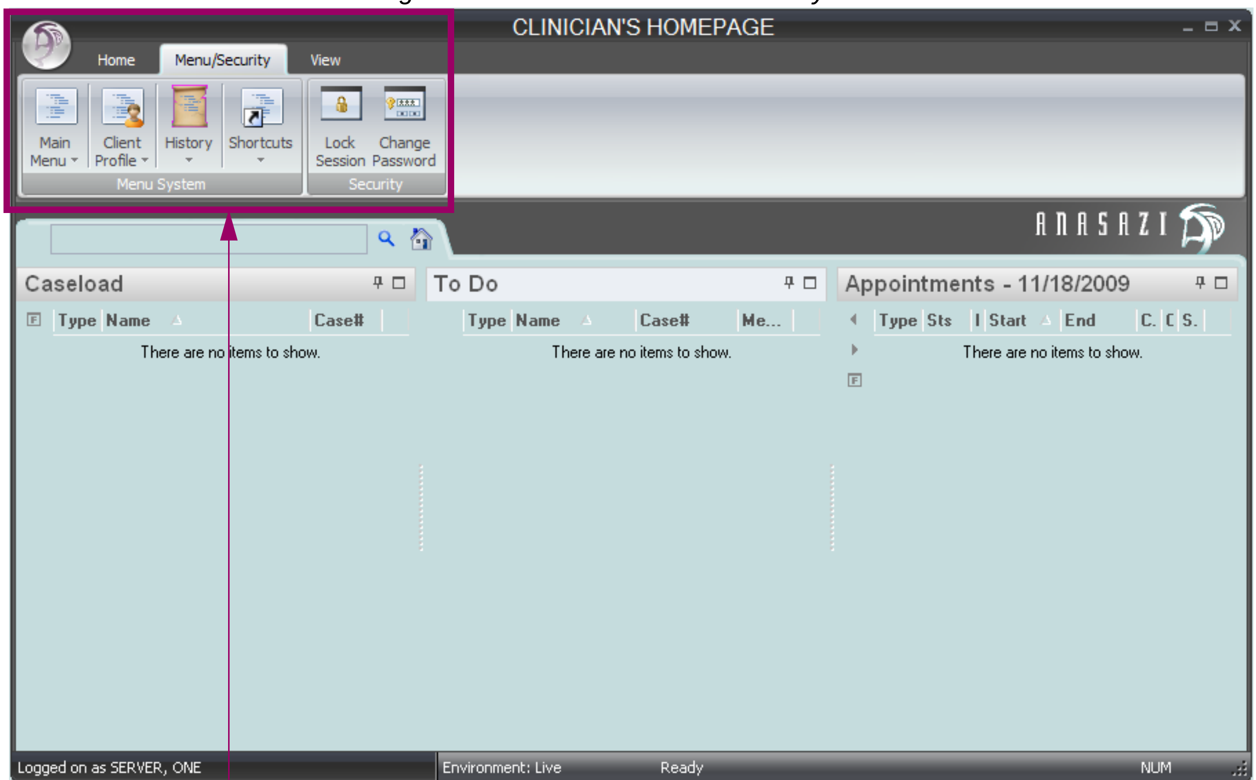
Figure 3 - Ribbon Bar - Home Tab



- The 'Home' Tab contains the following buttons:
  - 'Refresh' - Refreshes the data that is displayed to the Staff Panel.
  - 'Show Client Panel' - Overlays the Client Panel to the bottom of the Main Panel. If focus is on a Client in the Caseload, Appointment, or To Do List Panes, that Client is displayed to the Client Panel. Otherwise, a Client can be selected (subject to Privacy/Security).
  - 'Break The Glass' - Allows for 'breaking the glass', which is a means to, in a crisis situation, put a particular Client on a Staff Member's Homepage who ordinarily would not be displayed.
  - 'Launch External View' - Allows for launching the Anasazi Software Scheduler - Single Day, Scheduler - Multi-Day or Group Progress Note.
  - 'Preferences' - Displays the Staff Preferences Dialog.
  - 'Save Panel Layout and Filters Preferences' - Allows for saving a customized Panel layout and the selected filters. This button is only available if the 'Allowed to Save Panel Layout and Preferences' field is active on the CH/DR Product Access (14) Tab Page in Staff Maintenance. Refer to the Homepage System Administrator Manual for information on this field.
  - 'Restore Panel Layout' - Restores the Panel to the saved Panel Layout or the default Panel Layout.
  - 'Restore Panel Filters' - Restores the Panel Filters to their original selections.
  - 'Exit Application' - Exits the Homepage Product.

Ribbon Bar - Cont'd

Figure 4 - Ribbon Bar - Menu/Security Tab



- The 'Menu/Security' Tab contains the following buttons:
  - 'Main Menu' - Displays the Menu as it is established in the Anasazi Central Product. Anasazi Products and Views can be launched from this menu.
  - 'Client Profile' - Displays the Client Profile Menu as it is established in the Anasazi Central Product.
  - 'History' - Displays the most recently accessed Views; this is the same as the History Menu in the Anasazi Central Product.
  - 'Shortcuts' - Displays the Views that are on the Shortcut Bar in the Anasazi Central Product.
  - 'Lock Session' - Displays the Lock Session Dialog, which allows the Logged In Staff to lock their Homepage session. This is typically used when the Staff will be away from the machine. Once the Staff returns, he/she is prompted to enter his/her password in order to re-enter the session.
  - 'Change Password' - Allows Staff to change his/her password.

Ribbon Bar - Cont'd

Figure 5 - Lock Session

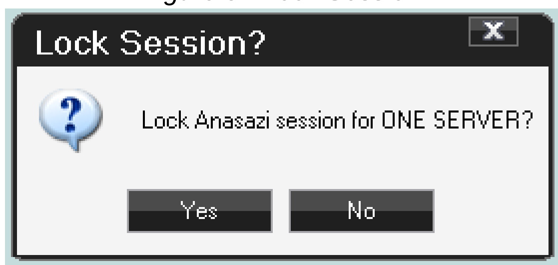


Figure 6 - Unlock Session

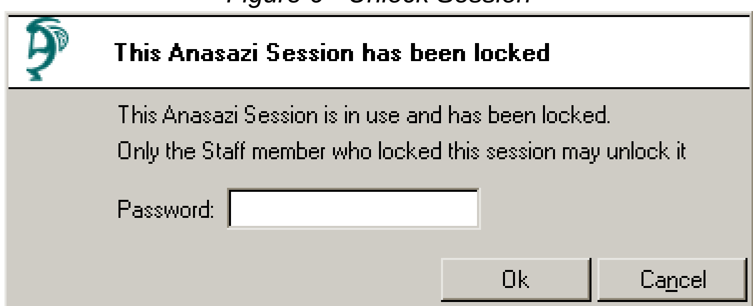
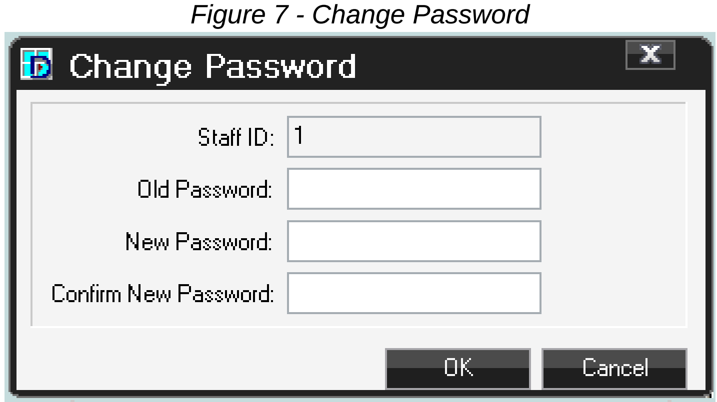
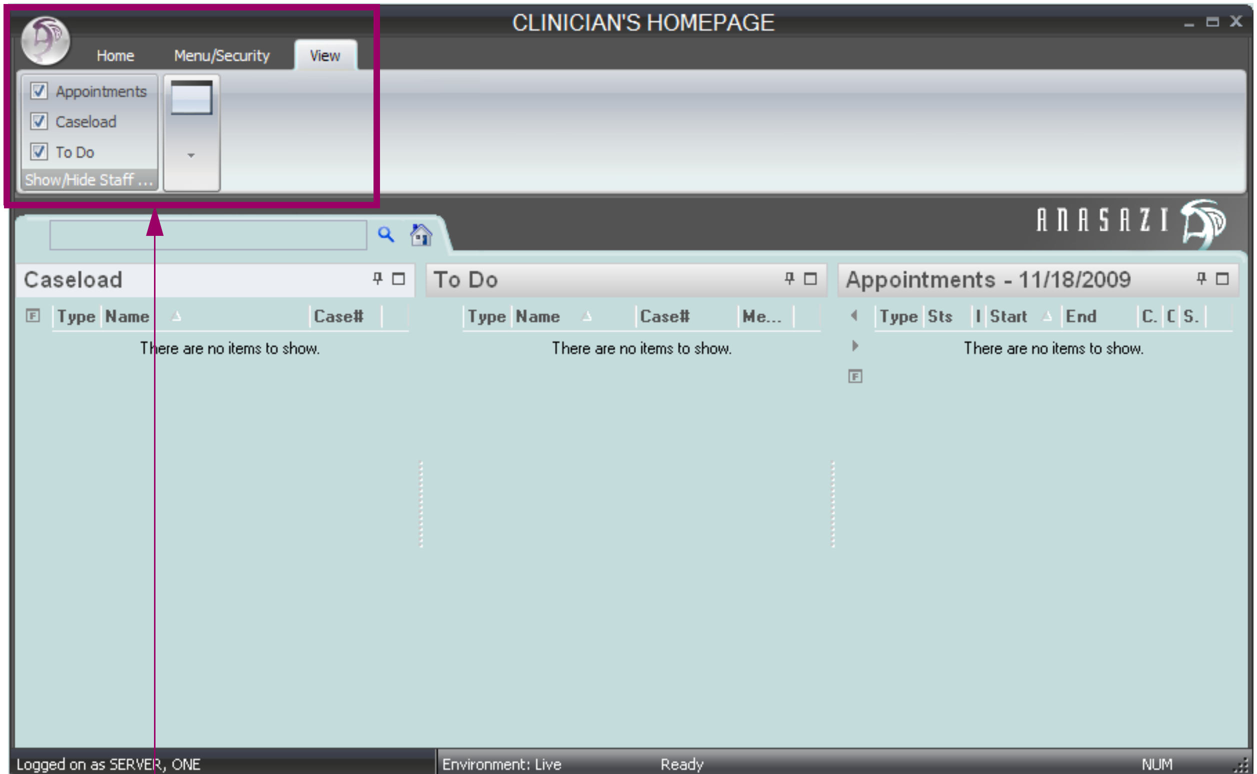


Figure 7 - Change Password



Ribbon Bar - Cont'd

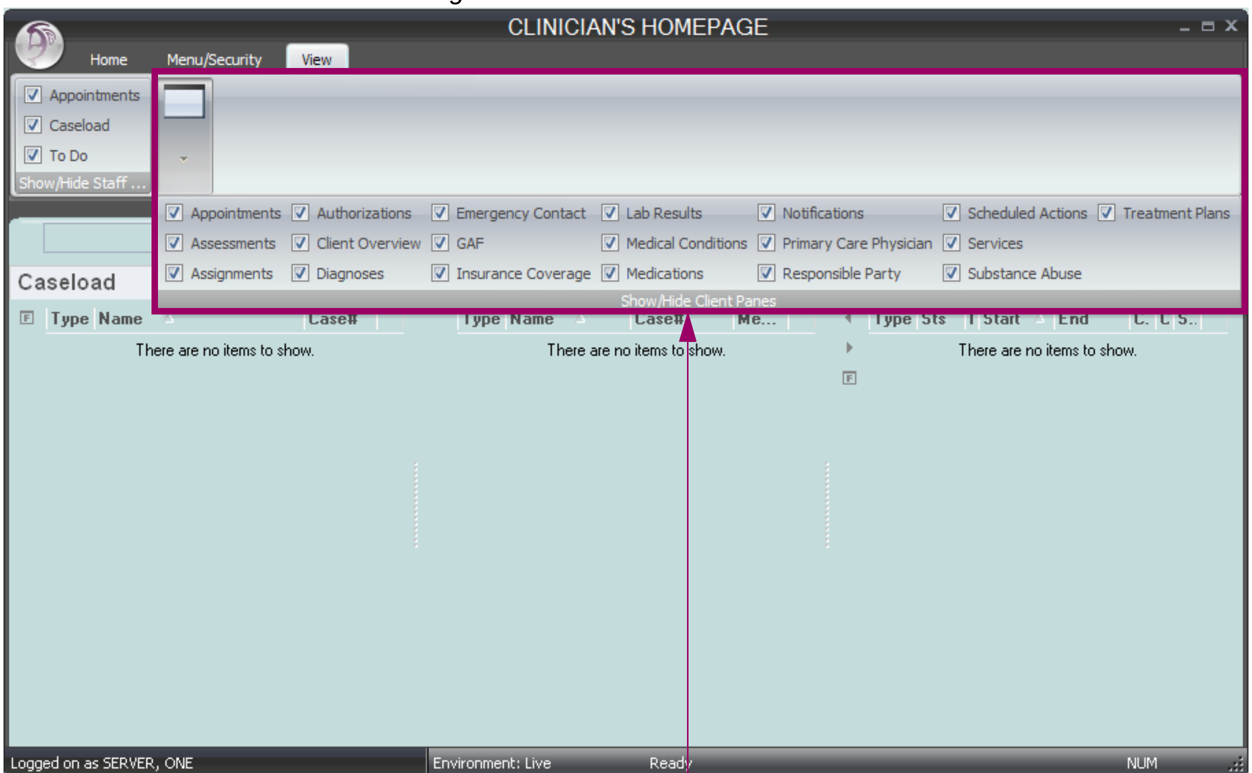
Figure 8 - Ribbon Bar - View Tab



- The 'View' Tab allows for displaying or hiding the Caseload, To Do and Appointments Panes, as well as numerous other Client Panes, as shown on the next page.

Ribbon Bar - Cont'd

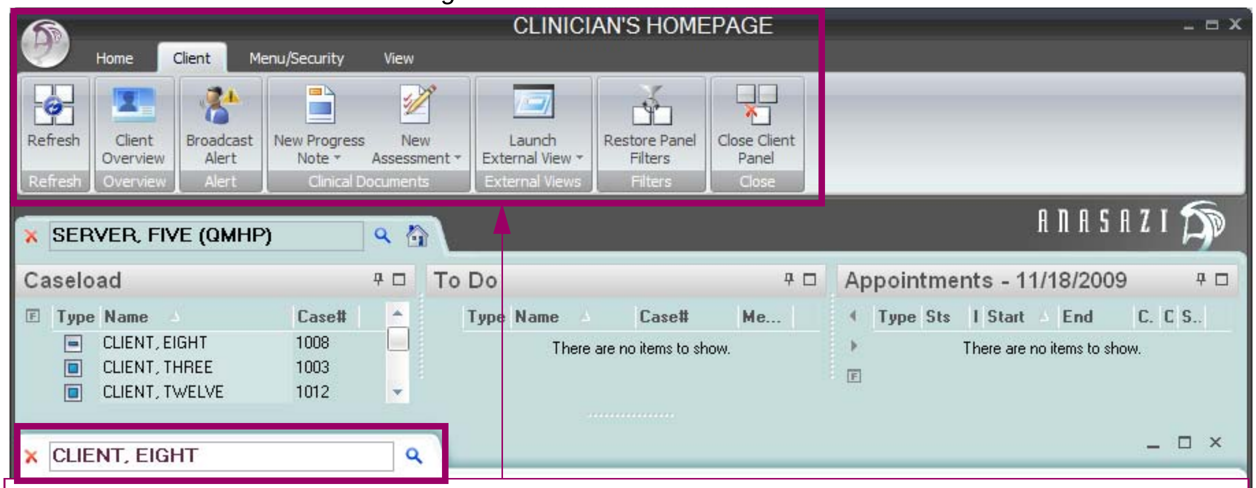
Figure 9 - Ribbon Bar - View Tab



- Clicking the down arrow on the Show/Hide Client Panes allows for selecting to display or hide various Client Panes, as follows:
  - Appointments
  - Assessments
  - Assignments
  - Authorizations
  - Client Overview
  - Diagnoses
  - Emergency Contact
  - GAF
  - Insurance Coverage
  - Lab Results
  - Medical Conditions
  - Medications
  - Notifications
  - Primary Care Physician
  - Responsible Party
  - Scheduled Actions
  - Services
  - Substance Abuse
  - Treatment Plans

Ribbon Bar - Cont'd

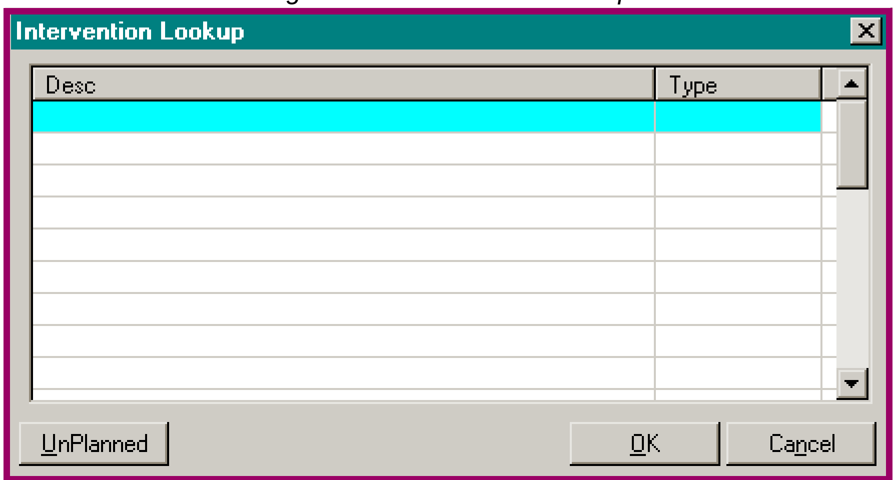
Figure 10 - Ribbon Bar - Client Tab



- When the Client Panel is displayed and a Client has been selected, a new Tab Page appears in the Ribbon Bar as 'Client', which may contain the following buttons:
  - 'Refresh' - Refreshes the data that is displayed to the Client Panel.
  - 'Client Overview' - Displays the Client Overview Dialog.
  - 'Pharmacy of Choice'- Displays the Pharmacy Lookup (Doctor's Homepage only).
  - 'Broadcast Alert' - Displays the Initiate Broadcast Alert Dialog.
  - 'New Medication' - Allows for entering a New Prescription, New Medication Order, New Client Instruction or New Pre-Existing Medication via the Medications Dialog (Doctor's Homepage only).
  - 'New Progress Note' - The top of this 'split' button displays the Client Chart to allow for adding a New Progress Note, New Multi-Service Progress Note, New Group Progress Note or New Informational Note to the Client's current Interim Service Log, Interim Treatment Plan or Treatment Plan. If the selected Client has a Treatment Plan that overlaps the current date and an Individual Progress Note or Multi Service Progress Note is selected for entry, the Client Chart displays and allows entry of an UnPlanned Note or selection of an applicable Intervention for entry of a Planned Note via the Intervention Lookup Dialog (shown on the next page). The bottom of the button allows for launching a 'New Progress Note', 'New Multi-Service Progress Note', 'New Group Progress Note' or 'New Informational Note'.
  - 'New Assessment' - The top of this 'split' button displays the New Assessment Lookup, from which an Assessment can be selected to be launched in Add Mode in the Client Chart View. Clicking on the bottom of the button displays the Assessments that have been selected to display in the New Assessments area of the Staff Preferences Dialog, sensitive to Categories of Treatment.
  - 'Launch External View' - Allows for launching the Client Chart or Client Action Schedules.
  - 'Restore Panel Filters' - Restores the Client Panel Filters to their original state.
  - 'Close Client Panel' - Closes the Client Panel.

Ribbon Bar - Cont'd

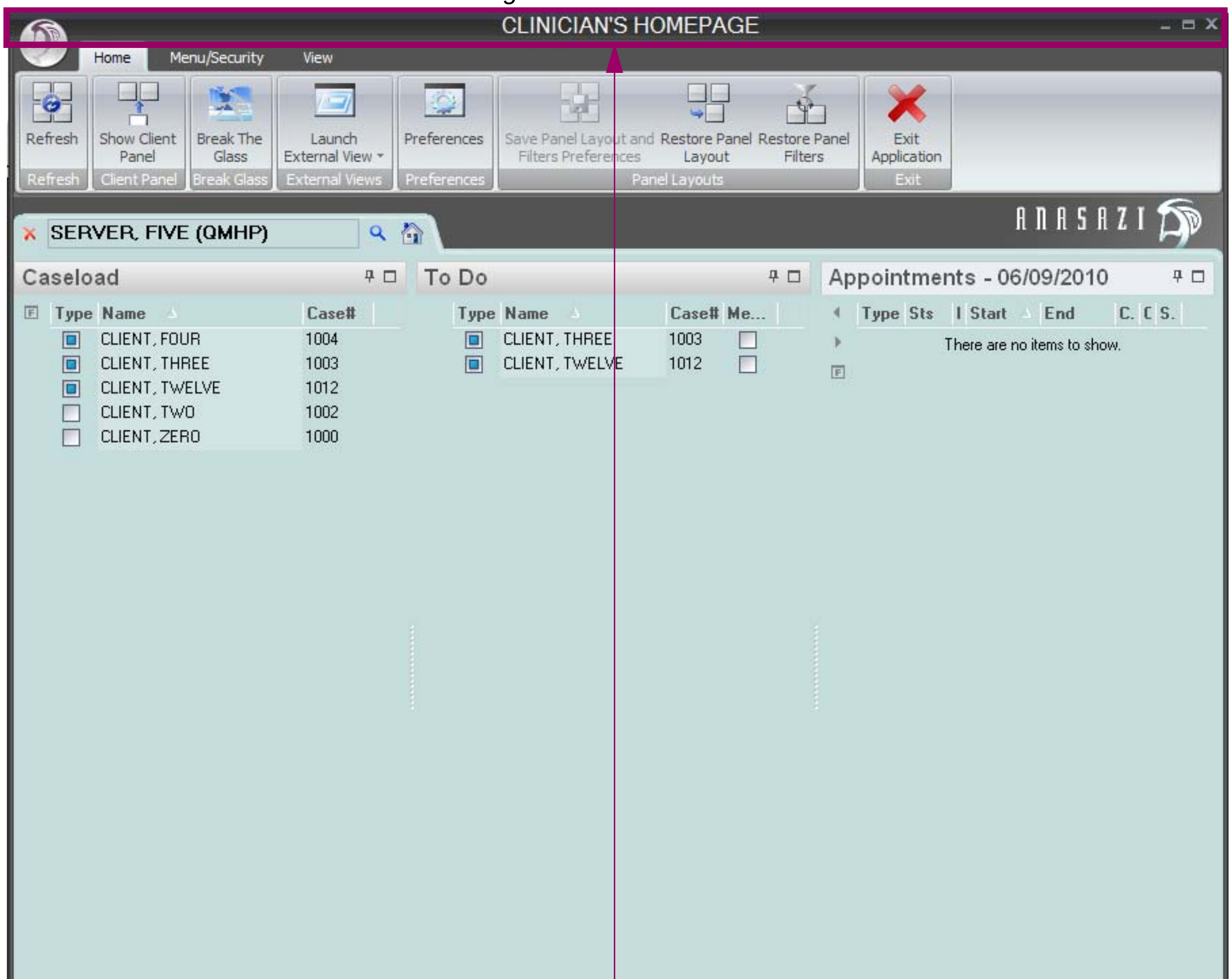
Figure 11 - Intervention Lookup



- The Intervention Lookup displays Interventions that pertain to the Note Type selected for entry via the 'New Progress Note' Ribbon Bar button (e.g., if an Individual Progress Note is selected for entry only Interventions with a Note Type of Individual are listed).
- The 'UnPlanned' button allows for entry of an UnPlanned Progress Note for the selected Note Type.

Panels

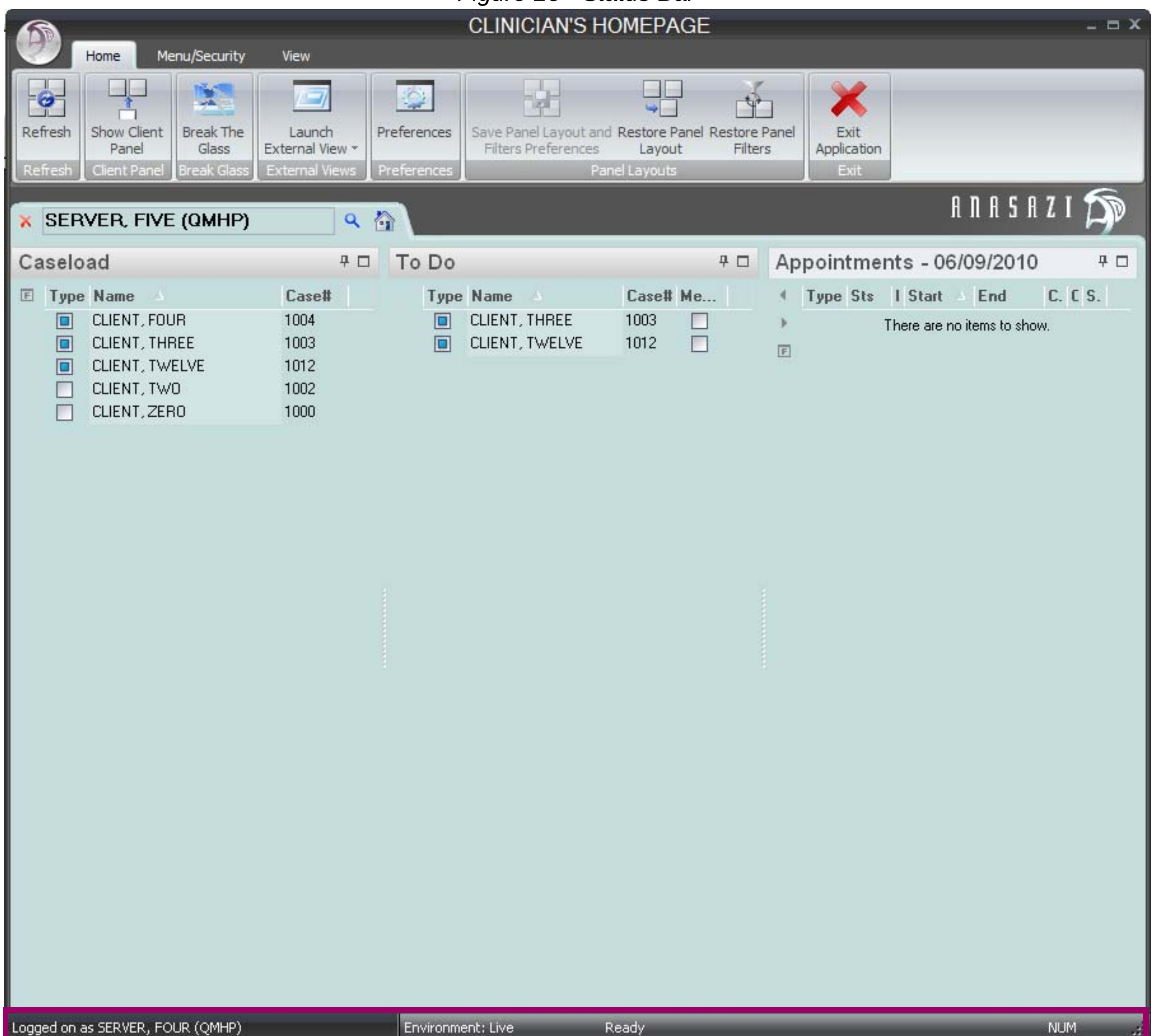
Figure 12 - Main Panel



- Clicking on the graphic in the upper left hand corner of the Homepage displays a menu that allows for exiting the Homepage Product. with the options shown below. Double-clicking on this graphic also exits the Product.
- The Title Bar displays the name of the Homepage Product.
- The icons on the right allow for minimizing, maximizing or closing the Homepage Product.
- The Doctor's Homepage can be moved on the desktop by clicking and holding the left mouse button on the Title Bar, moving the mouse to the desired location and the releasing it.

Panels - Cont'd

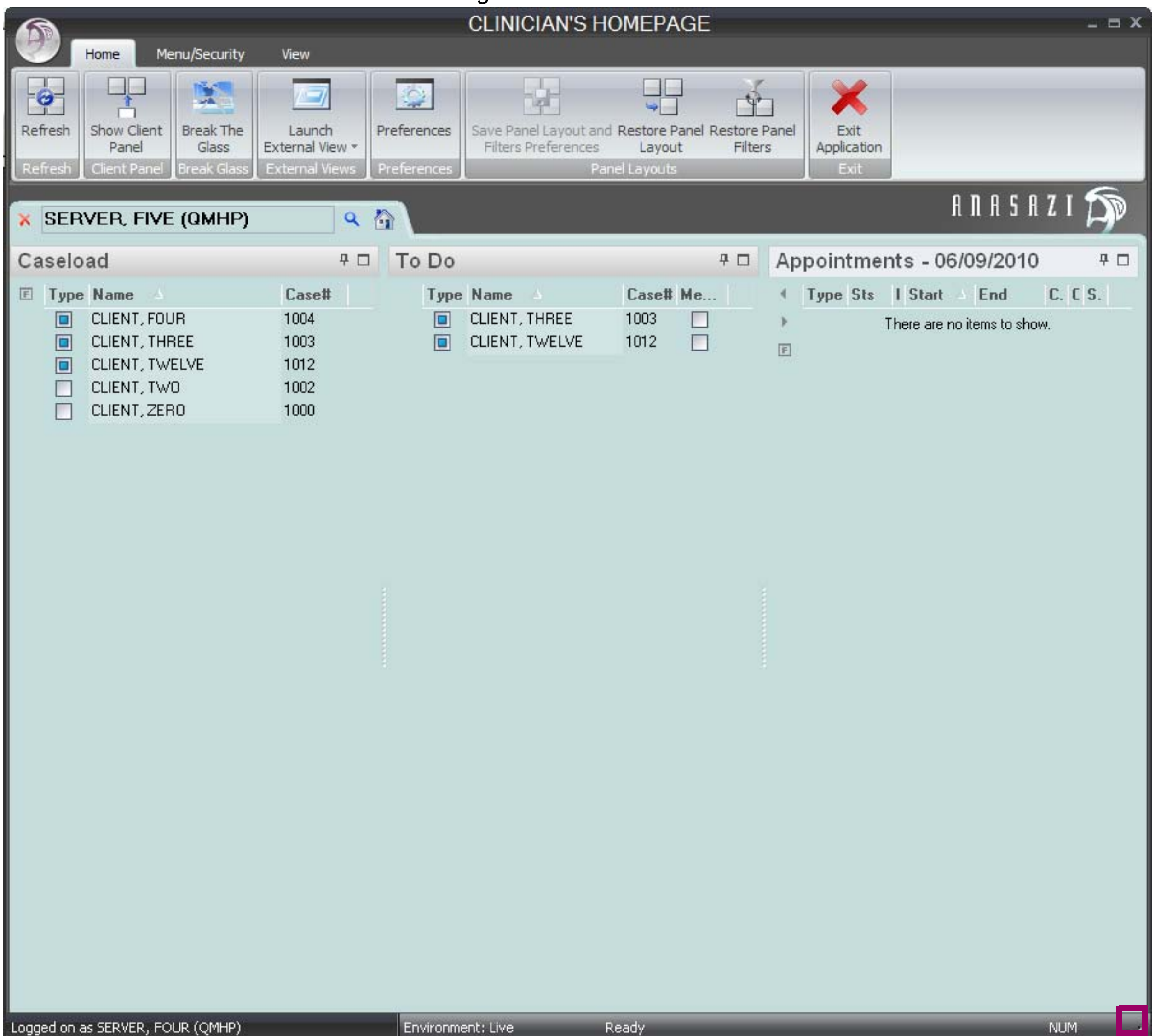
Figure 13 - Status Bar



- The Status Bar at the bottom of the Panel displays the Logged-in Staff, the Environment (e.g., Live or Training), a Progress Bar when processing or displays 'Ready' when no processing is taking place. It also displays 'CAP' if the Caps Lock key is on, 'NUM' if the Num Lock key is on and 'SCRL' if the Scroll Lock key is on.

Panels - Cont'd

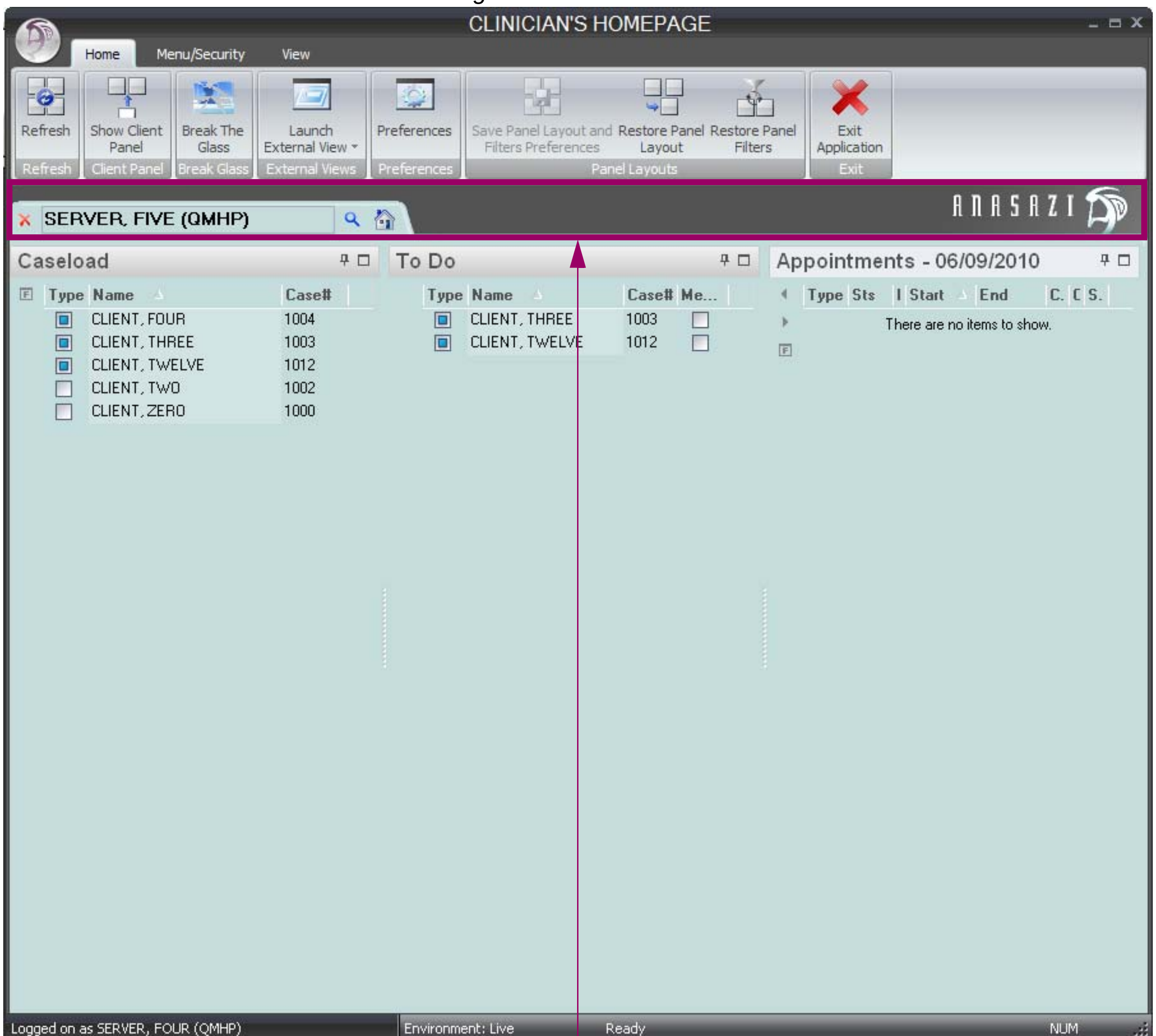
Figure 14 - Status Bar



- The Homepage Products can be resized by placing the mouse pointer at an edge or a corner of the Panel, which displays the cursor as a double arrow, and clicking and holding the left mouse button while moving the mouse until the Panel is the desired size and then releasing it.

Panels - Cont'd

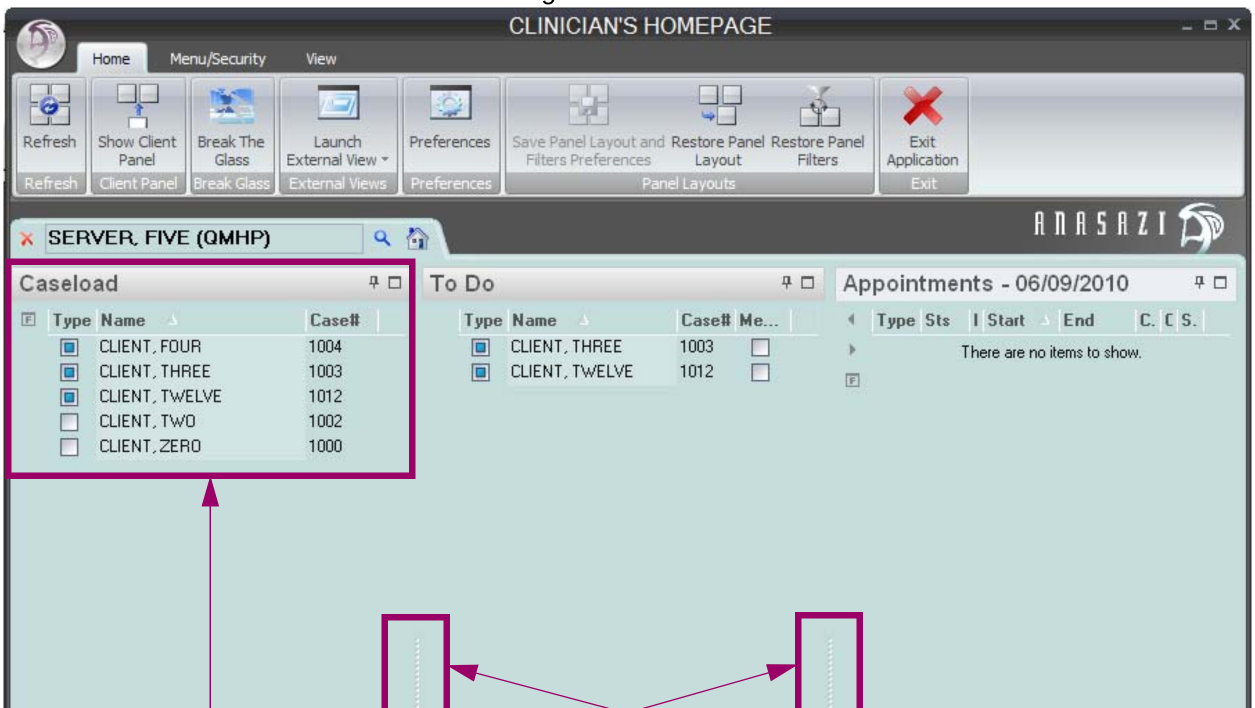
Figure 15 - Main Panel



- When the Homepage is launched, the Main Panel appears, with the Staff Panel exposed.
- The Server in the Tab area of the Panel defaults to the Logged In Staff, unless the Logged In Staff is designated as Clinical Support Staff, in which this field defaults blank (see the Doctor's Homepage User Manual for information on Staff Access Types. Staff can be cleared by clicking the 'Clear' button ('X') or changed by clicking the magnifying glass graphic, which displays the Staff Lookup.

