

The background of the slide features a hand in a white lab coat pointing at a futuristic digital interface. The interface consists of various icons and data visualizations, including a large circular gauge, a gear, a first aid kit, a person icon, a syringe, a magnifying glass, a pill, and a network diagram. The overall color scheme is blue and white, with a prominent orange and white diagonal graphic on the left side.

Sandata

Get more right from the start

Connecticut Department of Mental Health and
Addiction Services

Electronic Visit Verification (EVV) Provider Training
Client Module

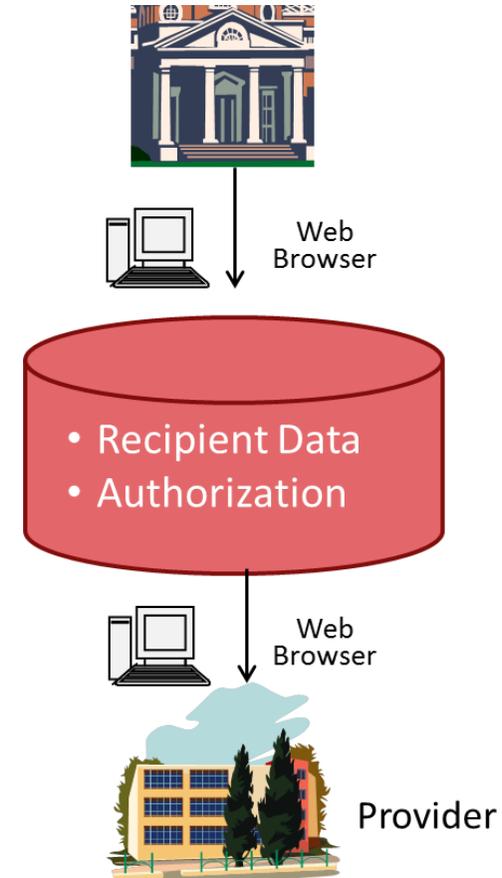


Agenda

- Locating Clients
- Using Client Search Functions
- Client Record Navigation
- Payor & Authorization Details
- Adding Exclusions & Attributes

Notification of a New Client

- ▶ Provider Agencies will be notified by DMHAS when they are assigned a new client.
- ▶ Client and authorization information needed to schedule services are provided via the MMIS system.

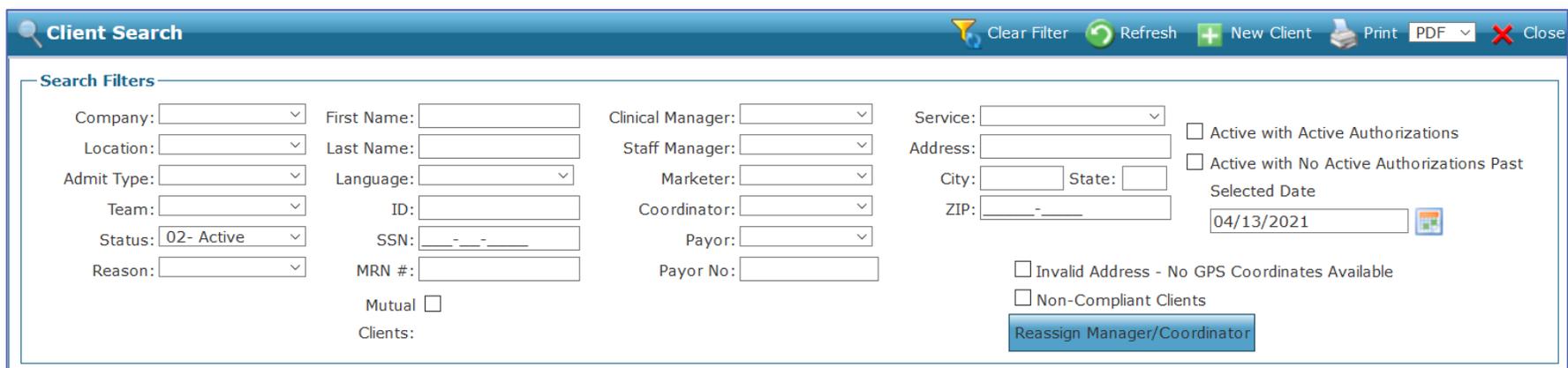


Client Search Screen

Clicking the Client module from the menu bar opens a *Client Search* screen.

Key Search Filters include:

- ▶ Name
- ▶ Coordinator
- ▶ Location (branch office)
- ▶ Admit Type

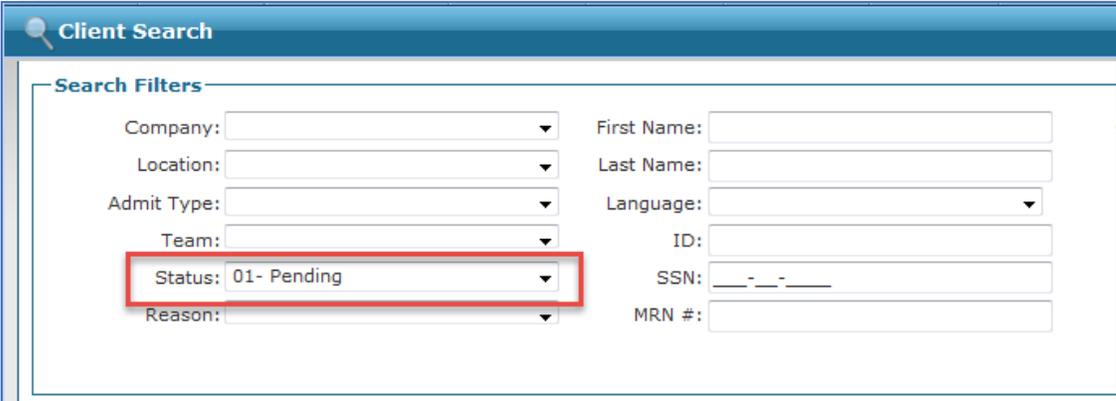


The screenshot displays the 'Client Search' interface. At the top, there is a search bar and a toolbar with buttons for 'Clear Filter', 'Refresh', 'New Client', 'Print', 'PDF', and 'Close'. Below the toolbar is the 'Search Filters' section, which is organized into several columns of input fields and checkboxes. The first column contains dropdown menus for 'Company', 'Location', 'Admit Type', 'Team', 'Status' (set to '02- Active'), and 'Reason'. The second column has text input fields for 'First Name', 'Last Name', 'Language', 'ID', 'SSN', and 'MRN #'. The third column includes dropdown menus for 'Clinical Manager', 'Staff Manager', 'Marketer', 'Coordinator', 'Payor', and 'Payor No.'. The fourth column features dropdown menus for 'Service', 'City', and 'State', along with a 'ZIP' field. To the right of these fields are several checkboxes: 'Active with Active Authorizations', 'Active with No Active Authorizations Past Selected Date' (with a date field set to '04/13/2021'), 'Invalid Address - No GPS Coordinates Available', and 'Non-Compliant Clients'. At the bottom right, there is a blue button labeled 'Reassign Manager/Coordinator'. A 'Mutual Clients' checkbox is also present at the bottom left of the filter area.



Locating New Client

- ▶ New clients appear with a status of **01- Pending**.
- ▶ New clients are assigned a unique internal Santrax Client ID, used in certain call scenarios. This ID is found on the *Client Address* report.
- ▶ Best Practice: Search regularly for client(s) with a Pending status.
- ▶ New clients need to be activated.

