

Senior Living Communities, LLC

Vision

Guide to Resident Charts & Assessments

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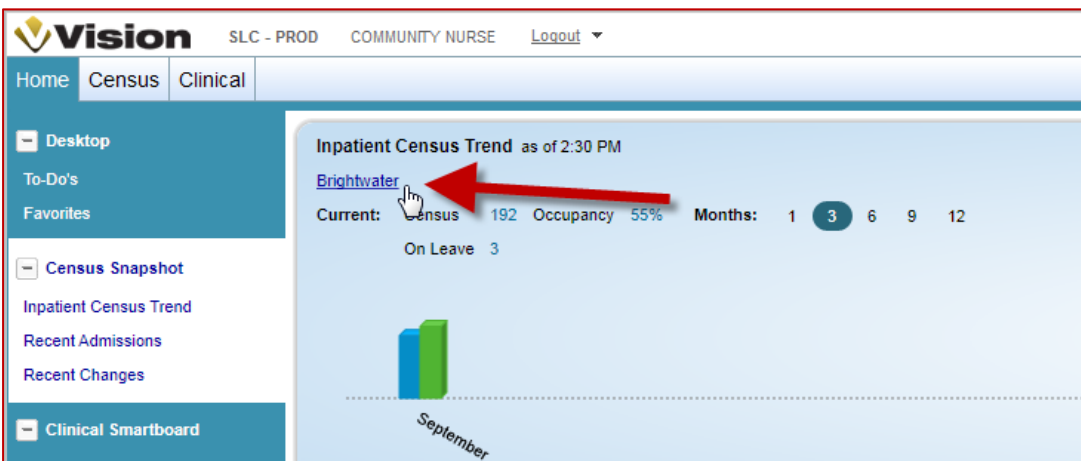
HealthMedX Implementation

Initial Workspace Setup

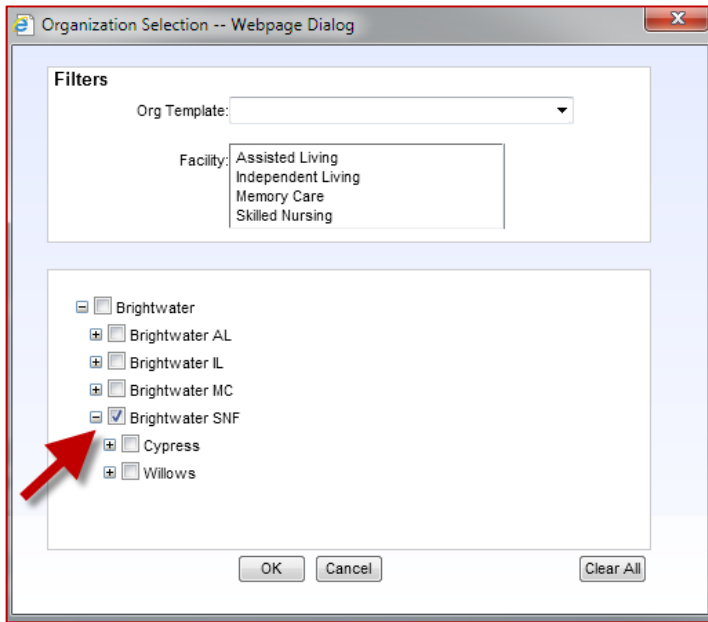
Configure Home Page Widgets:

Be sure to configure the widgets to show you the information you are most interested in. Remember that there are several useful widgets on your Home Page. Once initial configurations are made, they will be saved until you change them. Select the Facility or Unit you are primarily responsible for:

- a) Click on the blue hyperlink of each widget you want to configure.



- b) Be sure to uncheck all of the boxes except for the Facility or Unit you are primarily responsible for.



Resident Chart Management

Home Page Widgets

Properly configuring the Home Page widgets should be managed during the first login. These widgets can provide you important information in just a few simple clicks. Below is brief explanation of what some of these widgets provide.

Favorites

In the “Favorites” widget, we have provided quick links to important external sites and internal sections of Vision.

Inpatient Census Trend

The “Inpatient Census Trend” widget provides Census and Occupancy numbers as well as links to Census Reports and Admission and Discharge Reports.

Recent Admissions

The Recent Admissions widget displays the most recent admissions for the selected day range.

Recent Changes

The Recent Changes widget displays admissions, discharges, transfers, LOAs, and payer changes within the configured time frame.

Clinical Smartboard

The Clinical Smartboard widget displays care recipient activity for the previous and next 24 hours, ultimately displaying a 48 hour range.

This widget automatically refreshes to display the most up-to-date information every 10 minutes. As a result, it may take as long as 30 seconds to load the Smartboard.



Assessment Schedule


The Assessment Schedule widget provides a snapshot view of the assessment schedules for residents. You can view and add assessments from this widget.