Panes

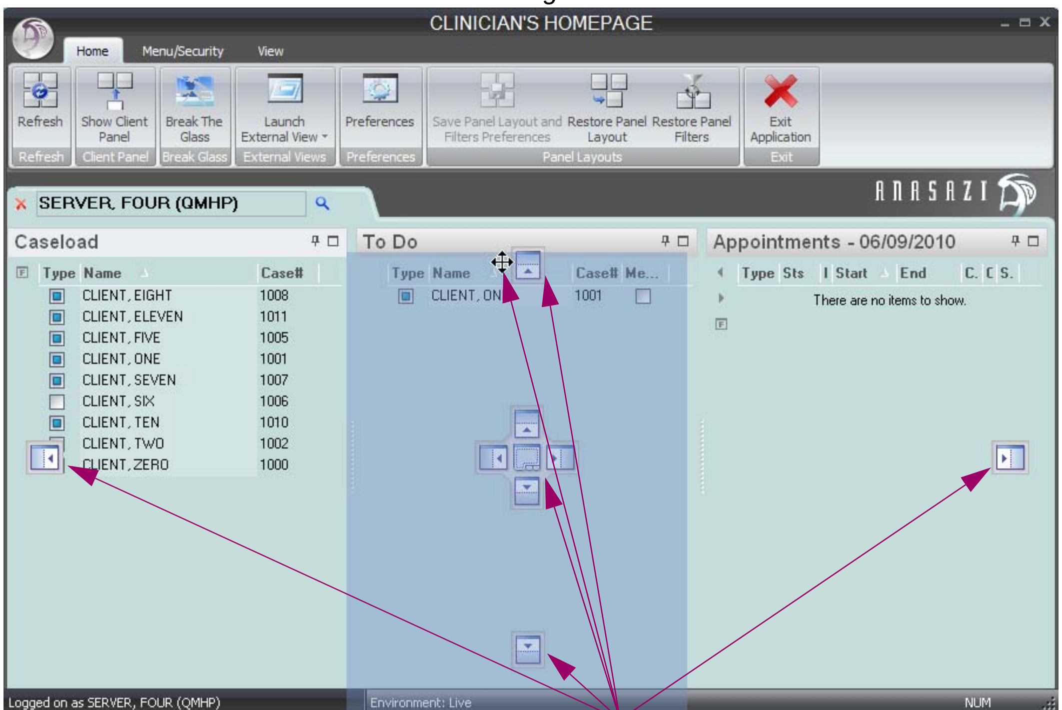
Figure 16 - Panes



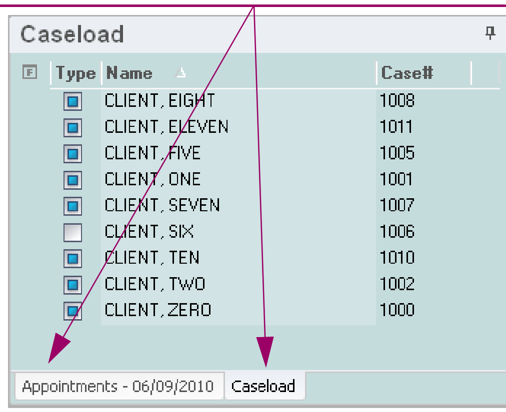
- Panes can be resized, maximized and restored, or hidden.
- A Pane can be moved by clicking on the Pane Toolbar, holding the left mouse button and dropping it where desired. Panes can be moved within the Panel, or off of the Panel (see the next page).
- Each Pane can be 'pinned' or 'unpinned' to/from the Panel via the 'Pin' graphic in the Title Bar. When Panes are unpinned (the pin graphic points downward), they can be moved within and even off of the Panel. When they are pinned the pin graphic points to the side), they display only the Title Bar until the Title Bar is hovered over or clicked.
- Panes 'remember' their last size; that is, if a Pane is made larger, the next time the Pane is accessed, it will appear as the larger size. If an unpinned Pane is made larger and the Homepage Panel is subsequently made smaller, the Pane may not be completely visible, since it remembers its last, larger size. This can be remedied by 1) clicking on the View Tab in the Ribbon Bar and de-selecting the option to display the affected Pane, and then re-selecting it; 2) double-clicking on the header (if it is not docked at the bottom and is visible), which will force the Pane to re-size, and then the Pane can be hidden again; or 3) adjust the docking area that contains the Panes to be large enough to fit the affected Pane, hover over the Pane to display it and then resize the Pane to be smaller such that it is visible.
- 'Grabber' bars are available that allow for changing the width or length of each Pane, depending on the orientation of the Pane (e.g., vertical, horizontal).

Panes - Cont'd

Figure 17 - Panes

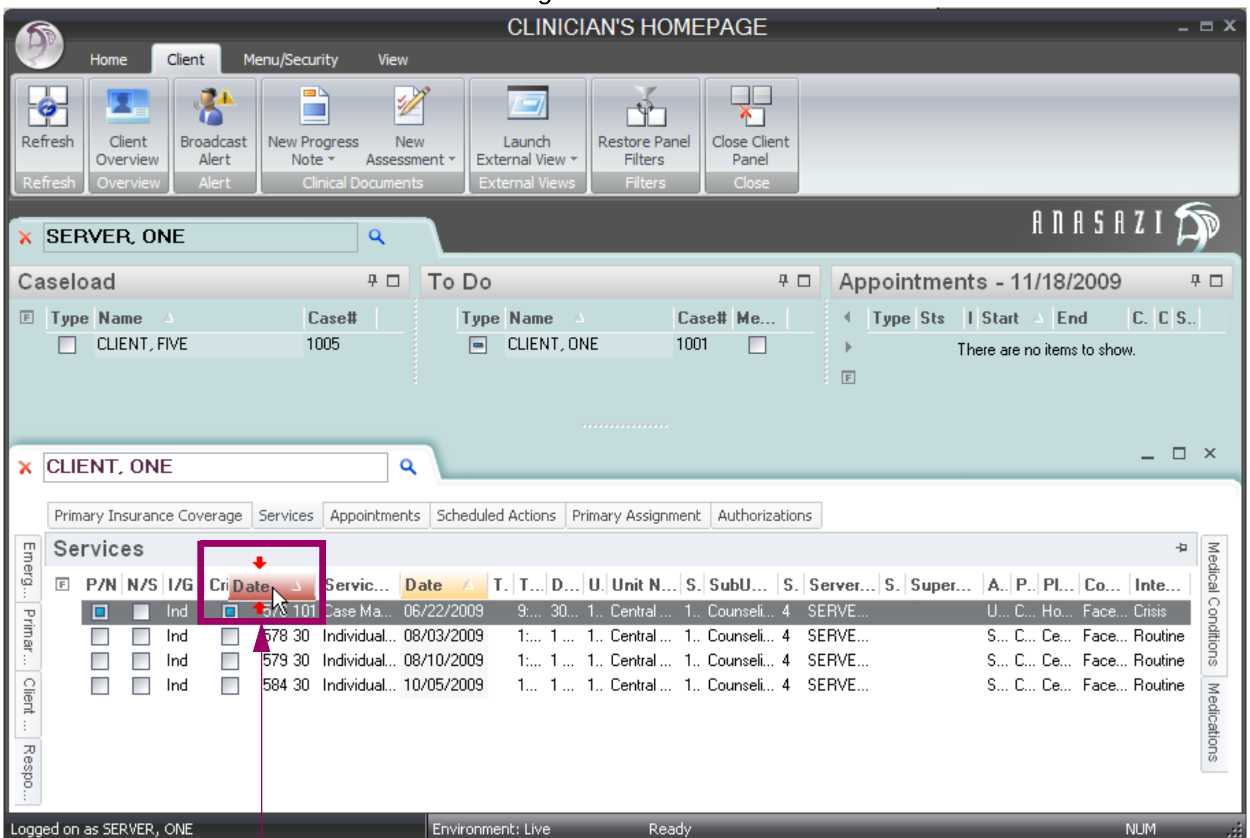


- Panes can be moved within the Panel or off of the Panel by clicking on the Title Bar with the left mouse button and holding and dragging it to the desired location.
- When moving a Pane, the screen displays several placement anchor indicators, which shows where the Pane could be dropped relative to other Panes. Dropping a Pane onto the middle anchor indicator places it together with another Pane such that they can be toggled using tabs at the bottom (as shown below). Dropping a Pane onto the right side anchor moves the Pane to the right; dropping a Pane onto the left side anchor moves the Pane to the left, and so on.



Panes - Cont'd

Figure 18 - Panes

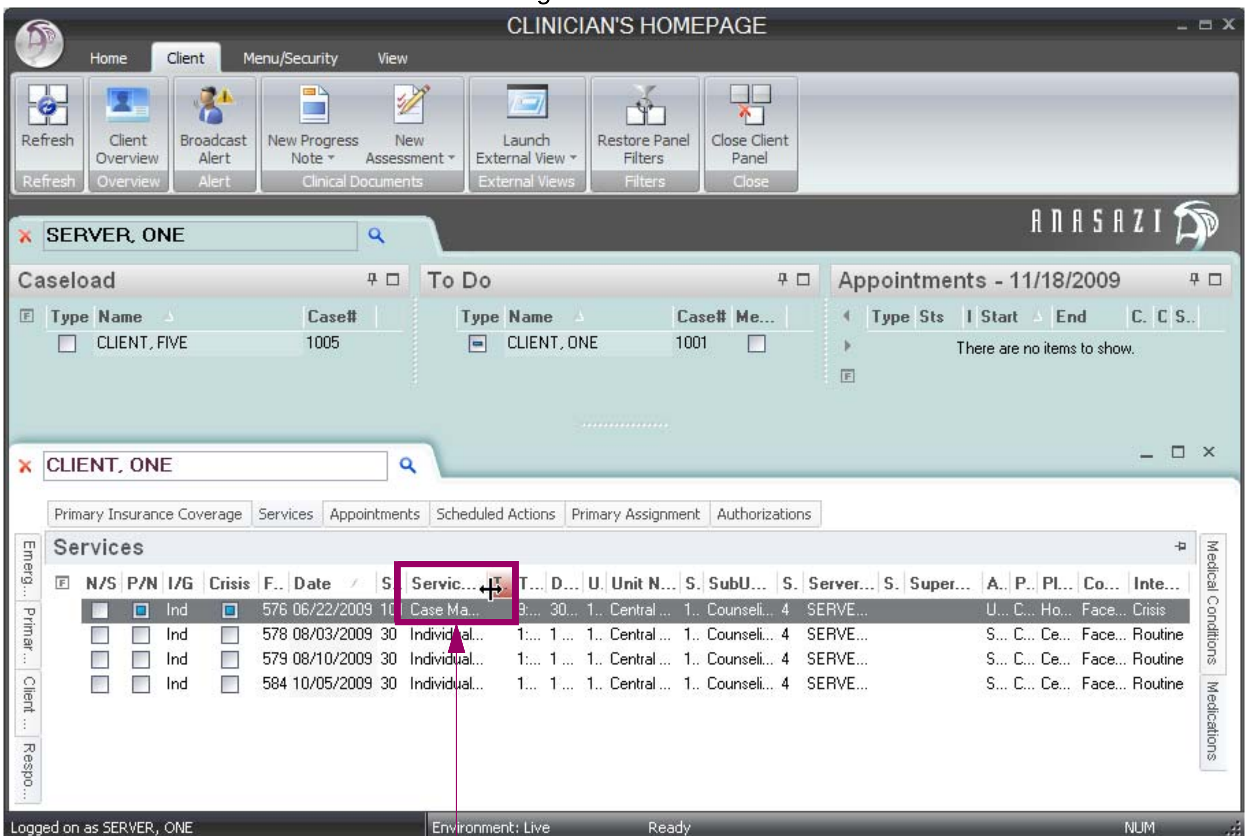


- Columns in a Pane can be reordered by clicking on the column header, holding the left mouse button down while moving it to the desired location. Red arrows help to visually display the location in which the column will be dropped, or moved. In the example above, the 'Date' column is being moved to the left, between the 'Crisis' and 'Service Code' columns.

- Column data can be sorted by clicking on the column header. Ascending and Descending sorting is accommodated on columns, with few exceptions. A graphic to the right of the active column displays an up arrow or down arrow to indicate the sort order. Sorting is not sensitive to case (i.e., uppercase/lowercase).

Panes - Cont'd

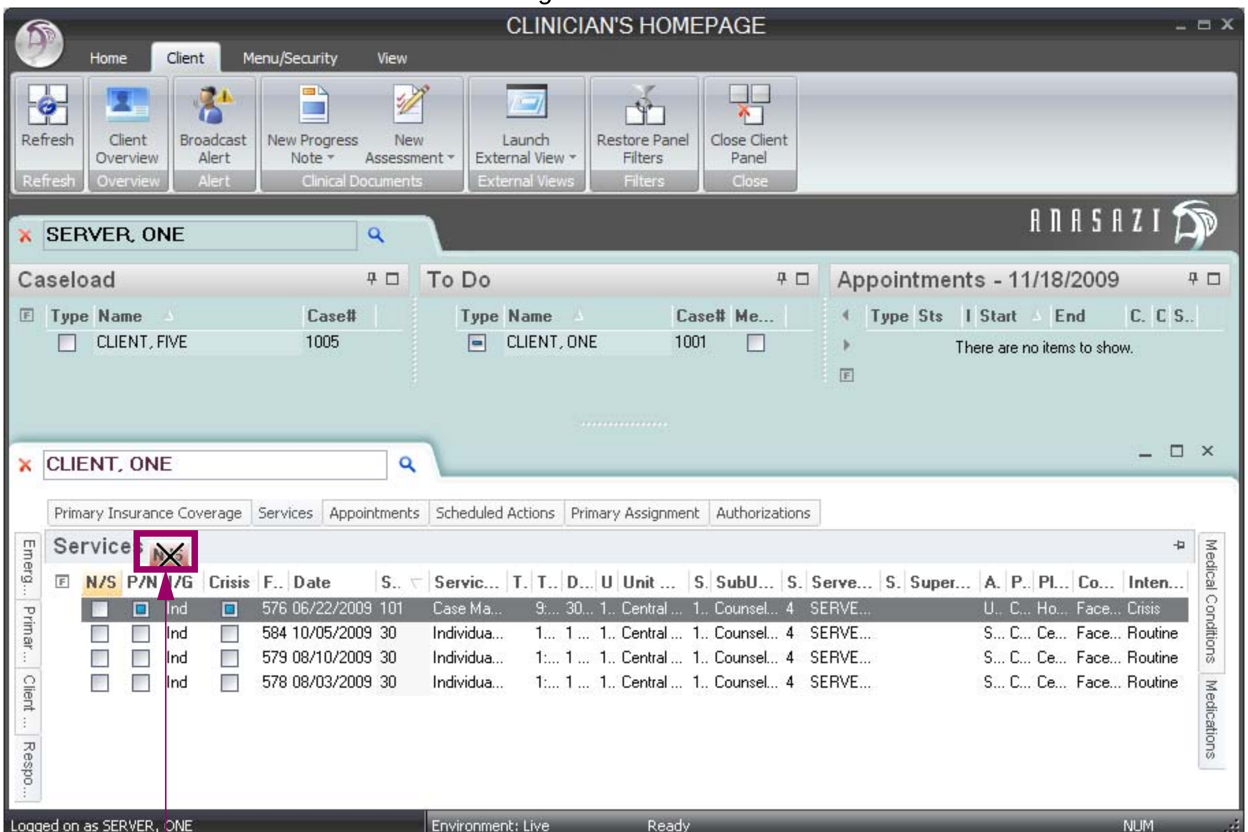
Figure 19 - Panes



- Some columns can be resized by clicking in between two columns, and when the mouse pointer appears as a double left-right arrow, holding the left mouse button while moving the mouse to the left or right. Alternately, double-clicking on the right border of a re-sizeable column resizes it to fit the contents of the column.

Panes - Cont'd

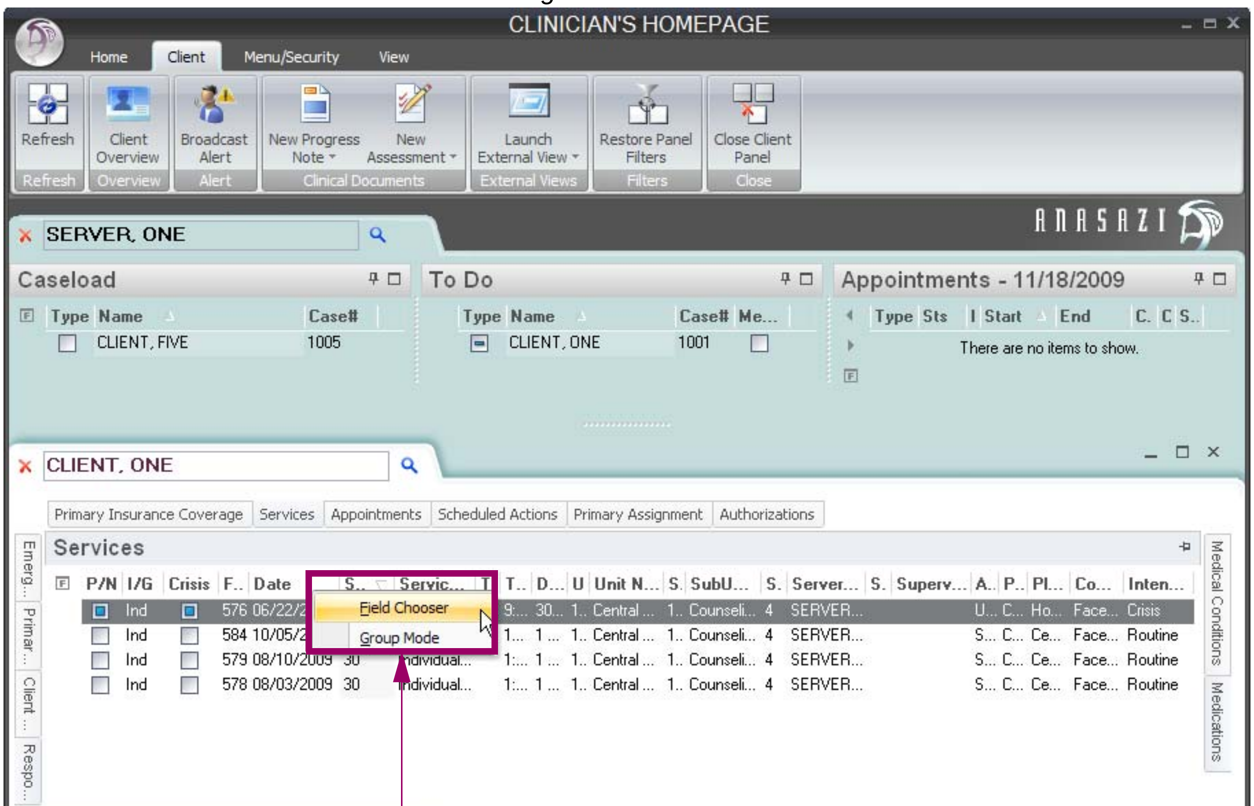
Figure 20 - Panes



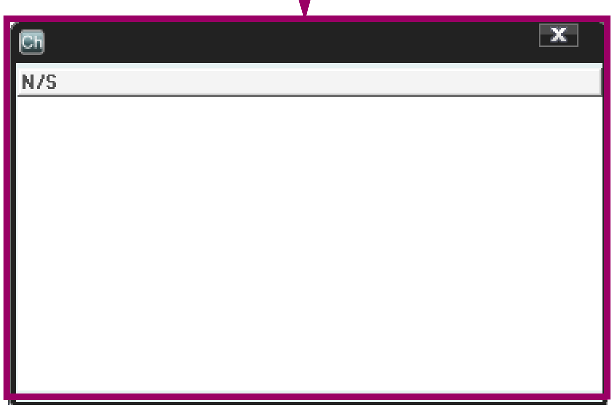
- Some columns in the Pane can be removed by clicking on the column header, holding the left mouse button down while moving it off of the Pane to remove. In the above example, the 'N/S' (No Show) column was being removed from the Pane.

Panes - Cont'd

Figure 21 - Panes

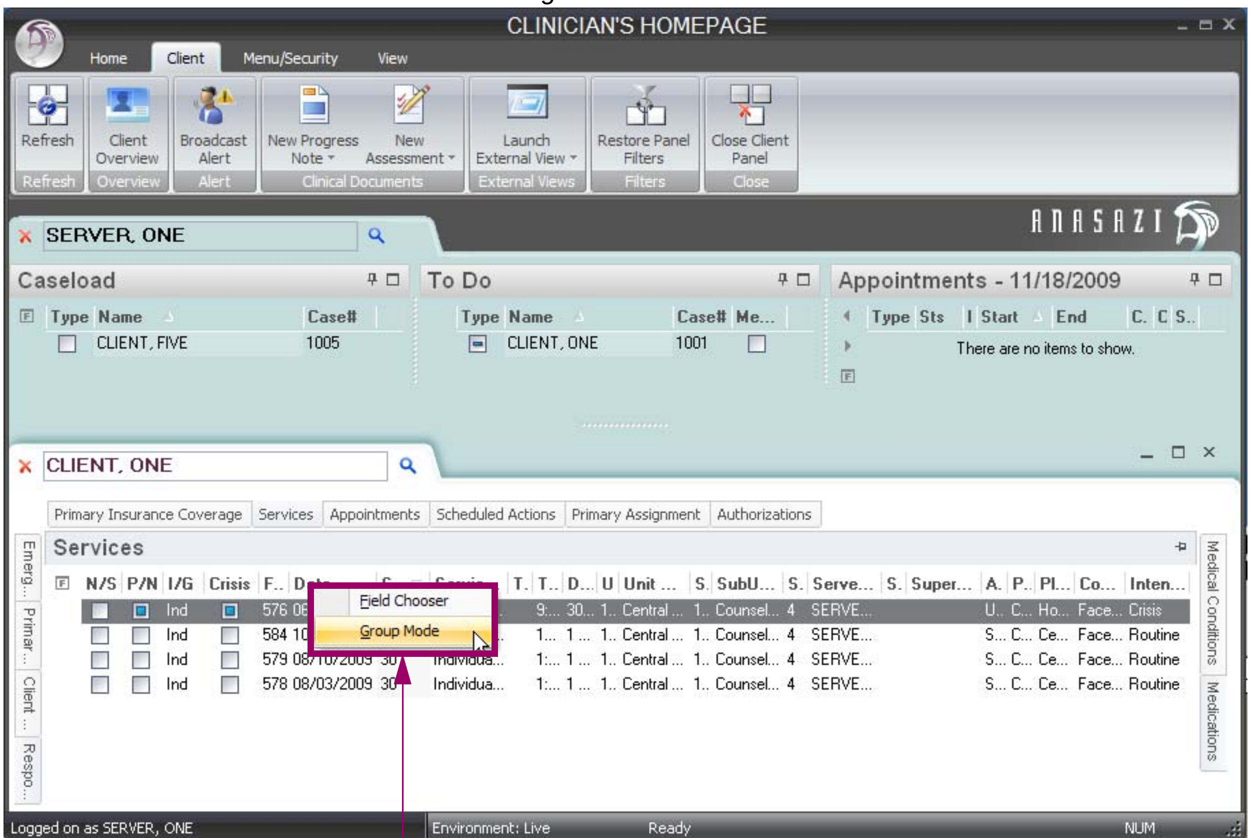


- To restore a previously removed column to a Pane, right-click anywhere in the column header area and select 'Field Chooser'. The Available Columns Dialog displays, from which a column can be added to the Pane by clicking and dragging it to the desired location.



Panes - Cont'd

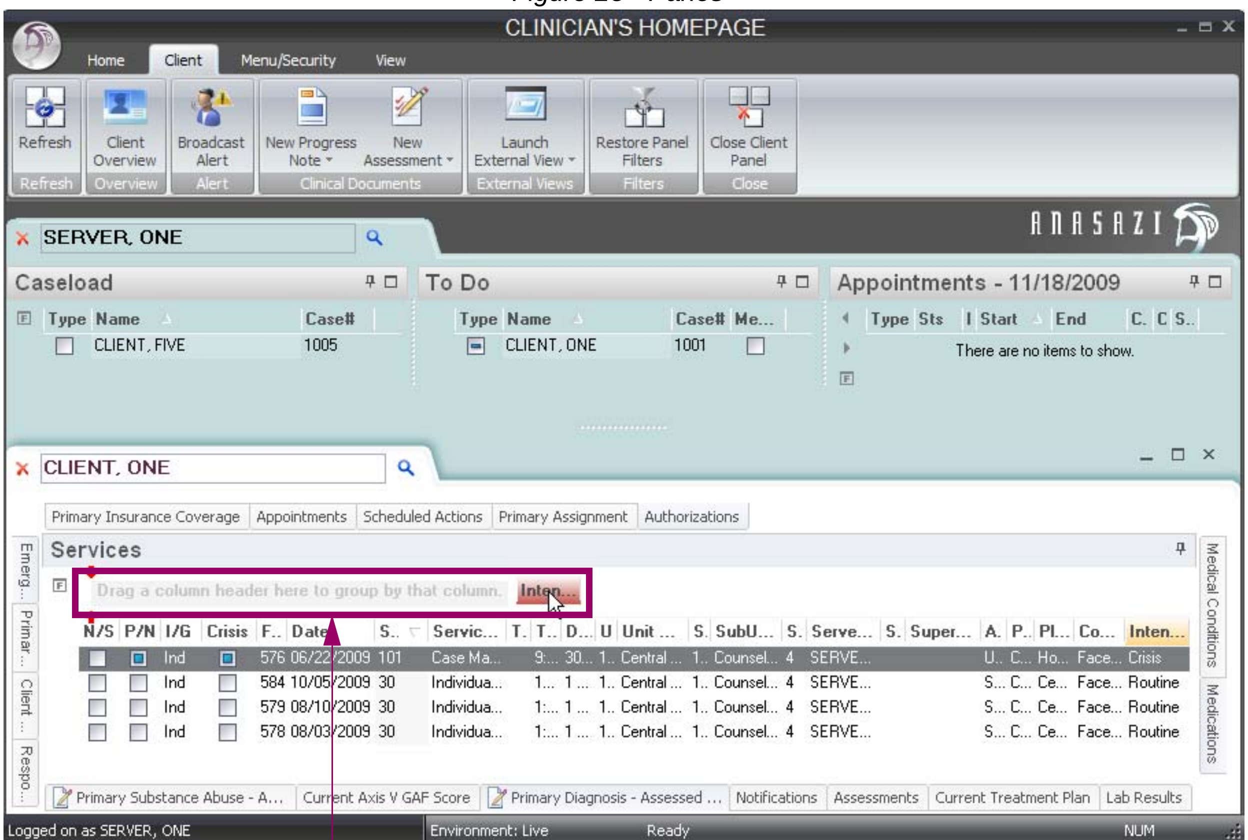
Figure 22 - Panes



- The menu that is available when right-clicking a column header also includes an option for 'Group Mode'. Group Mode allows for dragging columns to a different location in order to group them separately, yet within the Pane.

Panes - Cont'd

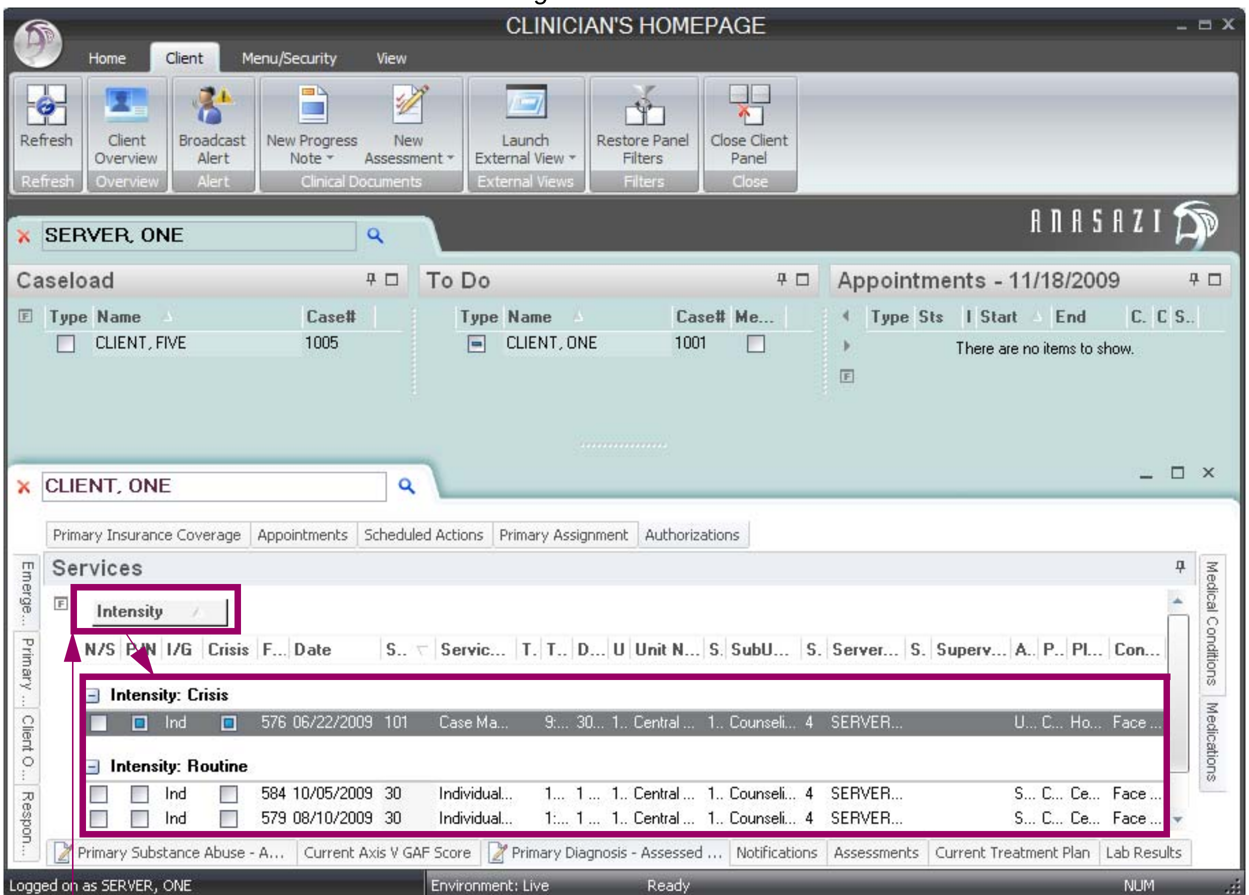
Figure 23 - Panes



- Click on a column to group the data by and drag it to the area above the column headings that displays as 'Drag a column header here to group by that column'.

Panes - Cont'd

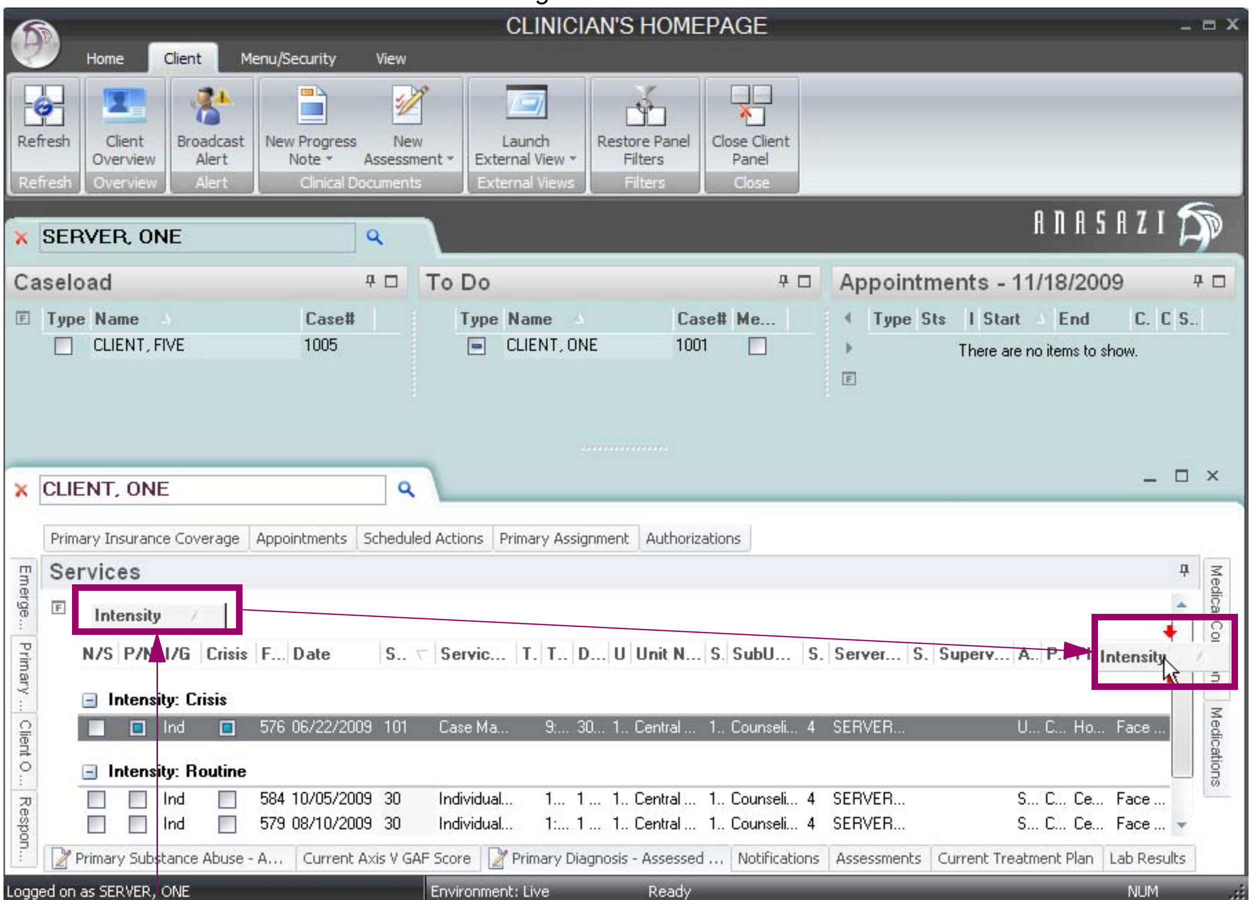
Figure 24 - Panes



- Once a column has been dragged and dropped to the 'Drag a column header here to group by that column' area above the column headers, the data is displayed grouped according to the selected column. In the example above, the 'Intensity' column has been chosen, and thus the data is displayed as grouped by Intensity.

Panes - Cont'd

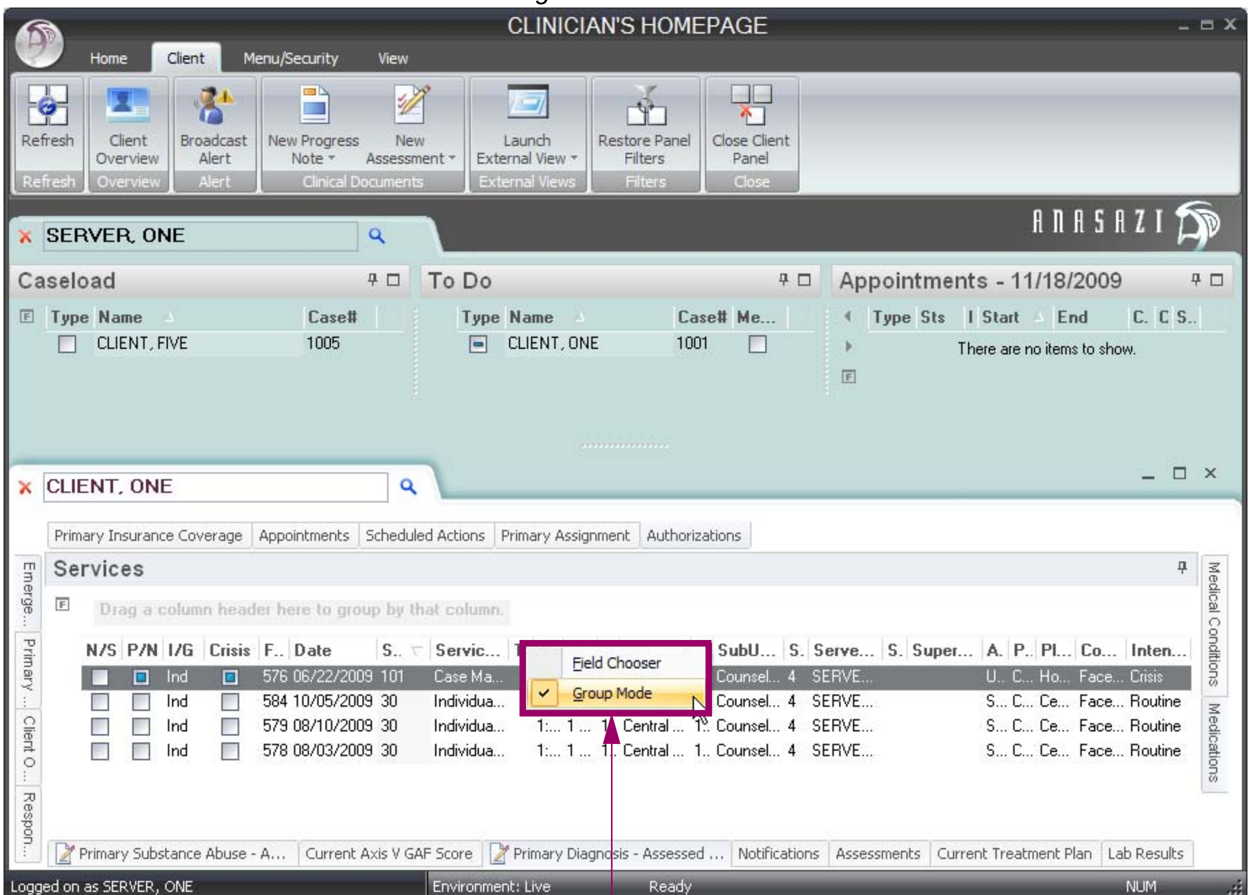
Figure 25 - Panes



- To remove the grouping and re-display the data un-grouped, click the column that is displayed in the area above the column headers and drag and drop it back into the Pane column headers in the desired location. In the example above, the 'Intensity' column is being removed as a grouping criteria and added to the column headers after the 'Contact Type' column.

Panes - Cont'd

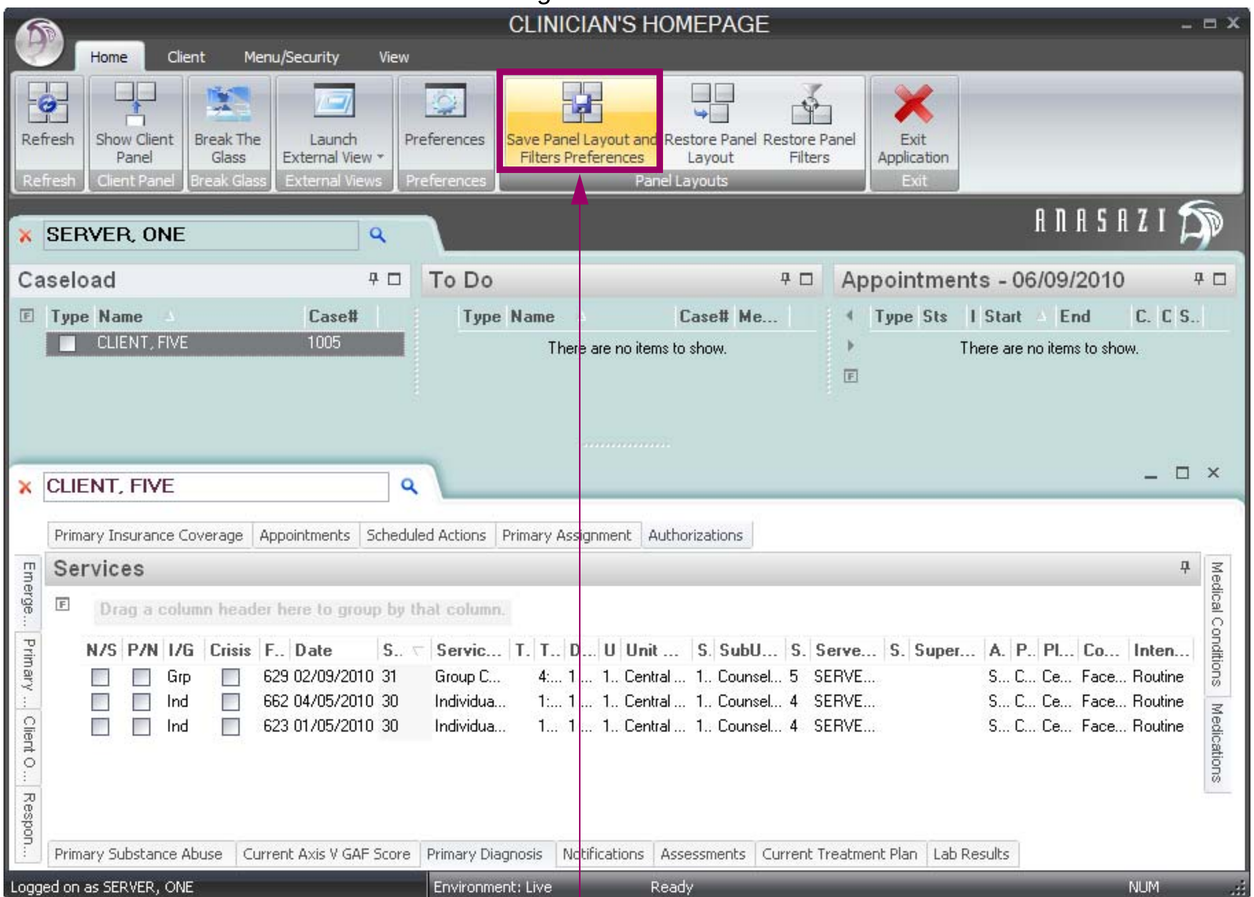
Figure 26 - Panes



- To de-select Group Mode, right-click in the column headings area and click 'Group Mode' (such that it no longer contains a check mark).