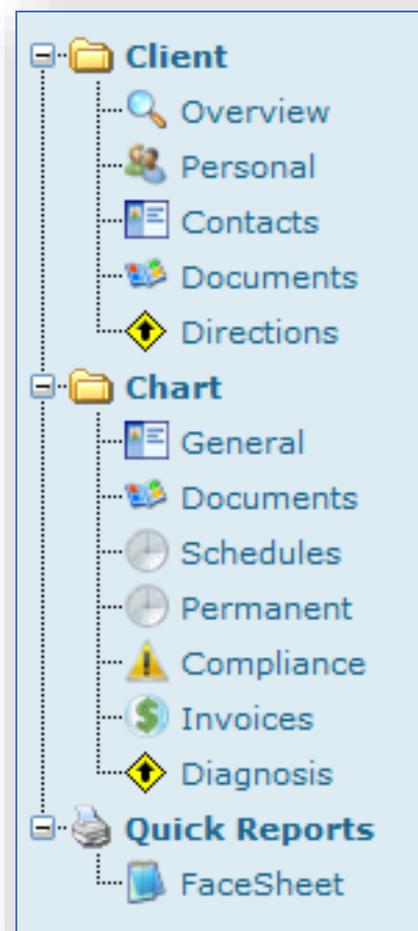


The screenshot displays a 'Client Search' window with a 'Search Filters' section. The filters are arranged in two columns. The left column includes: Company (dropdown), Location (dropdown), Admit Type (dropdown), Team (dropdown), Status (dropdown, highlighted with a red box and containing '01- Pending'), and Reason (dropdown). The right column includes: First Name (text input), Last Name (text input), Language (dropdown), ID (text input), SSN (text input with dashes), and MRN # (text input).



Client Record Navigation

- ▶ The Electronic Health Record (EHR) organizes information into folders for easy navigation
- ▶ The Client folder contains personal and demographic information
- ▶ The Chart folder contains information relating to the payer, services, authorizations, diagnosis, etc.



Client Folder > Overview Screen

The Overview screen provides a summary of information from other screens in the client record.

The screenshot shows the Overview screen for client CASH, JOAN T. (H-0000351-ABP). The interface includes a navigation menu on the left and several data panels on the right. The 'Overview' option in the navigation menu is highlighted with a red box. The data panels contain the following information:

- Personal:** CASH, JOAN T., H-0000351-ABP
- Current/Billing Address:** 33 MAPLE ST, 444, WATURBURY, CT 067230000, GPS Coordinates: 41.490327, -73.054543, Home:(564) 515-6414
- Admission and Other Dates:** ROC: 06/14/2016-Tue, SOC: 05/29/2016-Sun, EOC: Born: **/**/1943-Sat
- Admission Manager:** (Empty field)
- Referral Source:** (Empty field)
- Physician:** (Empty field)
- Referrer Contact:** (Empty field)
- Contacts:** (Empty field)
- Current Certification:** (Empty field)
- Directions:** (Empty field)



Client Folder > Personal Screen

- ▶ Information in the **Personal** screen is a combination of read-only and editable fields. Fields populated by data feed are greyed-out.

CASH, JOAN T. (H-0000351-ABP) Coord: 548-01, dj

Save Facesheet Close

Client

- Overview
- Personal**
- Contacts
- Documents
- Directions

Chart

- General
- Documents
- Schedules
- Permanent
- Compliance
- Invoices
- Diagnosis

Quick Reports

- FaceSheet

Name

Title: [dropdown]
First Name: JOAN
Middle Init: T
* Last Name: CASH
Suffix: [dropdown]

Current/Billing Address

Name: [greyed-out]
Address: 33 MAPLE ST
444 Apt.: [greyed-out]
City: WATURBURY
State: CT Zip: 06723-0000
County: [dropdown]
Region: [dropdown]
Type: [dropdown]
Evacuation Zone: [dropdown]

Other Information

Birthdate: 05/22/1943
SSN: [greyed-out]
Marital: [dropdown]
Gender: 2- Female
Language: [dropdown]
Ethnicity: [dropdown]
Religion: [dropdown]

Phone Numbers, Etc.

Home: (564)515-6414
Mobile: () - -
Work: () - - Ext -
Fax: () - -
Email: [greyed-out] Mobile:

Staff Excluded from Client

Agency Designations

Disaster Lvl: [dropdown]
DNR: [greyed-out]

Attributes

Name	Properties	Req?
------	------------	------



Client Folder > Personal Screen

- ▶ Verify the client info and validate the Home phone number
 - A maximum of three additional phone numbers can be entered for use with EVV calling.

The screenshot displays a software interface for a client named John Carter (HOU-0201701-TCB). The interface is divided into several sections:

- Name:** Title (dropdown), First Name: John, Middle Init (text), Last Name: Carter (with an asterisk), Suffix (dropdown).
- Other Information:** Birthdate: 06/17/1955, SSN (text), Marital (dropdown), Gender: 0- Unknown (dropdown), Language: E- English (dropdown), Ethnicity: H- Hispanic (dropdown), Religion (dropdown).
- Current/Billing Address:** Name (text), Address: 215 5th Avenue, Apt. (text), City: New York, State: NY, Zip: 10011-____, County: New York, Region (dropdown), Type (text), Evacuation Zone (text).
- Phone Numbers, Etc. (Pop-up):** Home: (212)555-1212, Mobile: () - - , Work: () - - Ext , Fax: () - - .
- Images (0/0):** A section for uploading images, currently empty.

The left sidebar contains a navigation menu with categories: Client (Overview, Personal, Contacts, Medical, Documents, Directions) and Chart (General, Documents, Schedules, Permanent, Compliance, Diagnosis, Quick Reports, FaceSheet). The top right of the window has buttons for Save, Facesheet, and Close.



Client Folder > Personal Screen

- ▶ Updating client phone numbers (agency updates)
 - The Home phone number is populated by the data feed from DMHAS/Gainwell.
 - Corrections to a client's home telephone number must be requested by contacting:
 - Ann Marie Luongo, Advanced Behavioral Health
 - [860-704-6211](tel:860-704-6211) or aluongo@abhct.com
 - The Mobile, Work & Fax numbers are available for the agency to add other phone numbers they may have for the client.
 - These phone numbers will not be overwritten by the data feeds.
 - All phone number fields are evaluated by the EVV system.

Phone Numbers, Etc.

Home: (212)555-1212

Mobile: () -

Work: () - Ext

Fax: () -

Delivered by DMHAS/Gainwell data feed

Agency phone numbers for clients can be added here (will not be overwritten by DMHAS data).



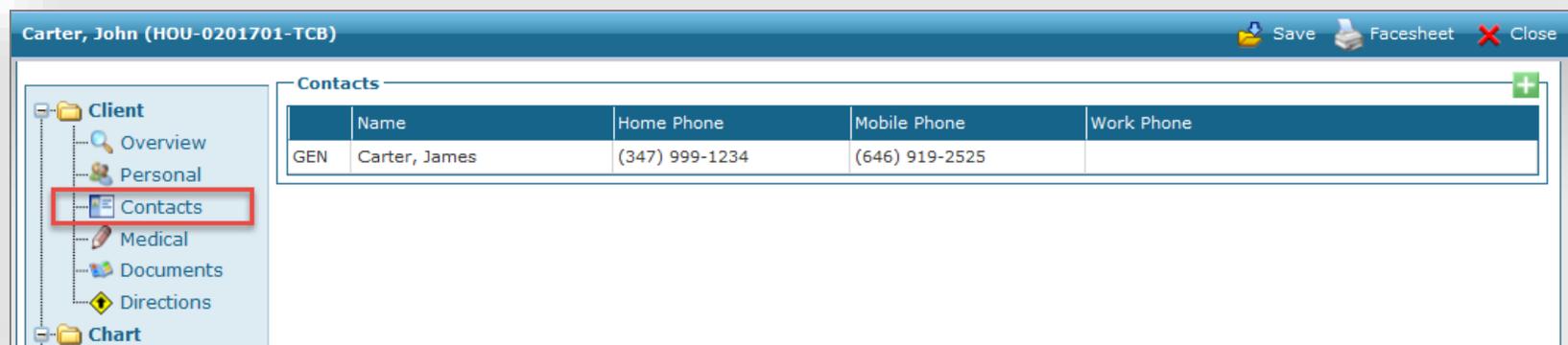
Client Folder > Contacts Screen

Multiple contacts can be entered for each client.

