

2015

CCM 1.1 Field Staff User Guide

COMMON QUESTIONS FOR FIELD STAFF USING CCM ON IPAD
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How Do I Sign In?

On your iPad home screen, locate the FileMaker Go icon.



Figure 1 FileMaker Go Icon

Tap the icon and select “CentriaCareManager” from the list of files. The file will be available under “Recents” if you have used it before. Otherwise, look for it under “Device”.

Enter your username and password and tap “Go”.

What Happens When I Sign In?

When you sign in, several actions will happen automatically:

1. **Sync** – The application will exchange information with the server to gather any changes made by the Clinical or CCC staff that may impact your shift.
2. **Create Timesheet** – In the background, the application will check to see if you have an open timesheet. If you do, it will notify you and then use that timesheet. If other users have open timesheets for the client, these will be automatically closed so you can continue to sign in. If you do not have an open timesheet, one will be created.

Tip: The start time will be automatically recorded so be sure to sign in right at the start of your shift.

Tip: If you learn that you have an open timesheet, a shift schedule will not be created. If you believe this is in error, contact the office. If the issue cannot be resolved, you may manually add events to record your activity on the Activity tab.

3. **Acknowledgements** – If you are signing in for a new shift, you will automatically be taken through several screens and asked to confirm that you have reviewed the information. These screens include:
 - a. View 485
 - b. Previous (Shift)
 - c. Notes

A task will be created or each one indicating that you have reviewed them during your shift.



Tip: Make sure you tap the “Continue” button to move through these screens.

Figure 2 Continue Icon

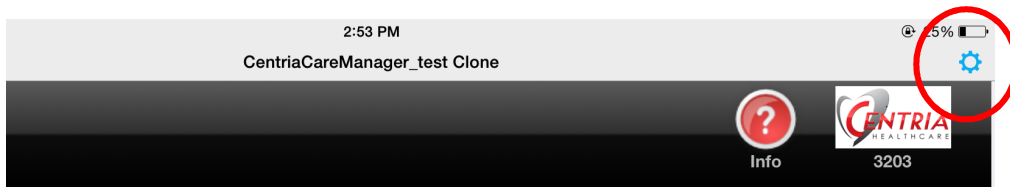


4. **Create Shift Schedule** – If you are signing in for a new shift, your tasks will be created. Typically, tasks that would fall outside of your shift are not created.

I'm having trouble changing the shift dates. What should I do?

This happens sometimes and the solution is to quit the file. To do this you'll need to complete two steps before logging back in:

1. In the upper right corner of the iPad tap on the blue gear icon and then select "Close Window".
 - a. This will quit the file.
 - b. Alternately, if you have a close button on the screen you can use that instead – it does the same thing.



r Your Shift Start and End times. This information will be used to generate a schedule for your shift. Click continue when you are done.

Start	Shift Start
<input type="text" value="Friday, July 1, 2015"/>	<input type="text" value="3:00 PM"/>
Finish	Shift Finish
<input type="text"/>	<input type="text"/>

2. Double click the home button to bring up a list of open apps. Place your finger on the FileMaker Go app and slide up to make it disappear. See "[How Do I Restart CCM?](#)"

Now you should be able to log back in and set your shift dates and times.

How is the Dashboard Organized?

The dashboard is organized into separate sections. Tap on a tab button to go to that section. Some sections are further organized into tabs.