Panes - Cont'd

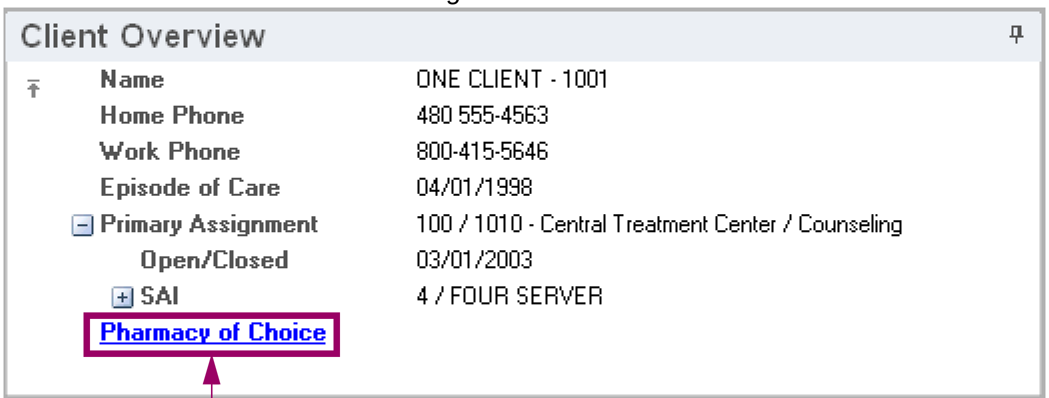
Figure 27 - Panes



- Once the layout has been customized, if the Logged In Staff has permission to save the layout (i.e., the Allowed to Save Panel Layout and Preferences' field is active on CH/DR Product Access (13) in Staff Maintenance), it can be saved by clicking the 'Save Panel Layout and Filters Preferences' button in the Ribbon Bar on the Home Tab.

Links

Figure 28 - Links

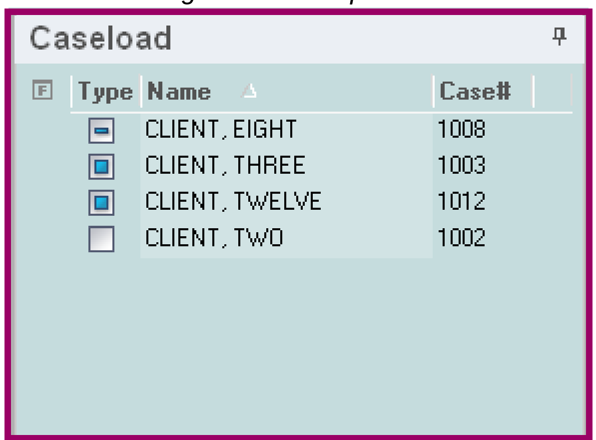


- Links are represented as underlined text and provide a means to launch an associated Dialog or View. For example, clicking the 'Pharmacy of Choice' link on the Client Overview Dialog displays the Pharmacy Lookup (in the Doctor's Homepage Product only).

- Links are single-click -- that is, the link must be clicked only one time in order to open the associated Dialog or View (not double-clicked). A double-click can lead to the Dialog or View launching twice and presenting a Stop Message indicating that the action cannot be performed.

Lists

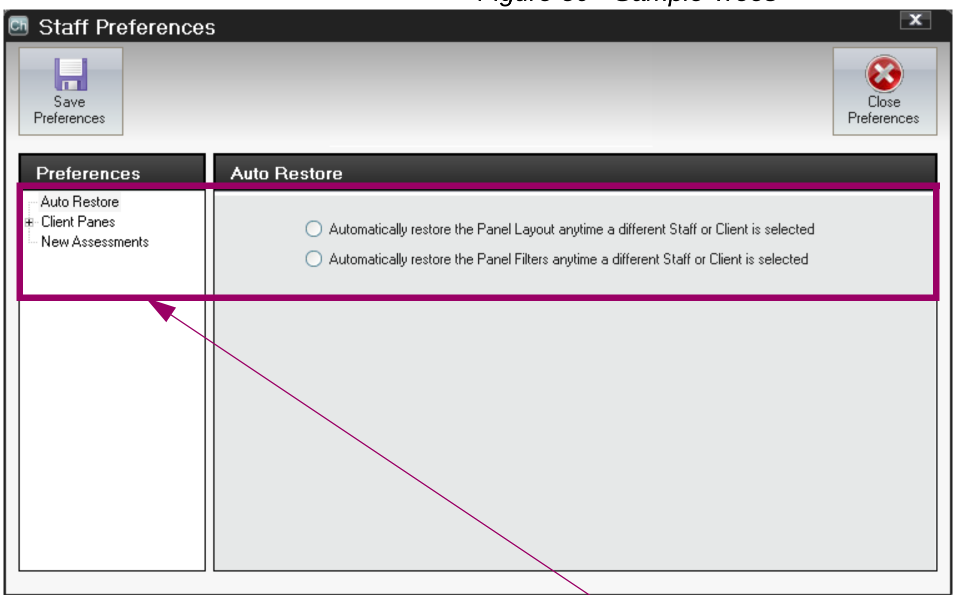
Figure 29 - Sample List



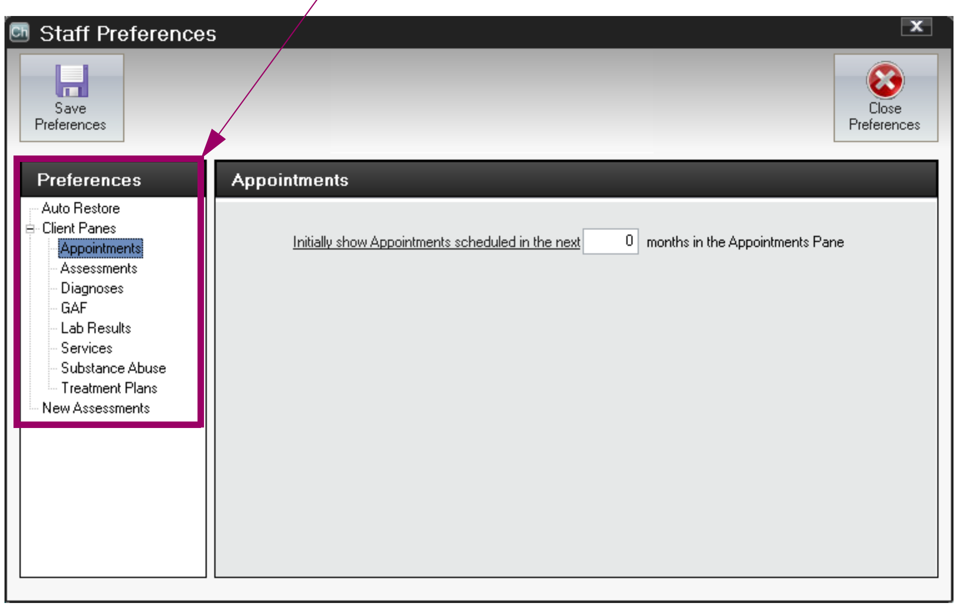
Lists display information relative to the title bar, and include columns, most of which can be sorted on.

Trees

Figure 30 - Sample Trees

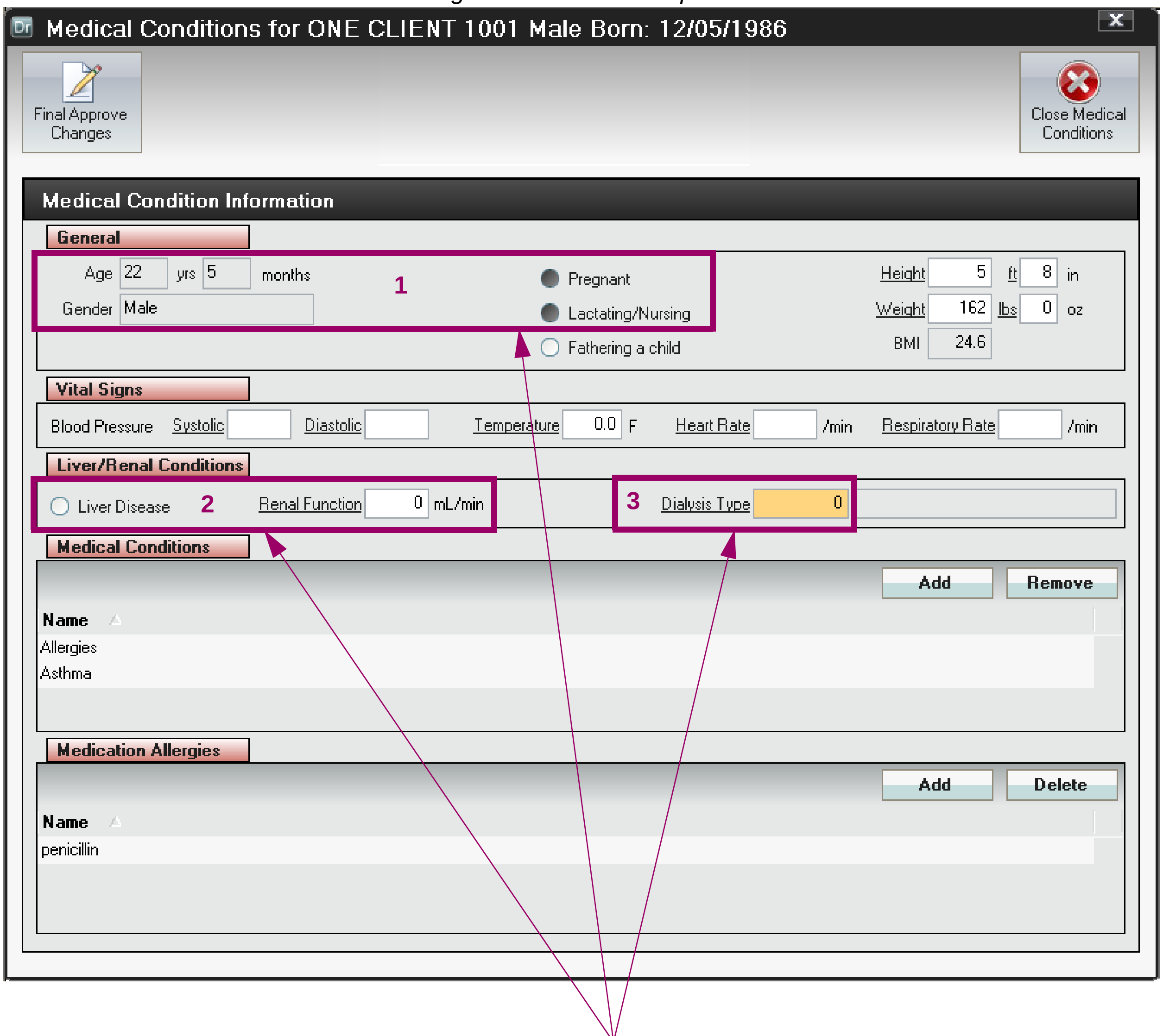


- Tree Views display a variety of topics on the left side, and when selected, the associated information displays on the right side. The figure above shows a tree that includes a topic that has branches (Client Panes), indicated by a '+' sign, and others that do not. The figure below shows a tree topic with the branches displayed.



Fields

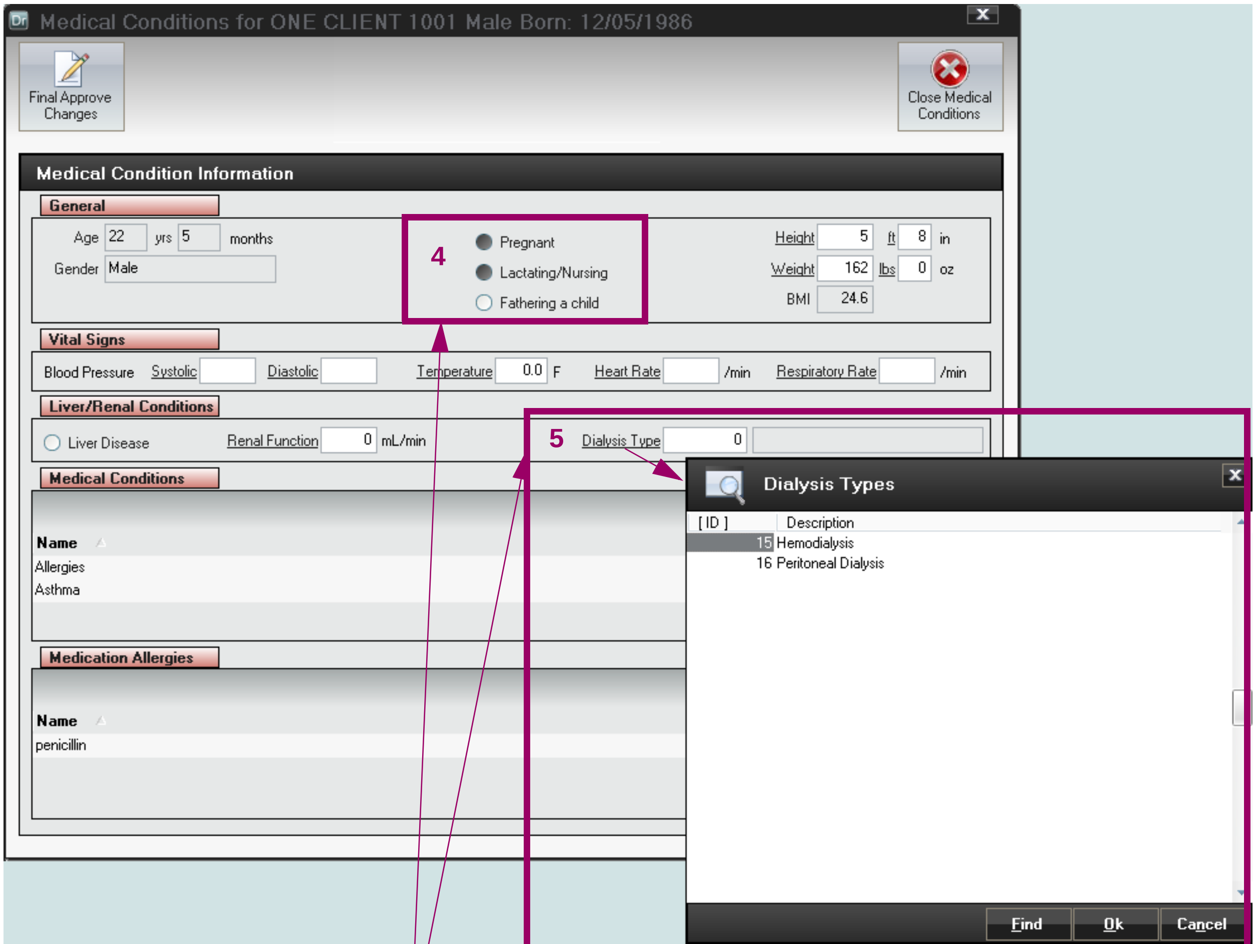
Figure 31 - Field Examples



1. Fields that are display only are displayed as shadowed (gray), including text, numeric, radio and lookup fields.
2. Available fields are displayed as unshadowed (white), including text, numeric, radio and lookup fields.
3. The field that currently has focus is shaded in a gold color.

Fields - Cont'd

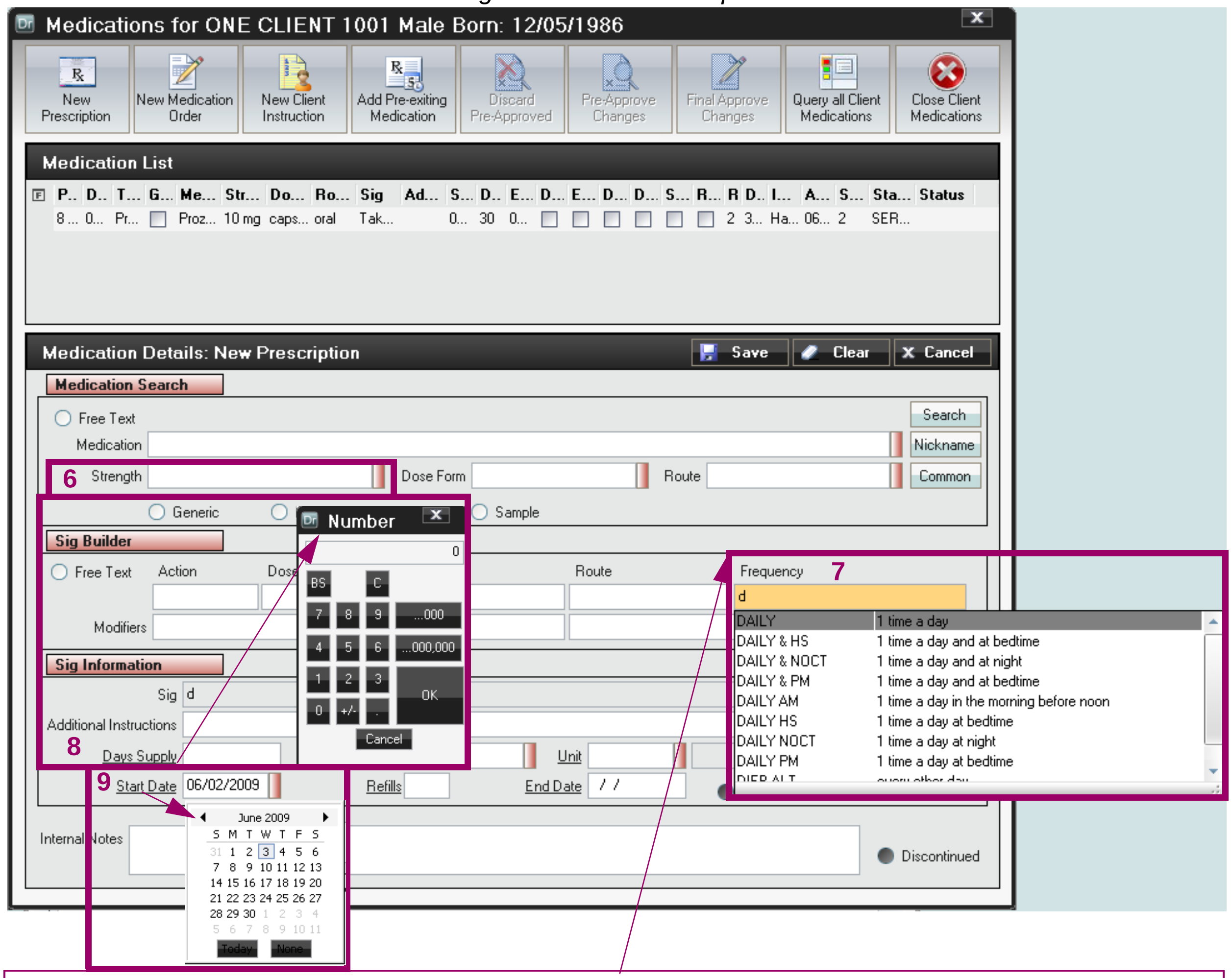
Figure 25 - Field Examples



4. Radio Buttons - Radio buttons allow for selecting or de-selecting a value.
5. <u>Underlined</u> fields are links - that is, when clicked, they open another related Dialog.

Fields - Cont'd

Figure 26 - Field Examples



6. Required fields are indicated with a small terra cotta colored graphic to the right of the fields. Hovering the mouse over the graphic displays an information message as 'This field is required'.

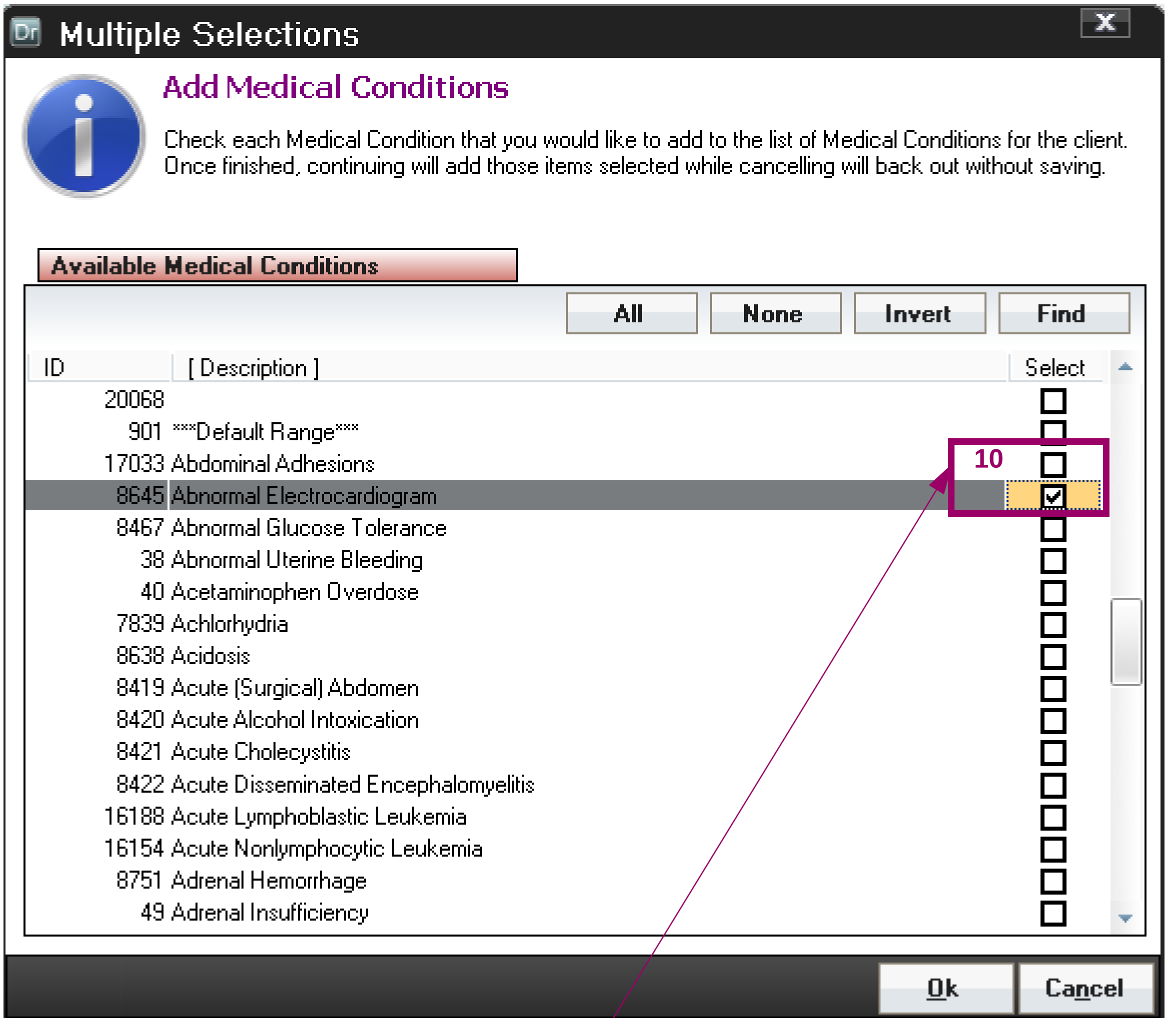
7. Super Drop Downs - Super Drop Downs allow for Staff to type in a value - the first few (the first four for medication queries) characters or an abbreviation - and select an option from a list that automatically appears based on the characters typed, or to enter a free-form value into the field.

8. Underlined numeric link fields display the Number Dialog.

9. Underlined date link fields display the Calendar Dialog.

Fields - Cont'd

Figure 27 - Field Examples

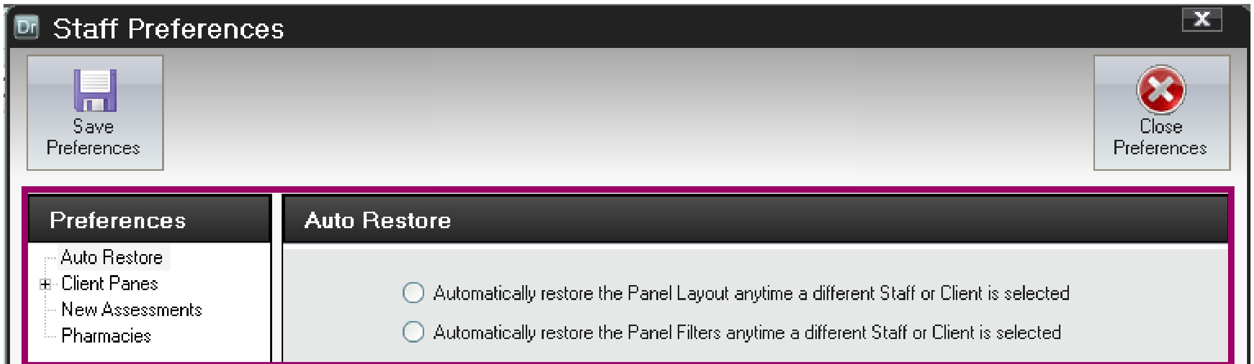


10. Checkbox Fields - Checkbox fields allow for selecting or de-selecting a value.

STAFF PREFERENCES

Staff Preferences Dialog

Figure 28 - Staff Preferences Dialog - Auto Restore

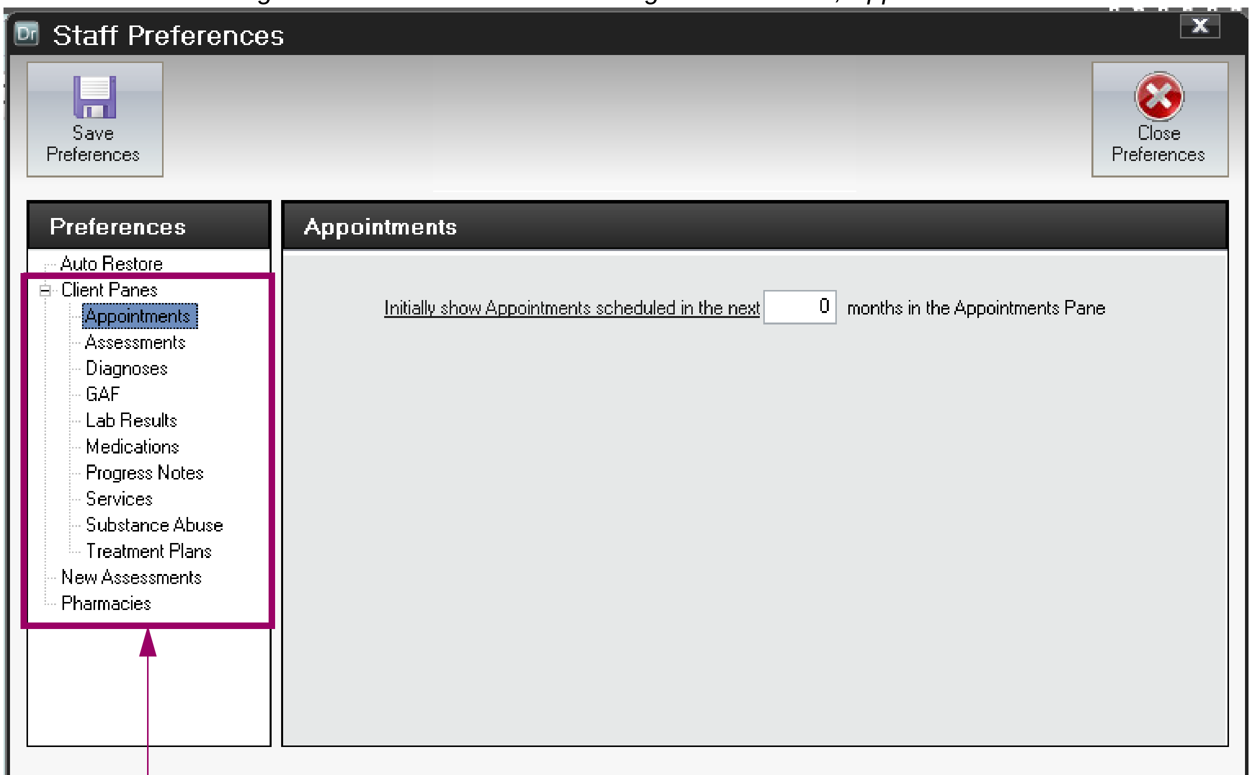


- The Preferences container displays options in a Tree format. A main option may or may not have additional tree branches below, which are denoted by a + sign (as with the Client Panes option above). Clicking on a branch displays the information to the right.

- The Auto Restore options can be set to one of the following:
  - 'Automatically restore the Panel Layout anytime a different Staff or Client is selected' - if this option is active, any customization that had been made to the layout of Panes on the Panel will be restored to the original layout (i.e., the Panel Layout that was most recently saved for the Logged In Staff via the 'Save Panel Layout and Filters Preferences' Ribbon Bar button) when either a new Staff or Client is selected.
  - 'Automatically restore the Panel Filters anytime a different Staff or Client is selected':
    - If this field is *active*, any customization that had been made to any Panel or Pane Filters are restored to their original selections (i.e., the selections in the fields in the Preferences Dialog and in the various Filters Dialogs that were most recently saved by the Logged In Staff via the 'Save Panel Layout and Filters Preferences' Ribbon Bar button) when either a new Staff or new Client is selected.
    - If this field is *inactive* and a change is made to a Preferences field that affects a Filter (e.g., a change is made to the Assessments Preference field 'Initially show Assessments in the past ## months in the Assessments Pane'), the 'Restore Panel Filters' button must be clicked on the Ribbon Bar on the Client Tab in order to view the filtered records. The data remains filtered until the 'Restore Panel Filters' button is clicked, regardless of whether a new Staff or new Client is selected.
      - Note that if a Filter is selected in one of the Filters Dialogs accessible from within a Pane (e.g., the 'Include Assessments on or after' field in the Assessments Pane Filters Dialog, which is accessible via the Filters button in the Assessments Pane), the data filters immediately and remains filtered for the entire session or until the 'Restore Panel Filters' button is clicked, regardless of whether a new Staff or new Client is selected.

Staff Preferences Dialog - Cont'd

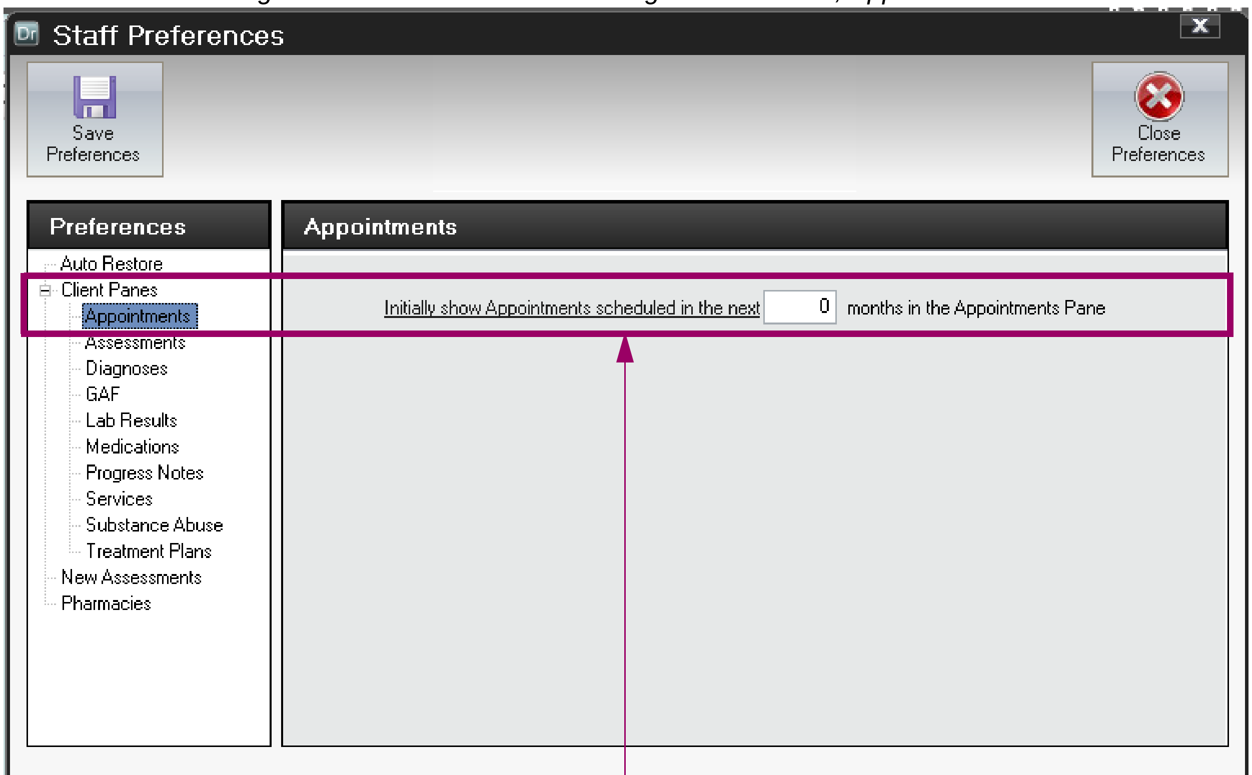
Figure 29 - Staff Preferences Dialog - Client Panes, Appointments



- The branches under the Client Panes branch pertain to preferences for the Panes in the Client Panel.

Staff Preferences Dialog - Cont'd

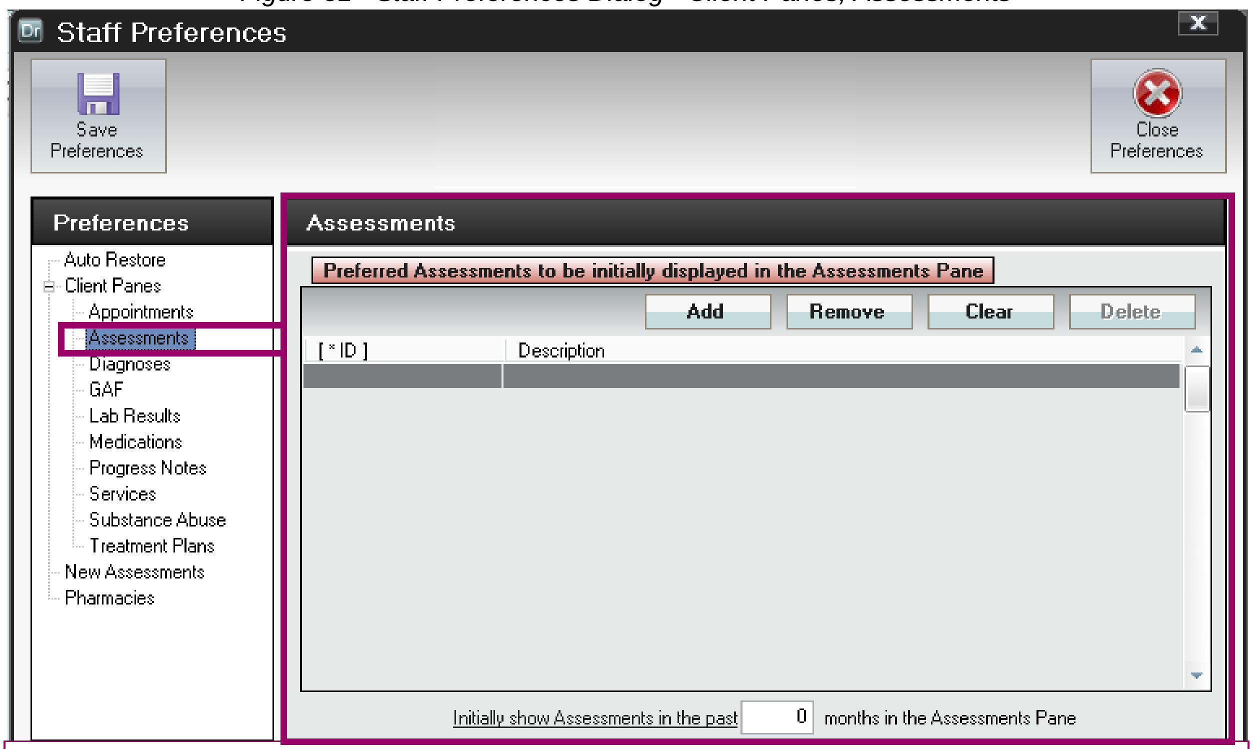
Figure 30 - Staff Preferences Dialog - Client Panes, Appointments



- The 'Initially show Appointments scheduled in the next ## months in the Appointments Pane' entry controls how far in the future scheduled Services from the Scheduler Product will display to the Appointments Pane.

Staff Preferences Dialog - Cont'd

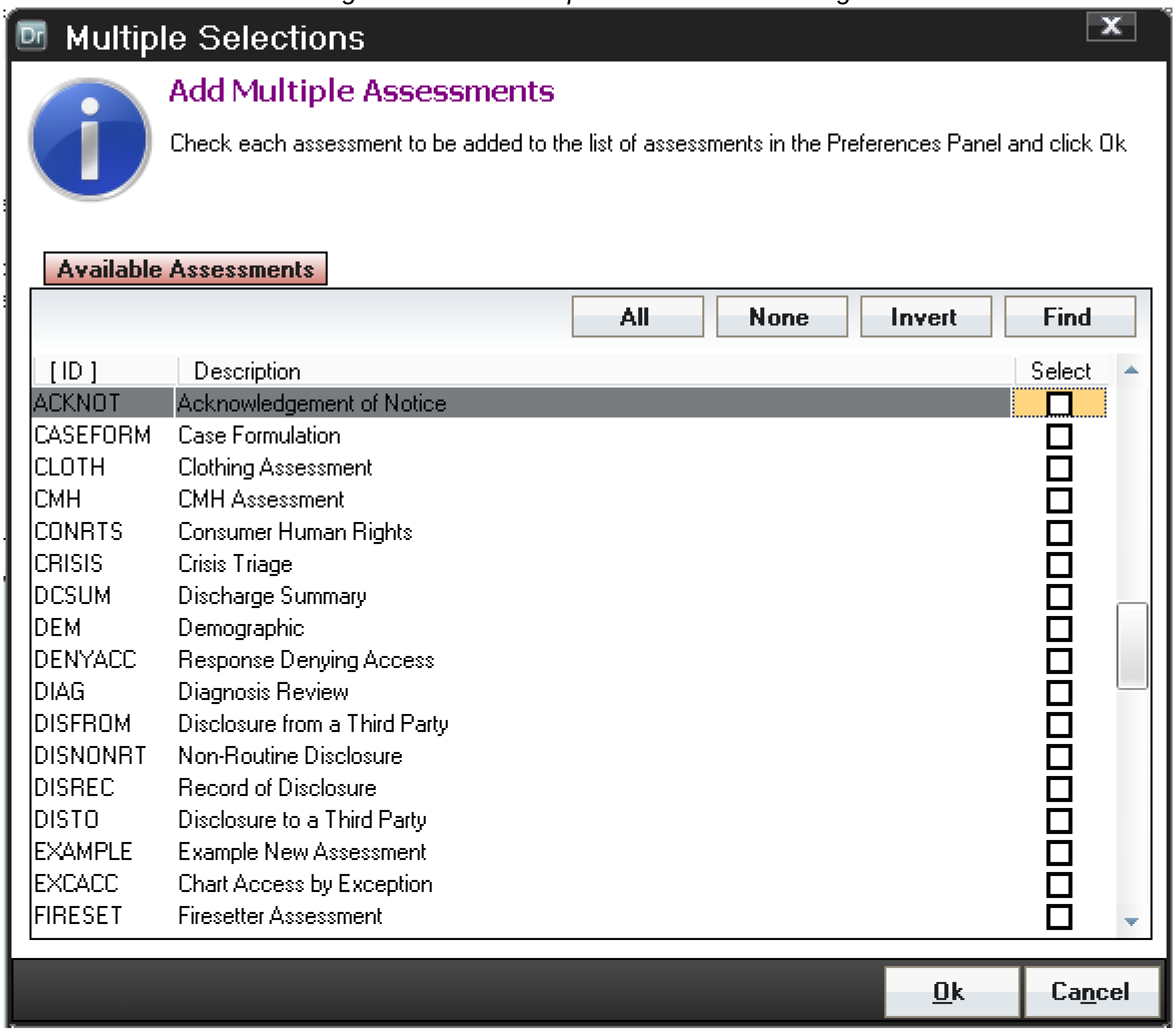
Figure 31 - Staff Preferences Dialog - Client Panes, Assessments



- The Assessments selected here are the Assessments that are initially displayed in the Assessments Pane.
- The 'Add' button displays the Add Multiple Assessments Dialog (shown on the next page), from which multiple Assessments can be added.
- The selection button to the right of the ID field displays the Assessment Lookup, from which a single Assessment can be added. The Assessment Lookup can also be displayed by typing in the ID of an Assessment.
- The 'Remove' button displays the Remove Multiple Assessments Dialog (shown later in this section).
- The 'Clear' button clears an unsaved entry in the 'ID' field.
- The 'Delete' button displays a Confirm Dialog that prompts the Staff whether to delete the selected line.
- The entry in the 'Initially show Assessments in the past ## months in the Assessments Pane' field indicates the Assessments to be displayed.