- ▶ Contacts can be family members, pharmacists, clergy etc.

Double-click one of the contacts listed to display the contact's information.

Click the green plus sign (+) to add new contacts.



The screenshot shows a software window titled "Carter, John (HOU-0201701-TCB)". The window has a blue header bar with "Save", "Facesheet", and "Close" buttons. On the left is a sidebar with a tree view containing "Client", "Overview", "Personal", "Contacts" (highlighted with a red box), "Medical", "Documents", "Directions", and "Chart". The main content area is titled "Contacts" and contains a table with the following data:

	Name	Home Phone	Mobile Phone	Work Phone
GEN	Carter, James	(347) 999-1234	(646) 919-2525	

A green plus sign (+) is located in the top right corner of the table area.



Client Folder > Directions Screen

Built in Google Maps functionality

Carter, John (HOU-0201701-TCB) Refresh Print Close

Directions

From: 10 Nathan D Perlman Pl, ny, ny 10003 **To:** 215 5th Avenue, New York, NY 10011 [Get Directions!](#)

A 10 Nathan D Perlman Pl, New York, NY 10003, USA

1.2 mi. About 10 mins

1. Head southwest on Nathan D Perlman Pl toward E 15th St 108 ft
2. Turn right onto E 15th St 0.2 mi
3. Turn right onto 3rd Ave 0.6 mi
4. Turn left onto E 27th St 0.4 mi
5. Turn left onto 5th Ave 230 ft
Destination will be on the left

B 215 5th Ave, New York, NY 10010, USA

Map data ©2016 Google

Map Satellite

Google Map Google Directions



Chart Folder > General Screen

The General screen contains admission details including:

- ▶ Approved Services
- ▶ Admission Status
- ▶ Payer and authorization information

Client
Carter, John (NY-0201701-MCD) Coord: 525-Brown, Fred

Admission Ties And Dates
Company: 1- NYC Care
Location: NY- New York City
ROC: 03/25/2016
SOC: 03/25/2016
EOC:

Managers/Etc.
Staff Manager:
Clinical Manager:
Coordinator: Brown, Fred
MRN #:
Marketer:
Team:
Admit Type: MCD- Medicaid

Admission Status
02-Active
No Secondary Status Selected
As Of: 03/25/2016

Admission Source

Pay Source

Referral Source

Physicians
Primary:
Secondary:
Certifying:

Services

Code	Description	Began	Ended	Case Seq #
PC	Personal Care	03/25/16		

Payors

Payor	Customer No.
1 Medicaid	988756

Client Navigation: Overview, Personal, Contacts, Medical, Documents, Directions, Chart (General, Documents, Schedules, Permanent, Compliance, Diagnosis), Quick Reports, FaceSheet



Chart Folder > General Screen

Activating New Clients

1. New clients can be found by running a search with the **Status** filtered for 'Pending' on the *Client Search* screen.
2. Open the client's record and go to the *Admission Status* section of the **General** screen.
3. Click the blue arrow next to the admission status.
4. Confirm the status as **Active** and set the *Start of Care* date.
5. Click **Save** in upper right corner.

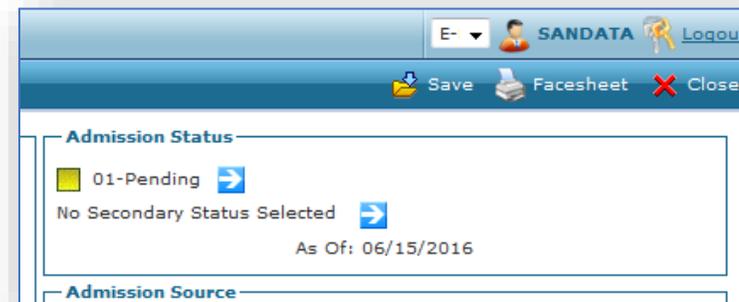


Chart Folder > General Screen

Admission Ties and Dates

- ▶ Located in the top left section of the General screen
- ▶ Can access Historian and Notes
- ▶ Displays the Company, Location to which the client has been assigned, plus the ROC, SOC and EOC
 - Referral of Care
 - Start of Care
 - End of Care



The screenshot shows a software interface for a client named Carter, John (NY-0201701-RCU). The interface is divided into two main sections. On the left is a navigation menu with a tree structure under the 'Client' folder, including 'Overview', 'Personal', 'Contacts', 'Medical', 'Documents', and 'Directions'. Below this is the 'Chart' folder, with 'General' selected. On the right is the 'Admission Ties And Dates' form, which is highlighted with a red border. The form contains the following fields: 'Company' (dropdown menu showing '1- NYC Care'), 'Location' (dropdown menu showing 'NY- New York City'), 'ROC' (text input field showing '03/25/2016'), 'SOC' (text input field showing '03/25/2016' with a calendar icon), and 'EOC' (text input field with a calendar icon). The top of the interface shows the client's name and a coordinator's name: 'Coord: S23-Brown, Freu'.

Chart Folder > General Screen

Manager/Etc.

Coordinators can be assigned to each client to allow for additional report filtering.

ADAMS, MARY (H-0000006-CHP) Coord: STX-Choo, Jimmy

Client

- Overview
- Personal
- Contacts
- Documents
- Directions
- Chart**
- General
- Documents

Admission Ties And Dates

Company: 4490- CT Home Care Agency 1

Location: H- Hartford

ROC:

SOC: 06/01/2016

EOC:

Managers/Etc.

Staff Manager:

Clinical Manager:

Coordinator: Choo, Jimmy

MRN #:

Other Contact:

Team:

Admit Type: CHP- CT Home Care Program

MCO Care Coord.:



Client Folder > General Screen

- ▶ Adding Agency-specific client identifiers
 - The EVV system uses the client's Medicaid ID as their primary ID.
 - If your agency has an additional agency-specific ID for the client which you wish to receive back in the 835, that ID needs to be added to the client record as their 'MRN' number.
 - This data point is then included in the 837 submission and returned in the 835 back to the agency.

The screenshot displays the 'General' screen for a client named ADAMS, MARY (H-0000006-CHP). The interface includes a navigation pane on the left with options like Overview, Personal, Contacts, Documents, Directions, and Chart. The 'General' option is selected and highlighted. The main content area is divided into two sections: 'Admission Ties And Dates' and 'Managers/Etc.'. The 'Admission Ties And Dates' section contains fields for Company (4490- CT Home Care Agency 1), Location (H- Hartford), ROC, SOC (06/01/2016), and EOC. The 'Managers/Etc.' section includes fields for Staff Manager, Clinical Manager, Coordinator (Choo, Jimmy), MRN # (highlighted with a red box), Other Contact, Team, Admit Type (CHP- CT Home Care Program), and MCO Care Coord. The MRN # field is currently empty.