Assessments

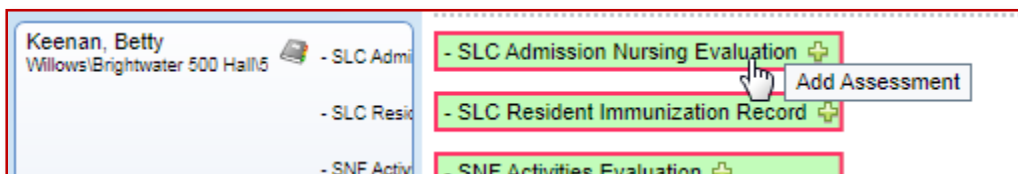
Create Assessments (from Assessment Schedule widget)

The Assessment Scheduler widget (snapshot below) provides you the best interactive illustration of the status of AL Assessments. This widget is available on your home page and can be filtered by Unit and Time Period.

- a. The plus sign icon () indicates an assessment is scheduled, but not started. The user simply needs to click on the icon and the wizard will create an assessment for that resident.
- b. The icons will change to () to notify you that an assessment has been started.

The assessments must be locked when completed which then turns the icon to (). Locking the assessment also triggers the system to schedule the next quarterly assessment.

1) Select the Assessment you would like to complete from the Assessment Schedule widget



2) The "Create New Assessment" wizard will open for the resident. Fill-in/select the *necessary fields to ensure the assessment is created correctly, and click "OK".

a. Assessment Type

Allows you to filter for specific assessment types, which essentially reduces the *Assessment to Create list.

b. *** Assessment Date**

The date the assessment actually took place.

c. *** Assessment to Create**

Verify the assessment you wish to create for the resident. When using the Assessment Schedule widget, be certain that you select the same assessment from this list that you click on in the Assessment Scheduler. Doing so will automatically populate the *** Scheduled Event**.

d. **Add Options**

Provides additional options. This field is typically left alone.

e. *** Reason**

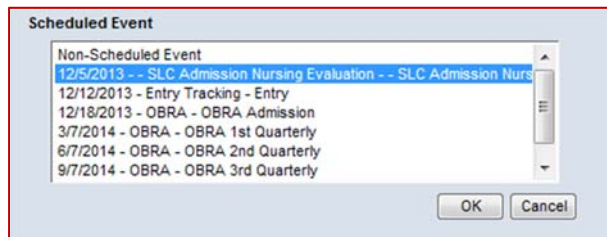
Free text the reason of the assessment (i.e. Initial, Quarterly).

f. **Discipline Type Responsible**

Allows you to specify what discipline is responsible for this assessment. This field is typically left alone.

g. *** Scheduled Event**

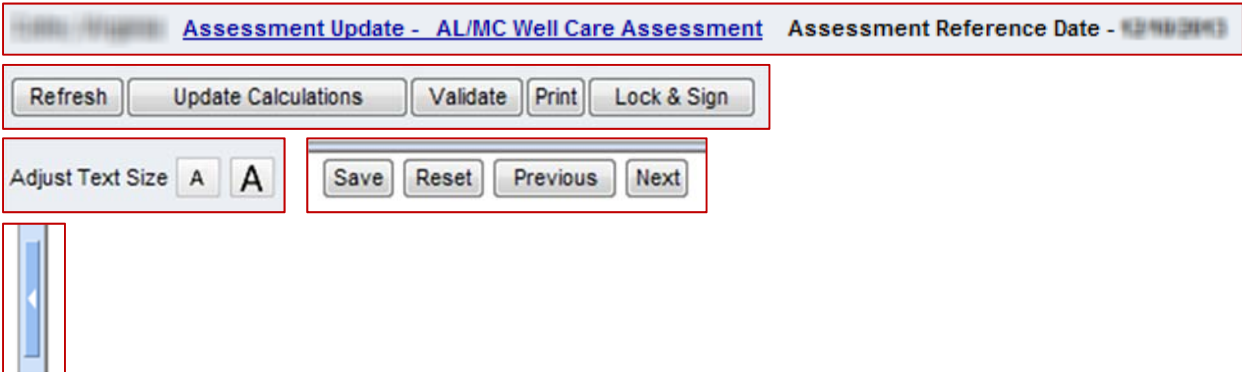
This is a very critical step. You must be sure the correct *** Scheduled Event** is selected/highlighted. This step ensures future schedules are automatically created correctly and it ensures that management reports accurately reflect pending, current, and past due assessments.





Workflow: Guide to Censu

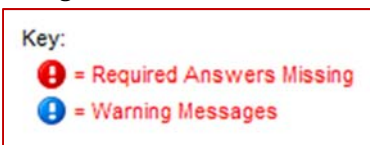
3) Complete the assessment and Lock when finalized.

TIP: Be familiar with buttons and links available when completing the assessments.