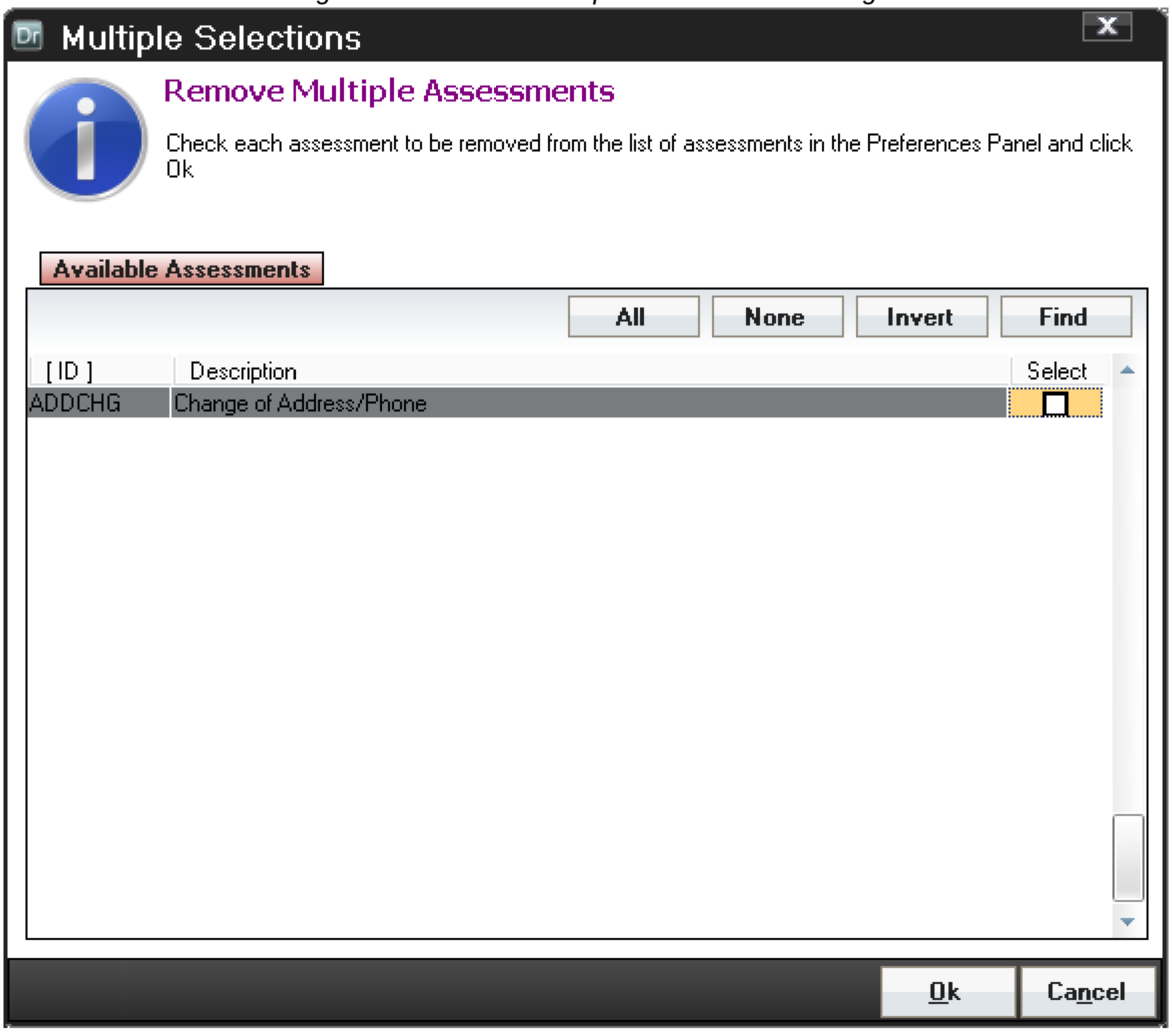
Staff Preferences Dialog - Cont'd

Figure 32 - Add Multiple Assessments Dialog



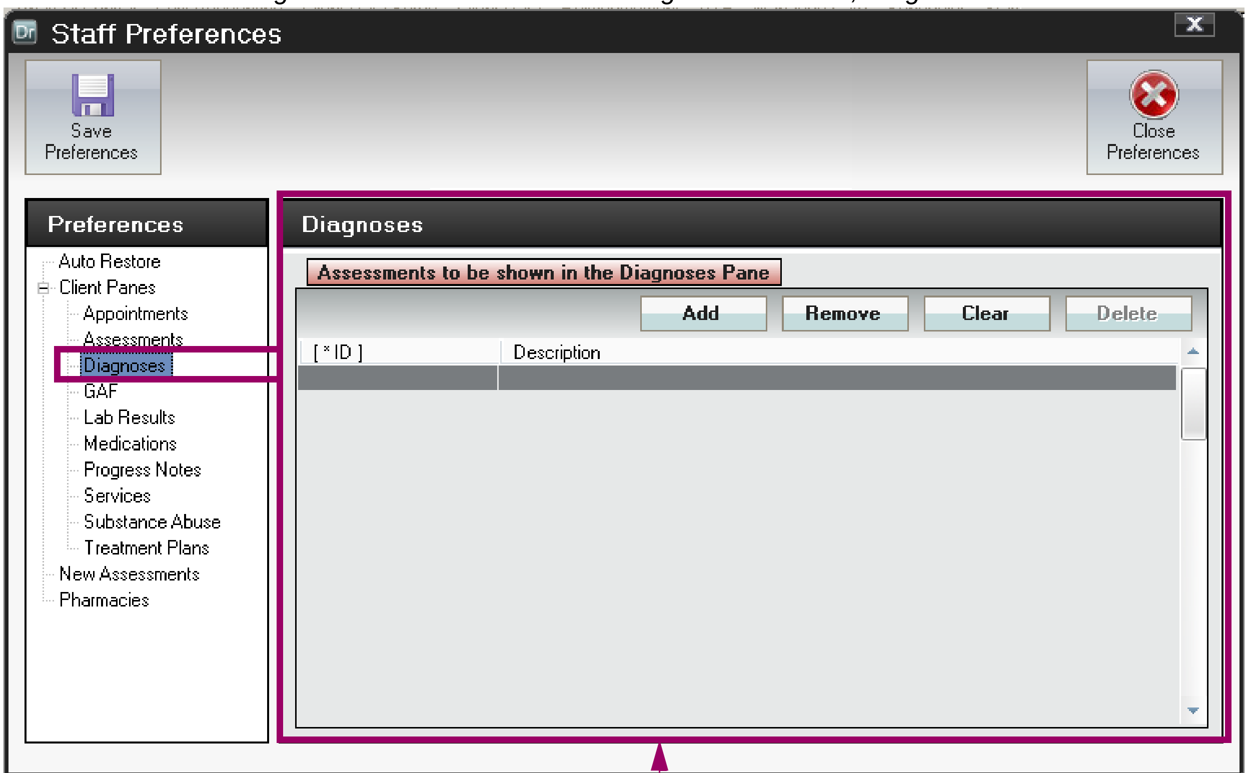
Staff Preferences Dialog - Cont'd

Figure 33 - Remove Multiple Assessments Dialog



Staff Preferences Dialog - Cont'd

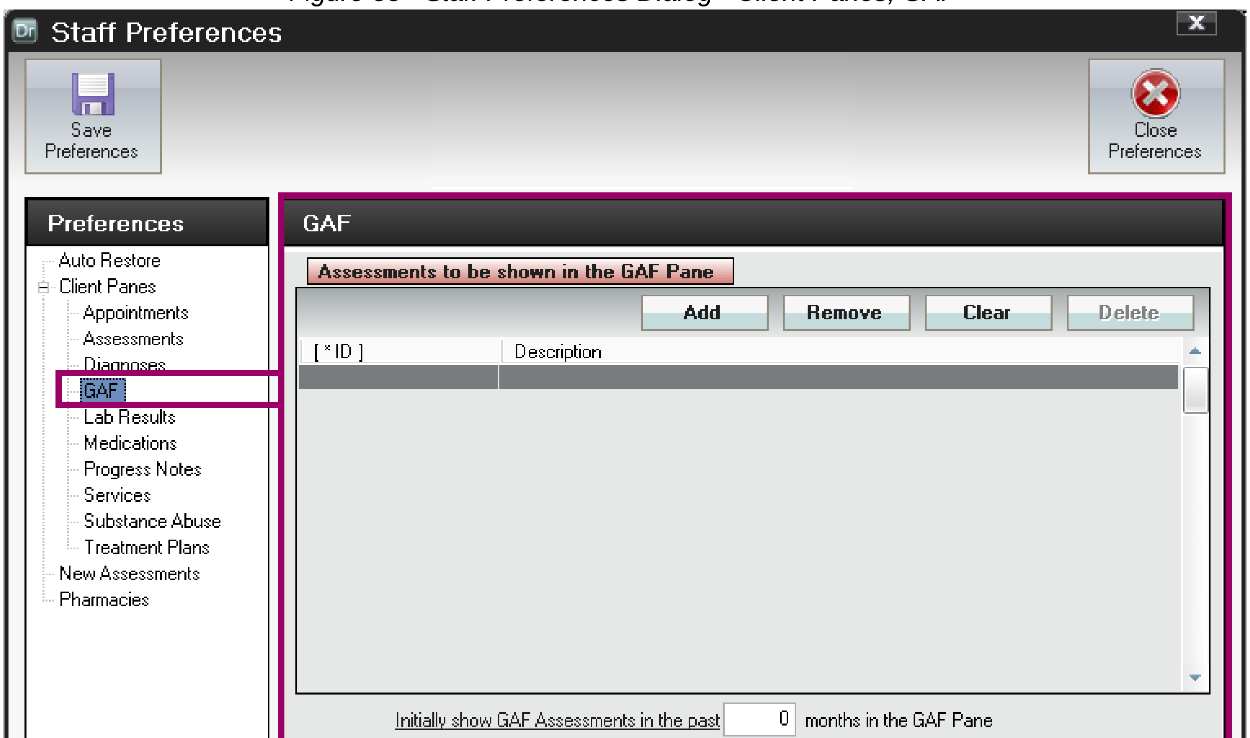
Figure 34 - Staff Preferences Dialog - Client Panes, Diagnoses



- The Assessments selected here are those Assessments containing the Diagnosis Tab Page and are the Assessments that are initially displayed in the Diagnoses Pane.
- The 'Add' button displays the Add Multiple Assessments Dialog (shown previously), from which multiple Assessments can be added.
- The selection button to the right of the ID field displays the Assessment Lookup, from which a single Assessment can be added. The Assessment Lookup can also be displayed by typing in the ID of an Assessment.
- The 'Remove' button displays the Remove Multiple Assessments Dialog (shown previously).
- The 'Clear' button clears an unsaved entry in the 'ID' field.
- The 'Delete' button displays a Confirm Dialog that prompts the Staff whether to delete the selected line.

Staff Preferences Dialog - Cont'd

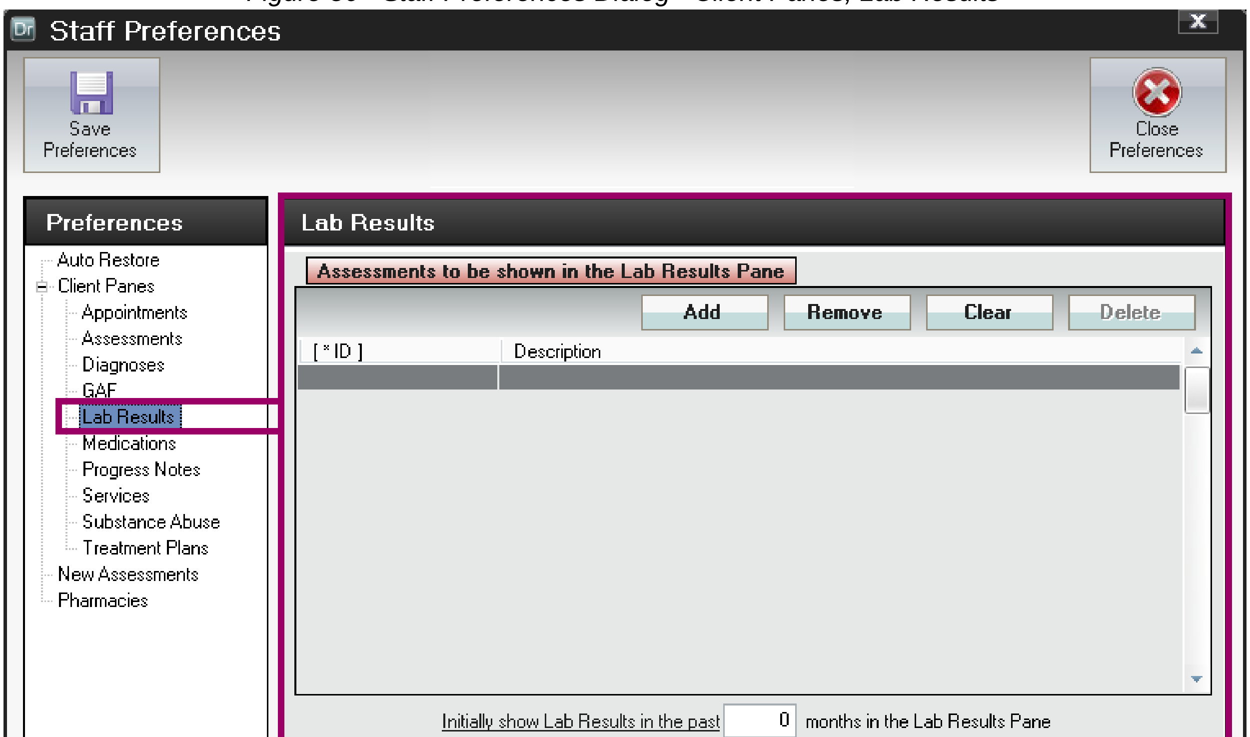
Figure 35 - Staff Preferences Dialog - Client Panes, GAF



- The Assessments selected here are those containing the GAF question, and are the Assessments that are initially displayed in the GAF Pane.
- The 'Add' button displays the Add Multiple Assessments Dialog (shown previously), from which multiple Assessments can be added.
- The selection button to the right of the ID field displays the Assessment Lookup, from which a single Assessment can be added. The Assessment Lookup can also be displayed by typing in the ID of an Assessment.
- The 'Remove' button displays the Remove Multiple Assessments Dialog (shown previously).
- The 'Clear' button clears an unsaved entry in the 'ID' field.
- The 'Delete' button displays a Confirm Dialog that prompts the Staff whether to delete the selected line.
- The entry in the 'Initially show GAF Assessments in the past ## months in the GAF Pane' field indicates the Assessments to be displayed upon launching the GAF Pane.

Staff Preferences Dialog - Cont'd

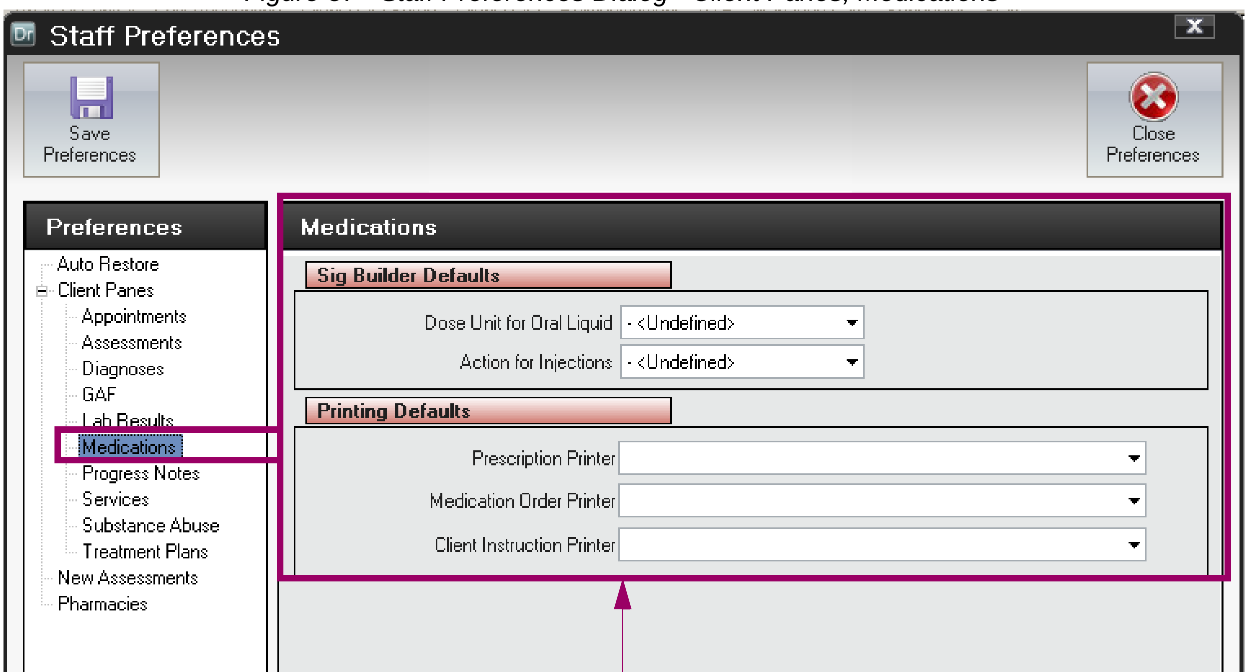
Figure 36 - Staff Preferences Dialog - Client Panes, Lab Results



- The Assessments selected here are those containing a place to record Lab Results, and are the Assessments that are initially displayed in the Lab Results Pane.
- The 'Add' button displays the Add Multiple Assessments Dialog (shown previously), from which multiple Assessments can be added.
- The selection button to the right of the ID field displays the Assessment Lookup, from which a single Assessment can be added. The Assessment Lookup can also be displayed by typing in the ID of an Assessment.
- The 'Remove' button displays the Remove Multiple Assessments Dialog (shown previously).
- The 'Clear' button clears an unsaved entry in the 'ID' field.
- The 'Delete' button displays a Confirm Dialog that prompts the Staff whether to delete the selected line.
- The 'Initially show Lab Results in the past ## months in the Lab Results Pane' field allows for filtering the Lab Results that are displayed to a specified number of months.

Staff Preferences Dialog - Cont'd

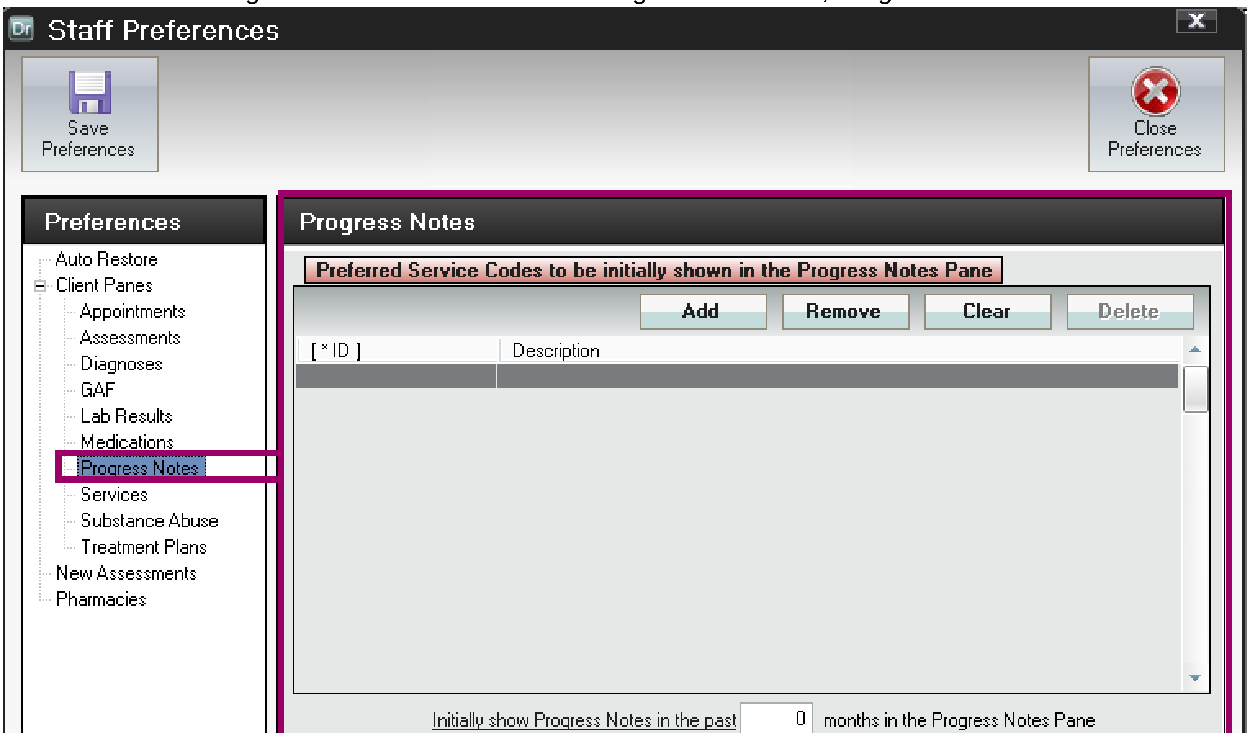
Figure 37 - Staff Preferences Dialog - Client Panes, Medications



- The 'Dose Unit for Oral Liquid' field selection specifies the default oral liquid unit that will appear in the Sig Builder and can be one of the following:
  - CC - Cubic Centimeter
  - ML - Milliliter
  - TSP - Teaspoon
- The 'Action for Injections' field selection specifies the default Action for Injections that will appear in the Sig Builder and can be one of the following:
  - ADM - Administer
  - INJ - Inject
- The 'Prescription Printer' field selection specifies the default printer that will be used for printing prescriptions. The drop-down field lists the printers that are available for selection.
- The 'Medication Order Printer' field selection specifies the default printer that will be used for printing Medication Orders. The drop-down field lists the printers that are available for selection.
- The 'Client Instruction Printer' field selection specifies the default printer that will be used for printing Client Instructions. The drop-down field lists the printers that are available for selection.

Staff Preferences Dialog - Cont'd

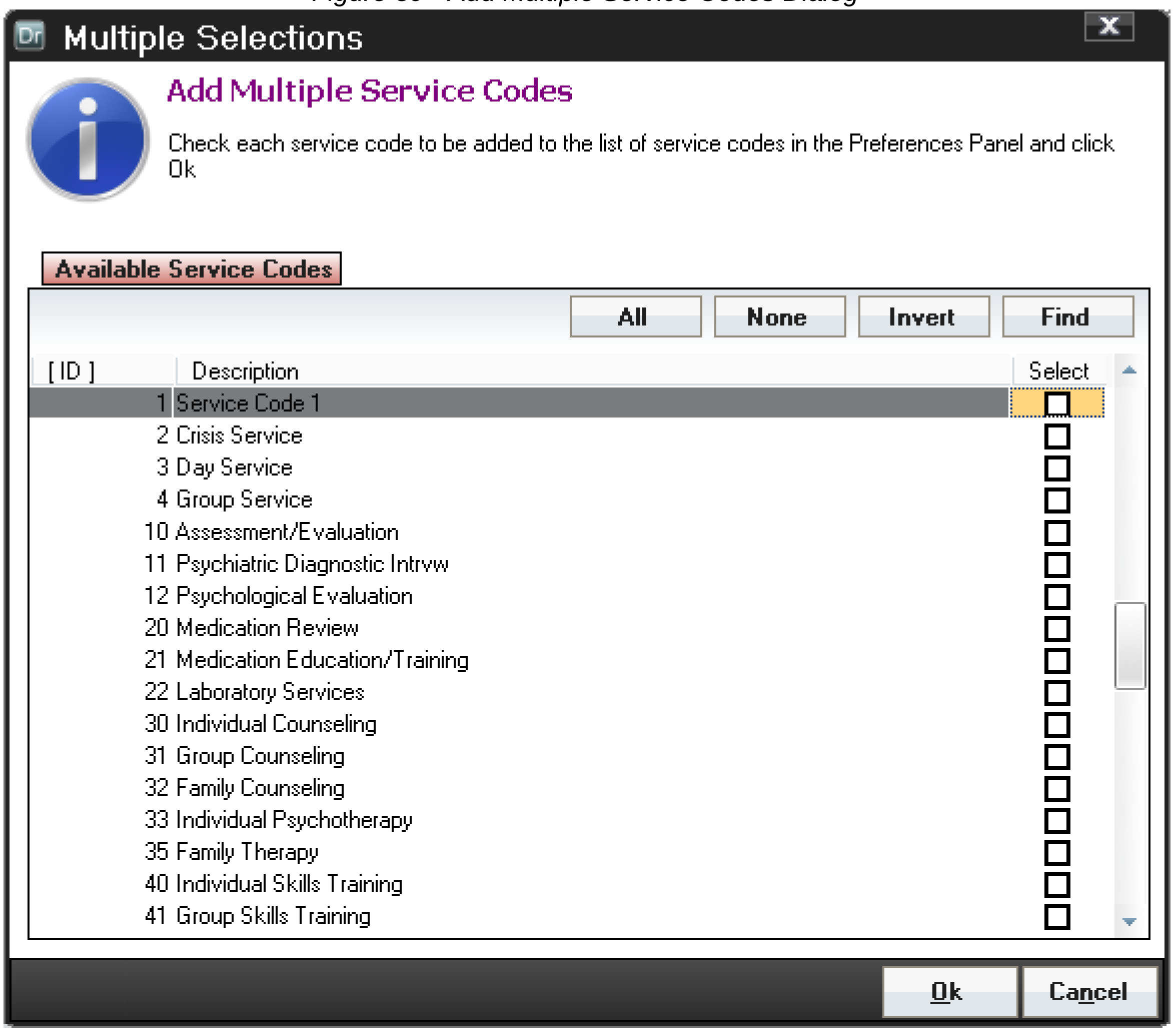
Figure 38 - Staff Preferences Dialog - Client Panes, Progress Notes



- The Service Codes selected here are the Service Codes that are initially displayed in the Progress Notes Pane.
- The 'Add' button displays the Add Multiple Service Codes Dialog (shown previously), from which multiple Service Codes can be added.
- The selection button to the right of the ID field displays the Progress Note Lookup, from which a single Progress Note Service can be added. The Progress Note Lookup can also be displayed by typing in the ID of a Progress Note Service.
- The 'Remove' button displays the Remove Multiple Service Codes Dialog (shown previously).
- The 'Clear' button clears an unsaved entry in the 'ID' field.
- The 'Delete' button displays a Confirm Dialog that prompts the Staff whether to delete the selected line.
- The 'Initially show Progress Notes in the past ## months in the Progress Notes Pane' field allows for filtering the Progress Notes that are displayed in the Progress Notes Pane to a specified number of months.

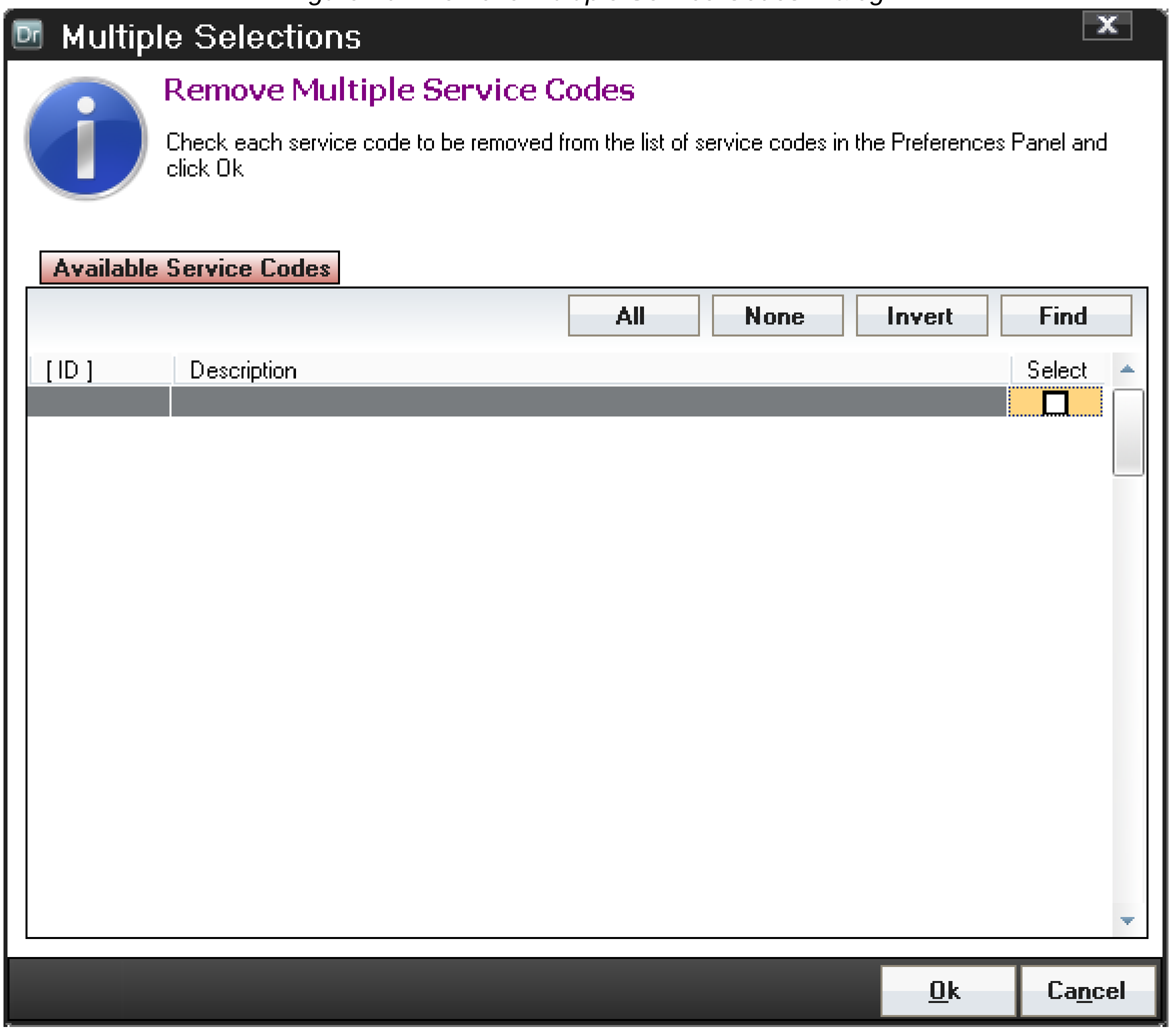
Staff Preferences Dialog - Cont'd

Figure 39 - Add Multiple Service Codes Dialog



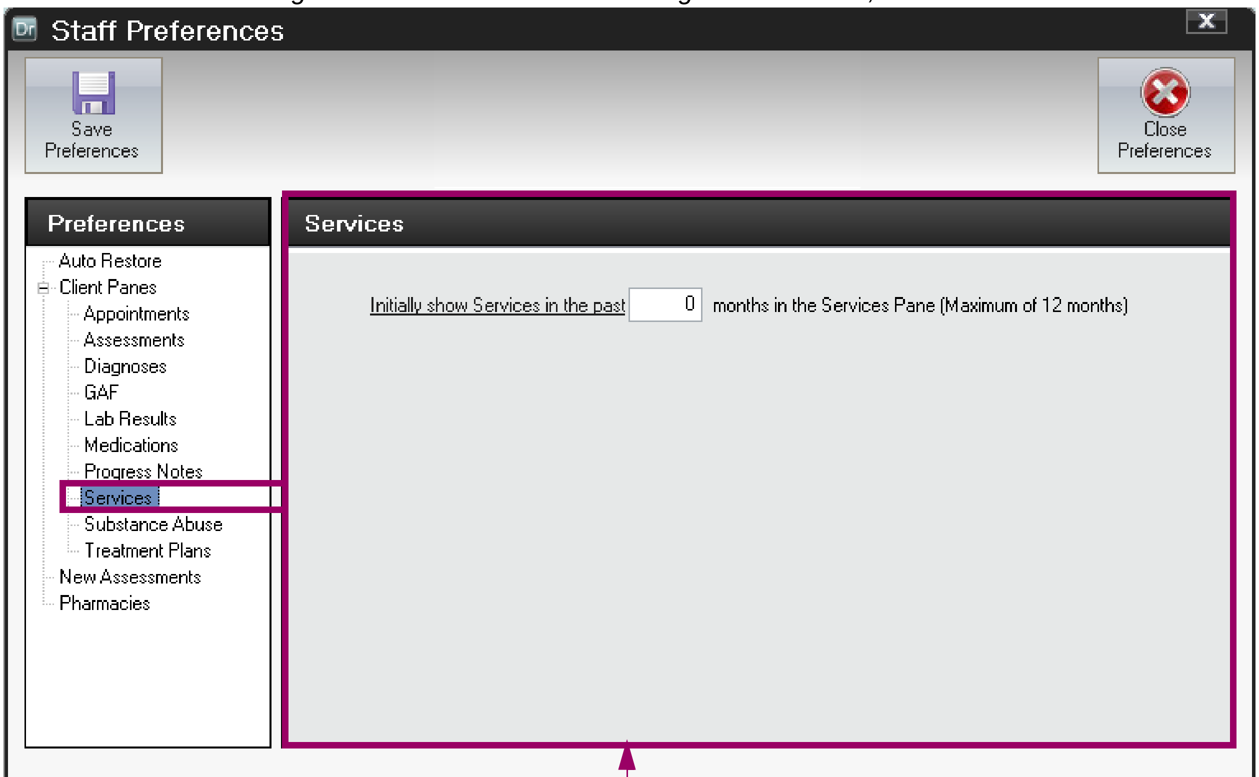
Staff Preferences Dialog - Cont'd

Figure 40 - Remove Multiple Service Codes Dialog



Staff Preferences Dialog - Cont'd

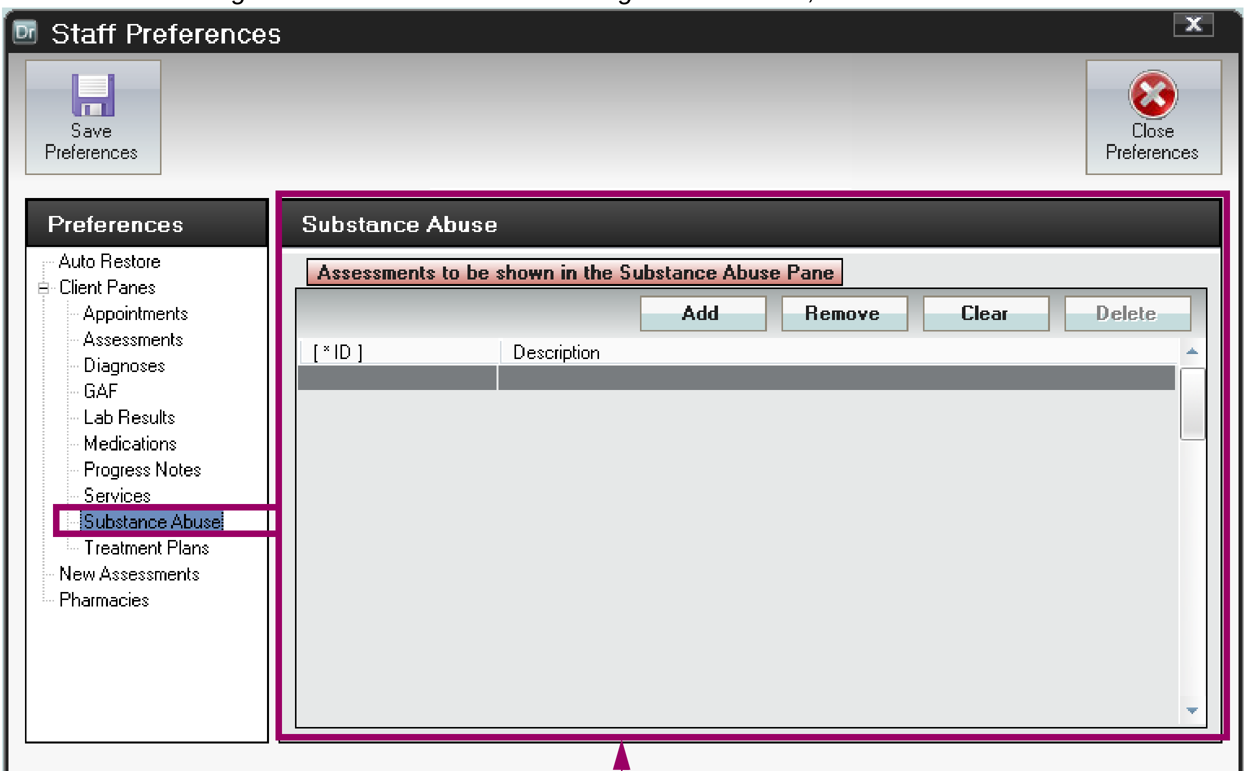
Figure 41 - Staff Preferences Dialog - Client Panes, Services



- The 'Initially show Services in the past ## months in the Services Pane (Maximum of 12 months)' field allows for filtering the Services that are displayed in the Services Pane to a specified number of months. Note that the higher the setting, the longer the amount of time it takes to load the information to the Client Panel.

Staff Preferences Dialog - Cont'd

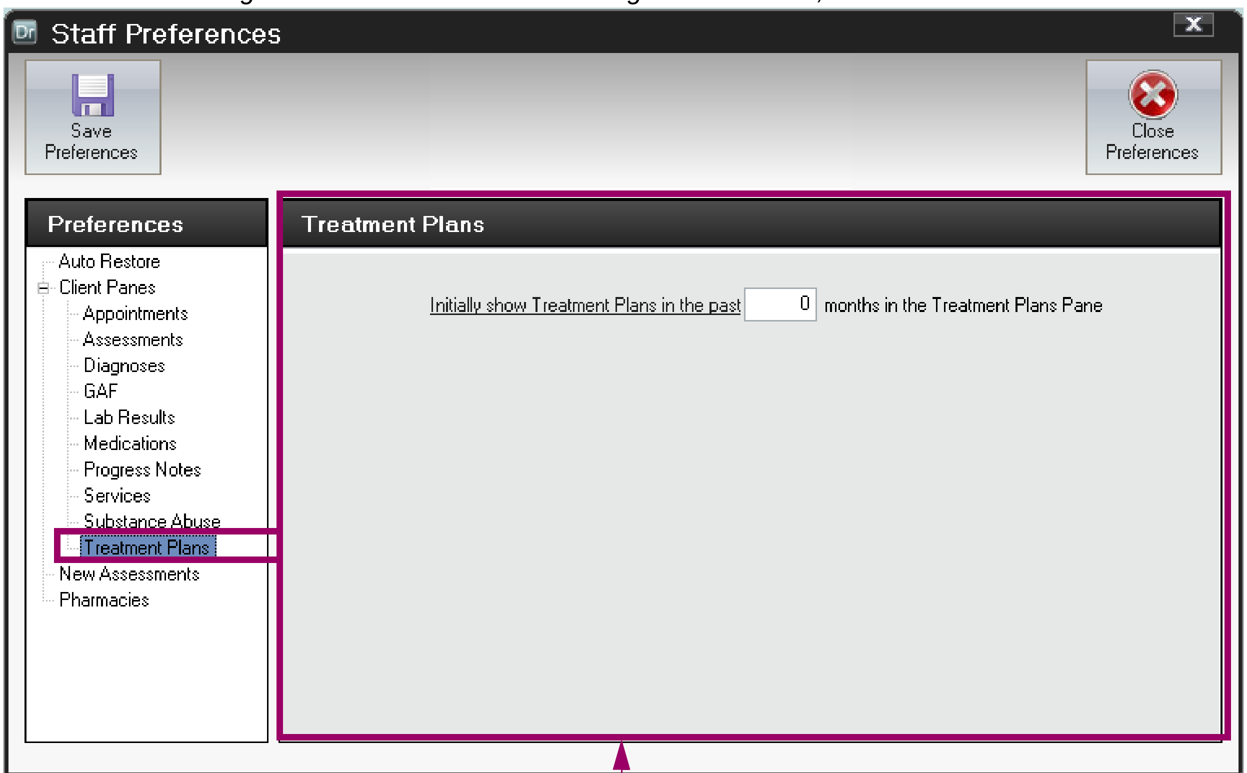
Figure 42 - Staff Preferences Dialog - Client Panes, Substance Abuse



- The Assessments selected here are those containing the Drug Use Multiple Entry Window (MEW), and are the Assessments that are initially displayed in the Substance Abuse Pane.
- The 'Add' button displays the Add Multiple Assessments Dialog (shown previously), from which multiple Assessments can be added.
- The selection button to the right of the ID field displays the Assessment Lookup, from which a single Assessment can be added. The Assessment Lookup can also be displayed by typing in the ID of an Assessment.
- The 'Remove' button displays the Remove Multiple Assessments Dialog (shown previously).
- The 'Clear' button clears an unsaved entry in the 'ID' field.
- The 'Delete' button displays a Confirm Dialog that prompts the Staff whether to delete the selected line.