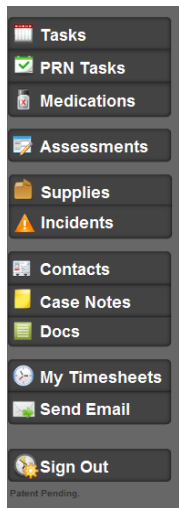


Figure 3 Dashboard Organized by Tabs

- **Tasks** – Shows tasks that are due or completed during your shift.
- **PRN Tasks** – Shows tasks (excluding meds) that can be completed as needed tasks. You may also add unplanned tasks in this section.
- **Medications** – This section includes the list of medications that the client takes and their schedules. Skilled Nursing Staff can also use this section to indicate that a PRN medicine has been given.
- **Assessments** – This section is organized into tabs based on the assessment section. Some sections are restricted to nurses. HHAs may view and update the Vitals, Intake/Output, Pain and Narrative sections.
- **Supplies** – This section displays the inventory list for the client. Use this section to update quantities on hand, or to see if an item is on order.
- **Incidents** – Use this section to record an incident.
- **Contacts** – Use this section to look up important client contacts.
- **Case Notes** – Notes added by the Clinical Staff or CSM will be included here.
- **Docs** – Use this section to view relevant documents during your shift. This section is organized into three tabs.
 - View 485 – View the Care Plan for the client.
 - Assessments/HHA Summaries – View previously completed assessments or HHA Summaries.
 - Schedule Summaries – View previously completed shift task summaries.
- **My Timesheets** – Review your timesheets for the specific client on the tablet. You may update signatures for previous shifts.
- **Send Email** – Send a non-critical email to the CSM/CCC or Clinical Lead. Email is one way – office staff cannot send return emails to the tablet.
- **Sign Out** – Initiates the sign out process.



How Do I Sign Out?

To sign out, tap the Sign Out button on the bottom left of the screen. This will start the sign out process.

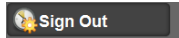


Figure 4 Sign Out Button

What Happens When I Sign Out?

When you sign out, several actions will happen automatically:

Check for Incomplete Tasks – All tasks scheduled for your shift must either be marked *Completed* or *Deferred*. You will not be able to continue if there are incomplete tasks remaining.

Check for Open Assessments/HHA Summaries – If you have an “In Process” assessment, you will not be able to continue. Complete the assessment as needed, then mark it complete.

Timesheet Confirmation – If all tasks and assessments are completed, you will be presented with the Timesheet Confirmation screen. Mark the completed goals and sign. You must also review the shift activity with the client and have them sign. If the client is unable to sign, you may indicate that as well.

Close Timesheet – In the background, the timesheet will be closed automatically.

Tip: The finish time will automatically be recorded so be sure to sign out right at the end of your shift.

Sync - The application will exchange information with the server automatically to send back any changes made during your shift. *This includes your timesheet!*

How Do I Update a Task?

Navigate to the Tasks section and select a task and tap on the icon to the left of the task name. A pop up will appear.

This pop up can be closed by tapping the close button or by tapping anywhere outside of the pop up. Note that any updates or validation will still be completed if you tap outside the pop up box.