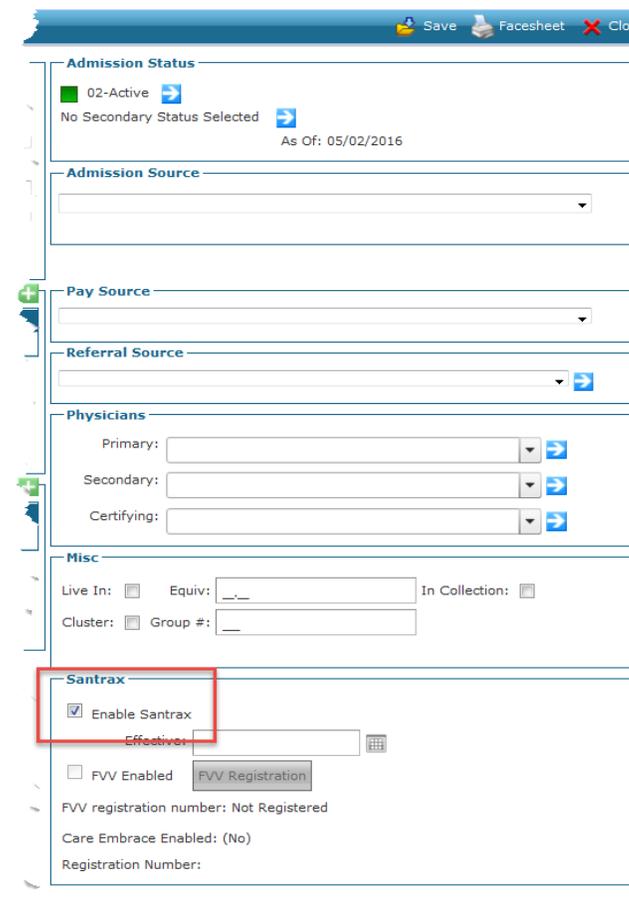


Chart Folder > General Screen

Santrax

Confirm that the **Enable Santrax** box is checked. Check the box and **Save** the record if **that box** is not checked.

Effective date is not required.



The screenshot displays a software interface for a 'Chart Folder > General Screen'. The interface is organized into several sections:

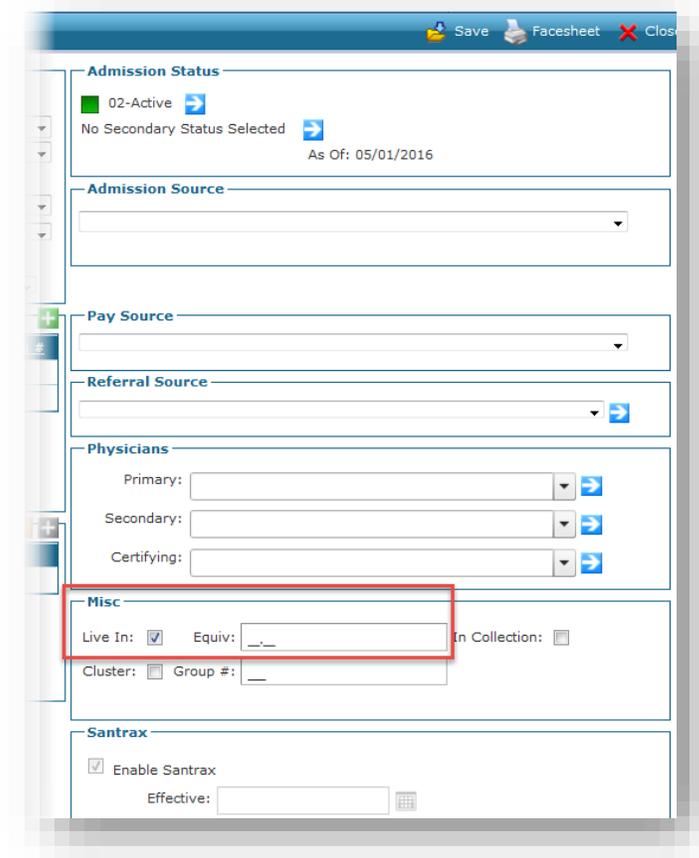
- Admission Status:** Shows '02-Active' with a dropdown arrow, 'No Secondary Status Selected' with a dropdown arrow, and 'As Of: 05/02/2016'.
- Admission Source:** A dropdown menu.
- Pay Source:** A dropdown menu.
- Referral Source:** A dropdown menu with a dropdown arrow.
- Physicians:** Three dropdown menus labeled 'Primary:', 'Secondary:', and 'Certifying:'.
- Misc:** Includes checkboxes for 'Live In:', 'Cluster:', and 'In Collection:', along with an 'Equiv:' field and a 'Group #' field.
- Santrax:** This section is highlighted with a red box. It contains a checked checkbox for 'Enable Santrax', an 'Effective:' field, an 'FVV Enabled' checkbox, and an 'FVV Registration' button. Below this, it shows 'FVV registration number: Not Registered', 'Care Embrace Enabled: (No)', and 'Registration Number:'.



Chart Folder > General Screen

Live- In

For 24 hour live-in clients, check the *Live-In* box and enter the equivalent pay hrs.



The screenshot displays a software interface for a 'Chart Folder > General Screen'. The interface includes several sections:

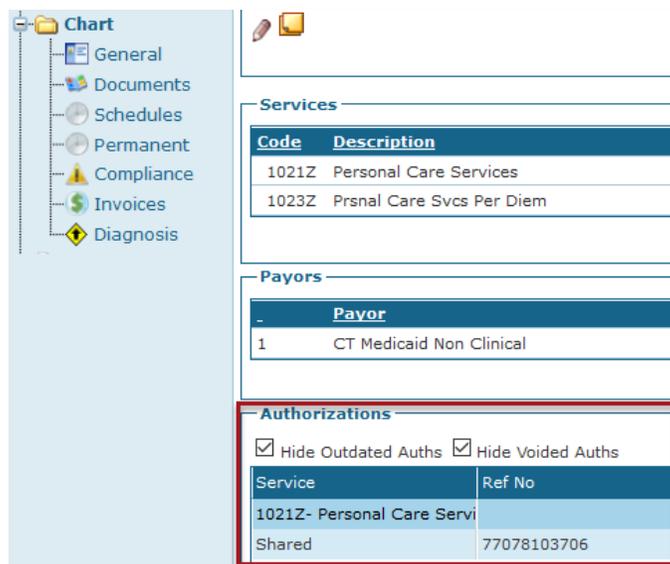
- Admission Status:** Shows '02-Active' with a right arrow, 'No Secondary Status Selected' with a right arrow, and 'As Of: 05/01/2016'.
- Admission Source:** A dropdown menu.
- Pay Source:** A dropdown menu.
- Referral Source:** A dropdown menu with a right arrow.
- Physicians:** Fields for 'Primary:', 'Secondary:', and 'Certifying:', each with a dropdown menu and a right arrow.
- Misc:** A section highlighted with a red box, containing:
 - 'Live In: Equiv: ___ In Collection:
 - 'Cluster: Group #: ___'
- Santrax:** Contains 'Enable Santrax' (checked) and 'Effective: ___'.



Chart Folder > General Screen

Payors and Authorizations

- ▶ Authorizations are accessed via the **Authorization** panel on the **General** screen.
 - Double-click the Authorization line to open the details



The screenshot displays the 'Chart' folder interface. On the left is a navigation tree with 'General' selected. The main area is divided into three panels: 'Services', 'Payors', and 'Authorizations'. The 'Services' panel contains a table with two rows. The 'Payors' panel contains a table with one row. The 'Authorizations' panel is highlighted with a red border and contains two checkboxes and a table with one row.