Staff Preferences Dialog - Cont'd

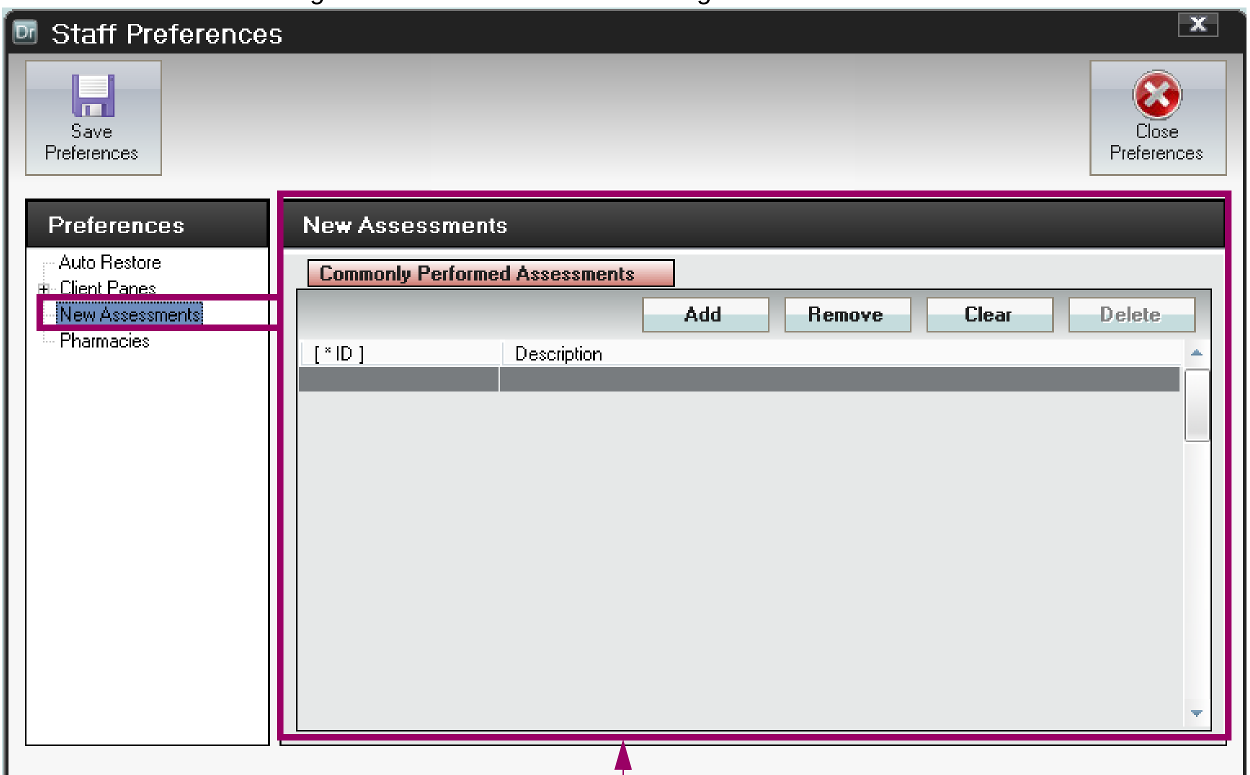
Figure 43 - Staff Preferences Dialog - Client Panes, Treatment Plans



- The 'Initially show Treatment Plans in the past ## months in the Treatment Plans Pane' field allows for filtering the Treatment Plans that are displayed in the Treatment Plans Pane to a specified number of months.

Staff Preferences Dialog - Cont'd

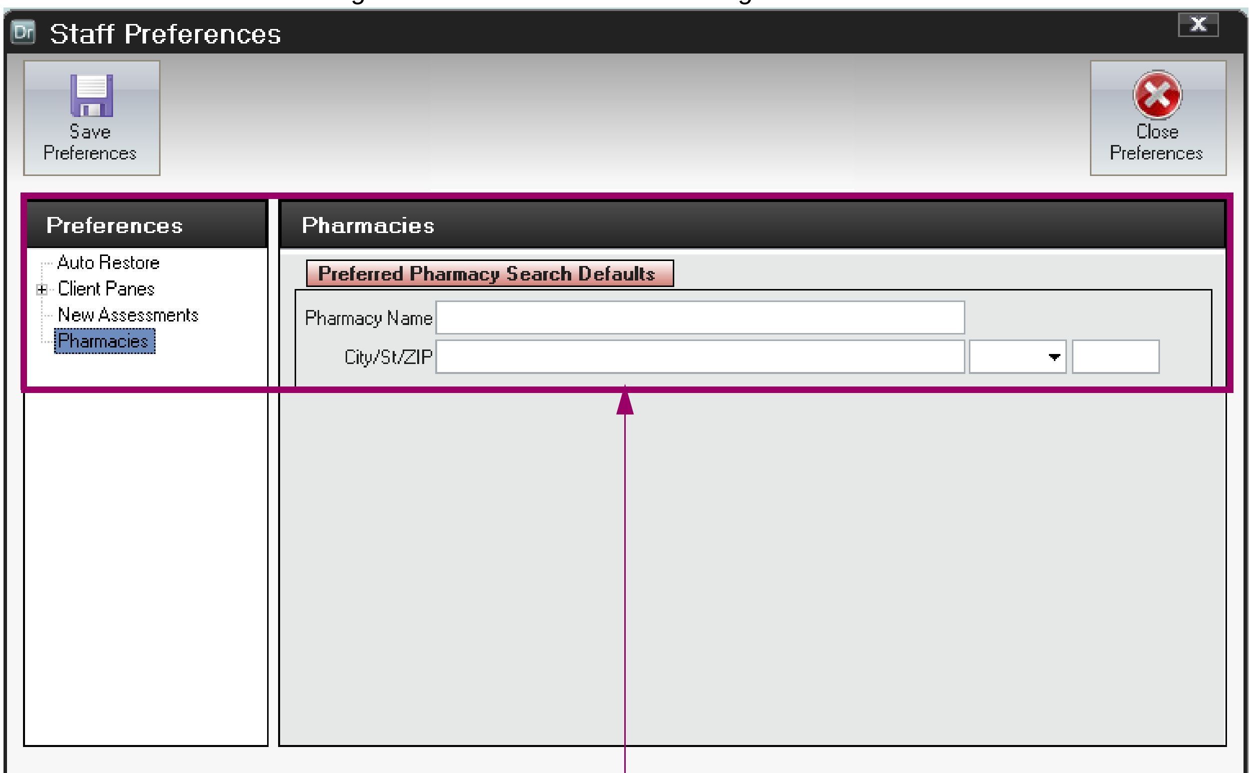
Figure 44 - Staff Preferences Dialog - New Assessments



- The Assessments selected here are the Assessments that are initially displayed in the selection list when creating new Assessments.
- The 'Add' button displays the Add Multiple Assessments Dialog (shown previously), from which multiple Assessments can be added.
- The selection button to the right of the ID field displays the Assessment Lookup, from which a single Assessment can be added. The Assessment Lookup can also be displayed by typing in the ID of an Assessment.
- The 'Remove' button displays the Remove Multiple Assessments Dialog (shown previously).
- The 'Clear' button clears an unsaved entry in the 'ID' field.
- The 'Delete' button displays a Confirm Dialog that prompts the Staff whether to delete the selected line.

Staff Preferences Dialog - Cont'd

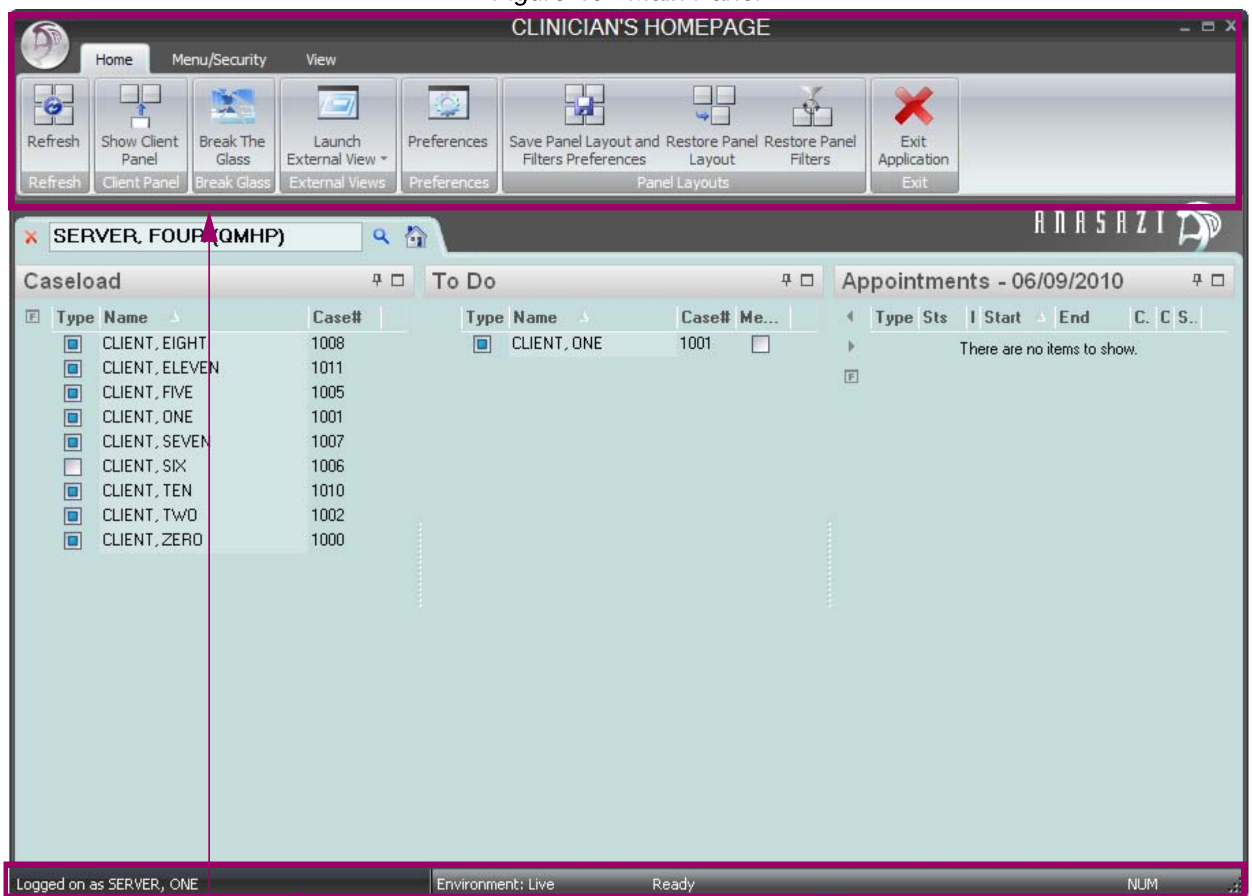
Figure 45 - Staff Preferences Dialog - Pharmacies



- The Pharmacies Pane is only available in the Doctor's Homepage Product, and allows for setting default search criteria that is used in the Pharmacy Lookup in the Doctor's Homepage.
- The 'Pharmacy Name' can be a maximum of 35 characters in length.
- The 'City' can be a maximum of 35 characters in length.
- The 'St' is selected from a drop-down list.
- The 'Zip' can be 1 to 5 characters in length.

MAIN PANEL

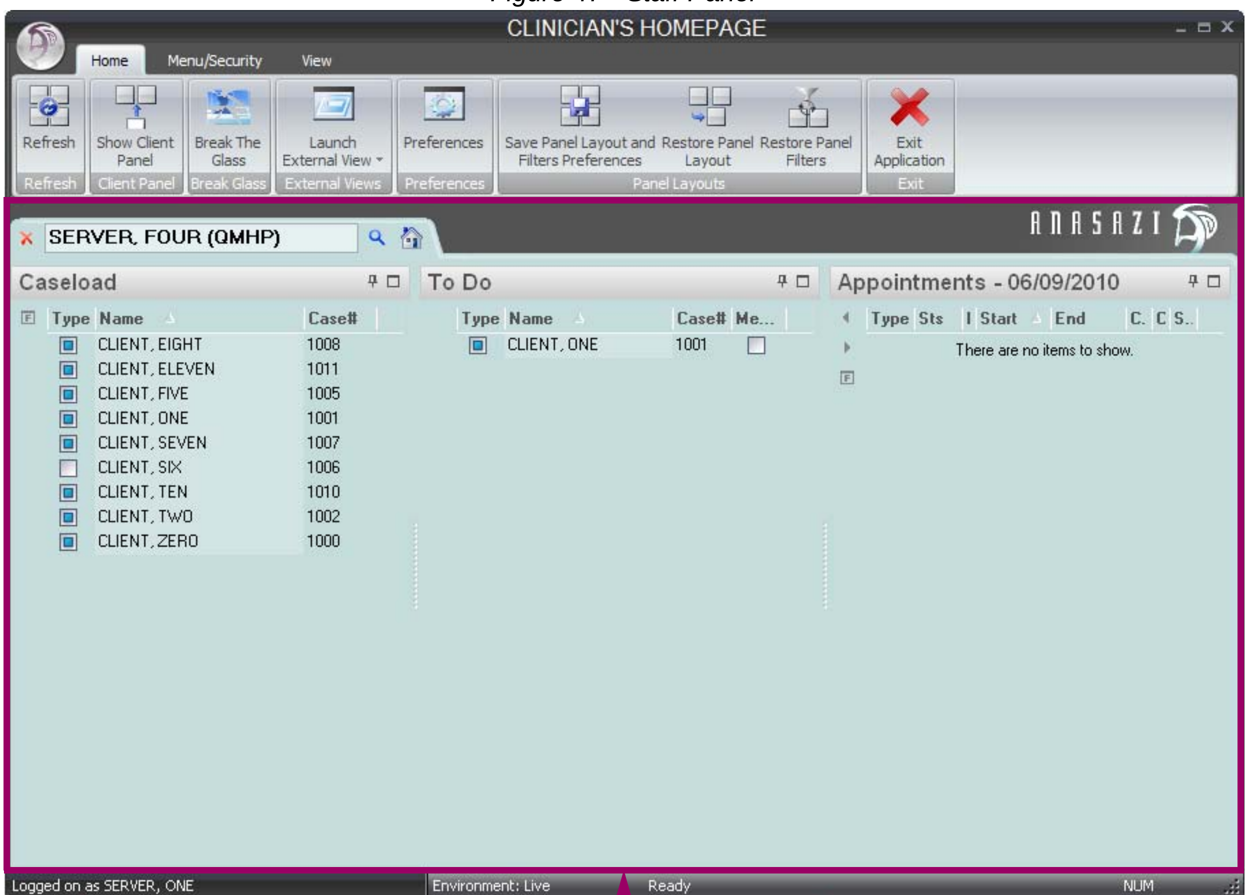
Figure 46 - Main Panel



- The Main Panel consists of the Title Bar, Ribbon Bars, and Status Bar. Refer to the Navigation section of this manual for details.

STAFF PANEL

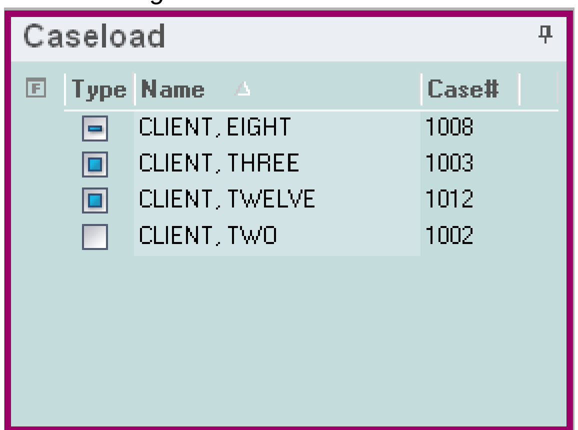
Figure 47 - Staff Panel



- The Staff can be selected from the Staff Lookup, accessible from the magnifying glass lookup graphic. Alternately, the Staff ID can be entered directly into the field.
- The 'X' graphic clears the selected Staff.
- The three Panes are available for display on the Staff Panel:
  - Caseload Pane
  - To Do Pane
  - Appointments Pane

Caseload Pane

Figure 48 - Caseload Pane



- The Caseload Pane displays Clients on the Selected Staff's Caseload, which can include Clients open to an Assignment for which the selected Staff is a Server or member of the Treatment Team, Clients for which the selected Staff is the SAI, and Foreign Clients (e.g., Pre-Intake, Glass Broken, etc.). For detailed information about the Caseload and which Clients are displayed, refer to the Caseload Pane information in The Flying Tour section of this manual. *Note that the Caseload Pane needs to be refreshed (via the 'Refresh' Ribbon Bar button) after Notifications have been updated.*

- The 'F' icon in the upper left side of the Caseload Pane displays the Caseload Pane Filters Dialog (shown on the next page).

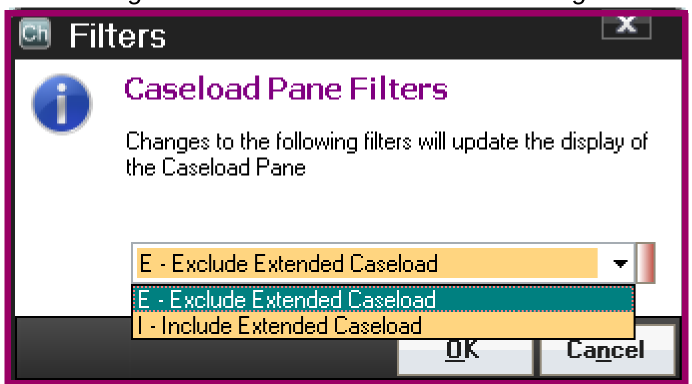
- The 'Type' column indicates whether the Client is on the Selected Staff's Caseload, if the Selected Staff is the Client's SAI, or if the Client is Foreign. Clients for whom the Selected Staff is the SAI display with a with a blue colored box; Foreign Clients display with a blue colored dash, and Clients on the Staff's Caseload display with an empty box. Hovering the mouse pointer above these icons displays this information.

- The 'Name' column displays the Sort Name of the Client.

- The 'Case#' column displays the Client's Case Number.

Caseload Pane - Cont'd

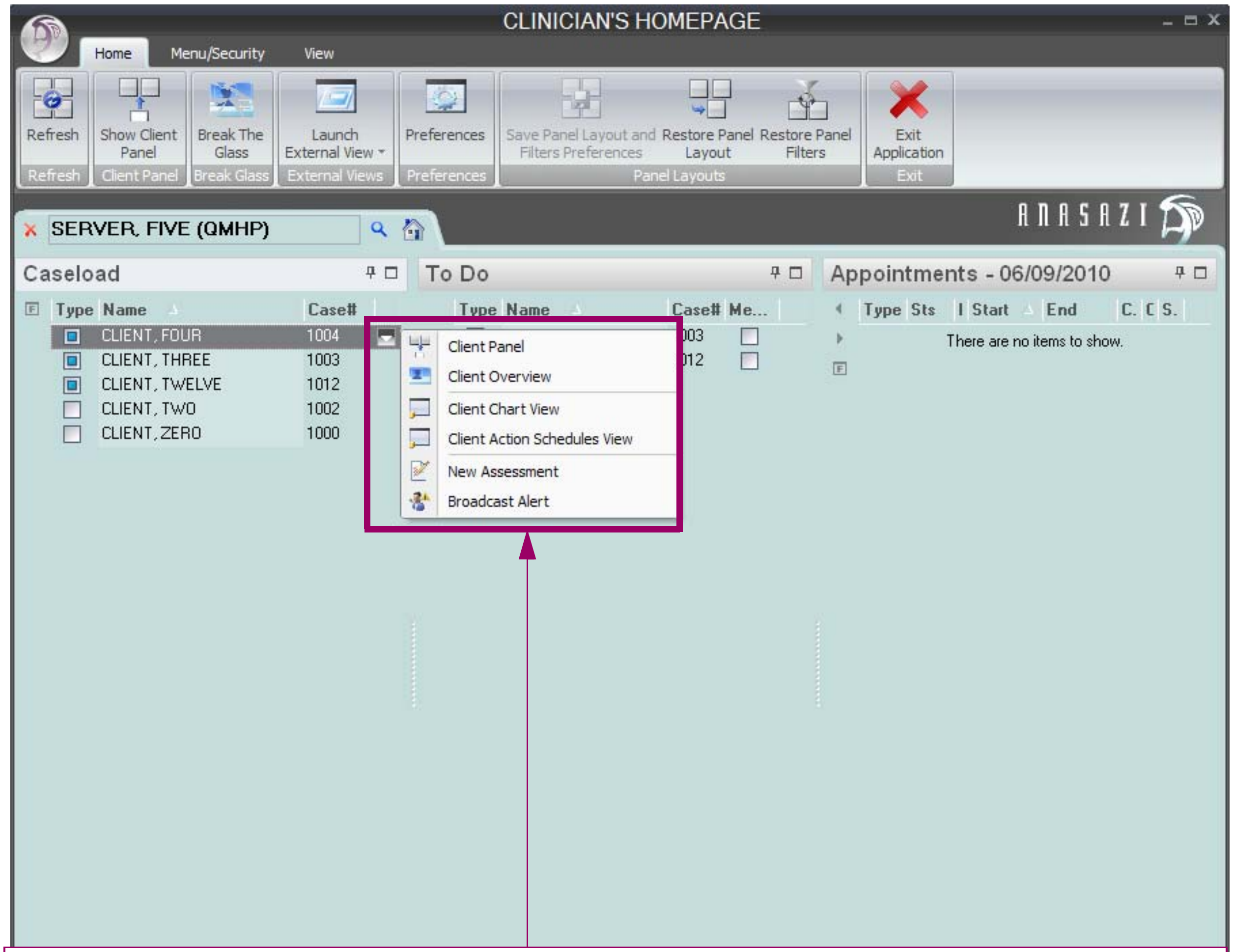
Figure 49 - Caseload Pane Filters Dialog



- The Caseload Pane can be filtered to display the Staff's Extended Caseload or to exclude it.

Caseload Pane - Cont'd

Figure 50 - Caseload Pane

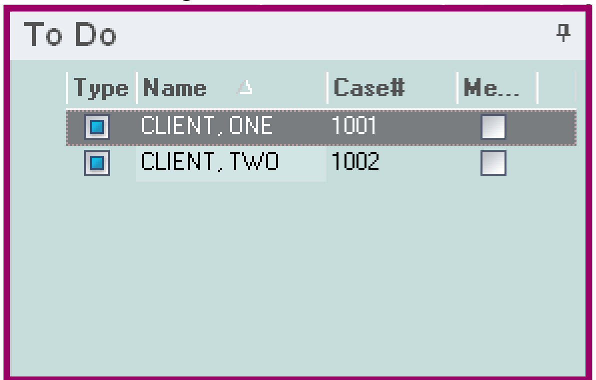


- Hovering the mouse pointer over the right-most column of a row displays a drop-down arrow icon.  Clicking this graphic displays a menu that allows for launching one of the following:
  - Client Panel
  - Client Overview
  - Client Chart View
  - Client Action Schedules View
  - New Assessment
  - Broadcast Alert

  Right-clicking on a row also displays this menu.

To Do Pane

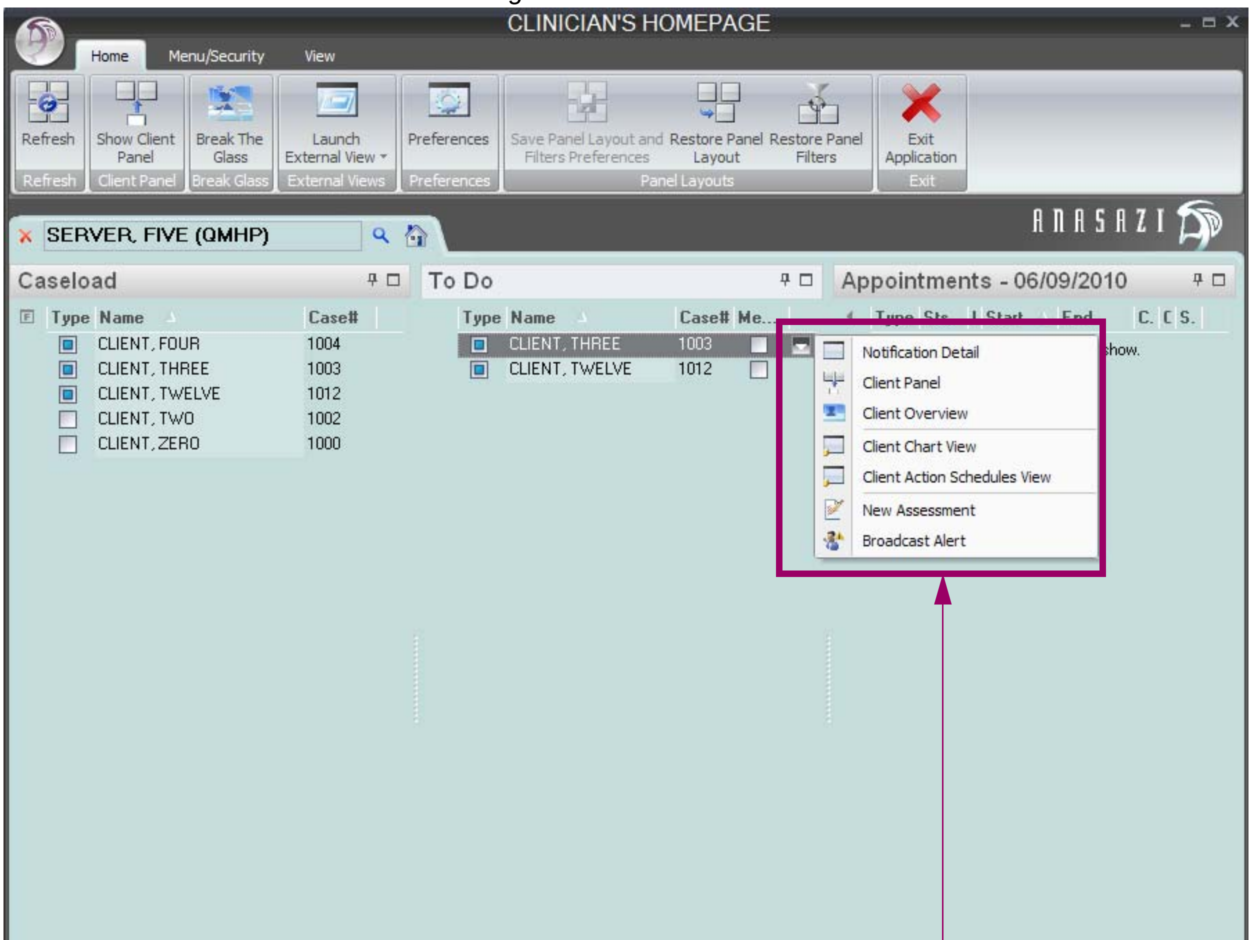
Figure 51 - To Do Pane



- The To Do Pane displays Clients who have at least one Notification that is relative to the selected Staff (e.g., Pre-Approved Medication(s) Pending or Refill Request(s) Pending, Assessment Pending Final Approval, etc.). If the Staff Member has elected to exclude their Extended Caseload (i.e., Treatment Teams) in the Caseload Pane Filters Dialog, Notifications for Clients on their Extended Caseload are not displayed in the To Do Pane.
- The 'Type' column indicates whether the Client is on the Selected Staff's Caseload, if the Selected Staff is the Client's SAI, or if the Client is Foreign. Clients for whom the Selected Staff is the SAI display with a with a blue colored box; Foreign Clients display with a blue colored dash, and Clients on the Staff's Caseload display with an empty box. Hovering the mouse pointer above these icons displays this information.
- The 'Name' column displays the Sort Name of the Client.
- The 'Case#' column displays the Client's Case Number.
- The 'Meds' column indicates whether there is a Notification for either Pre-Approved Medication(s) Pending or a Refill Request Pending (i.e., a task having to do with Medications is pending). Notifications only display for Assessments, Interim Service Logs, Interim Treatment Plans and Treatment Plans if the Staff has COT Access to the form(s). Refer to the Notification Types section in The Flying Tour for details. *Note: this column is currently only used by the assigned Prescriber in the Doctor's Homepage Product, but is visible in all Homepage Products.*

To Do Pane - Cont'd

Figure 52 - To Do Pane

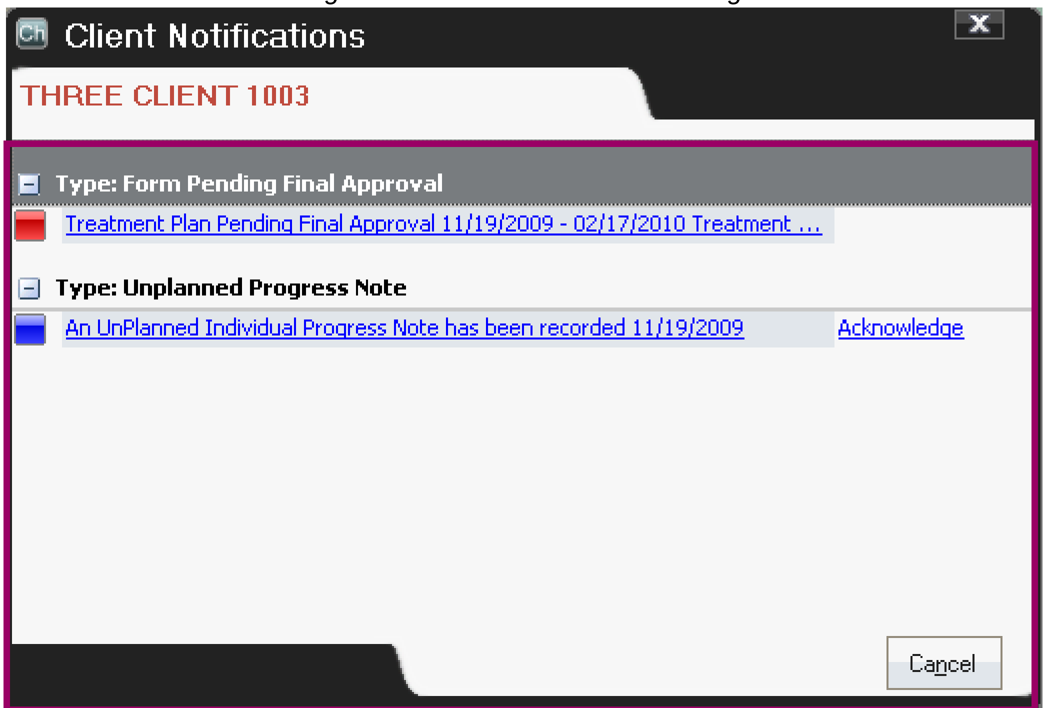


- Hovering the mouse pointer over the right-most column of a row displays a drop-down arrow icon. Clicking this graphic displays a menu that allows for launching one of the following:
  - Notification Detail
  - Client Panel
  - Client Overview
  - Client Chart View
  - Client Action Schedules View
  - New Assessment
  - Broadcast Alert

  Right-clicking on a row also displays the above menu options.

To Do Pane - Cont'd

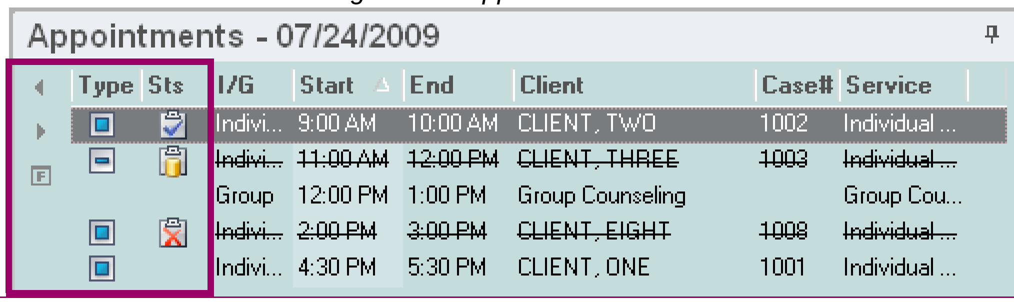
Figure 53 - Client Notifications Dialog



- The Client Notifications Dialog displays any Notifications for the selected Client.
- Items preceded by a red bang can be removed from the Notifications Dialog only by completing the required To Do task. Items preceded by a blue bang can be removed from the Notifications Dialog by clicking 'Acknowledge'.
- Clicking a Notification link launches the associated document.
- The 'Cancel' button closes the Client Notifications Dialog and returns focus to the Homepage.

Appointments Pane

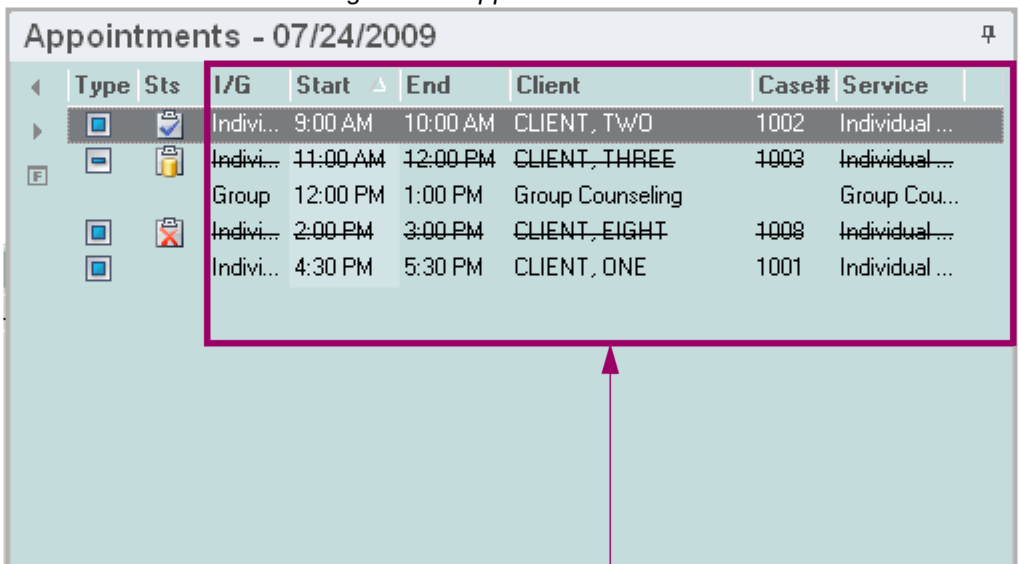
Figure 54 - Appointments Pane



- The Appointments Pane displays a list of Clients who have Services scheduled via the Scheduler Product for the selected Staff (both Individual and Group Events) for a day - today or any other day (past or future).
- The left arrow in the upper left corner of the Appointments Pane displays the previous day's scheduled Services.
- The right arrow in the upper left corner of the Appointments Pane displays the next day's scheduled Services.
- The Appointments List may be optionally filtered to include Resolved and Cancelled Services, include Resolved Services, include Cancelled Services or to exclude Resolved and Cancelled Services. The 'Filters' button displays the Appointments Pane Filters Dialog (shown later in this section).
- The 'Type' column displays a graphic representing the Appointment Type:
  -  A blue box for Clients on the selected Staff's Caseload, and for whom the Staff is the SAI
  -  An empty box for Clients on the Selected Staff's Caseload
  -  A blue dash in a box for Foreign Clients
  - Blank for Group Services
- The 'Sts' (Status) column displays a graphic representing the status of the Appointment:
  -  Resolved
  - Blank for Unresolved/Uncanceled/Not Checked-In
  -  Checked-In
  -  Cancelled

Appointments Pane - Cont'd

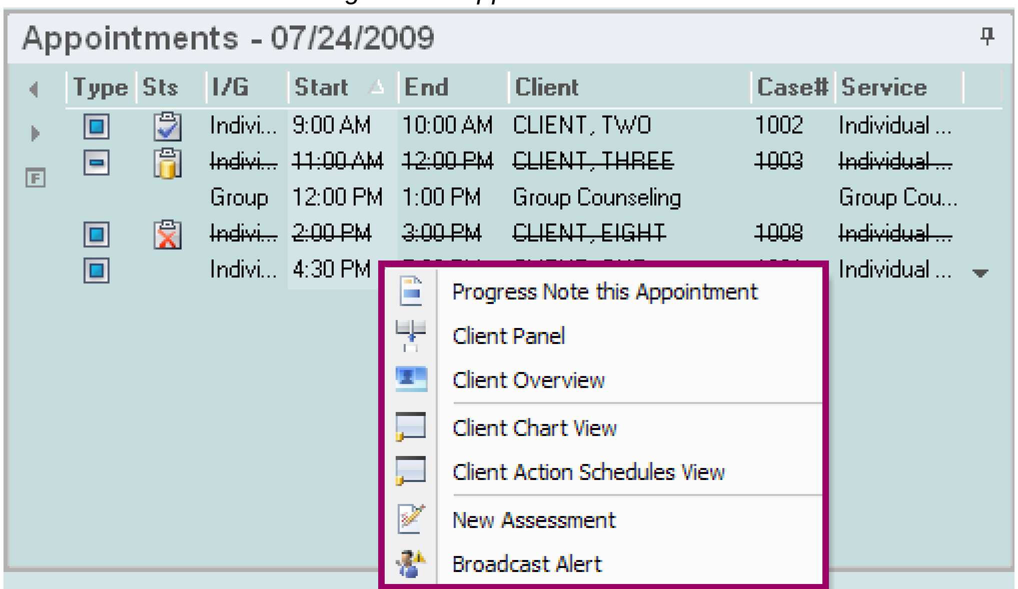
Figure 55 - Appointments Pane



- The 'I/G' column displays 'Individual' or 'Group'. A strikethrough indicates that the Service is either Resolved or Cancelled.
- The 'Start' column displays the Start Time of the Service. A strikethrough indicates that the Service is either Resolved or Cancelled.
- The 'End' column displays the End Time of the Service. A strikethrough indicates that the Service is either Resolved or Cancelled.
- The 'Client' column displays the Client's Name for Individual Services. Otherwise, it displays as blank for Group Services. A strikethrough indicates that the Service is either Resolved or Cancelled.
- The 'Case #' column displays the Client's Case Number for Individual Services. Otherwise, it displays as blank for Group Services. A strikethrough indicates that the Service is either Resolved or Cancelled.
- The 'Service' displays the description of the Service Code of the Service. A strikethrough indicates that the Service is either Resolved or Cancelled.

Appointments Pane - Cont'd

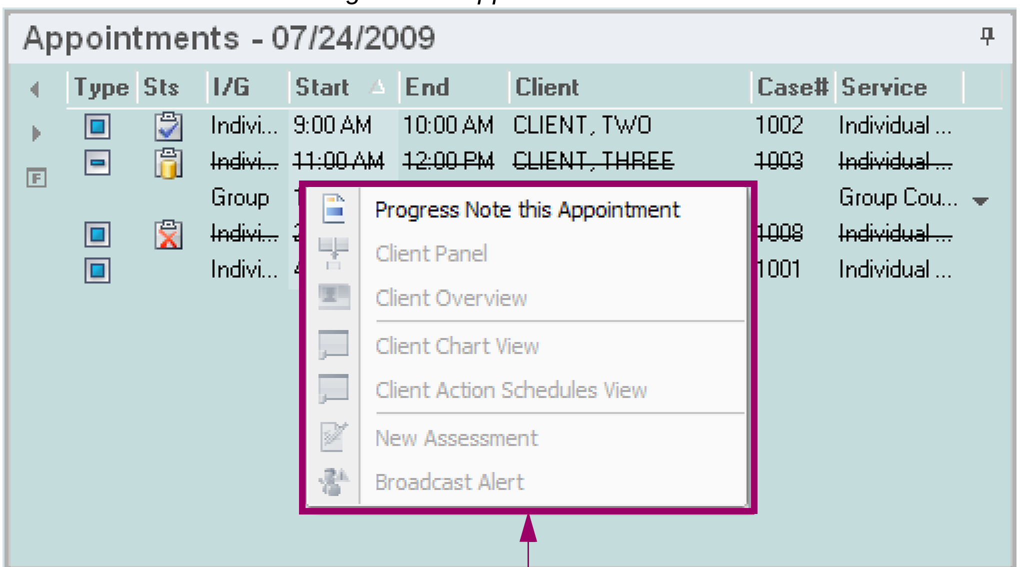
Figure 56 - Appointments Pane



- For Individual Services, the right-click menu contains the following options:
  - 'Progress Note this Appointment' - Progress Note entry may be initiated for Unresolved/ Uncanceled Individual Services. Clicking this option launches the Assessment Product Clinician's Homepage and Client Chart in Progress Note entry mode. *Note: Staff must have the previous version of the Clinician's Homepage (prior to v.3.0) available in his/her menu in order to use this feature.*
  - 'Client Panel' - Displays the Client Panel for the Client of the selected Individual Service.
  - 'Client Overview' - Displays the Client Overview Dialog for the Client of the selected Individual Service.
  - 'Client Chart View' - Launches the Assessment Product Client Chart for the Client of the selected Individual Service.
  - 'Client Action Schedules View' - Launches the Anasazi Central Client Action Schedules Maintenance View for the Client of the selected Individual Service.
  - 'New Assessment' - Displays the New Assessment Lookup for selection of an Assessment. Selecting an Assessment launches the Assessment Product Client Chart for the Client of the selected Individual Service with focus in the Add Client Assessment/Treatment Plan Dialog.
  - 'Broadcast Alert' - Displays the Initiate Broadcast Alert for entry of an Alert for the Client of the selected Individual Service.