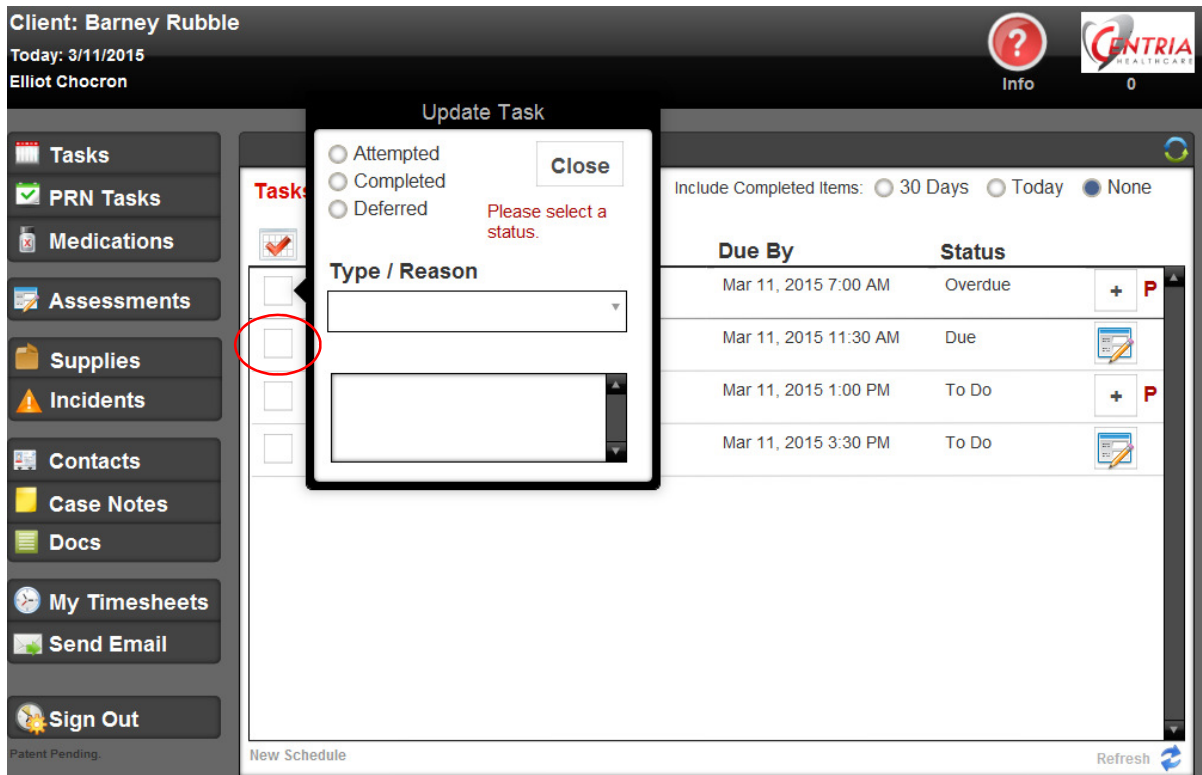


Figure 5 Update A Task

You may mark a task with one of three statuses:

Attempted – *You have tried to complete the task but for some reason were unable to do so.* Select a *Reason* from the drop down menu. If you select this option, a record will be maintained of the attempt, but the task will continue to appear in your dashboard so you can attempt it again later.

Completed – *The task has been completed.* Select a *Type* from the drop down menu. Each task may have a different set of options, depending on how it was set up. If you select this option the task will be moved to the completed section of your dashboard.

Deferred – *You are unable to complete the task during your shift.* This may occur after several attempts, or it may not be achievable during your shift for other reasons. Select a *Reason* from the drop down menu. If you select this option the task will be moved to the completed section of your dashboard.

Tip: The comment field is optional in most instances – only include a **brief** comment if you need to add more details. Be aware that comments may appear on *formal reports to insurance companies*. If you defer a task for “Other Reasons” a comment is required.



How Do I Know Which Tasks to Complete First?

Tasks are typically created with a start and finish time. Your task list will be sorted by task due date/times. **Note that if a task is marked “Priority” it will appear in red text. These tasks should always be considered first.**

Task Categories:

- **Overdue** – If the current time is past the task planned finish time, the task is *overdue*. These tasks should be addressed immediately. You will receive periodic alerts if you have overdue tasks.
- **Due** – If the current time is between the tasks planned start and finish times, the task is *due*. The tasks should be completed first, unless you have overdue tasks. You will receive periodic alerts if you have tasks due.
- **To Do** – If the current time is before the task planned start time, the task is marked *To Do*.
- **Completed** – Completed, Deferred and task Attempts will be marked Complete.

How Do I Refresh the Screen?

The screen will refresh periodically but you can always force a refresh by tapping on the refresh icon located at the bottom right of the tasks screen.



Figure 6 Refresh Icon

What Does “A” or “D” or “X” Mean Next to a Task Name?

These letters reflect the task status:

A – Attempted

D – Deferred

X – Completed

How Do I Add an Unscheduled Task?

The schedule that is generated should be comprehensive but it may happen that you perform a task that is not captured in the daily shift schedule. In that case, you may add an unscheduled task on the PRN Tasks screen.