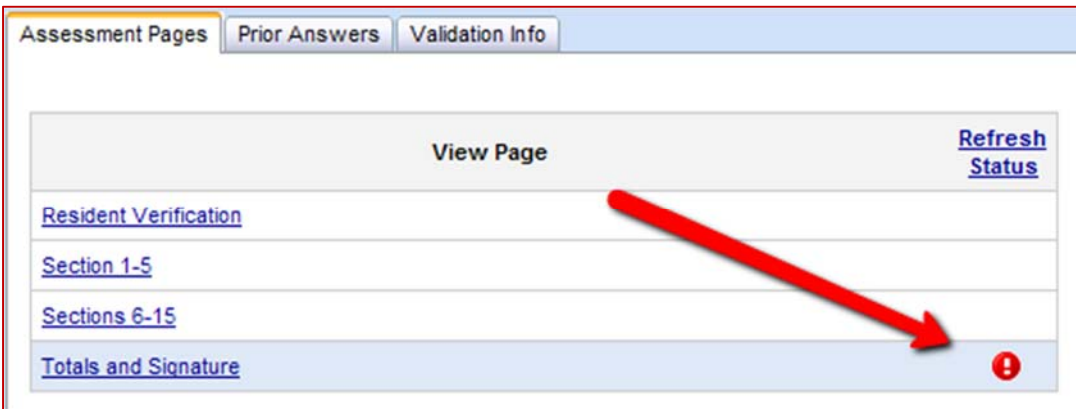


NOTE: When completing assessments, you may notice the following icons   along with a Key (image 1). If you click on the icon(s) (image 2), it will open the Validation Info tab and tell you the detail of the warning (image 3).

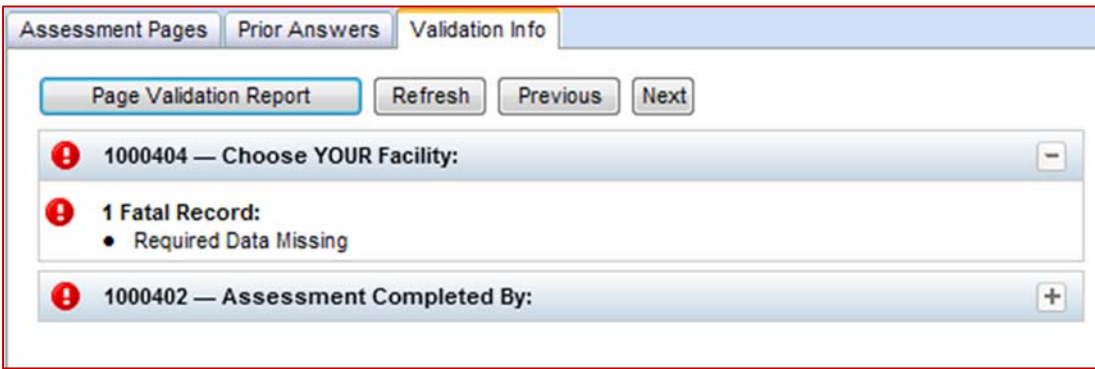
(image 1)



(image 2)



(image 3)



Create Assessments (from Resident Chart)

Assessments can be created/managed directly from a resident's chart. Select a resident to work with, and then:



Navigate to: [Clinical](#) > [Chart View](#) > [Assessments](#)

- 1) Once you navigate to the appropriate chart section, you will notice the first container/section below. Click on "Add Assessment".



- 2) Follow Step 2 from the section above.
- 3) Follow Step 3 from the section above.

Understanding Assessment Schedules

When a resident is properly admitted to your community using Vision, schedules of required assessments are automatically generated (based on information provided by the Clinical Operations Team). The Admission Process is typically handled by the Business Manager (IL), Healthcare Marketer (AL/MC), and the Social Worker (SNF).



There are multiple ways to view the schedules generated for residents and the status of the schedules.


Individual Chart View:










Navigate to: [Clinical](#) > [Chart View](#) > [Assessments](#)

- 1) Once you navigate to the appropriate chart section, you will notice the container/section below.

[Scheduled Assessments](#)  [Add Schedule](#)  [Add Plan Schedule](#)

a. You can view the current required schedules below this container by clicking the plus icon before the schedule name. 

Scheduled Assessments  Add Schedule  Add Plan Schedule						
Schedule Name	Started					
 - SNF Skin Observation	11/30/2013					
Event	Status	Due Date	Last Grace Day	Asmt Creation Date	Assessment Id	
- SNF Skin Observation	Created Scheduled Event	12/14/2013	12/14/2013			
 - SNF Braden Scale Risk Screening	11/30/2013					
 - SNF Falls Risk Screening and Intervention	11/30/2013					
 - SNF Dental Assessment	11/30/2013					

b. You can click on the link "[Scheduled Assessments](#)" to view current and completed schedules by clicking the plus icon before the schedule name. 

The images below are examples of the following:


- i. A completed schedule (assessment is attached and locked)
- ii. A schedule that does not currently have an assessment attached to it.