Appointments Pane - Cont'd

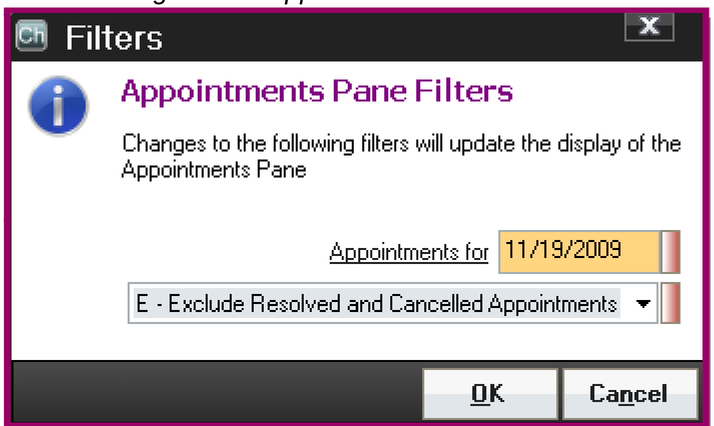
Figure 57 - Appointments Pane



- For Group Services, the right-click menu contains the following option:
  - 'Progress Note this Appointment' - Progress Note entry may be initiated for Unresolved/ Uncanceled Group Services. Clicking this option launches the Clinician's Homepage in Progress Note entry mode.

Appointments Pane - Cont'd

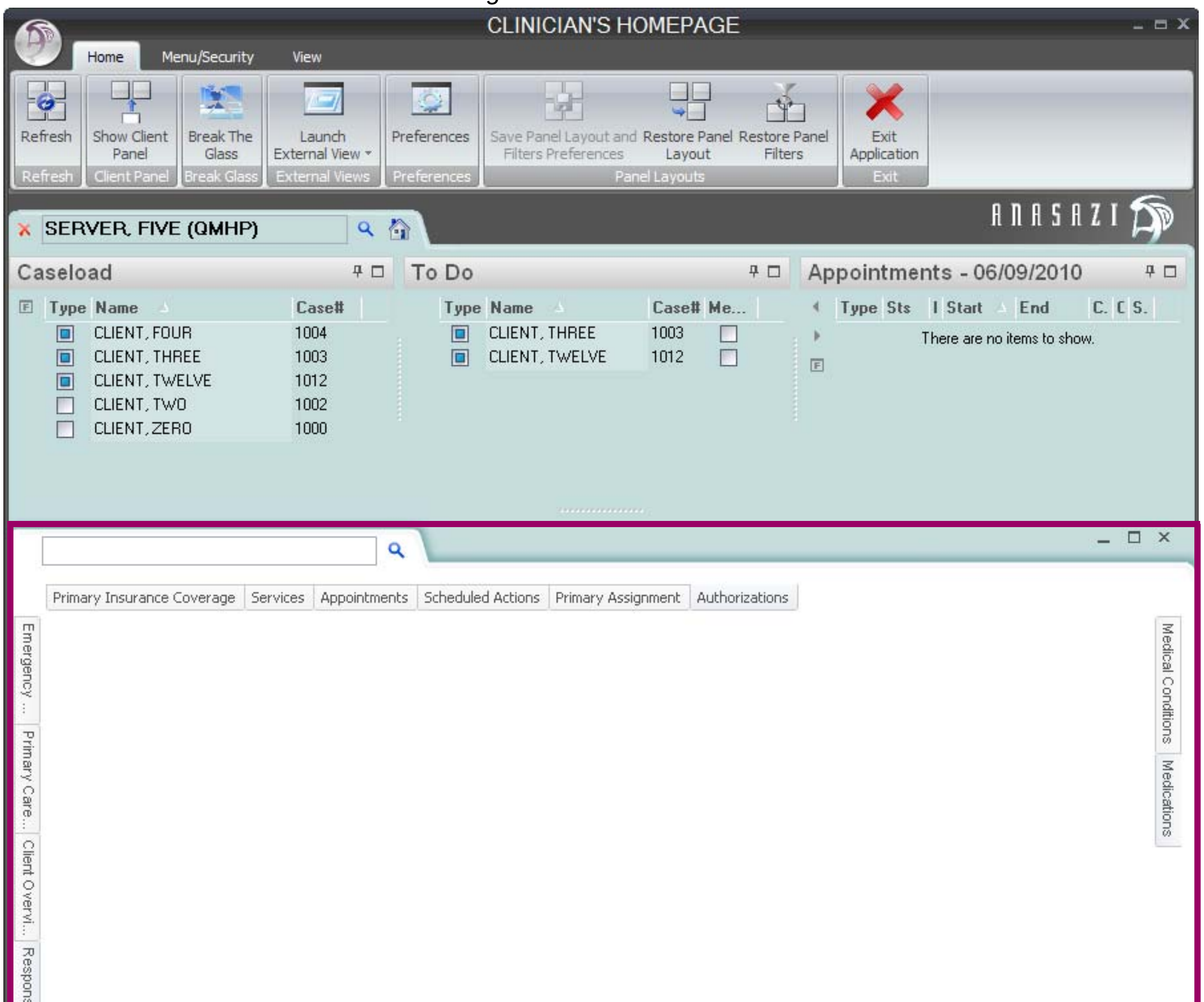
Figure 58 - Appointments Pane Filters



- The 'Filters' icon displays the Appointments Pane Filters Dialog, allowing for changes to what information is displayed to the Appointments Pane.
- The 'Appointments for' field is required, and is the date for which to displays Client Appointments.
- The dropdown field is required and can be set to one of the following options:
  - 'Exclude Resolved and Cancelled Appointments'
  - 'Include Cancelled Appointments'
  - 'Include Resolved and Cancelled Appointments'
  - 'Include Resolved Appointments'

CLIENT PANEL

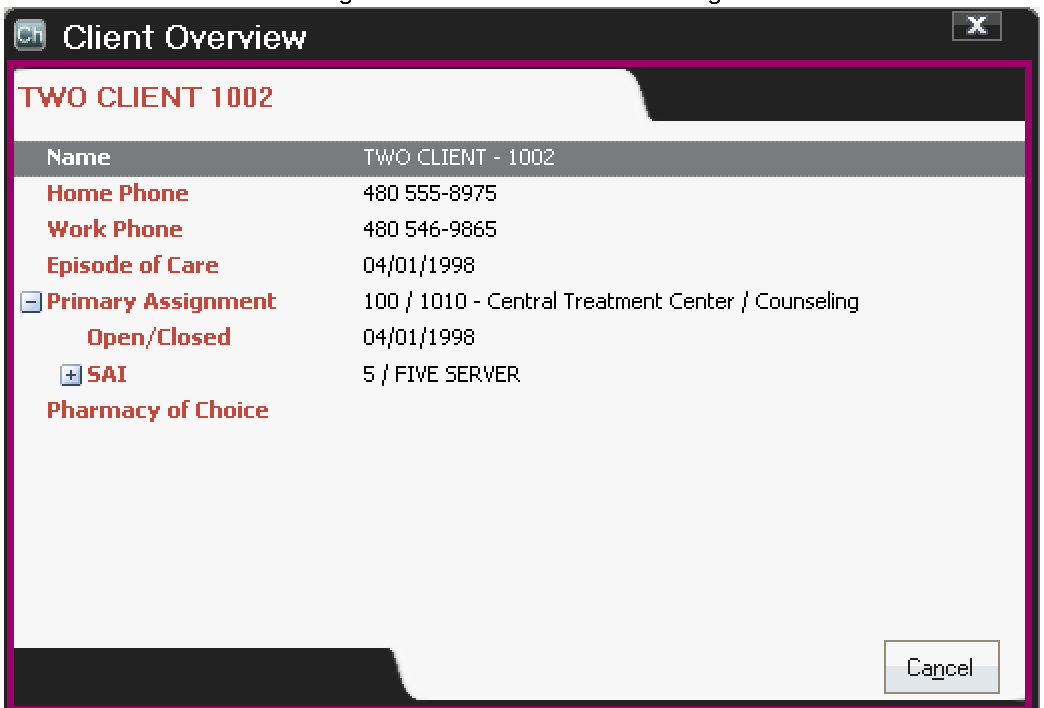
Figure 59 - Client Panel



- The Client Panel can be displayed by various methods, as noted below:
  - Quick Access Toolbar: via the Show Client Panel icon.
  - Ribbon Bar: via the Show Client Panel button.
  - Caseload Pane, To Do Pane or Appointments Pane:
    - by highlighting a Client and right-clicking on their Name or Case #
    - by clicking on the drop-down arrow icon to the right of the Client and clicking on the ‘Client Panel’ option from the menu that appears
    - by double-clicking on a Client.

Client Overview

Figure 60 - Client Overview Dialog



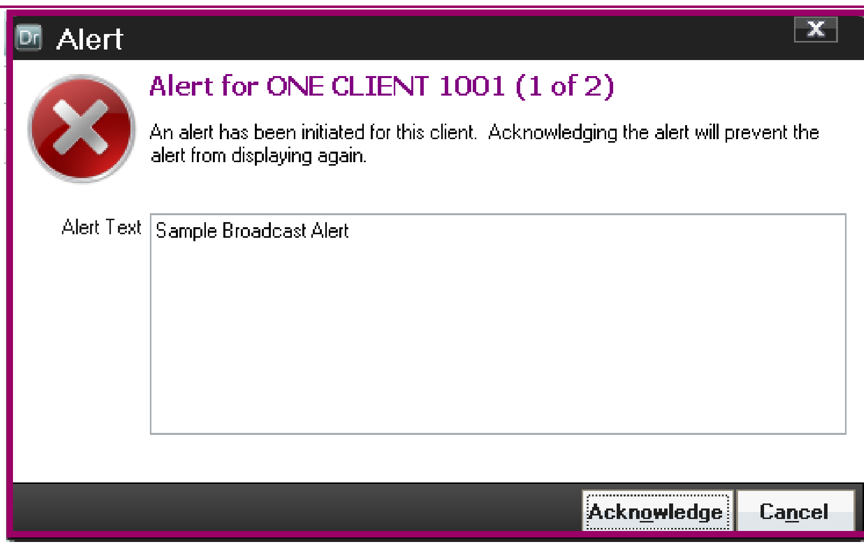
- The Client Overview Dialog is displayed via the 'Client Overview' button on the Client Ribbon Bar, and lists information about the selected Client, including the following:
  - Client Name and Case Number
  - Home Phone
  - Work Phone
  - Episode of Care
  - Primary Assignment & Open/Closed Dates
  - SAI
  - Pharmacy of Choice *(Note: this displays as a link in the Doctor's Homepage Product, which launches the Pharmacy Lookup.)*

  Note: The information displayed to this Dialog is hard-coded to report information from various sources, including Assessment Questions. If the information entered in the Assessment Questions differs from the label (e.g., a Client's cell phone number is entered as his/her home phone), the data that is displayed here may not match the label.

Broadcast Alert

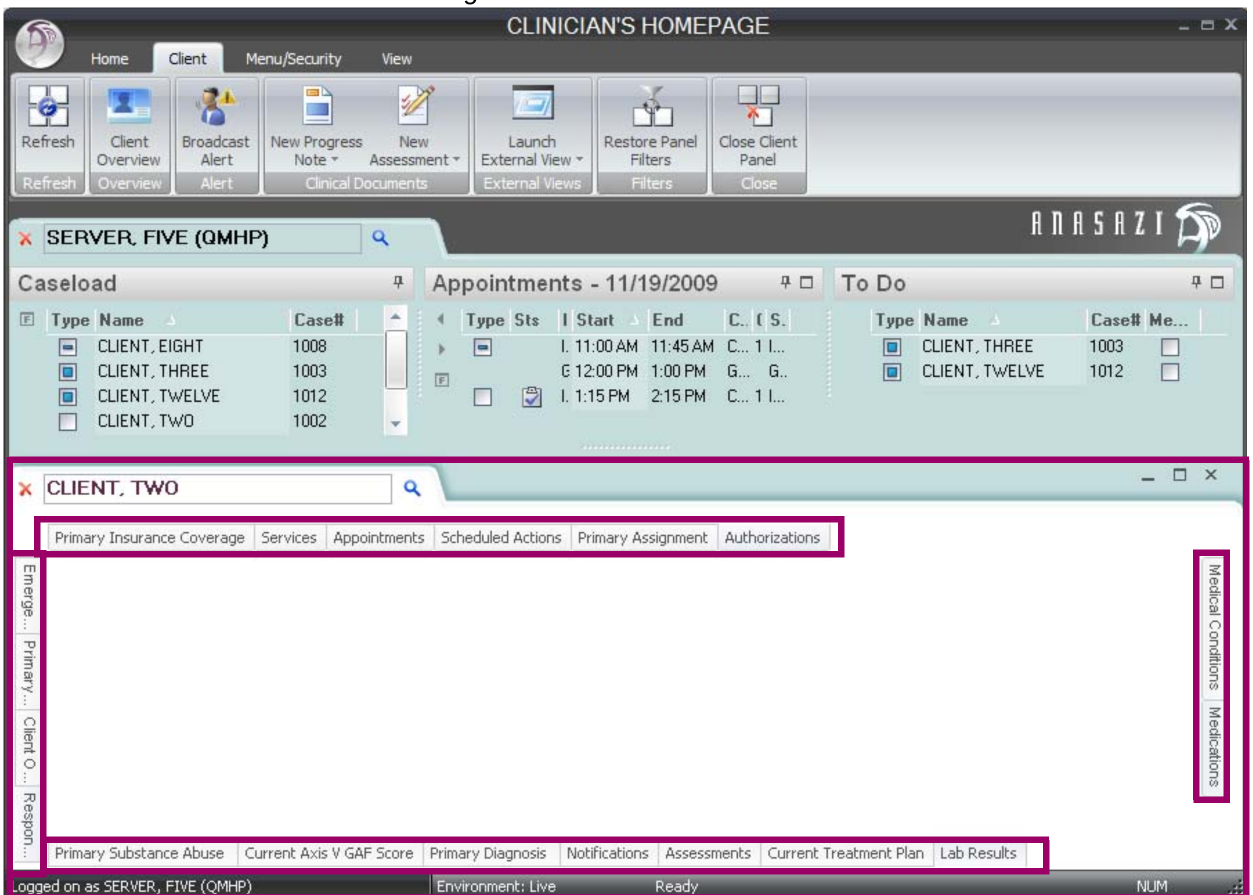
Figure 61 - Initiate Broadcast Alert

- The ‘Alert Text’ entered displays as a Broadcast Alert each time Staff opens the selected Client in the Client Panel for Alerts that were initiated in the past 30 days and that have not been acknowledged by the Logged-In Staff. The ‘Acknowledge’ button in the Broadcast Alert Dialog (shown below) allows the Logged-in Staff to acknowledge the Broadcast Alert so that it will not display again. A Broadcast Alert is automatically flagged as acknowledged by the Staff who initiated it (such that is doesn’t appear when he/she is logged in). The title displays the number of Alerts that exist for the Client.
- Note: The Broadcast Alert functionality is separate from and does not communicate with any Client Note or Alert functionality in Anasazi Central.



Client Panel Panes

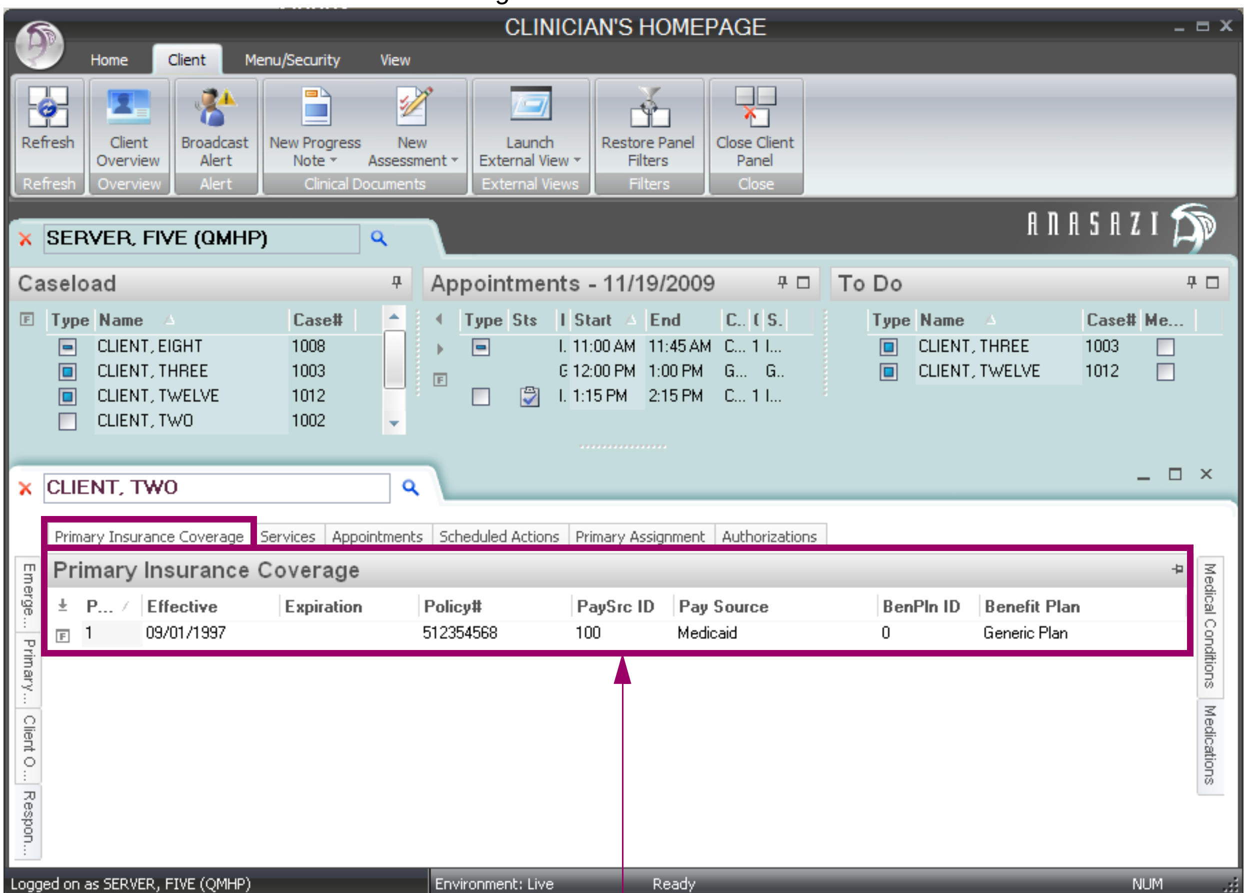
Figure 62 - Client Panel Panes



- The Client Panel includes Panes that can be included or excluded via the View Tab above the Ribbon Bar.
- Hovering over or clicking on a Pane button displays information related to what is included in the Pane (shown on the next page).

Client Panel Panes - Cont'd

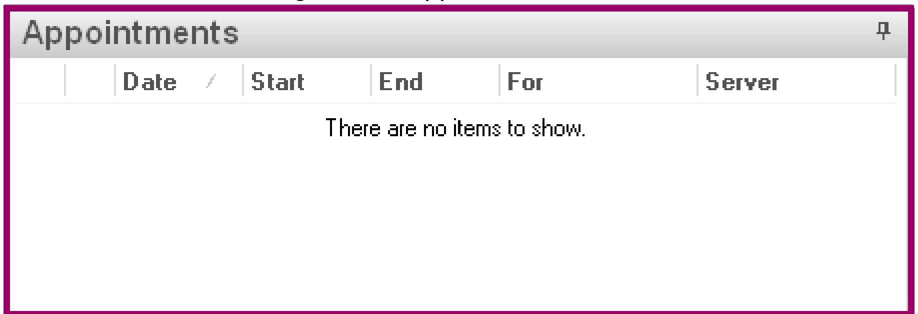
Figure 63 - Pane Buttons



- Clicking on or hovering over a Pane button displays information related to what is included in the Pane.

Appointments Pane

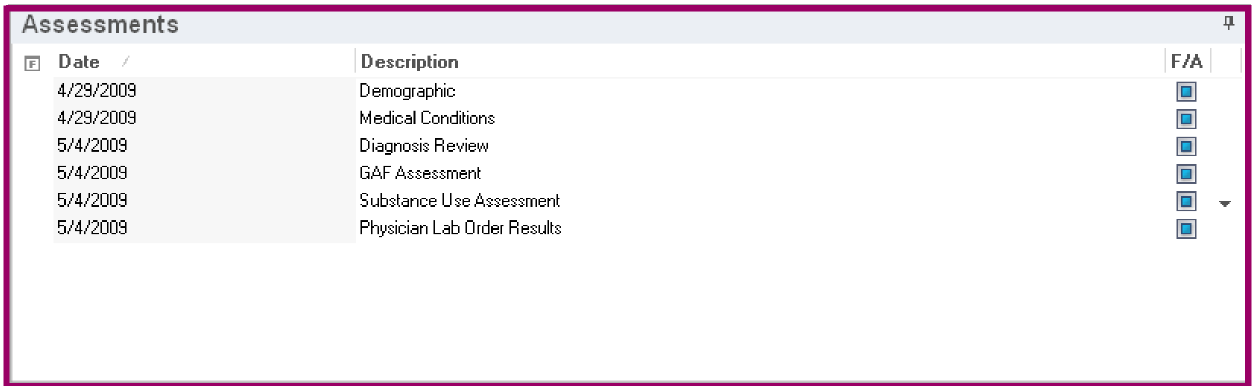
Figure 64 - Appointments Pane



- The Appointments Pane displays the following information about the Client's scheduled Services as they has been entered in the Scheduler Product. The Services that are displayed depend on the settings in the Staff Preferences Dialog.
  - 'Date' - the date of the Service.
  - 'Start' - the start time of the Service.
  - 'End' - the end time of the Service.
  - 'For' - the description of the Service.
  - 'Server' - the Server associated with the Service.

Assessments Pane

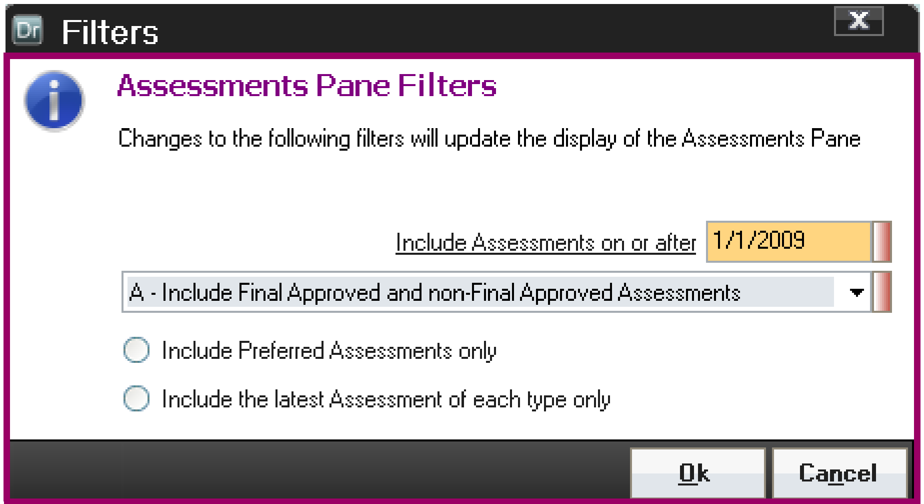
Figure 65 - Assessments Pane



- The ‘Date’ is the date the Assessment was added to the Client Chart (the ‘Assessment Date’).
- The ‘Description’ is the description of the Assessment.
- The ‘F/A’ field displays as a blue color-filled box if the Assessment has been Final Approved. Otherwise, displays as an empty box.
- Double-clicking on an Assessment or clicking the arrow in the right column for a row launches the selected Assessment in the Client Chart.
- The ‘Show Filters’ graphic displays the Assessment Pane Filters Dialog (shown on the next page).

Assessments Pane - Cont'd

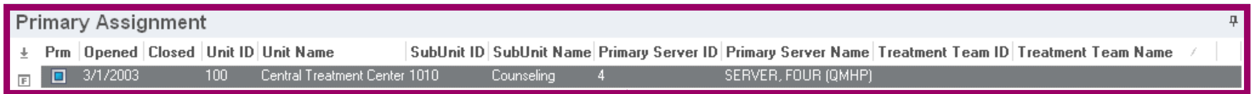
Figure 66 - Assessments Pane Filters Dialog



- The 'Include Assessments on or after' field is required.
- The dropdown field is required and can be set to one of the following:
  - 'A - Include Final Approved and non-Final Approved Assessments'
  - 'F - Include Final Approved Assessments only'
  - 'N - Include non-Final Approved Assessments only'
- If the 'Include Preferred Assessments only' field is active, only the Assessments specified in the Assessments branch of Staff Preferences are displayed.
- If the 'Include the latest Assessment of each type only' field is active, only the most recently saved Assessment of each Type is displayed.

Assignments Pane

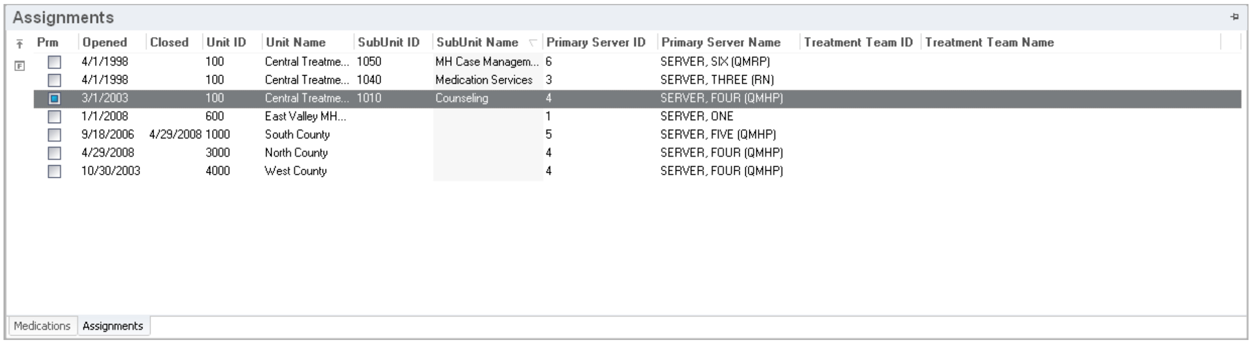
Figure 67 - Primary Assignment Pane



- The Primary Assignment Pane displays the following columns:
  - The down arrow in the left corner, 'Expand this Pane', expands the pane to display all Assignments, and the Pane button and title changes to read 'Assignments' (shown on the next page). If all Assignments are displayed, this arrow appears as an up arrow, 'Collapse this Pane', to return to displaying only the Primary Assignment.
  - The Filters icon displays the Assignments Pane Filters Dialog (shown later in this section).
  - 'Prm' - indicates if the Assignment is the Client's Primary Assignment.
  - 'Opened' - displays the date on which the Assignment was opened.
  - 'Closed' - displays the date on which the Assignment was closed.
  - 'Unit ID' - displays the Unit ID.
  - 'Unit Name' - displays the description of the Unit.
  - 'SubUnit ID' - displays the SubUnit ID.
  - 'SubUnit Name' - displays the description of the SubUnit.
  - 'Primary Server ID' - displays the ID of the Client's Primary Server.
  - 'Primary Server Name' - displays the description of the Client's Primary Server.
  - 'Treatment Team ID' - displays the ID of the Client's Treatment Team (if any).
  - 'Treatment Team Name' - displays the description of the Client's Treatment Team (if any).

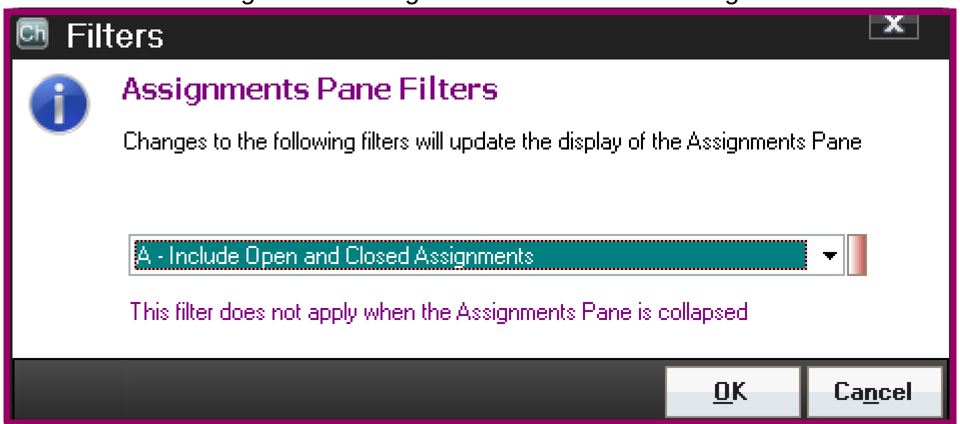
Assignments Pane - Cont'd

Figure 68 - Assignments Pane



Assignments Pane - Cont'd

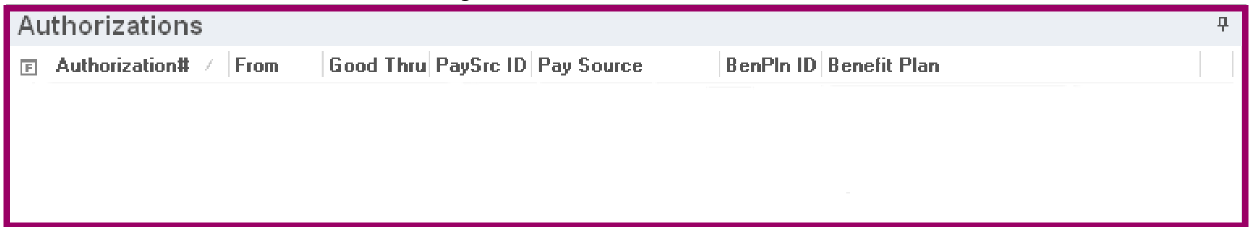
Figure 69 - Assignments Pane Filters Dialog



- The Assignments Pane can be filtered to display as follows:
  - A - Include Open and Closed Assignments
  - C - Include Closed Assignments Only
  - O - Include Open Assignments Only
- Note that the filter does not apply when the Assignments Pane is collapsed.

Authorizations Pane

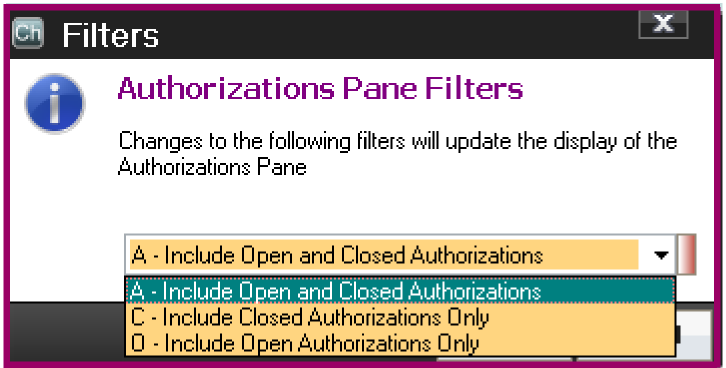
Figure 70 - Authorizations Pane



- The Authorizations Pane displays the following information about the Client's Authorizations from Client Authorizations Maintenance:
  - The Filters icon displays the Authorizations Pane Filters Dialog (shown on the next page).
  - 'Authorization#'
  - 'From' - the beginning date of the Authorization.
  - 'Good Thru' - the ending date of the Authorization.
  - 'PaySrc ID' - the ID of the Pay Source the Authorization is for.
  - 'Pay Source' - the description of the Pay Source the Authorization is for.
  - 'BenPln ID' - the ID of the Benefit Plan the Authorization is for.
  - 'Benefit Plan' - the description of the Benefit Plan the Authorization is for.

Authorizations Pane - Cont'd

Figure 71 - Authorizations Pane Filters Dialog



- The Authorizations Pane can be filtered to display as follows:
  - A - Include Open and Closed Authorizations
  - C - Include Closed Authorizations Only
  - O - Include Open Authorizations Only

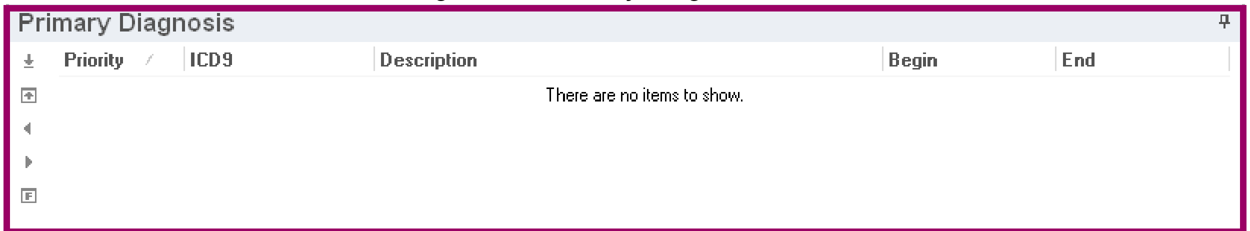
Client Overview Pane

Figure 72 - Authorizations Pane

- The Client Overview Pane displays the selected Client's name and Case Number. If the 'Expand this Pane' graphic is clicked, the following information is displayed about the selected Client:
    - Client Name & Case Number
    - Home Phone Number
    - Work Phone Number
    - Episode of Care Date
    - Primary Assignment Unit/SubUnit
    - Primary Assignment Opened Date and Closed Date
    - SAI ID and Name
    - Pharmacy of Choice

Diagnoses Pane

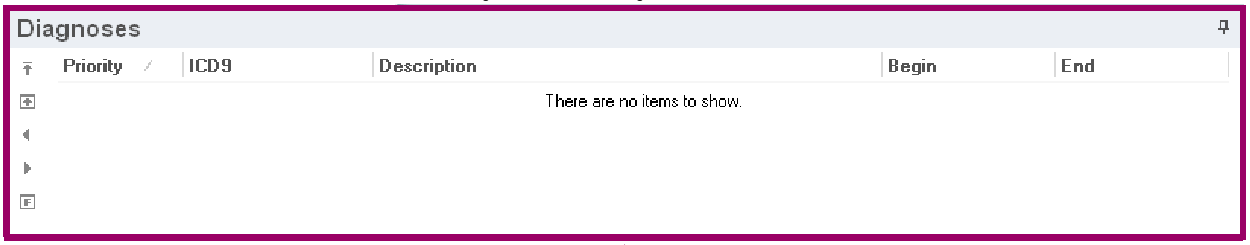
Figure 73 - Primary Diagnosis Pane



- The Primary Diagnosis Pane displays the Client's Primary Diagnosis from their most recently Final Approved Assessment that contains the Diagnosis Review Tab Page, provided all Assessments that include the Diagnosis Review Tab Page, both as a stand-alone Assessment and where it has been added as a Tab Page to another Assessment, have been identified through Staff Preferences. The Assessments included in this Pane are specified in the Diagnoses Preferences branch of Staff Preferences, and are constrained to Assessments to which the Staff has Categories of Treatment (COT) Access.

Diagnoses Pane - Cont'd

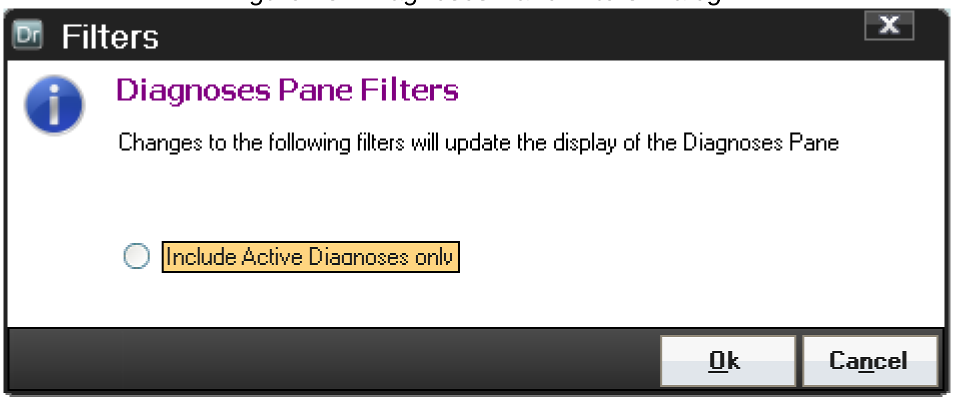
Figure 74 - Diagnoses Pane



- The 'Expand this Pane' graphic displays the Diagnoses Pane, which lists all of the Client's Diagnoses from a single selected Diagnosis Assessment, including the following columns:
  - 'Priority'
  - 'ICD9'
  - 'Description'
  - 'Begin' date
  - 'End' date
- The 'Launch this Diagnosis Assessment in the Client Chart View' graphic launches the Client Chart View (if it is not already launched) with the selected Assessment displayed. An Assessment can not already be displayed to the Client Chart in order for this feature to work.
- The left arrow graphic, 'Show the previous Diagnosis Assessment', displays the previous Diagnosis Assessments.
- The right arrow graphic, 'Show the next Diagnosis Assessment', displays the next Diagnosis Assessments.
- The 'Show Filters' graphic displays the Diagnoses Pane Filters Dialog (shown on the next page).

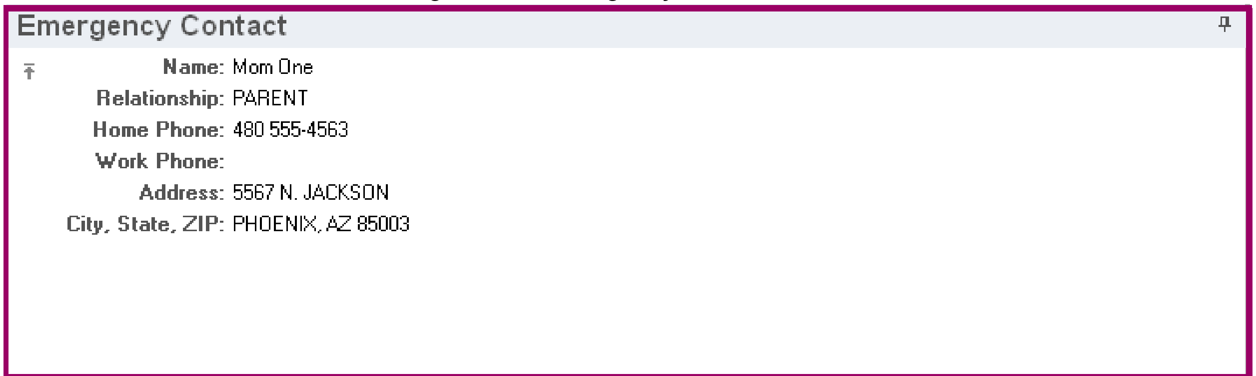
Diagnoses Pane - Cont'd

Figure 75 - Diagnoses Pane Filters Dialog



Emergency Contact Pane

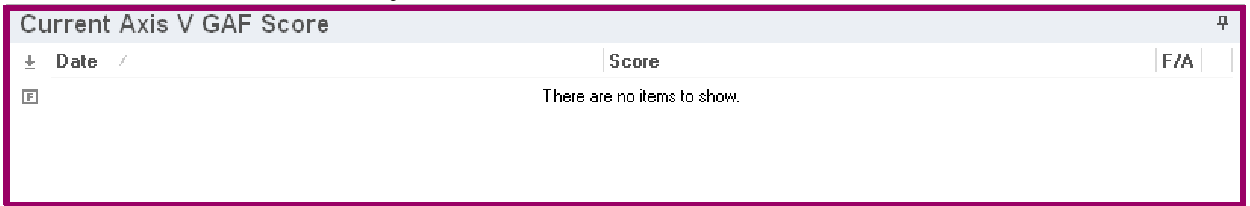
Figure 76 - Emergency Contact Pane



- The Emergency Contact Pane displays the name of the selected Client's Emergency Contact as defined in his or her most recently Final Approved Assessment that includes the Emergency Contact Questions. If the 'Expand this Pane' graphic is clicked, the following additional information is displayed about the selected Client's Emergency Contact:
    - Contact Name
    - Relationship
    - Home Phone
    - Work Phone
    - Address
    - City, State, Zip

Axis V GAF Scores Pane

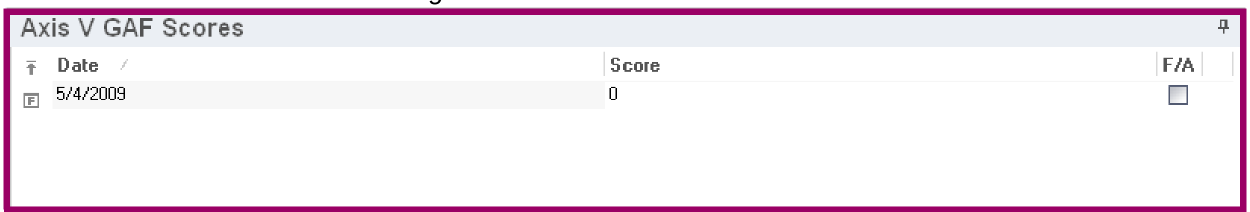
Figure 77 - Current Axis V GAF Score Pane



- The Current Axis V GAF Score Pane displays the Client's GAF Score from his/her most recently Final Approved Assessment that include the GAF Question.
- The GAF Scores that display are from the Assessments that are specified in the GAF branch of Staff Preferences, provided all of the Assessments that contain the GAF Score have been identified through Staff Preferences, and are restricted to Assessments to which the Staff has COT Access.