Figure 6 PRN Tasks Opens to add an Unplanned Activity

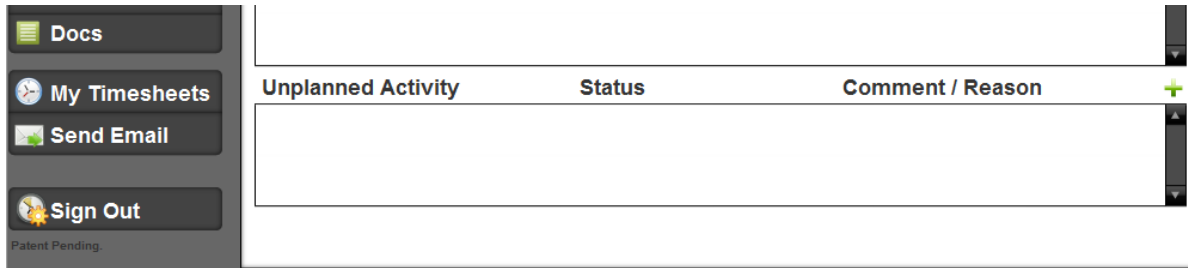


Figure 7 Add Unscheduled Task or Activity

Tap the “+” button and select a standard task from the available list. You may also add a free form task (e.g. a task not in the standard list) by selecting “Other” from the list and entering your task name. “Other” may be found at the bottom of the task list.

I’m Lost. How Do I Get Back to the Main Screen?

You can usually tap on the Centria logo if you get lost and need to get back to the main screen.



Figure 8 Centria Logo Returns to Dashboard

Tip: Make sure that you do not have a “Continue” button displayed. This usually means that CCM is waiting for you to respond so it can complete an action.

How Do I Record An Incident?

Navigate to the Incidents section. Any open incidents will be displayed. Scroll to a blank line and enter your details.

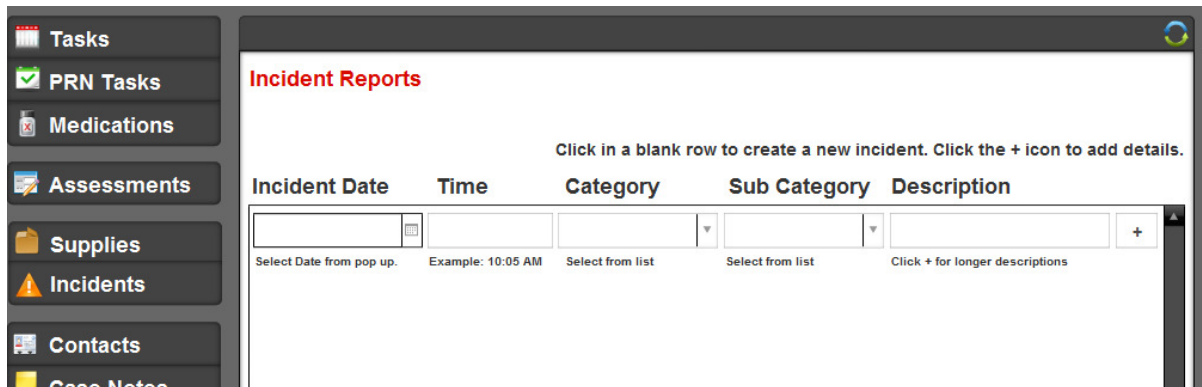


Figure 9 Incident Reports

The blank line will include some basic instructions to follow:

Incident Date – Tap on the field to open a calendar pop up.

Tip: On the iPad, you cannot automatically accept the default date. You must modify the date in order for it to be recorded. Slide up then down to enter the current date.

Time – Tap on the field to enter a time.

Tip: On the iPad, you cannot automatically accept the default time. You must modify the time in order for it to be recorded. Slide up then down to enter the current time.

Category – Choose one of the four categories presented (Fall, Injury, Medication Error, Other). This selection will be used to populate the options for Sub Category.

Sub Category – Choose a sub category. The options available in the drop down menu will depend on the choice made for Category.

Description – Add a brief summary of the incident.

Reported – Note if the incident has already been reported to the office.

You can include additional details by tapping on the “+” icon. This will open a pop up screen where you can enter more information. Tap the “+” again to close the pop up.