Code	Description
1021Z	Personal Care Services
1023Z	Prsnal Care Svcs Per Diem

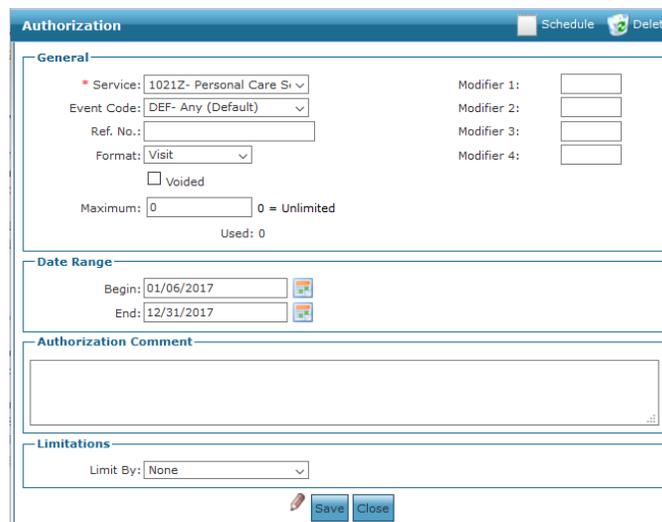
Payor
1 CT Medicaid Non Clinical

Service	Ref No
1021Z- Personal Care Servi Shared	77078103706



Chart Folder > Viewing an Authorization

- ▶ An authorization specifies limits established by the payer on the services a client may receive:
 - Service: type of visits
 - Date Range: of visits
 - Limitations: Maximum number of encounters per day/week/month



The screenshot shows a software window titled "Authorization" with a blue header bar containing "Schedule" and "Delete" icons. The form is divided into several sections:

- General:** Contains fields for "Service" (dropdown menu showing "1021Z- Personal Care S"), "Event Code" (dropdown menu showing "DEF- Any (Default)"), "Ref. No." (text input), "Format" (dropdown menu showing "Visit"), "Maximum" (text input showing "0" with "0 = Unlimited" next to it), and "Used" (text input showing "0"). There are also four "Modifier" fields (Modifier 1 through 4) on the right side.
- Date Range:** Contains "Begin" and "End" date pickers, both showing "01/06/2017" and "12/31/2017" respectively.
- Authorization Comment:** A large text area for entering comments.
- Limitations:** Contains a "Limit By" dropdown menu showing "None".

At the bottom of the form, there are "Save" and "Close" buttons.



Chart Folder > Schedule Screen

- ▶ Client's scheduled visits
- ▶ Schedules can be filtered for a specified date range
- ▶ Schedules can be edited from this screen by double-clicking on a schedule line to view the details

Client/Admission Information

Addr: 370 James St New Haven, CT 06513
Home: (718) 263-3790 Mobile: Work:
MRN #:

Client Schedules

Date From: 04/11/2021 Date To: 04/17/2021 Show Confirmed Hrs Only Hide Cancelled Events Show Client Calendar

Weekly Authorized Hrs: N/A Proposed Hrs: 0.50 Bill Hrs: 0.50 Pay Hrs: 0.42

Page size: 20 2 items in 1 pages

Date	Staff	P/T	Pos	Service	EC	P/T INP	OUTP	P/T TZ	HrsP	IN	OUT	Bill Hrs	Pay Hrs	Auth	Supplies	Status	PRN	Comments
04/12/21-Mon	Young, Charlie	T	RA	H2015	ZZ	T	17:30	17:45	T	E	0.25	17:32	17:47	0.25	0.25	N	0	02-Confirmed
04/12/21-Mon	Young, Charlie	T	RA	H0038	ZZ	T	17:45	18:00	T	E	0.25	17:47	17:57	0.25	0.17	N	0	02-Confirmed



Chart Folder > Permanent Screen

Permanent Schedule Templates

- ▶ Allows you to create up to a 2 week pattern
- ▶ Allows for different caregivers and times
- ▶ Allows for creating alternating patterns

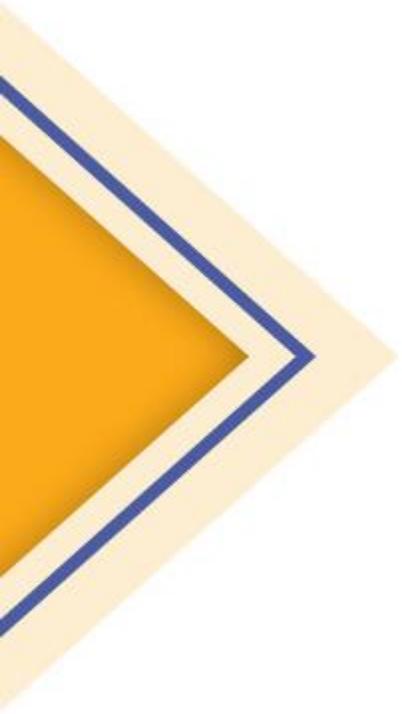
Rogers, Rose (HA-000021-MHP) Coord: wwo-Wonka, Will