Axis V GAF Scores Pane - Cont'd

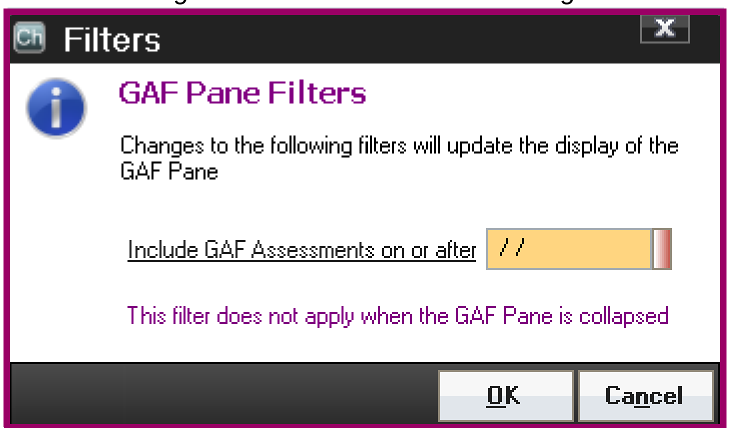
Figure 78 - Axis V GAF Scores Pane



- The Current Axis V GAF Score Pane displays a list of the Client's GAF Scores and the title bar displays as 'Axis V GAF Scores'. The following columns are displayed:
  - 'Date'
  - 'Score'
  - 'F/A' - displays as a blue color-filled box if the Assessment has been Final Approved. Otherwise, displays as an empty box.
- The 'Show Filters' graphic displays the GAF Pane Filters Dialog (shown on the next page).

Axis V GAF Scores Pane - Cont'd

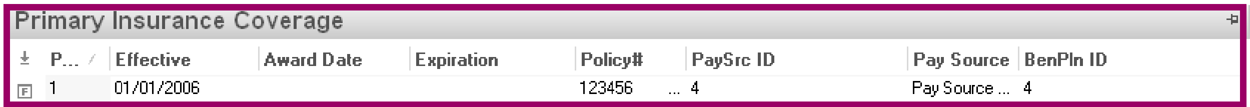
Figure 79 - GAF Pane Filters Dialog



- The Axis V GAF Scores Pane can be filtered to display Assessments containing GAF scores on or after a certain date.
- As noted in the Dialog above, this filter does not apply when the GAF Pane is collapsed.

Insurance Coverage Pane

Figure 80 - Primary Insurance Coverage Pane



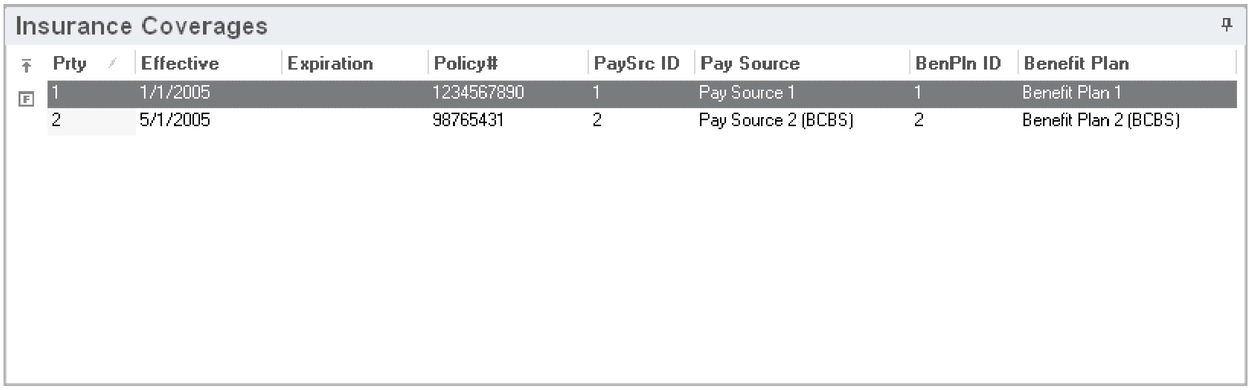
Primary Insurance Coverage

P...	Effective	Award Date	Expiration	Policy#	PaySrc ID	Pay Source	BenPln ID
1	01/01/2006			123456 ...	4	Pay Source ...	4

- The Primary Insurance Coverage Pane displays the following information from Client 3rd Party Coverages:
  - The down arrow in the left corner, 'Expand this Pane', expands the pane to display all of the Client's Insurance Coverages, and the Pane button and title change to read 'Insurance Coverages'. If all Insurance Coverages are displayed, this arrow appears as an up arrow, 'Collapse this Pane', to return to displaying only the Primary Insurance Coverage.
  - The Filters icon displays the Insurance Coverage Pane Filters Dialog (shown later in this section).
  - 'Pty' - displays the Priority of the coverage.
  - 'Effective' - displays the Effective Date of the coverage.
  - 'Award Date' - displays the date on which coverage was awarded to the Client.
  - 'Expiration' - displays the Expiration Date of the coverage.
  - 'Policy#' - displays the Policy Number of the coverage.
  - 'PaySrc ID' - displays the ID of the Pay Source the coverage is with.
  - 'Pay Source' - displays the description of the Pay Source the coverage is with.
  - 'BenPln ID' - deposals the ID of the Benefit Plan the coverage is with.
  - 'Benefit Plan' - displays the description of the Benefit Plan the coverage is with.

Insurance Coverages Pane - Cont'd

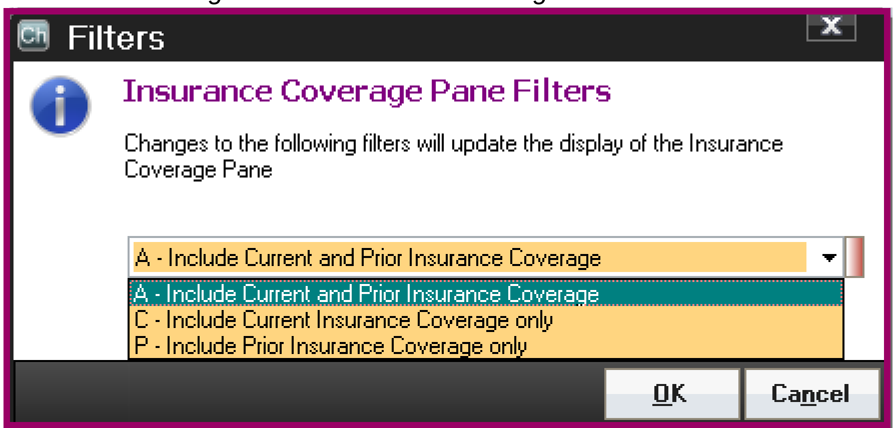
Figure 81 - Insurance Coverage Pane


Insurance Coverages

Prty	Effective	Expiration	Policy#	PaySrc ID	Pay Source	BenPln ID	Benefit Plan
1	1/1/2005		1234567890	1	Pay Source 1	1	Benefit Plan 1
2	5/1/2005		98765431	2	Pay Source 2 (BCBS)	2	Benefit Plan 2 (BCBS)

Insurance Coverages Pane - Cont'd

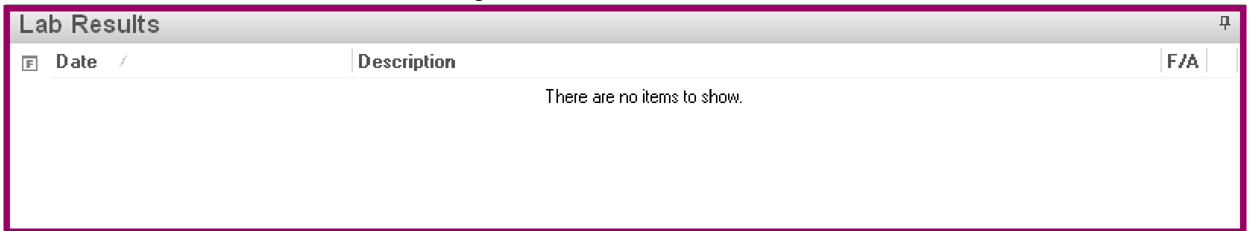
Figure 82 - Insurance Coverage Pane Filters



- The Insurance Coverage Pane can be filtered to display as follows:
  - A - Include Current and Prior Insurance Coverage
  - C - Include Current Insurance Coverage only
  - P - Include Prior Insurance Coverage only

Lab Results Pane

Figure 83 - Lab Results Pane



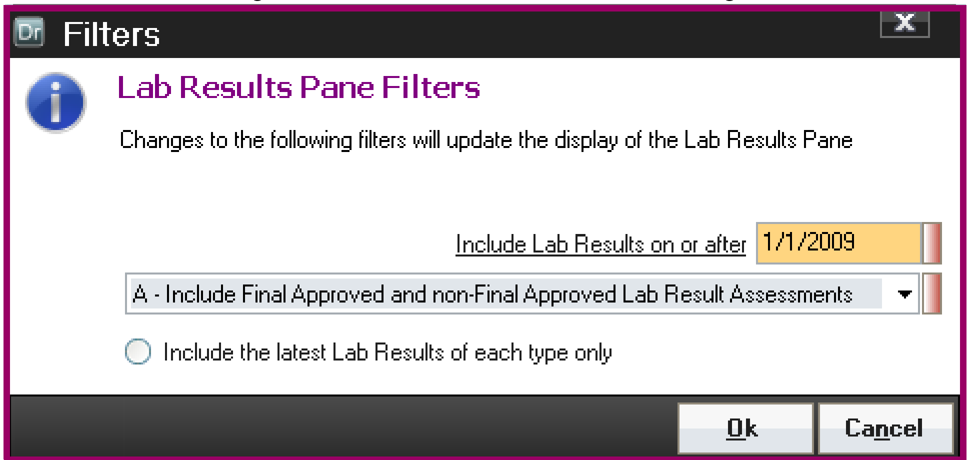
- The Lab Results Pane displays information from Assessments that contain Lab Results. The Assessments that display are those that are specified in the Lab Results branch of Staff Preferences. This Pane displays the date, description and Final Approved flag, and the Assessment must be launched to display the contents of the Assessment.

- Lab Assessments can be launched in the Client Chart View by double-clicking a row. Final Approved Lab Result Assessments are launched in show mode and Lab Result Assessments that are not Final Approved are launched in edit mode so that Staff can sign them. If the Staff does not have Add COT Access, the Lab Result Assessment is launched in show mode.

- The 'Show Filters' graphic displays the Lab Results Pane Filters Dialog (shown on the next page).

Lab Results Pane - Cont'd

Figure 84 - Lab Results Pane Filters Dialog



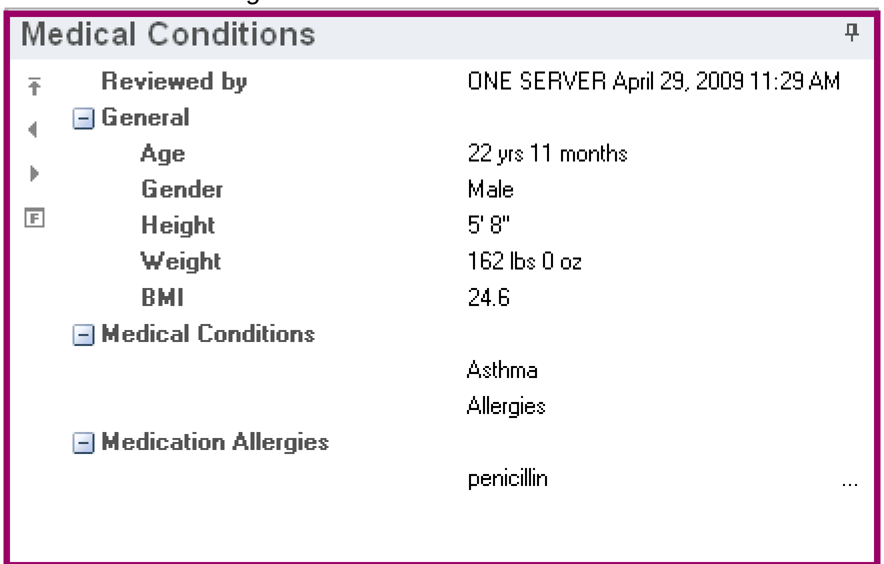
- The 'Include Lab Results on of after' field is required and defaults according to the 'Initially show Lab Results in the past ## months in the Lab Results Pane' field on the Lab Results branch of Staff Preferences.

- The dropdown field is required and can be set to one of the following:
  - 'A - Include Final Approved and non-Final Approved Lab Result Assessments'
  - 'F - Include Final Approved Lab Result Assessments only'
  - 'N - Include non-Final Approved Lab Result Assessments only'

- If the 'Include the latest Lab Results of each type only' field is active, the list is filtered to display only the latest lab result of each type.

Medical Conditions Pane

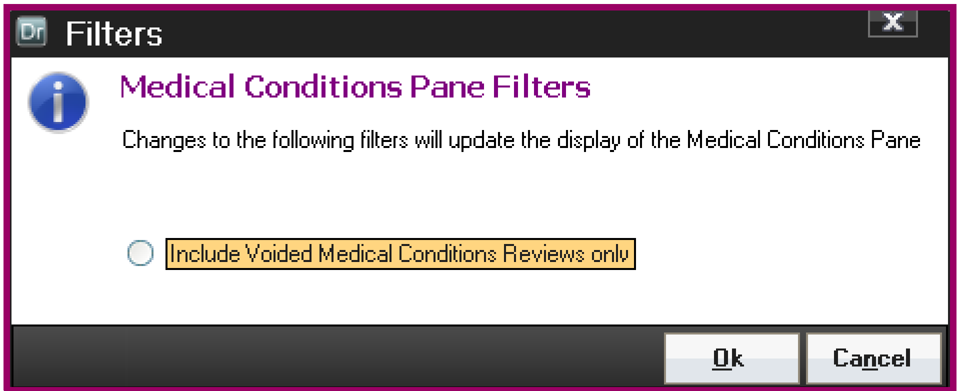
Figure 85 - Medical Conditions Pane



- The Medical Conditions Pane displays the Client's medical conditions from their most recent Final Approved Medical Condition Review in the Doctor's Homepage Product.
- The 'Show the previous Medical Conditions Review' graphic displays the previous record.
- The 'Show the next Medical Conditions Review' graphic displays the next record.
- The 'Show Filters' graphic displays the Medical Conditions Pane Filters Dialog (shown on the next page).

Medical Conditions Pane - Cont'd

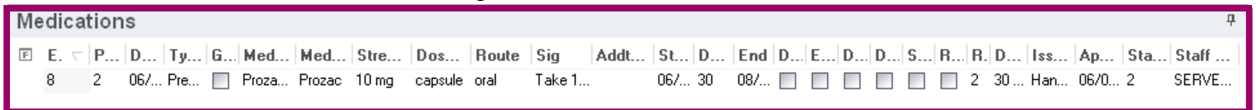
Figure 86 - Medical Conditions Pane Filters Dialog



- If the 'Include Voided Medical Conditions Reviews only' field is active, only Medical Conditions Reviews that have been Voided are displayed in the Medical Conditions Panel.

Medications Pane

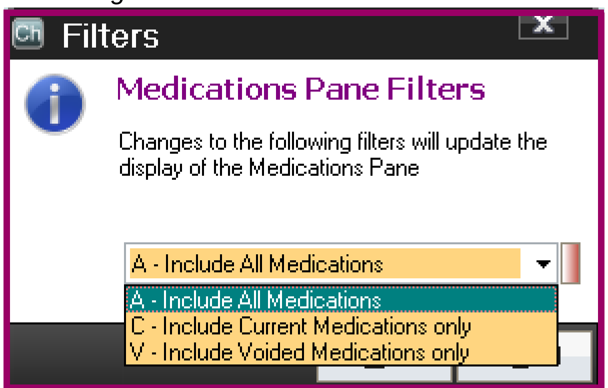
Figure 87 - Medications Pane



- The Medications Pane displays the following information regarding the Client's Final Approved Medications:
  - The 'Filters' button displays the Medications Pane Filters Dialog.
  - 'Event' - Displays the Medication Event ID.
  - 'Presc/Order #' - displays the prescription/order number.
  - 'Date' - the date on medication record was entered.
  - 'Type' - displays as 'Prescription', 'Medication Order', 'Client Instruction' or 'Pre-existing Medication'.
  - 'Generic' - displays a checkmark if the medication is a generic.
  - 'Med/Str/DF' - displays the medication, strength, and dose form.
  - 'Medication' - the description of the medication.
  - 'Strength' - the strength of the medication.
  - 'Dose Form' - the dose form of the medication.
  - 'Route' - the route of administration.
  - 'Sig' - the description of the Sig.
  - 'Addtnl Instruct' - the description of any additional instructions.
  - 'Start' - the date on which the Client began (or is to begin) taking the medication.
  - 'Days Supply' - the number of days supply that has been ordered.
  - 'End' - the date on which the Client stopped (or is to stop) taking the medication.
  - 'Dt Estimated' - the estimated date on which the Client stopped taking the medication.
  - 'External' - displays a checkmark if the medication was written outside of the Center.
  - 'Discontinued' - the date on which the medication order was discontinued.
  - 'DAW' - displays a checkmark if the medication is to be dispensed as written.
  - 'Sample' - displays a checkmark if the medication is a sample.
  - 'Renewal' - displays a checkmark if the medication is a renewal.
  - 'Refills' - the number of refills for the medication.
  - 'Dispense Qty' - the quantity of medication to be dispensed appended with the Unit of Measure.
  - 'Issue Method' - the method the medication is issued: 'Hand Written', 'Printed', 'Transmitted' or 'Called In'.
  - 'Approved' - the date on which the medication was approved.
  - 'Staff ID' - the Staff ID of the Staff who approved the medication.
  - 'Staff Name' - the full name of the Staff who approved the medication.

Medications Pane - Cont'd

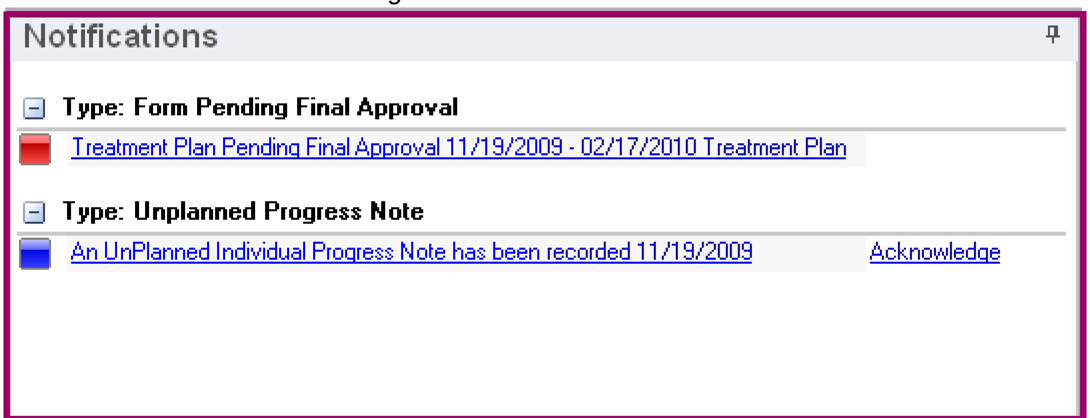
Figure 88 - Medications Pane Filters



- The Medications Pane can be filtered to display as follows:
  - A - Include All Medications
  - C - Include Current Medications only
  - V - Include Voided Medications only

Notifications Pane

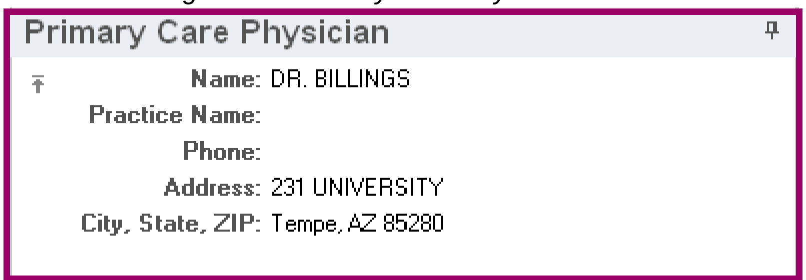
Figure 89 - Notifications Pane



- The Notifications Pane displays Pending Notifications associated with the selected Client for the selected Staff. Red boxes ('bangs') are displayed in front of items that require Staff to perform an action (such as Final Approval). When a Notification is clicked, the associated view displays, allowing for appropriate action by the Staff. Once the appropriate action has been taken, the Notification no longer displays. Blue boxes ('bangs') are displayed in front of informational Notifications, and once they are acknowledged (by clicking 'Acknowledge'), they no longer display on the list.

Primary Care Physician Pane

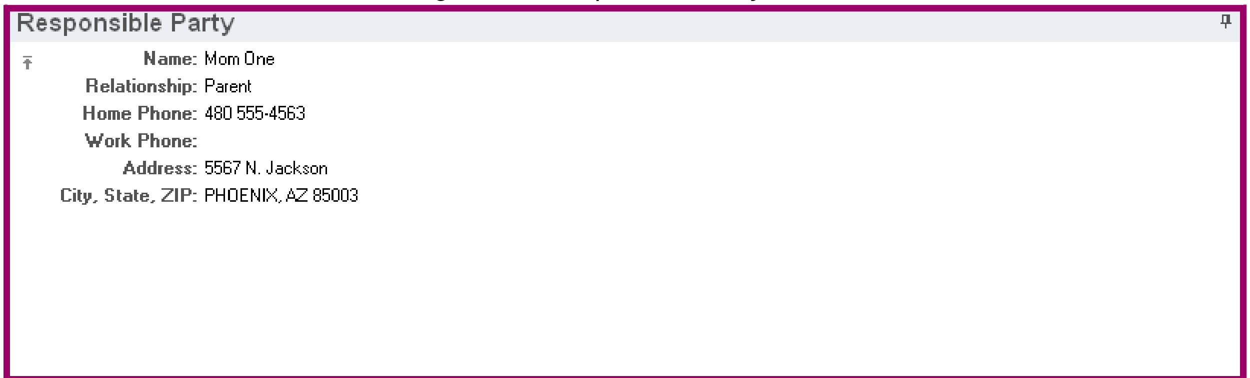
Figure 90 - Primary Care Physician Pane



- The Primary Care Physician Pane displays the name of the selected Client's Primary Physician as defined in his or her most recently Final Approved Assessment that contains the Primary Care Questions. If the 'Expand this Pane' graphic is clicked, the following additional information is displayed about the selected Client's Primary Care Physician:
    - Physician Name
    - Practice Name
    - Phone Number
    - Address
    - City, State, Zip

Responsible Party Pane

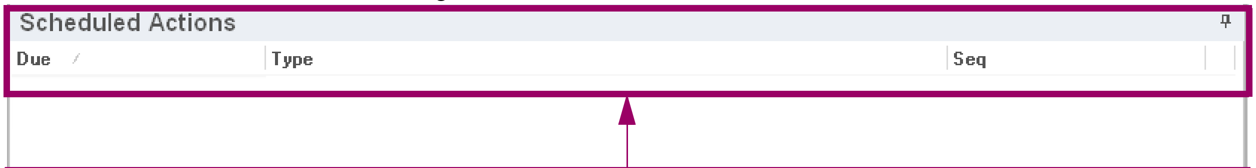
Figure 91 - Responsible Party Pane



- The Responsible Party Pane displays the Client’s responsible party information from their most recently Final Approved Assessment that contains the Responsible Party Questions.

Scheduled Actions Pane

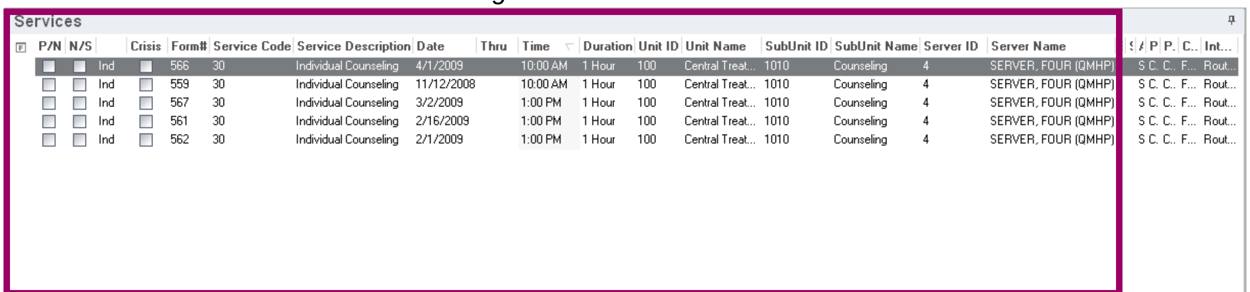
Figure 92 - Scheduled Actions Pane



- The Scheduled Actions Pane displays the following information regarding the Client's Scheduled Actions from Client Action Schedules Maintenance:
  - 'Due' - the date on which the Scheduled Action is due.
  - 'Type' - the Scheduled Action Type.
  - 'Seq' - the Scheduled Action sequence.

Services Pane

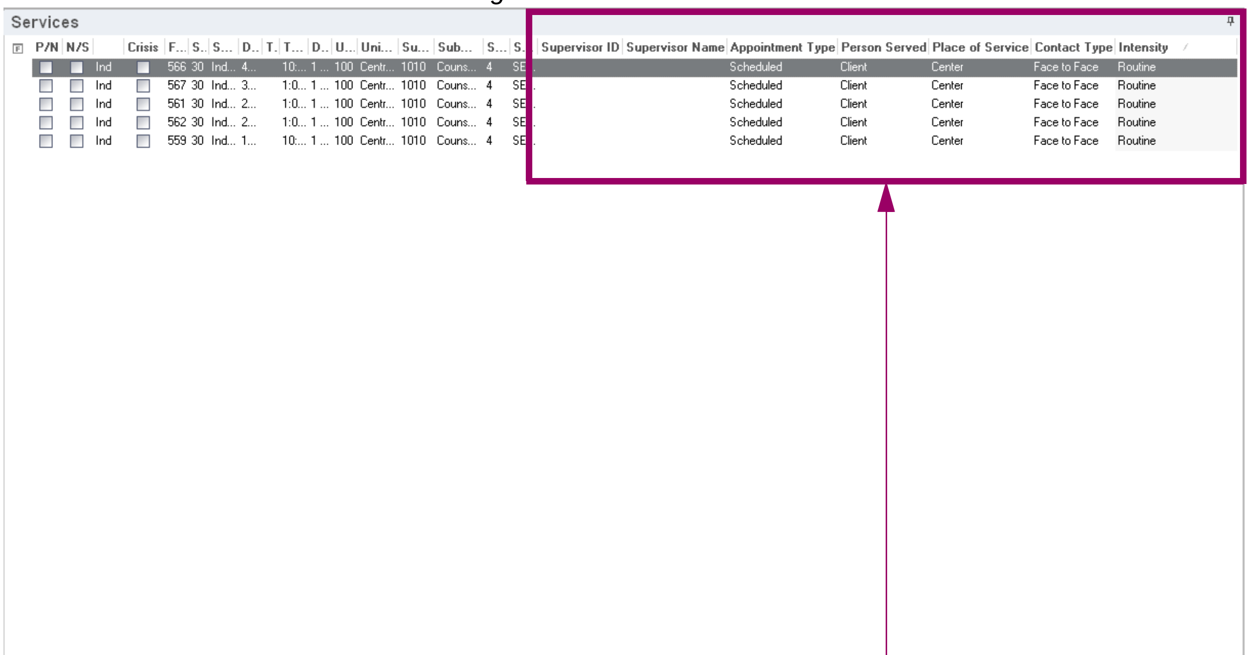
Figure 93 - Services Pane



- The ‘P/N’ field is filled if the Service has been Progress Noted.
- The ‘N/S’ field is filled in if the Service is a cancellation or no-show.
- The next column displays as ‘Ind’ for Individual Services or ‘Gr’ for Group Services.
- The ‘Crisis’ field is filled in if the Service is a crisis Service.
- The ‘Form#’ field displays the Form Number of the Service.
- The ‘Service Code’ field displays the Service Code of the Service that was provided.
- The ‘Service Description’ displays the description of the Service provided.
- The ‘Date’ field displays the begin date on which the Service took place.
- The ‘Thru’ field displays the end date of the Service.
- The ‘Time’ is the time at which the Service began.
- The ‘Duration’ is the length of the Service.
- The ‘Unit ID’ field displays the ID of the Unit to which the Service is associated.
- The ‘Unit Name’ field displays the description of the Unit to which the Service is associated.
- The ‘SubUnit ID’ field displays the SubUnit ID of the SubUnit to which the Service is associated.
- The ‘SubUnit Name’ field displays the description of the SubUnit to which the Service is associated.
- The ‘Server ID’ field displays the ID of the Server who performed the Service.
- The ‘Server Name’ field displays the Name of the Server who performed the Service.

Services Pane - Cont'd

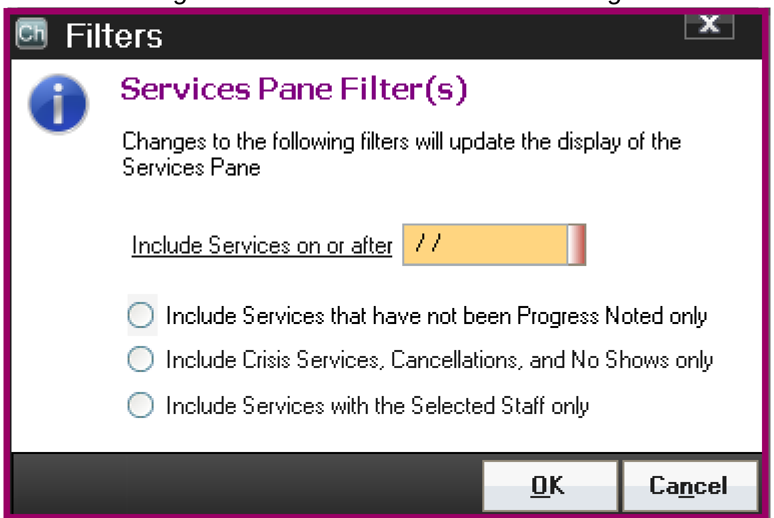
Figure 94 - Services Pane



- The 'Supervisor ID' is the ID of the Supervisor Staff of the Service.
- The 'Supervisor Name' is the name of the Supervisor Staff of the Service.
- The 'Appointment Type' is the Service Type specified for the Service.
- The 'Person Served' is the Person Contacted for the Service.
- The 'Place of Service' is the Place at which the Service took place.
- The 'Contact Type' is the Type of Contact specified for the Service.
- The 'Intensity' is the Intensity specified for the Service.

Services Pane - Cont'd

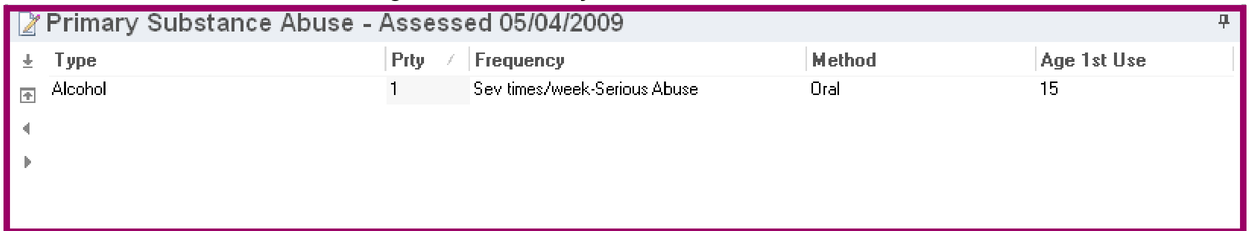
Figure 95 - Services Pane Filters Dialog



- The Services Pane can be filtered to display as follows:
  - Include Services on or after MM/DD/YYYY.
  - Include Services that have not been Progress Noted only
  - Include Crisis Services, Cancellations, and No Shows only
  - Include Services with the Selected Staff only

Substance Abuse Pane

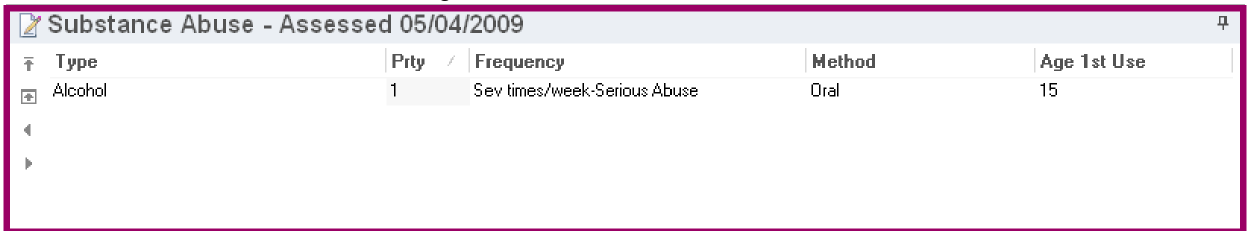
Figure 96 - Primary Substance Abuse Pane



- The Primary Substance Abuse Pane displays the Client's Primary Substance Abuse Type from the Client's most recently Final Approved Assessment that contains the Drug Use Multiple Entry Window (MEW), provided all of the Assessments that contain the Drug Use Mew have been identified through the Substance Abuse branch of Staff Preferences. The Title Bar displays as 'Primary Substance Abuse - Assessed *[date]*'.

Substance Abuse Pane - Cont'd

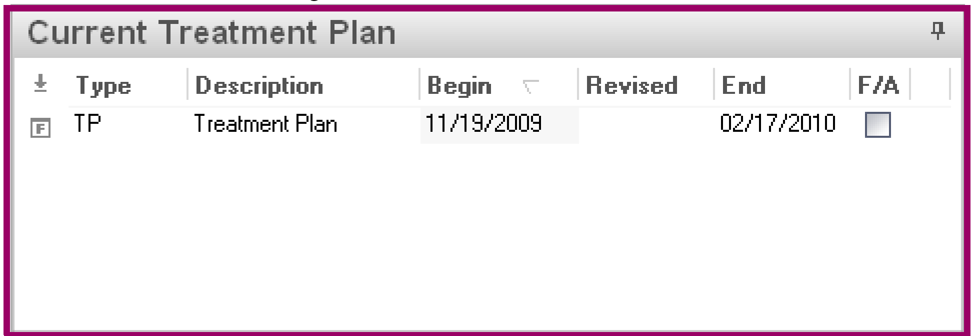
Figure 97 - Substance Abuse Pane



- The 'Expand this Pane' button displays the Substance Abuse Pane, which is a list of the Client's Substance Abuse Types from a single selected Substance Abuse Assessment that contains the Drug Use MEW, provided all of the Assessments that contain the Drug Use Mew have been identified through Staff Preferences. The Title Bar displays as 'Substance Abuse - Assessed *[date]*'. The following columns are displayed:
  - 'Type'
  - 'Prty' - the Priority
  - 'Frequency'
  - 'Method' - the method of administration (e.g., oral, injection, etc.)
  - 'Age 1st Use'
- The 'Launch this Substance Abuse Assessment in the Client Chart View' launches the Client Chart View (if it is not already launched) with the selected Assessment displayed. An Assessment can not already be displayed to the Client Chart in order for this feature to work.
- The left arrow graphic, 'Show the previous Substance Abuse Assessment', displays the previous Substance Abuse Assessments.
- The right arrow graphic, 'Show the next Substance Abuse Assessment', displays the next Substance Abuse Assessments.

Treatment Plans Pane

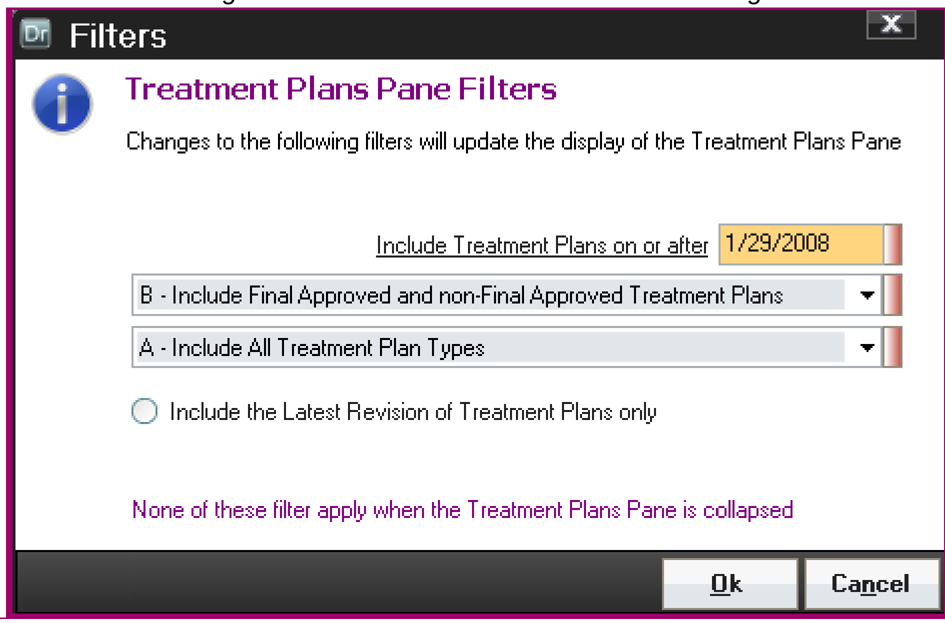
Figure 98 - Treatment Plans Pane



- The Treatment Plans Pane displays the Client's Treatment Plans from the Client Chart, including the following information:
  - 'Type' - displays 'TP' for Treatment Plans, 'ITP' for Interim Treatment Plans or 'ISL' for Interim Service Logs.
  - 'Description' - displays 'Treatment Plan', 'Interim Treatment Plan' or 'Interim Service Log'.
  - 'Begin' - the begin date of the Treatment Plan, Interim Treatment Plan or Interim Service Log.
  - 'Revised' - the date on which the Treatment Plan, Interim Treatment Plan or Interim Service Log was last revised.
  - 'End' - the end date of the Treatment Plan, Interim Treatment Plan or Interim Service Log.
  - 'F/A' - displays as a blue color-filled box if the Treatment Plan, Interim Treatment Plan or Interim Service Log has been Final Approved. Otherwise, displays as an empty box.
- The 'Show Filters' graphic displays the Treatment Plans Pane Filters Dialog (shown on the next page).
- Double-clicking on a Treatment Plan displays it in the Treatment Plan Detail Dialog (shown later in this section).

Treatment Plans Pane - Cont'd

Figure 99 - Treatment Plans Pane Filters Dialog



- The Treatment Plans Pane Filters Dialog allows for specifying the default data that displays to the Pane. Note that the past number of months to display Treatment Plans for is specified in Staff Preferences, which overrides the settings made in the Treatment Plans Pane Filters Dialog. For example, a filter option can be set to display Final Approved and non-Final Approved Treatment Plans and to include all Treatment Plan Types, but if Staff Preferences are set to display Treatment Plans for the past month, only those Treatment Plans completed in the last month are displayed.