- SNF Braden Scale Risk Screening					12/2/2013
Event	Due Date	Last Grace Day	Assessment Creation Date		
 SNF Braden Scale Risk Screening (Admission)	Monday 12/2/2013	Monday 12/2/2013	12/2/2013		
- SNF Braden Scale Risk Screening (Week 1)	Monday 12/9/2013	Monday 12/9/2013			
- SNF Braden Scale Risk Screening (Week 2)	Monday 12/16/2013	Monday 12/16/2013			

- iii. A schedule that has an assessment attached to it, but not locked for completion.

- SNF Geriatric Depression Scale					12/2/2013
Event	Due Date	Last Grace Day	Assessment Creation Date		
- SNF Geriatric Depression Scale	Monday 12/2/2013	Monday 12/2/2013	12/4/2013		

Home Page Assessment Widget:

 Navigate to: [Home >](#)

Located on your Home Page, the Assessment Scheduler widget provides you the best interactive illustration of the status of AL/MC or Skilled Assessments. Refer to the "Create Assessments (from Assessment Schedule widget)" section of this document.

Assessment Reports:



Navigate to: [Clinical](#) > [Reports](#) > [Assessments](#) > [Assessment Schedules](#)

The Assessment Schedules report can provide you all the information you need to stay on top of compliance as it relates to required assessments. Refer to the Reports section of this document.

Correct Assessment Schedule Attachment (Status = Current)

Attaching the Assessment to the correct schedule is a very **critical step** in the assessment process. This step ensures future schedules are automatically created correctly and it ensures that management reports accurately reflect pending, current, and past due assessments.

If you miss this important step during the creation of the assessment, you have the ability to edit this information once the form/assessment is created. The goal is to ensure this information is correct before the form/assessment is locked. If the form/assessment needing the correction is locked, you will need to request assistance from a supervisor (see “ **Correct Assessment Schedule Attachment (Status = Locked)**” section below).

Individual Chart View:



Navigate to: [Clinical > Chart View > Assessments](#)

- 1) Once you navigate to the appropriate chart section, you will notice the container/section below.

Assessment	Discipline	Reason	Author	Date	Status	Created	Physician Returned	E-Signed
_SLC Incident / Accident Report		Fall	William J. McCreedy	7/23/2014	Current	7/23/2014		
_SLC Nursing Monthly Summary Report			Carol Perle	7/16/2014	Locked	7/16/2014		✓
_SLC Fall Risk Screening and Interventions			Laura M. Mays	7/3/2014	Current	7/3/2014		
_SLC Nursing Monthly Summary Report			Mark A. Hedin	7/1/2014	Locked	7/1/2014		✓
_SLC Fall Risk Screening and Interventions			Mark A. Hedin	7/1/2014	Locked	7/1/2014		✓
_SLC Wandering/Elopement Risk Screening			William J. McCreedy	6/20/2014	Locked	6/20/2014		
_SLC Geriatric Depression Scale (GDS)			Mark A. Hedin	6/16/2014	Current	6/17/2014		

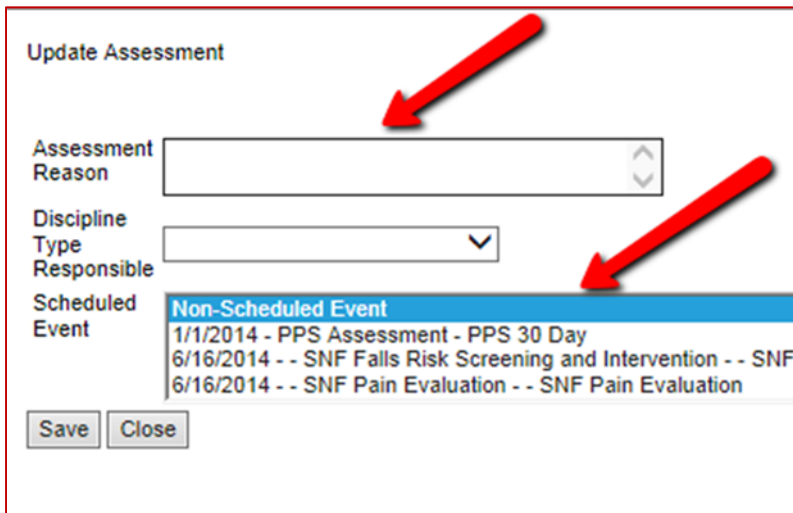
- a. To correct the schedule attached to the Form/Assessment, simply click on the Form/Assessment that needs to be corrected. If the Status of the Form/Assessment is not “Current” but is “Locked”, it will need to be unlocked first by an approved staff member (see “Correct Assessment Schedule Attachment (Status = Locked)” section below).

Workflow: Guide to Census

- b. When the Form/Assessment is open, click on the name of the Form/Assessment (blue hyperlink).



- c. A window will open allowing you to add and/or modify several items. Make the appropriate changes and click "Save".