Schedules - Generated Through: never generated

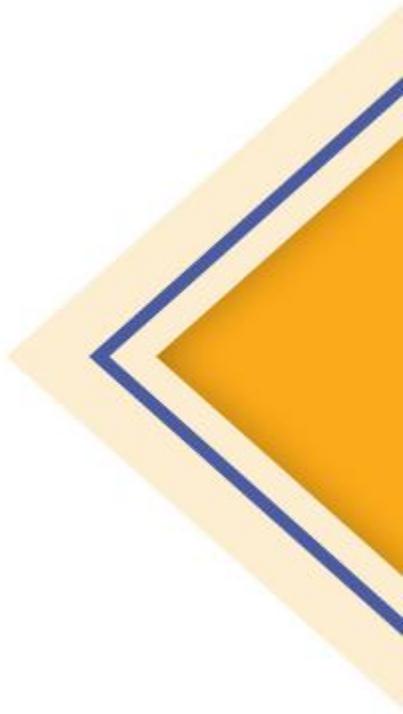
Week	Sunday	Monday	Tuesday	Wedn
1				

Details





Exclusions & attributes



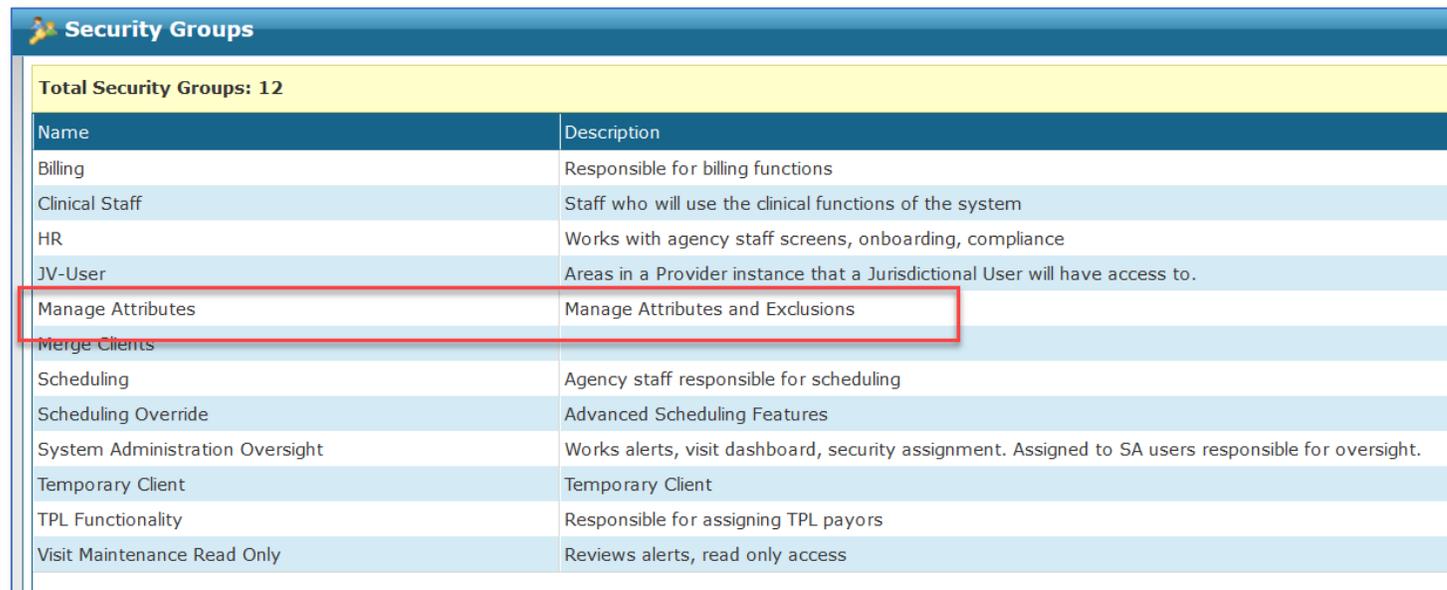
Introduction

Exclusions limit which clients are allowed to be assigned to a particular staff member. When exclusions are created in Santrax® Agency Management, users are warned or prevented from creating and editing a schedule that will conflict with the exclusions.



Exclusion Set-up: User Security

The ability to add and edit client exclusions depends on the assigned security group. The Security Group, 'Manage Attributes', is must be assigned to a user to allow access to Exclusions and Attributes by going to **Staff > Staff Profile > Security**.

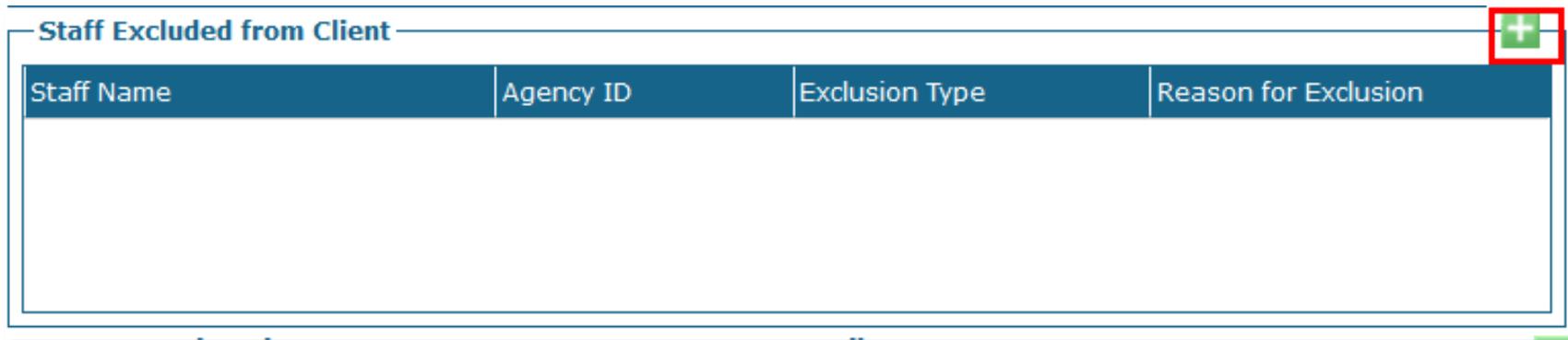


Security Groups	
Total Security Groups: 12	
Name	Description
Billing	Responsible for billing functions
Clinical Staff	Staff who will use the clinical functions of the system
HR	Works with agency staff screens, onboarding, compliance
JV-User	Areas in a Provider instance that a Jurisdictional User will have access to.
Manage Attributes	Manage Attributes and Exclusions
Merge Clients	
Scheduling	Agency staff responsible for scheduling
Scheduling Override	Advanced Scheduling Features
System Administration Oversight	Works alerts, visit dashboard, security assignment. Assigned to SA users responsible for oversight.
Temporary Client	Temporary Client
TPL Functionality	Responsible for assigning TPL payors
Visit Maintenance Read Only	Reviews alerts, read only access



Adding Exclusions

1. From the Personal screen in the client's profile, click the green plus sign to enter a staff member to be flagged as excluded from this client.



The screenshot shows a table titled "Staff Excluded from Client" with a green plus sign button in the top right corner. The table has four columns: Staff Name, Agency ID, Exclusion Type, and Reason for Exclusion. The table is currently empty.

Staff Name	Agency ID	Exclusion Type	Reason for Exclusion
------------	-----------	----------------	----------------------

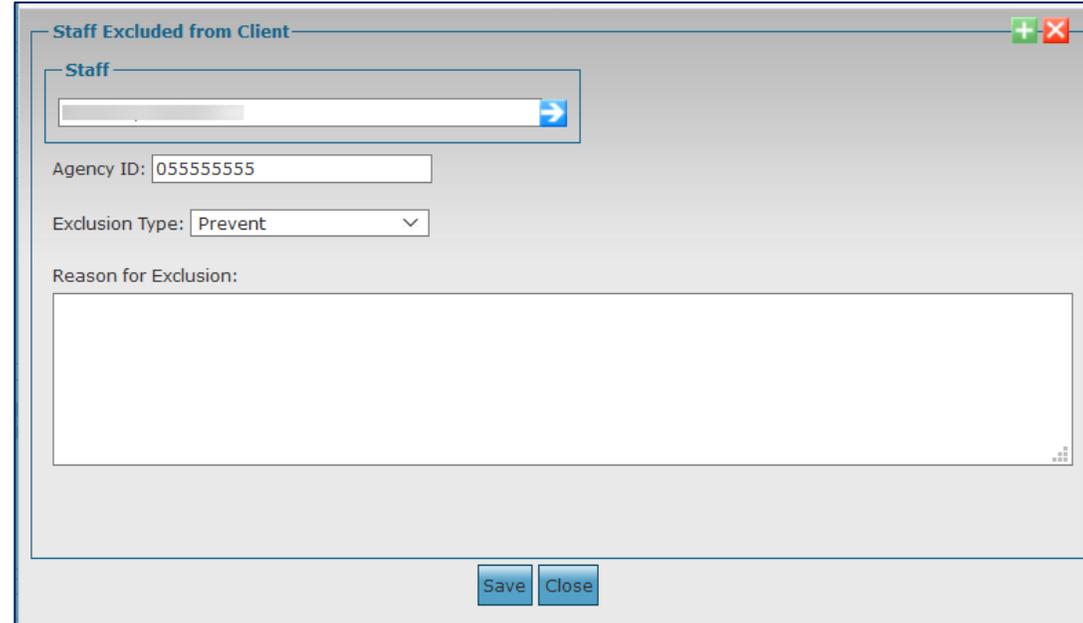
Adding Exclusions (cont'd)

2. Enter the Staff member's name by clicking the blue arrow. Use the **Staff Search** filter to select a staff member. If the staff has an **Agency ID** the ID displays.
3. Enter the **Exclusion Type (Prevent/Warn)** and the **Reason for Exclusion**
 - ▶ **Prevent** – when scheduling, a message appears informing the user a schedule cannot be created using the client and staff combination
 - ▶ **Warn** – when scheduling, a warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user can choose to override the warning message or choose another staff member.



Adding Exclusions (cont'd)

4. Click Save.



The screenshot shows a dialog box titled "Staff Excluded from Client" with a close button (X) and a help button (+) in the top right corner. The dialog contains the following fields:

- A "Staff" dropdown menu with a blue arrow button on the right.
- An "Agency ID" text box containing the value "05555555".
- An "Exclusion Type" dropdown menu with "Prevent" selected.
- A "Reason for Exclusion:" label above a large, empty text area.
- "Save" and "Close" buttons at the bottom center.