- The 'Include Treatment Plans on or after' date is required.

- The first dropdown field is required and can be set to one of the following options:
  - 'B - Include Final Approved and non-Final Approved Treatment Plans'
  - 'F - Include Final Approved Treatment Plans only'
  - 'N - Include non-Final Approved Treatment Plans only'

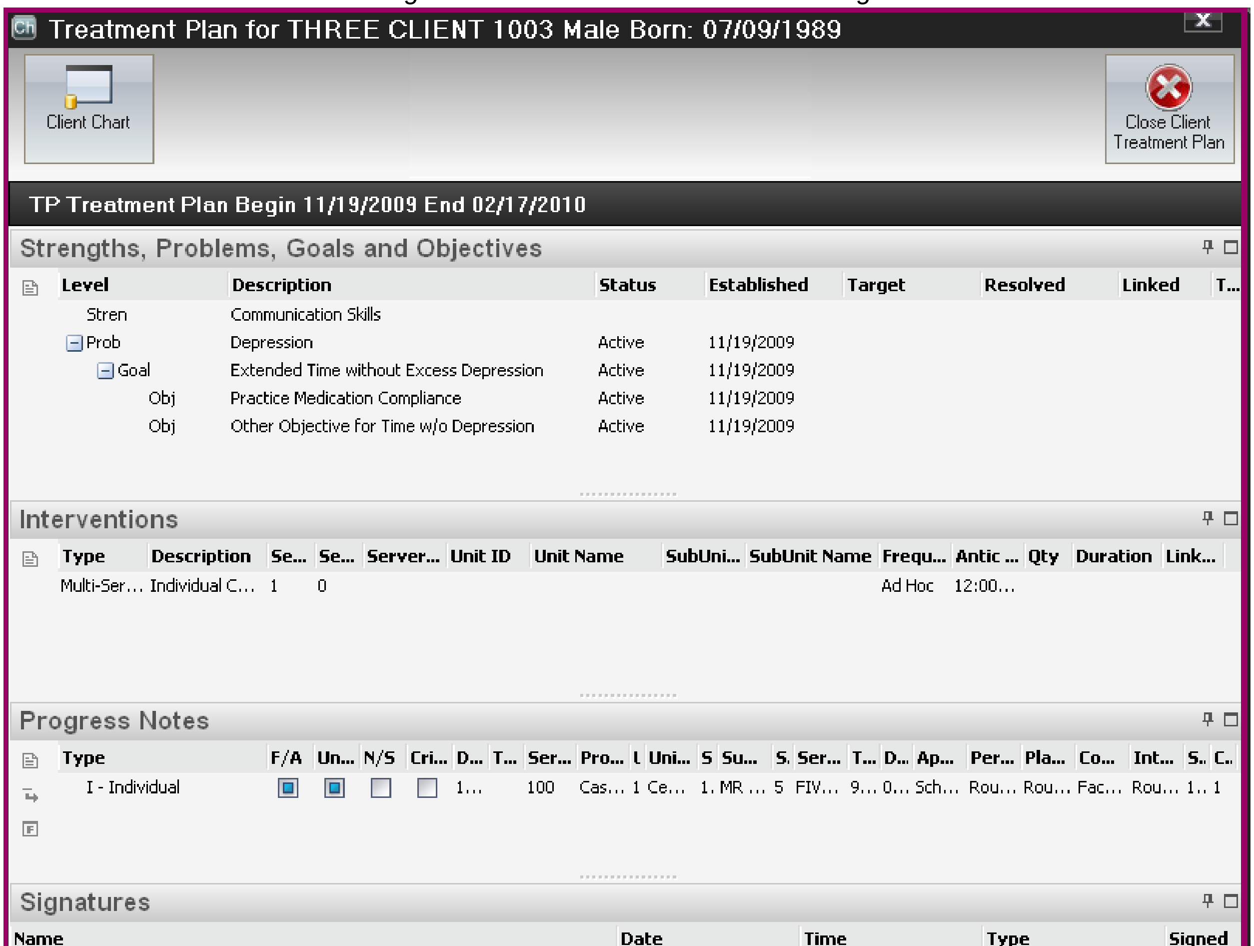
- The second dropdown field is required and can be set to one of the following options:
  - 'A - Include All Treatment Plan Types'
  - 'F - Include Full Treatment Plans only'
  - 'S - Include Interim Service Logs only'
  - 'T - Include Interim Treatment Plans only'

- If the 'Include the Latest Revision of Treatment Plans only' field is active, only the most recent revision of the Treatment Plan, Interim Treatment Plan or Service Log is initially displayed to the Pane; otherwise, all revisions are displayed.

- Note that none of the filters apply when the Treatment Plans Pane is collapsed.

Treatment Plans Pane - Cont'd

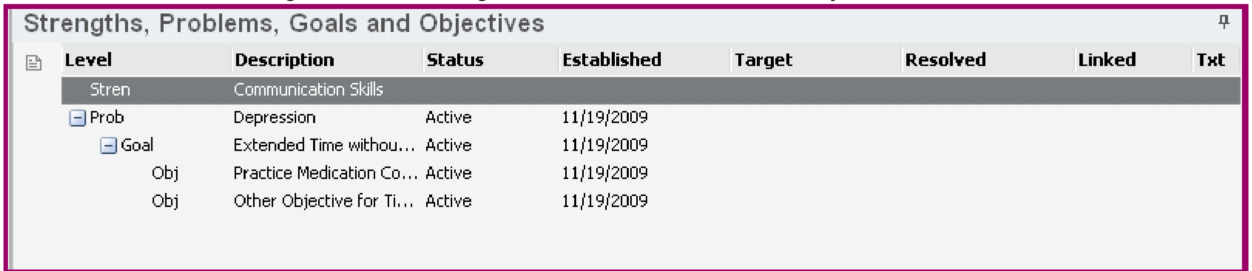
Figure 100 - Treatment Plan Detail Dialog



- The Treatment Plan Detail Dialog is displayed when a Treatment Plan is double-clicked from the Treatment Plans Pane.
- The 'Client Chart' button launches the Treatment Plan in the Client Chart View in the Assessment and Treatment Plan Products.
- The 'Close Client Treatment Plan' button closes the Treatment Plan Detail Dialog.
- Four Panes are available to display in the Treatment Plan Detail Dialog (and behave in the same manner as all Panes in the Homepage Products):
  - Strengths, Problems, Goals and Objectives
  - Interventions
  - Progress Notes
  - Signatures

Treatment Plans Pane - Cont'd

Figure 101 - Strengths, Problems, Goals and Objectives Pane



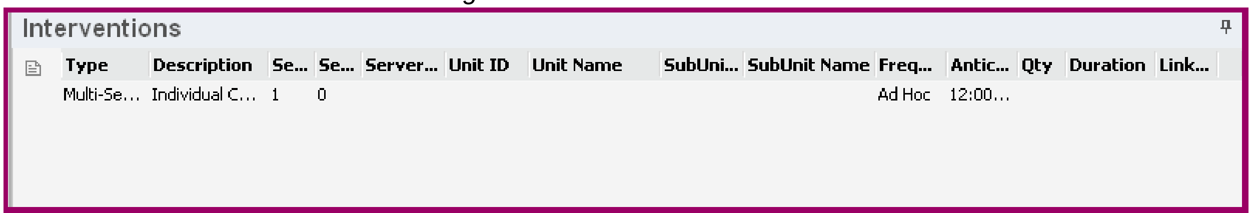
Strengths, Problems, Goals and Objectives

Level	Description	Status	Established	Target	Resolved	Linked	Txt
Stren	Communication Skills						
Prob	Depression	Active	11/19/2009				
Goal	Extended Time withou...	Active	11/19/2009				
Obj	Practice Medication Co...	Active	11/19/2009				
Obj	Other Objective for Ti...	Active	11/19/2009				

- The Strengths, Problems, Goals and Objectives Pane can display the following information for the selected Treatment Plan:
  - Show Text/Hide Text icon - displays or hides details about the Strengths, Problems, Goals and Objectives.
  - Level (i.e., Strength, Problem, Goal or Objective)
  - Description
  - Status
  - Established Date
  - Target Date
  - Resolved Date
  - Linked
  - Text

Treatment Plans Pane - Cont'd

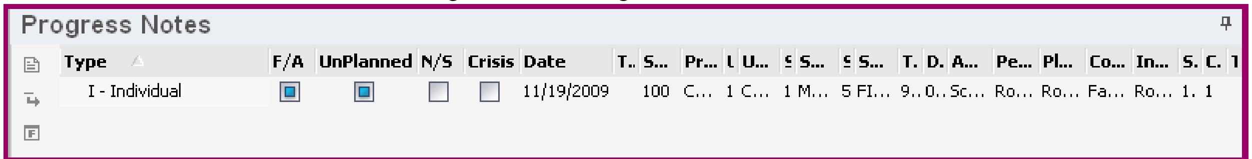
Figure 102 - Interventions Pane



- The Interventions Pane can display the following information for the selected Treatment Plan:
  - Show Text/Hide Text icon - displays or hides Intervention details.
  - 'Type' - the Intervention Type
  - 'Description' - the Description of the Intervention
  - 'Sequence'
  - 'Server ID'
  - 'Server Name'
  - 'Unit ID'
  - 'Unit Name'
  - 'SubUnit ID'
  - 'SubUnit Name'
  - 'Frequency'
  - 'Antic Start'
  - 'Qty'
  - 'Duration'
  - 'Linked' - displays a blue box if the Intervention is linked
  - Intervention Text

Treatment Plans Pane - Cont'd

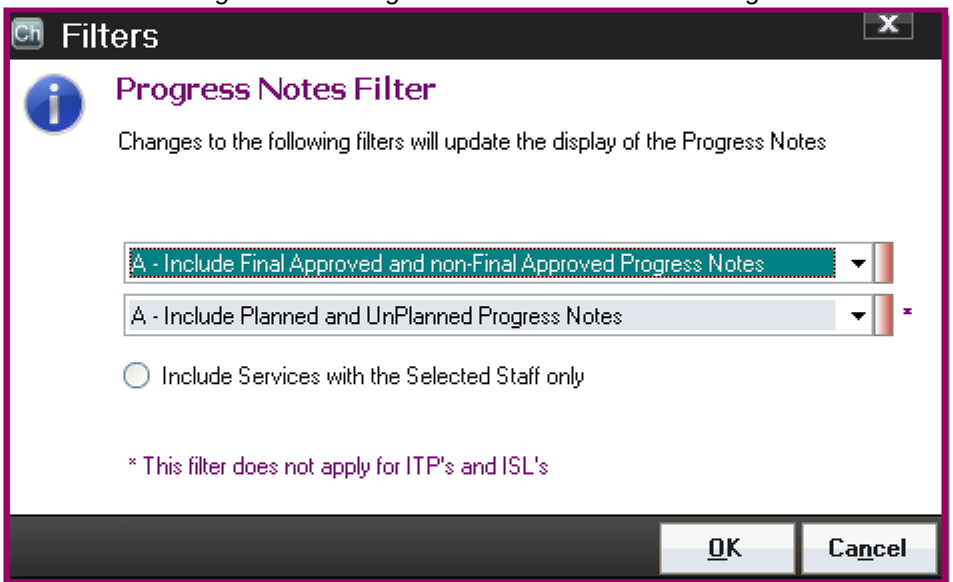
Figure 103 - Progress Notes Pane



- The Progress Notes Pane can display the following information for the selected Treatment Plan:
  - Show Text/Hide Text icon - displays or hides Progress Note details.
  - Show/Hide the Detail for Group and Multi-Service Progress Notes icon - displays or hides Group and Multi-Service Progress Note details.
  - Filters icon - displays the Progress Notes Filter Dialog (shown on the next page).
  - 'Type' - the Progress Note Type
  - 'F/A' - displays a blue box if the Progress Note has been Final Approved
  - 'UnPlanned' - displays a blue box for Unplanned Progress Notes
  - 'N/S' - displays a blue box for No-Show Interventions
  - 'Crisis' - displays a blue box for Crisis Intervention
  - 'Date' - start date
  - 'Thru' - through date
  - 'Service Code'
  - 'Progress Note'
  - 'Unit ID'
  - 'Unit Name'
  - 'SubUnit ID'
  - 'SubUnit Name'
  - 'Server ID'
  - 'Server Name'
  - 'Time'
  - 'Duration'
  - 'Appointment Type'
  - 'Person Served'
  - 'Place of Service'
  - 'Contact Type'
  - 'Intensity'
  - 'Server Time'
  - 'Clients Present'
  - 'Txt'

Treatment Plans Pane - Cont'd

Figure 104 - Progress Notes Pane Filters Dialog



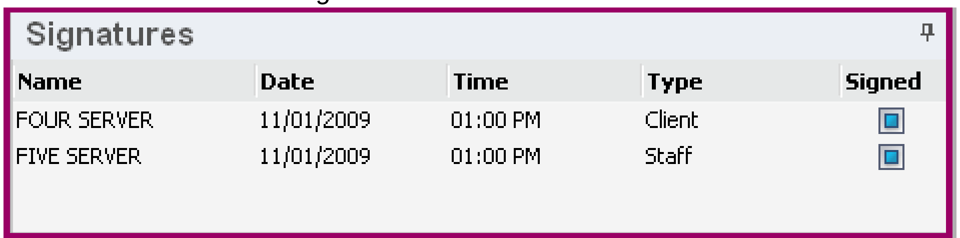
- The Progress Notes Pane can be filtered according to Final Approved Status as follows:
  - 'A - Include Final Approved and non-Final Approved Progress Notes'
  - 'F - Include Final Approved Progress Notes only'
  - 'N - Include non-Final Approved Progress Notes only'

- The Progress Notes Pane can also be filtered according to Planned/UnPlanned status as follows:
  - 'A - Planned and UnPlanned Progress Notes'
  - 'P - Include Planned Progress Notes Only'
  - 'U - Include UnPlanned Progress Notes Only'

- If the 'Include Services with the Selected Staff only' field is active, only Services for the Staff selected in the Staff Panel are displayed in the Progress Notes Pane. Note that this filter does not apply for Interim Treatment Plans (ITPs) and Interim Service Logs (ISLs).

Treatment Plans Pane - Cont'd

Figure 105 - Interventions Pane



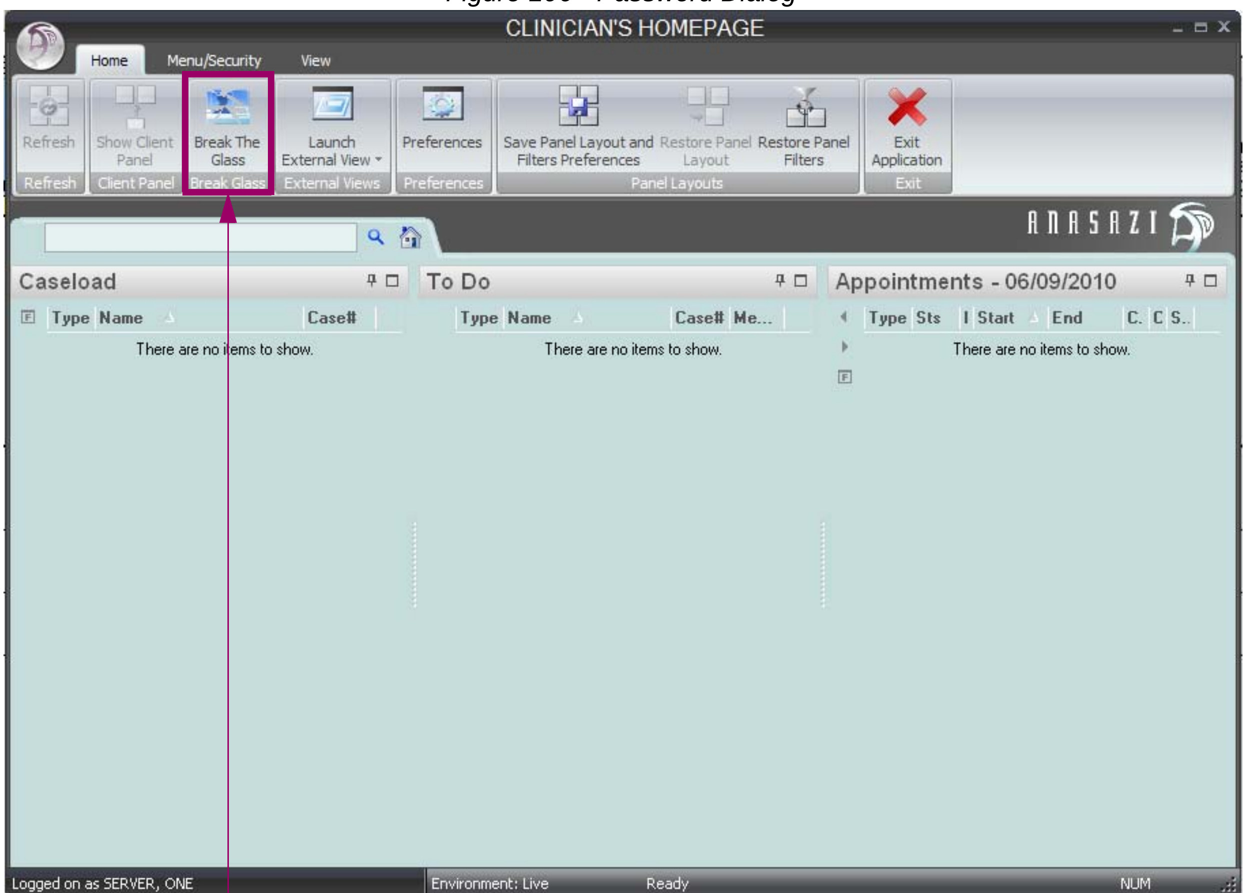
Signatures

Name	Date	Time	Type	Signed
FOUR SERVER	11/01/2009	01:00 PM	Client	
FIVE SERVER	11/01/2009	01:00 PM	Staff	

- The Signatures Pane can display the following information for the selected Treatment Plan:
  - Show Text/Hide Text icon - displays or hides Signature details.
  - 'Name' - the name of the signer.
  - 'Date' - the date of the signature
  - 'Time' - the time of the signature
  - 'Type' - the Signature Type (i.e, Client or Staff)
  - 'Signed' - displays a blue box if the noted Staff or Client has signed the Treatment Plan

BREAK THE GLASS

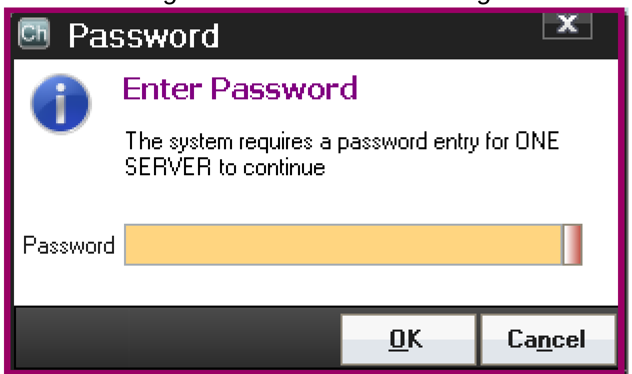
Figure 106 - Password Dialog



- Clicking the ‘Break The Glass’ button on the Home Tab of the Ribbon Bar initiates the Break the Glass process.

Break the Glass Dialog

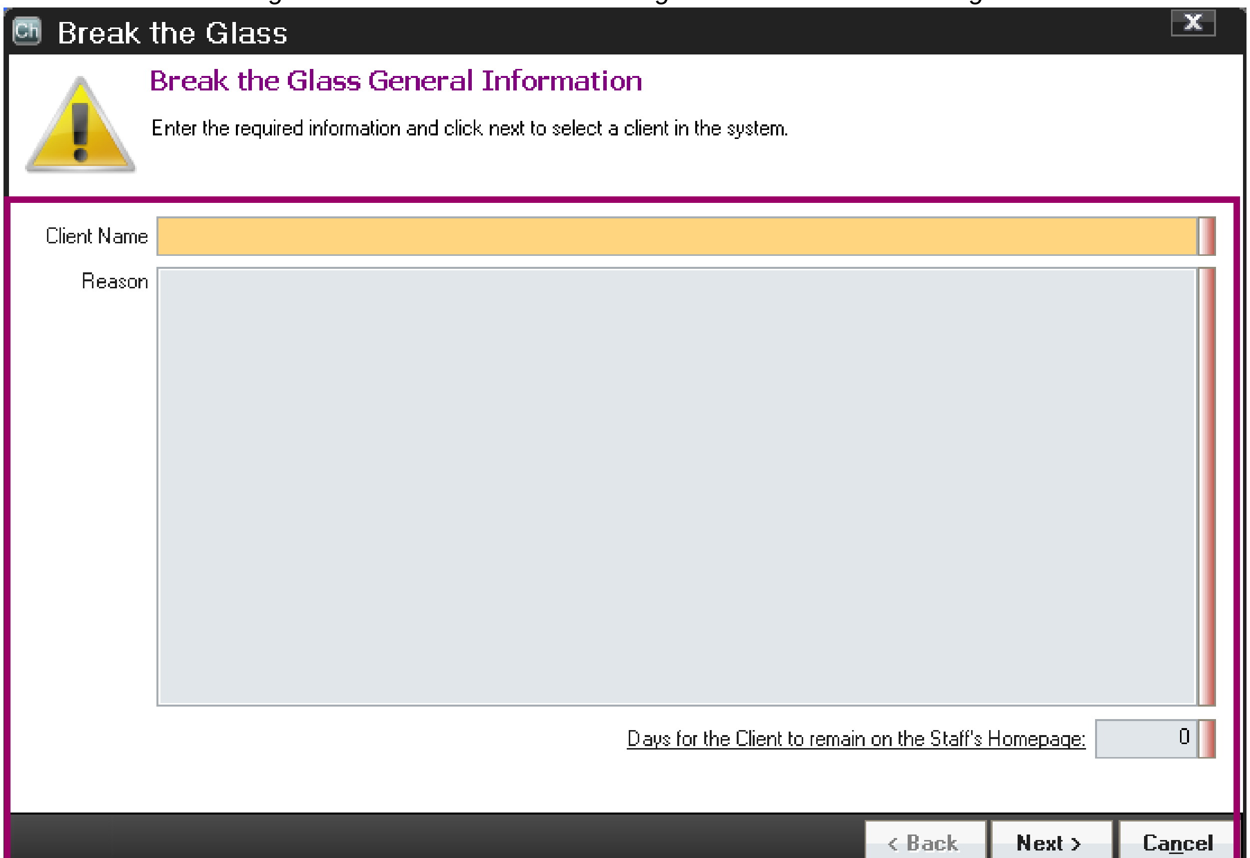
Figure 107 - Password Dialog



- When the 'Break the Glass' button is clicked from the Home Tab Page of the Ribbon Bar, the Password Prompt displays. The password for the Logged-in Staff is required.

Break the Glass Dialog - Cont'd

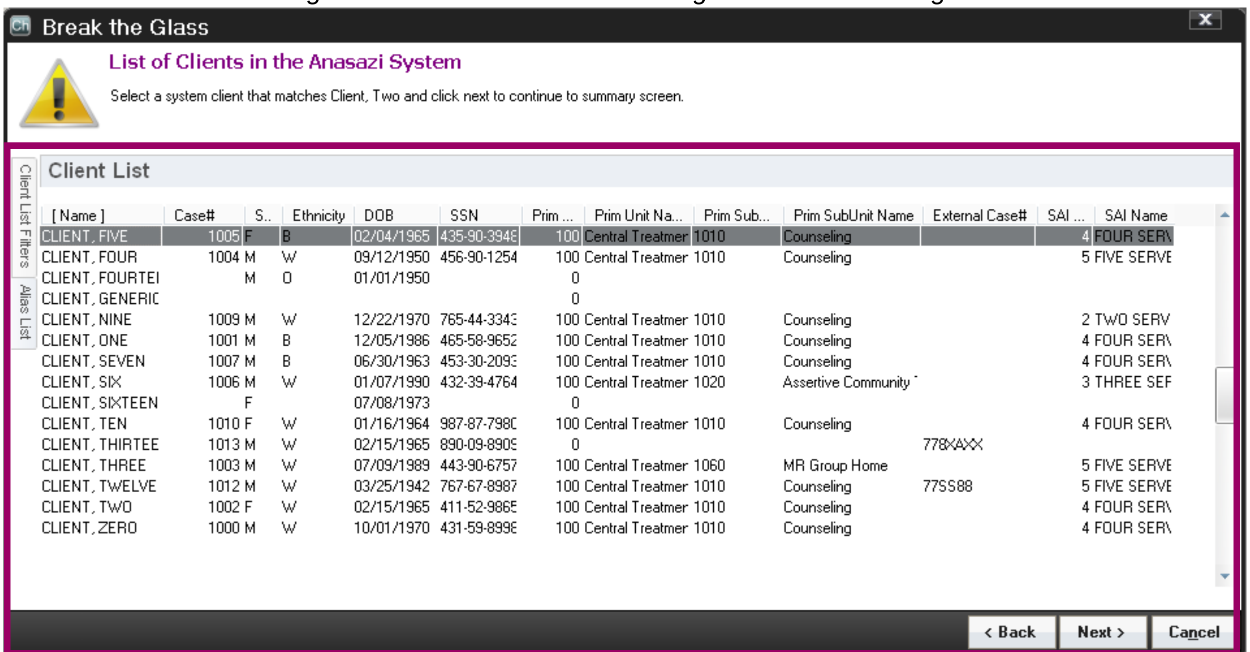
Figure 108 - Break the Glass Dialog - General Information Page



- After the Staff's password has successfully been entered, the Break the Glass Dialog appears, displaying the General Information Page.
- The 'Client Name' is required, is a free-form text field, and is used to enter the Client's name for whom the Glass is to be Broken.
- The 'Reason' is required and is used to enter the reason for Breaking the Glass.
- The 'Days for the Client to remain on the Staff's Homepage' field is required and may not be greater than the number entered in the 'Max. days to keep Client on Homepage when Breaking the Glass' field in Security Parameters Setup.
- The 'Back' button is shadowed in the General Information Page.
- Clicking the 'Next' button saves the record to the system and displays a list of Clients in the Anasazi System (shown on the next page).
- The 'Cancel' button cancels the Break the Glass action and returns focus to the Homepage.

Break the Glass Dialog - Cont’d

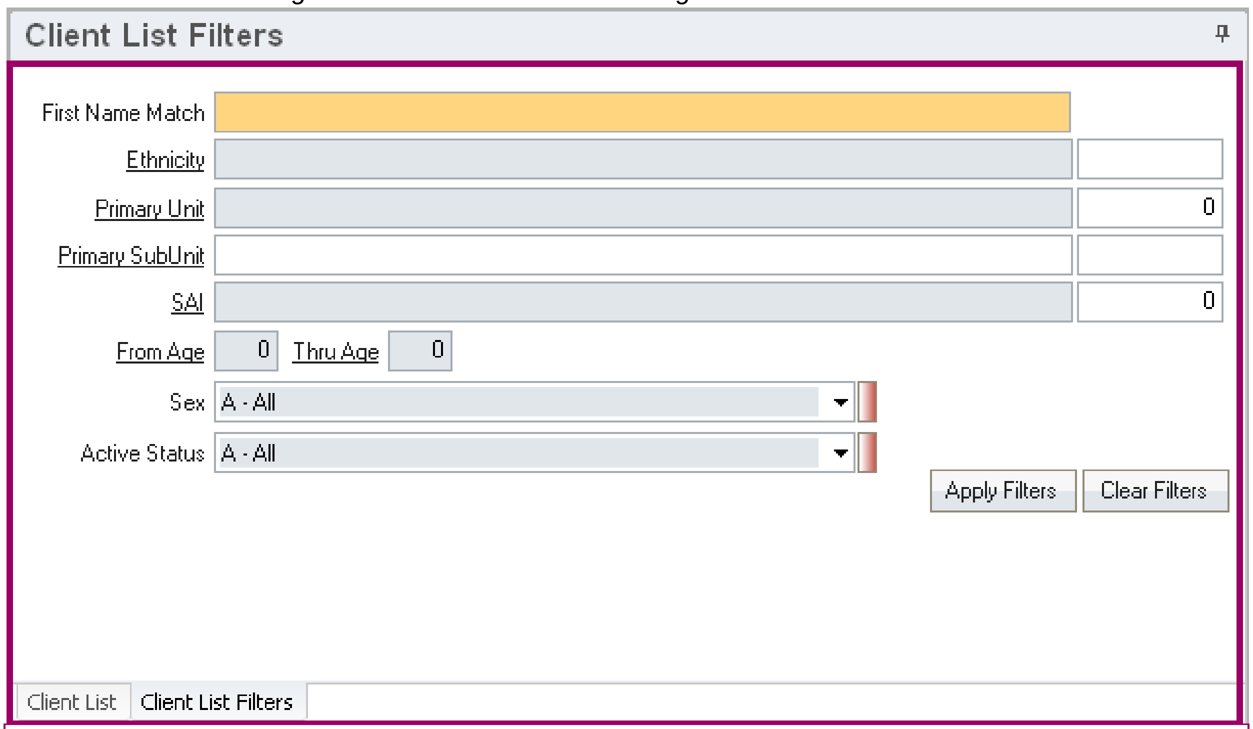
Figure 109 - Break the Glass Dialog - List of Clients Page



- The Client List displays all Clients in the Anasazi System without regard to the Logged-in Staff’s security settings.
- The ‘Client List Filters Tab on the left side of the Client List displays the Client List Filters Pane, which allows for selecting filters to constraining the list.
- The ‘Alias List’ Tab on the left side of the Client List displays the Alias List, which allows for searching Clients based on their Alias name.
- The ‘Back’ button returns the display to the General Information Page, which allows for editing the general information. Note: If the ‘Client Name’, ‘Reason’ or ‘Days for the Client to remain on the Staff’s Homepage’ fields are changed in the General Information Page, the corresponding record in the Break the Glass Data File is updated.
- The ‘Next’ button displays the Breaking the Glass Summary Page (shown later in this section).
- The ‘Cancel’ button cancels the Break the Glass action and returns focus to the Homepage.

Break the Glass Dialog - Cont’d

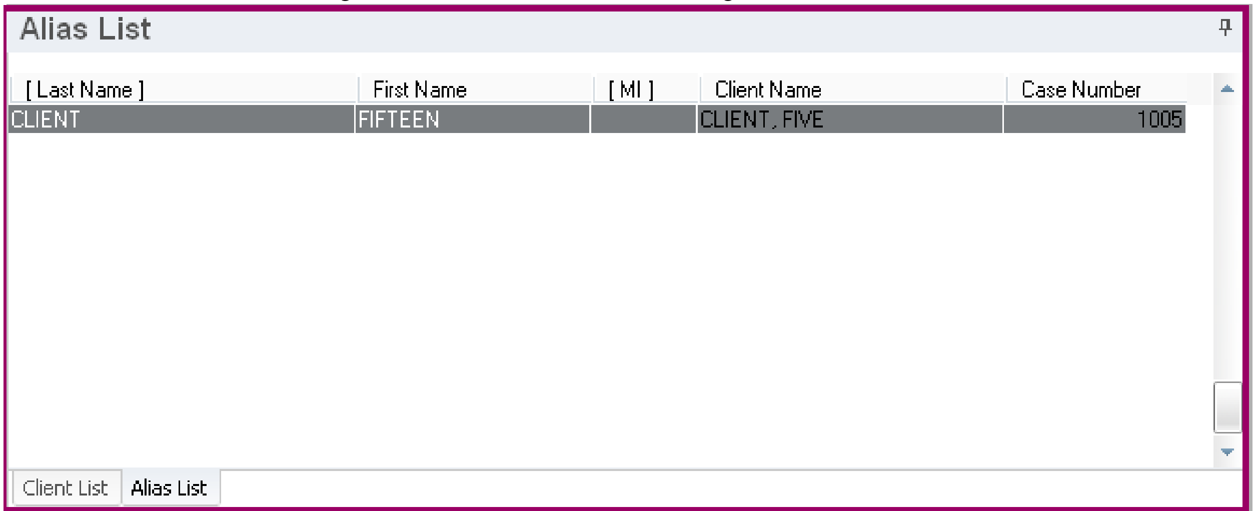
Figure 110 - Break the Glass Dialog - Client List Filters Pane



- The ‘First Name Match’ field is a free-form text field to allow for entry of the Client’s First Name. It can be a maximum of 166 characters in length.
- The ‘Ethnicity’ is selected from the Ethnicities Lookup.
- The ‘Primary Unit’ is selected from the Units Lookup.
- The ‘Primary SubUnit’ field is available if a value is in the ‘Primary Unit’ field and is selected from the SubUnits Lookup.
- The ‘SAI’ is selected from the Staff Lookup.
- The ‘From Age’ and ‘Thru Age’ fields can each be 1 to 3 digits in length and can be entered directly into the fields or selected from the Number Dialog.
- The ‘Sex’ can be ‘A - All’, ‘F - Female’ or ‘M - Male’.
- The ‘Active Status’ can be set to ‘A - All’, ‘N - Inactive’ or ‘Y - Active’.
- The ‘Apply Filters’ button applies the selected filters to the Client List.
- The ’Clear Filters’ button clears the filters from the Client List Filters Pane and from the Client List.

Break the Glass Dialog - Cont'd

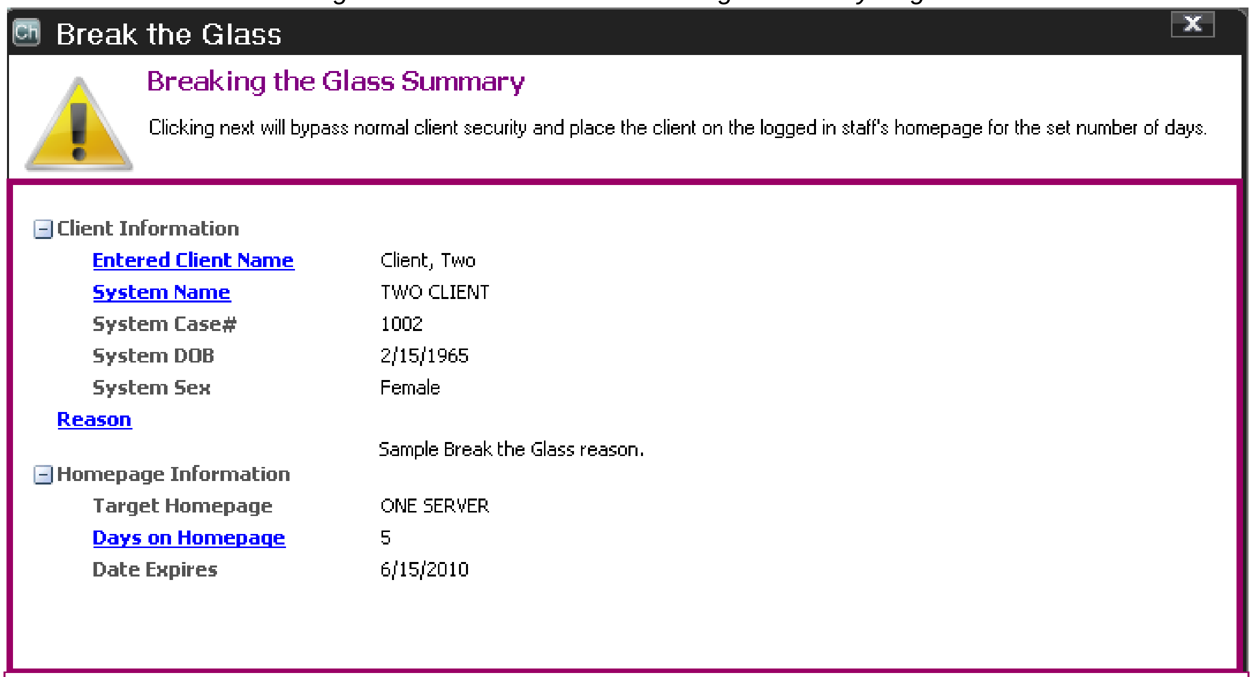
Figure 111 - Break the Glass Dialog - Alias List Pane



- The Alias List displays the Clients who have aliases defined in their Demographic Assessment.

Break the Glass Dialog - Cont'd

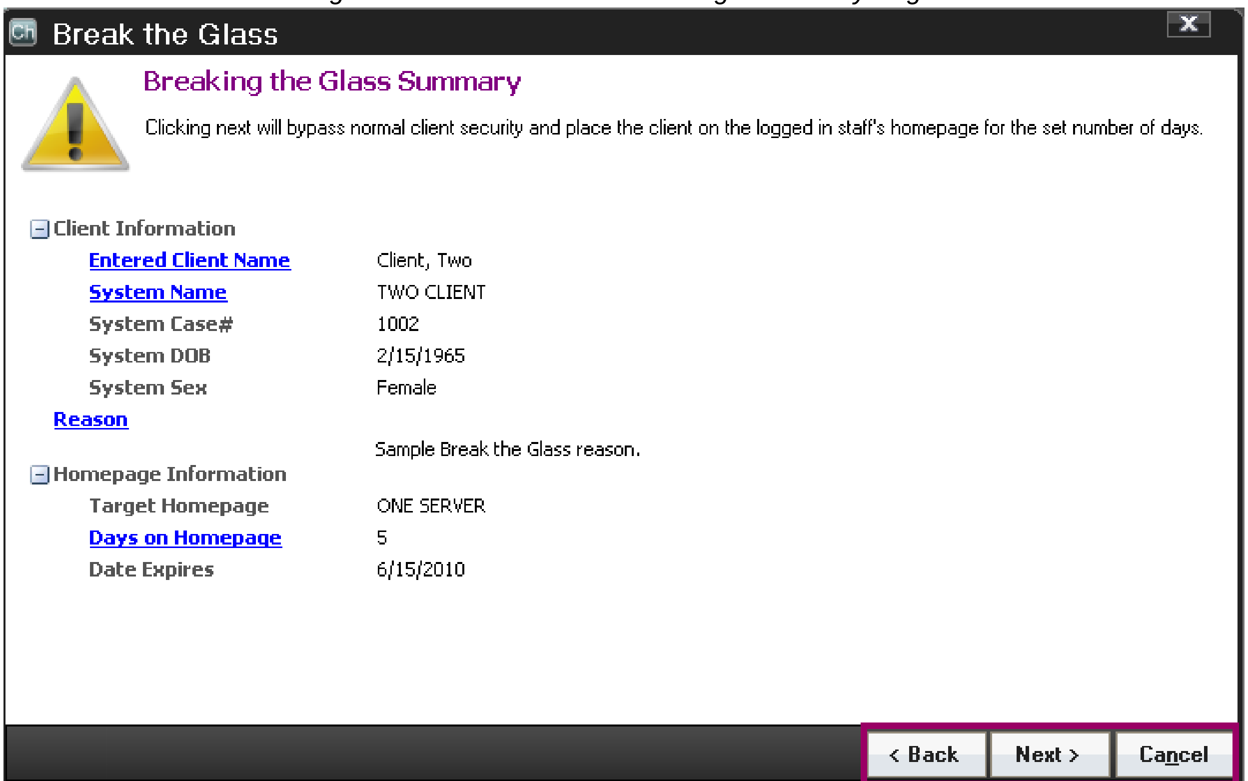
Figure 112 - Break the Glass Dialog - Summary Page



- The Breaking the Glass Summary Page displays Client and Homepage information for the Client and Staff:
    - 'Entered Client Name' - displays the Client's name as entered on the Break the Glass General Information Page. Clicking this link returns focus to the Break the Glass General Information Page and allows for editing.
    - 'System Name' - displays the Client's name as it exists in the system. Clicking this link returns focus to the List of Clients Page and allows for editing.
    - 'System Case #' - displays the Client's Anasazi System Case Number.
    - 'System DOB' - displays the Client's date of birth as defined in the Anasazi System.
    - 'System Sex' - displays the Client's sex as defined in the Anasazi System.
    - 'Reason' - displays the reason for breaking the glass as entered on the Break the Glass General Information Page. Clicking this link returns focus to the Break the Glass General Information Page and allows for editing.
    - 'Target Homepage' - displays the name of the Staff whose Homepage the Client is being added to.
    - 'Days on Homepage' - displays the number of days the Client will remain on the Staff's Homepage. Clicking this link returns focus to the Break the Glass General Information Page and allows for editing.
    - 'Date Expires' - displays the date on which the Break the Glass access will expire.

Break the Glass Dialog - Cont'd

Figure 113 - Break the Glass Dialog - Summary Page



- The 'Back' button returns focus to the List of Clients in the Anasazi System Page.
- The 'Next' button places the Client on the Logged-in Staff's Caseload.
- The 'Cancel' button cancels the Break the Glass action.

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