Correct Assessment Schedule Attachment (Status = Locked)

Attaching the Assessment to the correct schedule is a very **critical step** in the assessment process. This step ensures future schedules are automatically created correctly and it ensures that management reports accurately reflect pending, current, and past due assessments.

If you miss this important step during the creation of the assessment, you have the ability to edit this information once the form/assessment is created. The goal is to ensure this information is correct before the form/assessment is locked. If the form/assessment needing the correction is locked, you will need to request assistance from a supervisor.

Individual Chart View:

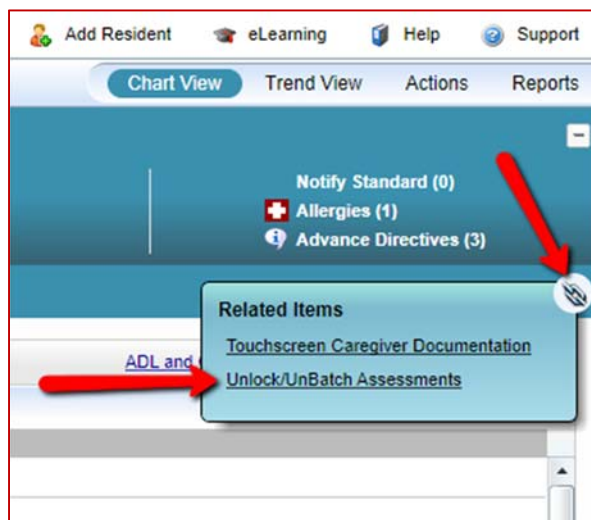


Navigate to: [Clinical](#) > [Chart View](#) > [Assessments](#)


- 1) Once you navigate to the appropriate chart section, you will notice the container/section below.

Assessment	Discipline	Reason	Author	Date	Status	Created	Physician Returned	E-Signed
_SLC Incident / Accident Report		Fall	William J. Piro-Caregiver	7/23/2014	Current	7/23/2014		
_SLC Nursing Monthly Summary Report			Carol M. Piro-Caregiver	7/16/2014	Locked	7/16/2014		✓
_SLC Fall Risk Screening and Interventions			William J. Piro-Caregiver	7/3/2014	Current	7/3/2014		
_SLC Nursing Monthly Summary Report			William J. Piro-Caregiver	7/1/2014	Locked	7/1/2014		✓
_SLC Fall Risk Screening and Interventions			William J. Piro-Caregiver	7/1/2014	Locked	7/1/2014		✓
_SLC Wandering/Elopement Risk Screening			William J. Piro-Caregiver	6/20/2014	Locked	6/20/2014		
_SLC Geriatric Depression Scale (GDS)			William J. Piro-Caregiver	6/16/2014	Current	6/17/2014		

To the far right of this screen, you will notice a chain link icon. Click on icon then click on "Unlock/UnBatch Assessments".



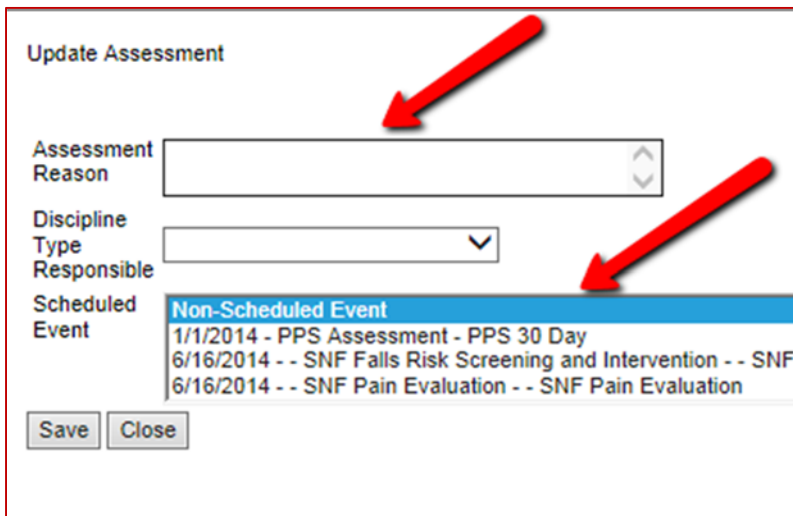
Workflow: Guide to Census

Press the check box of the Form/Assessment you need to Unlock, you will then be prompted to confirm – press “OK”. Now close the “Unlock/UnBatch Assessments” window using the small red .

- 2) Now that the Form/Assessment is Unlocked and “Current”, :
 - a. Simply click on the “Current” Form/Assessment that needs to be corrected.
 - b. When the Form/Assessment is open, click on the name of the Form/Assessment (blue hyperlink).




- c. A window will open allowing you to add and/or modify several items. Make the appropriate changes and click “Save”.