Adding Exclusions (cont'd)

5. Click **Save** at the *Personal* screen of the client's EHR.

ASHER, RONALD (H-70820163-CHP) Coord: STX-Choo, Jimmy

Name
Title: [v]
First Name: RONALD
Middle Init: [v]
Last Name: ASHER
Suffix: [v]

Other Information
Birthdate: 02/20/1940
SSN: [v]
Marital: [v]
Gender: 1- Male
Language: [v]
Ethnicity: [v]
Religion: [v]

Current/Billing Address
Name: [v]
Address: 91 Starberry Hill
City: Stamford
State: CT Zip: 06902-
County: [v]
Region: [v]
Type: [v]
Evacuation Zone: [v]

Phone Numbers, Etc.
Home: () - -
Mobile: (929)340-7575
Work: () - -
Fax: () - -
Email: [v] Mobile:

Staff Excluded from Client

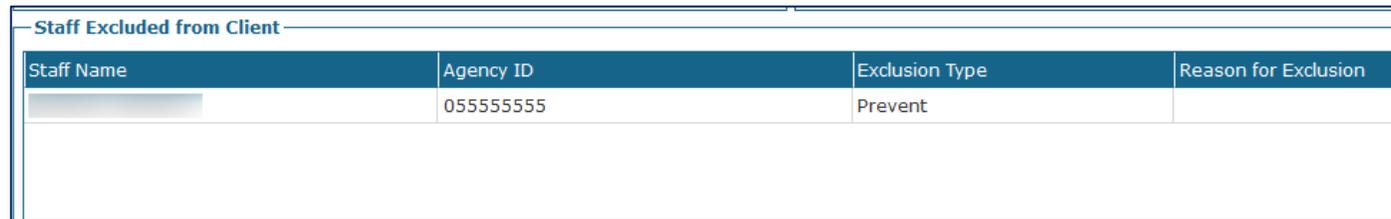
Staff Name	Agency ID	Exclusion Type	Reason for Exclusion
Bumford, Daniel D.	055555555	Prevent	

Save Facesheet Close



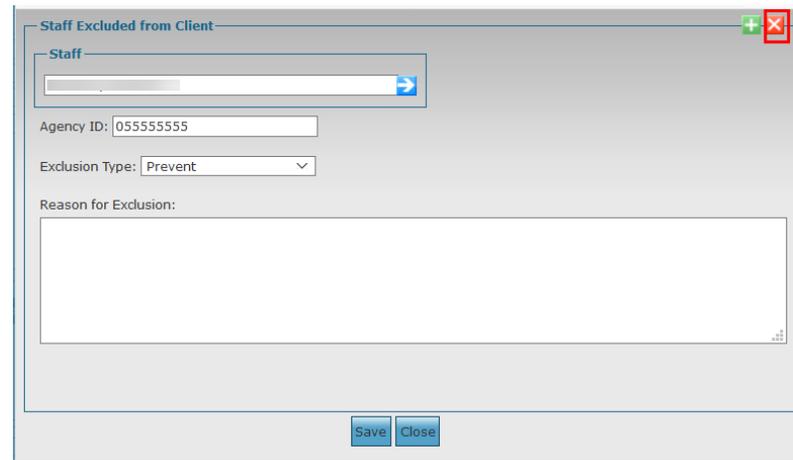
Deleting Exclusions

1. Double click an Exclusion to open the *Staff Excluded from Client* screen



Staff Name	Agency ID	Exclusion Type	Reason for Exclusion
	055555555	Prevent	

2. Click Delete.



Staff Excluded from Client

Staff:

Agency ID:

Exclusion Type:

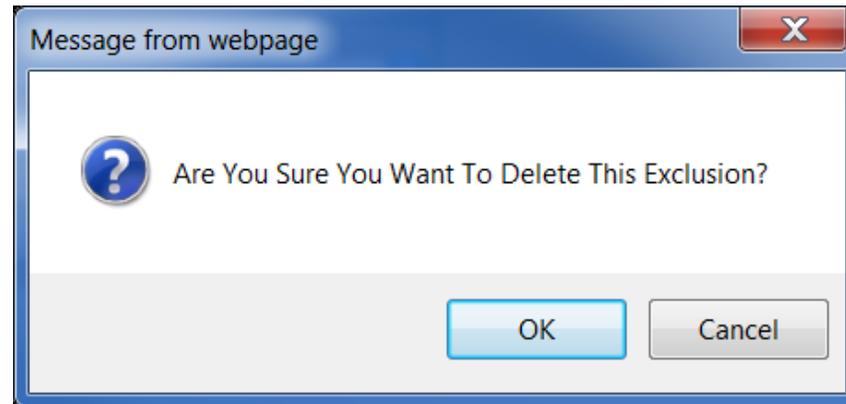
Reason for Exclusion:

Save Close



Deleting Exclusions (cont'd)

3. Click OK.



Scheduling with Exclusions

When 'Prevent' is set on an exclusion, the following messages appear if a user attempts to save or commit a schedule with a client and staff member that are excluded from each other. This also applies when a staff member is excluded from a client's payor.

- Saving from the Schedule Detail screen:

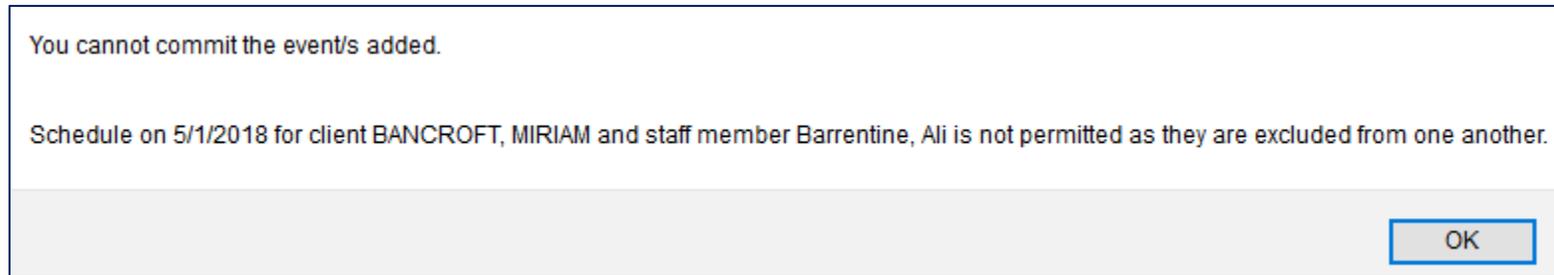
You cannot confirm this schedule.
Schedule on 5/5/2018 for client and staff member Barrentine, Ali is not permitted as they are excluded from one another.