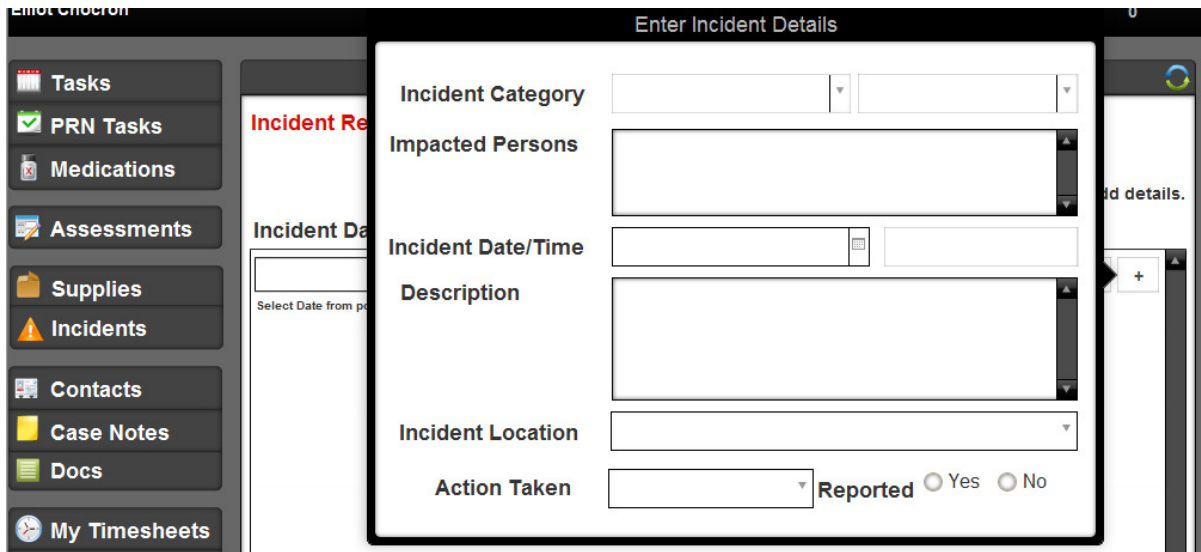


Figure 10 Add Incident Details

Note that once a minimum of information has been entered, the application will automatically send an email to the office with details. This will only be completed if there is an internet connection active.

How Do I Update Supplies?

To update the supplies, tap on the Supplies button.

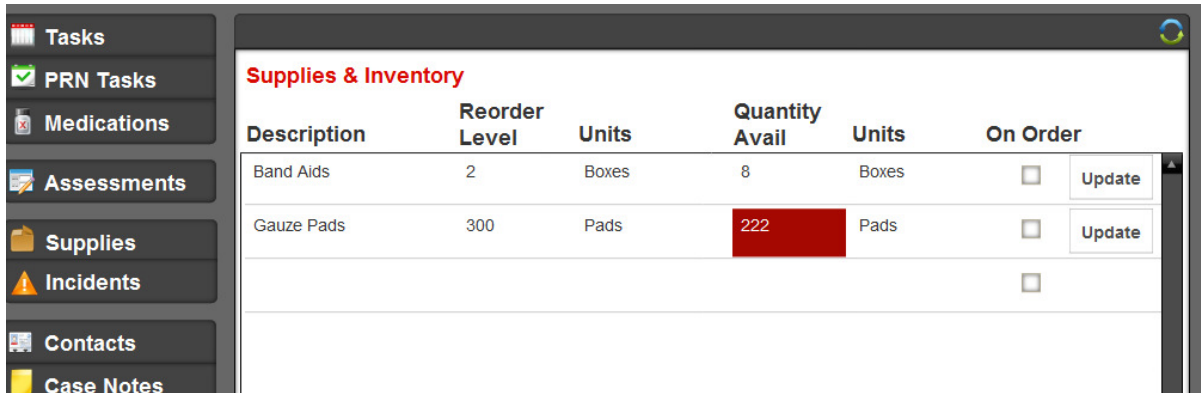


Figure 11 Supplies & Inventory

Supplies listed are specific to the client. If there are not enough of a particular supply, the Quantity Available will appear in *red highlight*. This happens when the Quantity Available is less than the Reorder Level. If the Units are mismatched, they will appear in *yellow highlight*.

You can update the quantities on hand at any time. Tap on the “Update” button in the “Inventory Check-In” column and enter in the new quantity or update the units. Tap the “OK” button to finish.