Notes

Create Clinical Notes

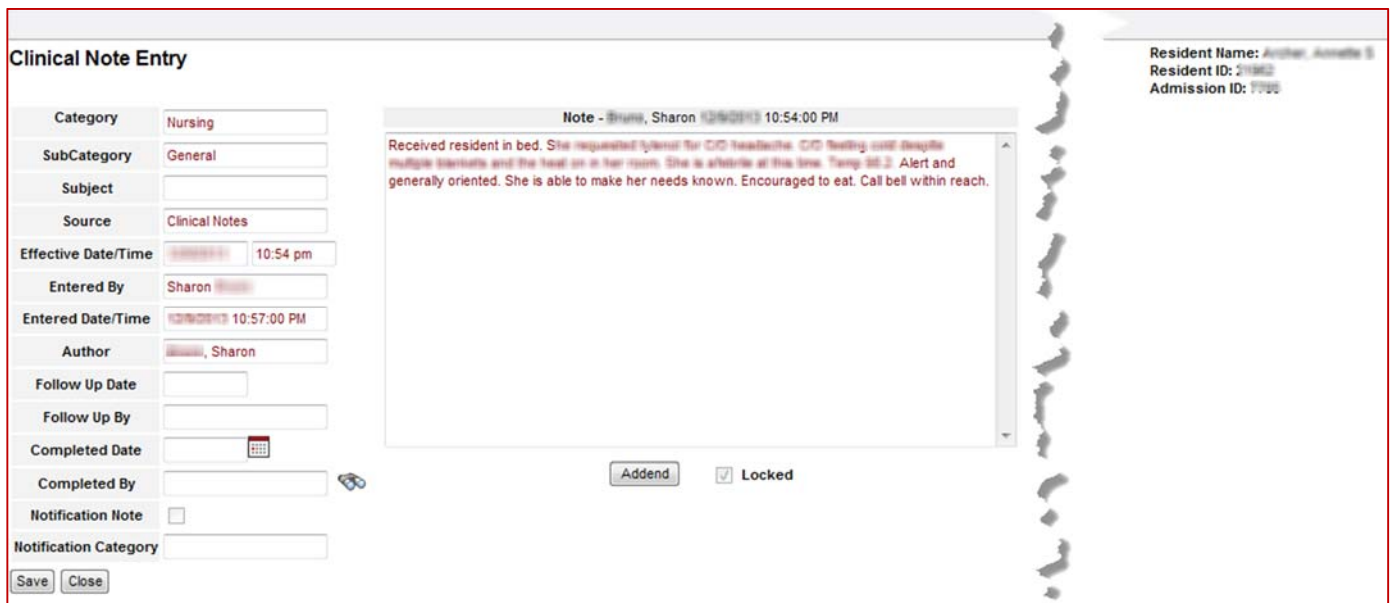
Clinical Notes can be created/managed directly from a resident's chart. Select a resident to work with, and then:

 Navigate to: *Clinical > Chart View > Assessments*

1) Once you navigate to the appropriate chart section, you will notice the container/section below. Click on "Add Clinical Note".



2) Click Save when you have entered the necessary information. Example:



Let's look at the following "What If...?" scenarios:

Q) What if you need to change/addend a note you have saved and locked?

A) Click the Addend button at the bottom of the note you need to change. Up to three notes can be added. After the third note is added, the Addend button is no longer available. Addended notes are added in reverse order.

Q) What if you saved and locked a note for the wrong resident and need to correct it?

A) Notify your supervisor immediately. Notes can only be inactivated by your supervisor or approved personnel. They will see a box labeled "Inactive" under the Note Entry screen (next to the "Addend" button). When they select the check box, the Inactivate Note window opens. They will select the reason for the inactivation and click OK.

Resident Vitals

Resident Vitals

To enter Vital Signs (without Touchscreen) follow the information below.



Navigate to: [Clinical](#) > [Chart View](#) > [Vitals](#)

- 1) Click the Add [Select Vital] button for the Vital Sign that is to be entered. For Instance Add Temperature. The Flow Sheet screen will appear.
- 2) Enter the Care Recipient's temperature in the Temperature Section.
- 3) The available field is used to enter the exact temperature in Fahrenheit. Vitals may be entered as a decimal, maximum 2-digit. The vital will appear on the flow sheet with the decimal value.
- 4) Select the location the temperature was taken from the Location drop-down.
- 5) Click the Save button.
- 6) Click the close button to close the Flow Sheet Screen. The vital will now appear in the appropriate section on the Vitals tab of the Chart View.

Other Related Items

Resident Scanned Documents

Insurance documents should be added to the residents [Attachments](#). This will allow the Medicare Biller to verify or recover information should the need arise. If there is no SNF coverage, add a general note to this affect.