OK



Scheduling with Exclusions (cont'd)

- Committing from the *New Events* screen:



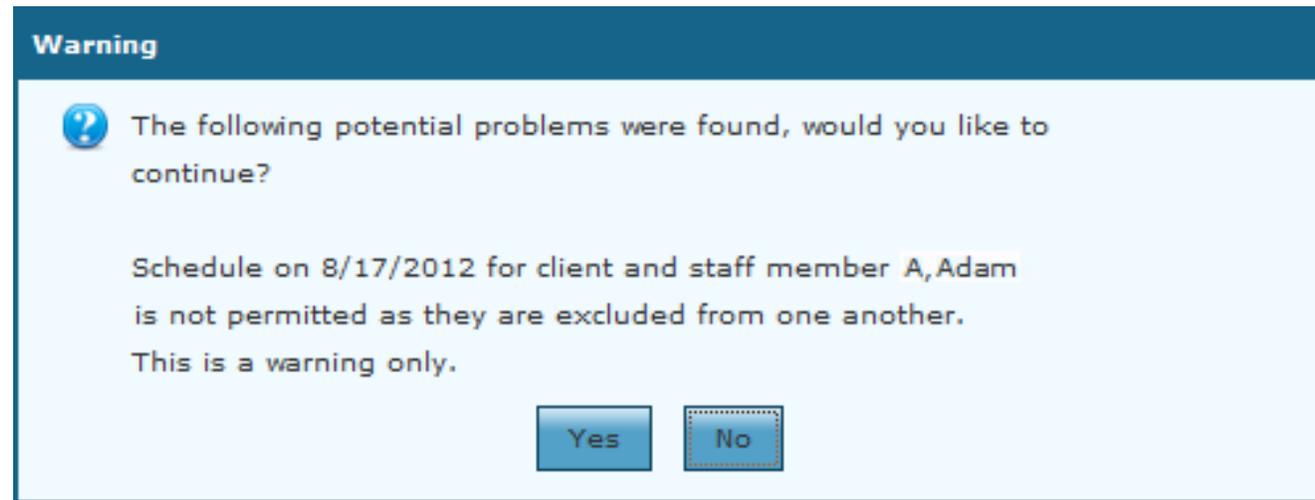
When 'Warn' is set on an exclusion, the following warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user has the option of confirming the schedule.



Scheduling with Exclusions (cont'd)

When 'Warn' is set on an exclusion, the following warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user has the option of confirming the schedule.

- Confirming from the *Schedule Detail* screen



Scheduling with Exclusions (cont'd)

- Committing from the *New Events* screen



The screenshot shows a dialog box titled "New Events" with a light blue background. The content is as follows:

```
=====
Summary
=====
The following errors have been found:

Authorization Violations: 0
Availability Conflicts: 0
Time Conflicts: 0
Compliance Violations: 0
Order Conflicts: 0
OverTime Warnings: 0

=====
Details
=====

Schedule on 8/30/2012 for client A, Anna and staff member 01, Test is not permitted as they are excluded from one another. This is a warning only.
```

At the bottom of the dialog box, there is a "Continue?" label and two buttons: "Ok" and "Cancel".



Adding Attributes

To assign attributes, from the *Personal* section of the client's EHR, locate the *Attributes* section of the screen and complete the following steps.

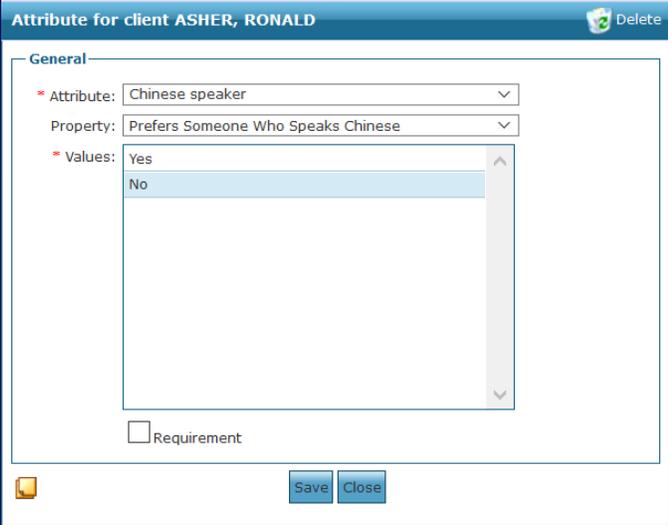
1. Click **Add (+)**.



2. Select the **Attribute**.
3. Select the **Property**.

Adding Attributes (cont'd)

4. Select the **Values**.
5. Multi-Select using the <Ctrl> or <Shift> key.
6. Select the Requirement checkbox, if applicable (selecting **Requirement** indicates the attribute must be met/satisfied).
7. Click **Save**.



Attribute for client ASHER, RONALD

General

* Attribute: Chinese speaker

Property: Prefers Someone Who Speaks Chinese

* Values: Yes
No

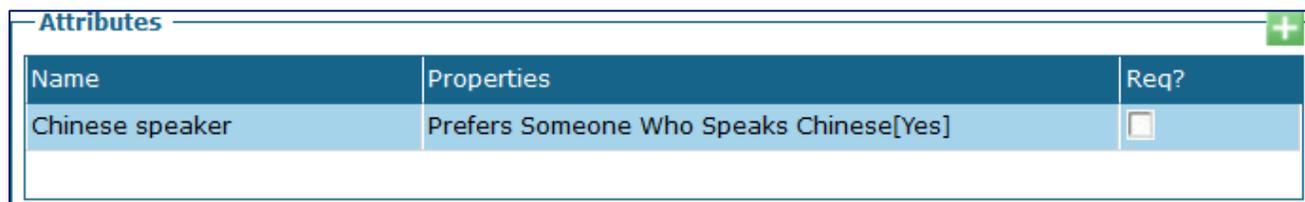
Requirement

Save Close

Deleting Attributes

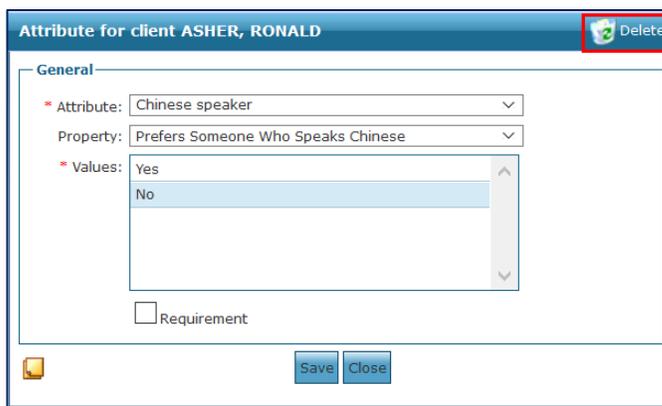
To delete a Client Attribute

1. Double click an Attribute to open the *Attribute for Client* screen.



Name	Properties	Req?
Chinese speaker	Prefers Someone Who Speaks Chinese[Yes]	<input type="checkbox"/>

2. Click Delete.



Attribute for client ASHER, RONALD

General

Attribute: Chinese speaker

Property: Prefers Someone Who Speaks Chinese

Values: Yes, No

Requirement

Save Close



Deleting Attributes (cont'd)

3. Click **Yes** to confirm the deletion.



4. Click **Save**.

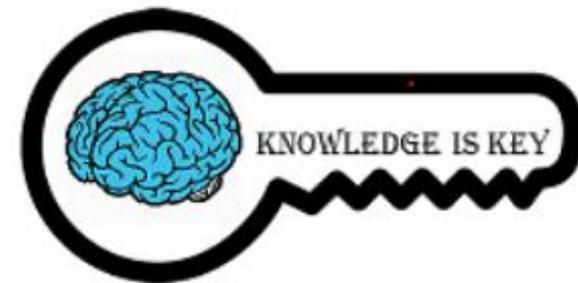
DEMONSTRATION

- ▶ Client Search
- ▶ Activating Clients
- ▶ Client Electronic Health Record
- ▶ Viewing Authorizations
- ▶ Adding Exclusions & Attributes



What You Have Learned

- ▶ Notification of a new client:
 - Access Agency will notify provider agencies when they are assigned a new client.
 - Client and Authorization will be sent to Sandata Payor Management (SPM) via a data feed.
 - Verifying pre-populated client information.
- ▶ Accessing the Client module and utilizing the search filters.
- ▶ Locating new clients.
- ▶ Activating new clients; changing status from Imported to Active.
- ▶ Accessing and viewing Payers and Authorizations.



Questions...