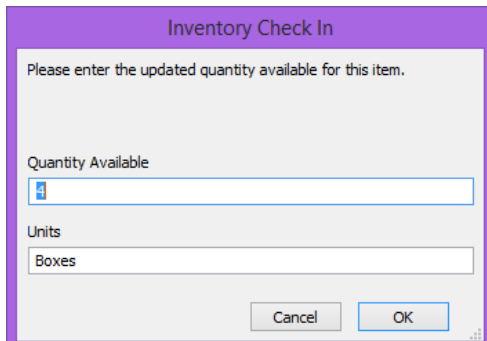


Figure 12 Update Supply Quantities

The program will automatically capture a task to reflect that you have updated the inventory list.

There Are Two People Scheduled To Work at the Same Time. Can We Both Sign In?

Yes. However, each employee must be using a different iPad. If you are an HHA, you must use the iPad specifically set up for HHAs. HHAs may use the same iPad that other HHAs have used at that client during different shifts.

If you are a Skilled Nurse, you must use the iPad specifically set up for Skilled Nurses. Skilled Nurses may use the same iPad that other Skilled Nurses have used at that client during different shifts.

Tip: Remember that each iPad is specifically configured for one client.

How Do I View the 485?

Tap on the Docs button and then the View 485 Tab. You will likely be presented with an image of the 485. Tap on that image and you will be presented with an option to "View". Select that option to open a full screen view of the 485 Plan PDF. You can use your finger to swipe up and down through different pages.

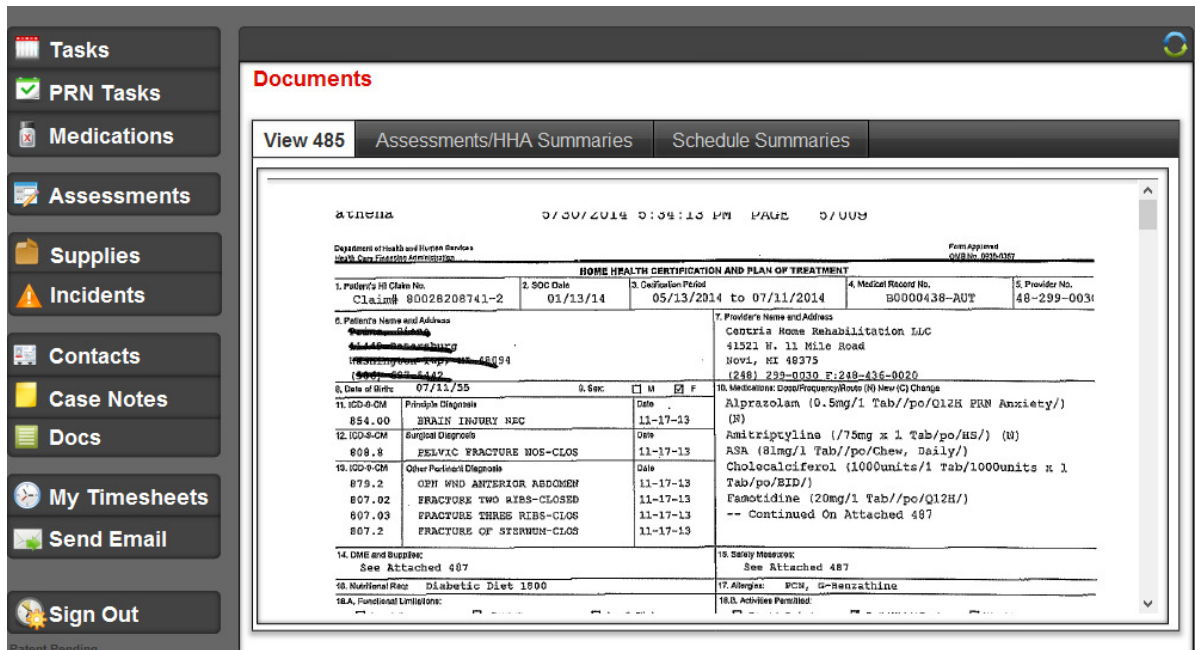


Figure 13 View 485

To close the 485 Plan document, tap the screen once and select “Done”.