Navigate to: [Clinical](#) > [Chart View](#) > [Resident Info](#) > [Attachments](#)

To Add:

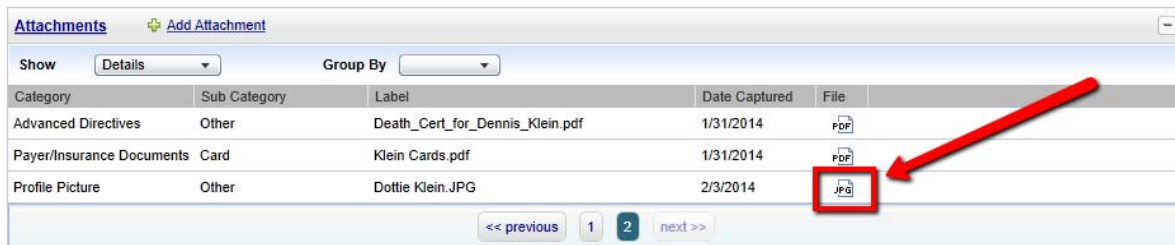
- 1) Click **Add Attachment**
- 2) Select the Category of **"Payer/Insurance Documents"**
- 3) Select the Sub Category
- 4) Click the **Browse...** button to browse your computer or network for the residents insurance document.

NOTE: There is a file size restriction of 4mb per file.

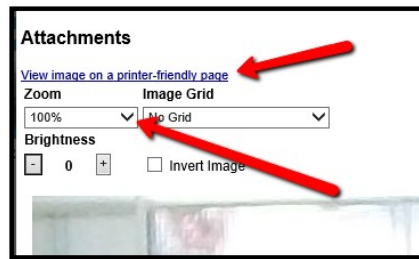
- 5) Rename the label of the file to correspond with the residents name, such as "Ins - " (residents last name).
- 6) Click **OK** in the center of the screen.

To Print an attachment that is uploaded:

- a. Click on the icon of the image or file (as shown below).



- b. You can then adjust the zoom if necessary and click the link "View image on..."



c. You then print the file from your browser.

Resident Related/Responsible Parties



Navigate to: [Clinical](#) > [Chart View](#) > [Resident Info](#) > [Related Parties](#)

Add Resident Related/Responsible Parties



Navigate to: [Clinical](#) > [Chart View](#) > [Resident Info](#) > [Related Parties](#)

Adding Related and Responsible parties for each resident ensures proper billing as well as provides the necessary contacts in the event of emergencies. To view resources on how Related and Responsible Parties integrate with our Mass Notification Tool - Regroup, visit <http://its.maxwell-group.com/how-to/regroup/>



- Click the Add button in the Edit column for the next Blank row of either the Responsible Parties or Other Relationships sections of the screen.
- Click the ? search button to search for and select the necessary party. The selected party will populate the fields of the Add Responsible Party/Add Other Relationship screen.

Workflow: Guide to Census

- c. **Note:** All related parties must first be added as entities (one time) before they can be selected. If you have security rights to do so, you can add a new party via the search screen in Related Parties.
- a. Enter the display order for this party in the Display Order field.
- b. Select a type from the Responsible Party Type/Related Party Type field. This is a required field.
- c. Enter the email address for the responsible party/related party in the Email field.
- d. Check the checkbox for the Default Address field if the care recipient's address is to be used for this party. If the checkbox is checked select the type of care recipient address from the drop-down at the right of the checkbox.
- e. Make any additions to the Address Type and other address fields. **Note:** Zip codes cannot contain alphabetical characters.
- f. Select the type of phone number being entered from the Type field in the Phones section. Enter the exact phone number in the Number field.
NOTE: Be sure to select "Emergency Contact" if the party should be included in Emergency Mass Notification messages.
- g. Click Submit to save the responsible party/related party.

Resident Admitting Diagnosis



Navigate to: [Clinical](#) > [Chart View](#) > [Admission](#) > [Admission Diagnosis/Surgical Proc](#)

To Add:

- 1) Click **Add Diagnosis/Surgical Proc**
In this screen, you can add primary diagnosis for the resident.
- 2) Click **Save**

Resident Advanced Directives



Navigate to: [Clinical](#) > [Chart View](#) > [Resident Info](#) > [Advance Directives](#)

To Add:

- 1) Click **Add Advance Directive**

In this screen, you can add advance directives for the resident. Once you have completed the fields under.

Resident Allergies

The Allergies widget displays the following information for care recipient's allergies: Category, Allergen, Adverse Reactions, and Comments. Click on the "Help" icon for details on how to add allergy information.




Navigate to: [Clinical](#) > [Chart View](#) > [Resident Info](#) > [Allergies](#)

Resident Physician(s)



Navigate to: [Clinical](#) > [Chart View](#) > [Resident Info](#) > [Physicians](#)

- 1) Click **Add Physician**

In this screen, you can add new physicians or remove existing physicians. By clicking the  button, you will be able to search for physicians in the system. If the search does not return the physician you are looking for, you will be able to add the physician in the system by clicking "Add Entity" at the bottom of the screen.

- 2) **Date Active** must be the same as the **Admission Date**
- 3) Click **Submit**

Resident Profile Picture

Adding a profile picture for the resident will help verify the resident you are working with as well as provide more appreciation for the individual we serve. It will replace the default resident silhouette in the resident ribbon with the picture you upload. It may take several minutes for the image to appear in the resident ribbon. Images should be no more than 2MB.



Navigate to: [Clinical](#) > [Chart View](#) > [Resident Info](#) > [Attachments](#)

- 1) Click **Add Attachment**
- 2) Select the Category of "**Profile Picture**"
- 3) Click the **Browse...** button to browse your computer or network for the residents profile image. NOTE: There is a file size restriction of 4mb per file.
- 4) Rename the label of the file to correspond with the residents name.
- 5) Click **OK** in the center of the screen.

Reports

Assessment Reports:



Navigate to: [Clinical](#) > [Reports](#) > [Assessments](#) > [Assessment Schedules](#)

The Assessment Schedules report can provide you all the information you need to stay on top of compliance as it relates to required assessments.

Filtering the report properly will determine how effective the report is for you. Keep the following in mind:

- 1) **Selection (Multiple)** - Be sure you select the proper facility or unit
- 2) **Date Range**
- 3) **Select Residents to Include** – If left blank, the report will include all residents in the facility or unit you selected above.
- 4) **Select Schedules** – If left blank, the report will include all schedules
- 5) **Select Payer Types** – Typically left blank.
- 6) **Include Options/Display Order** – Check/un-check options as you see fit.

Typically used example:

Assessment Schedules

Select Organizations To Include

Community X - SNF/all

Break at Facility level.

Select Date Range To Include

Date Range

Schedule Dates Start 11/1/2013 End 12/31/2013

Select Residents To Include

Last Name:

Available Residents	Selected Residents
<input type="button" value="Add Residents"/>	<input type="button" value="Remove Residents"/>

Select Schedules/Schedule Events To Include

Select Payer Types/Plans To Include

Include Options/Display Order

Include	Display Order
<input type="checkbox"/> All	Order By Resident
<input checked="" type="checkbox"/> Resident's Location	Then By Due Date
<input type="checkbox"/> Bed Only	Then By Schedule
<input checked="" type="checkbox"/> ARD Beg Date	
<input checked="" type="checkbox"/> ARD End Date	
<input type="checkbox"/> Batched	
<input type="checkbox"/> Accepted	
<input type="checkbox"/> Rejected	
<input type="checkbox"/> Discharged Residents	
<input type="checkbox"/> Double Space Report	
<input checked="" type="checkbox"/> ARD	
<input checked="" type="checkbox"/> Started	
<input checked="" type="checkbox"/> Completed	
<input type="checkbox"/> RAPs/CAAs Completed	
<input type="checkbox"/> Care Plan Decision	



Clinical Notes Reports:



Navigate to: *Clinical > Reports > Notes > Clinical Notes Report*

The Clinical Notes Report can provide you all the information you need to stay on top of compliance as it relates to notes.

Filtering the report properly will determine how effective the report is for you. Keep the following in mind:

- 1) **Organization Selection** – Click on the  icon. Be sure you select the proper facility or unit.
- 2) **Date Filter(s)** – Fill in all that apply.
- 3) **Resident Selection** – Check all to include. Next, you can then click on the  icon if you want to select one or several residents that match your selection(s). To select multiple residents from this list, press and hold the CTRL button on your keyboard

Workflow: Guide to Census

while you click on multiple residents. If you leave this blank, the report will include all residents that match your criteria.

- 4) **Note Category/Subcategory Selection** – If left blank, the report will include all categories/subcategories. To select multiple categories from this list, press and hold the CTRL button on your keyboard while you click on multiple categories.
- 5) **Sort by** – You can sort the report in many different ways. Select items from the “Available Items” list to the “Selected Items” list using the left/right arrows. You can then set the order of which the “Selected Items” will show on the report using the up/down arrows.
- 6) **Format/Processing Options** – Select if you want the report in Excel or PDF. You also have the option to “Store Templates” which saves the selections you have made for future reports.

Typically used example:

The screenshot displays the 'Clinical Notes Report' interface. Several key sections are highlighted with red boxes:

- Organization Selection:** Shows 'Brightwater SHF' and a 'Display To: Facility' dropdown.
- FormatProcessing Options:** Includes 'Format' (Excel, PDF) and 'Process' (Online, Background) options.
- Date Filter(s):** Contains 'Entry Date Range', 'Completed Date Range', 'Follow Up Date Range', and 'Effective Date Range' with date pickers.
- Resident Selection:** Features 'Include' checkboxes for 'Not Admitted', 'Active', and 'Discharged', and a 'Note Category/Subcategory Selection' dropdown.
- Sort by:** A table with 'Available Items' and 'Selected Items' columns. 'Entry Date' and 'Follow Up Date' are selected in the 'Selected Items' column.