How Do I View My Timesheets?

At any time, you can view your past timesheets by tapping on the “My Timesheets” button.

You will be presented with a list of your timesheets.

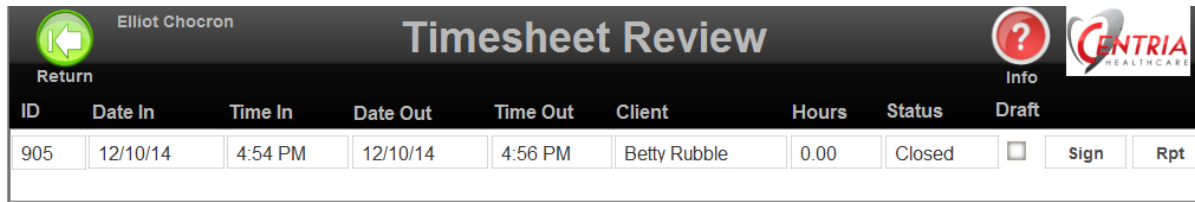


Figure 14 Timesheet Review Screen

If you wish to review the shift summary, tap on the “Rpt” button on the timesheet row.

If the “Sign” button appears in red text, that means that one or both signatures is absent. Tap to add missing signatures.

If the “Draft” checkbox is checked, this means that CCM closed your timesheet for a previous shift. Please review with the office to confirm your shift times. They can uncheck the checkbox.



Tap the “Return” icon in the upper left portion of the screen to return to your Dashboard.

How Do I Sign My Timesheet?

During the sign out process, you will be presented with the Timesheet Confirmation screen. To sign, tap the “Caregiver Signature” box. A signature screen will appear. Sign with your finger and click “Accept” to confirm, or “Clear” to try again.

The client signs using the same method.

ID: (990)
Timesheet Confirmation

Shift Goals
Time In: 1/15/2015 2:00:48 PM
Time Out: 1/15/2015 2:18:26 PM

X	Task Name	Type	Date / Time	+	
X	Client maintained adequate hydration/nutrition status during care.	Nutrition Goal	1/15/2015 2:18:26 PM	+	
X	Medication taken as ordered and attended scheduled appointments.	Compliance Goal	1/15/2015 2:18:26 PM	+	
X	Lidoderm patch/5%/one patch/transdermal/Q24 hours		1/15/2015 2:09:43 PM	+	P
X	Observe for Safety Concerns	NA	1/15/2015 2:08:49 PM	+	
X	Perform Vital Signs	N/A	1/15/2015 2:08:37 PM	+	
X	Position for Comfort	Assist	1/15/2015 2:08:03 PM	+	P
X	Perform this task as needed.	NA	1/15/2015 2:07:37 PM	+	
X	Position for Comfort	Assist	1/15/2015 2:07:02 PM	+	P

Enter Mileage / Description

A client signature is required. Or check box --> **Client Unable to Sign**

Figure 15 Timesheet Confirmation Screen

What if the Client Can’t Sign the Timesheet?

If the client is unavailable to sign, check the option at the bottom of the screen labeled “Client Unable to Sign.”

I’m Working Past My Scheduled Shift Time. Can I Create A New Schedule?

If your shift is over and you have not signed out, you can create a new schedule. Click on “New Schedule” in the lower left corner of the tasks screen. This action will ask you for a new shift – put in the new shift times and continue through the process.

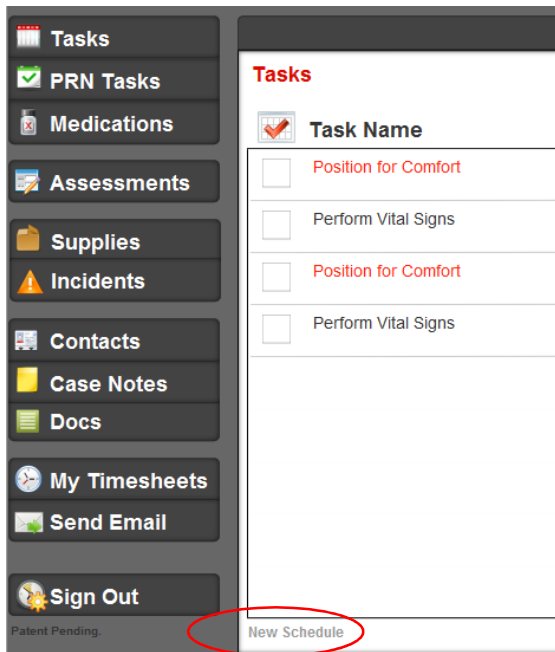


Figure 16 New Schedule

This action will not add a new timesheet but will simply let you extend your current shift.

For example:

1. Your original shift was from 7AM to 7PM.
2. Before 7PM you agree to continue working until 10 PM.
3. Without signing out, click “New Schedule”.
4. Enter a new shift of 7 PM to 10 PM.
5. That’s it!

If you’ve already signed out then sign back in and enter in the new shift time.

Can I Sign My Timesheet After My Shift?

Yes! Navigate to your Timesheets by tapping the My Timesheets button. Find the timesheet you want to sign then tap the “Sign” button – it will appear in red text if a signature is missing. Tap the signature box and use your finger to sign. Tap “Accept” to continue.

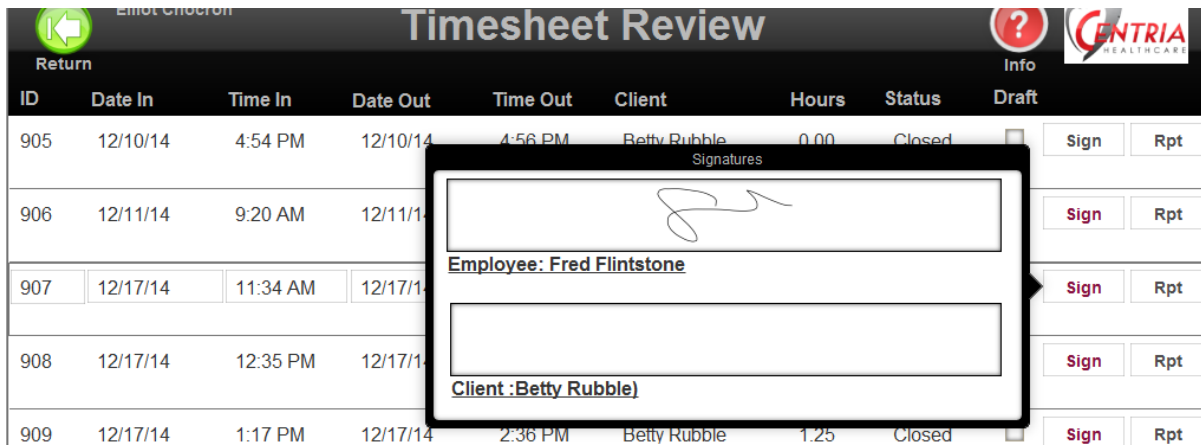


Figure 17 Sign Previous Timesheet

Tap the “Return” icon when complete and return to the Dashboard.

Can the Client Sign My Timesheet After My Shift?

Yes! Navigate to your Timesheets by tapping the My Timesheets button. Find the timesheet you want to sign then tap the “Sign” button – it will appear in red text if a signature is missing.

You may tap the “Rpt” button to let the client review the shift summary or tap the signature box and have the client use their finger to sign. Tap “Accept” to continue.

Tap the “Return” icon when complete and return to the Dashboard.

Should I turn the Tablet Off?

The tablet should remain **on** during your shift. This will allow any scheduled processes to run successfully. You may turn off the tablet at the end of your shift.

Tip: Check you iPad battery life and plug it in to charge as needed. Make sure you plug it in before you leave.

How Do I Restart CCM?

It’s easy to restart CCM due to unresponsiveness or other issue.



- 1) Double click the home button to bring up the list of running apps.



Figure 18 iPad Home Button (Green Arrow)

- 2) Swipe up on FileMaker Go app.



Figure 19 Swipe Up to Force Quit an App

You should be able to sign back in and pick up where you left off.



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