

# 2009 HQ™ Manual

For Assisted Living Communities

Including sections for general users,  
providers and administrators



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**HQ Management System**

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## **User Guide**


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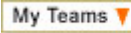





# Guidelines





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## Guideline 1: Log In/Log Out


To use the BlueStep™ system, you must be logged in, starting with a click on the Login  button. The system requires a username and password, which should be given to you by the appropriate individual at your organization.

If you login successfully, but receive a message that you are not authorized to view the site, you will also see one, two or three buttons    that will allow you to navigate to the Teams or Sites where you do have permission to view. These buttons vary, depending upon the products your organization has purchased. Lastly, for security reasons, it is important that you log out at the end of your work session. Logging out is immediate when you click on the Logout link  at the top of the screen.


## Guideline 2: Save vs. Cancel, Back or Close Buttons

Always remember to use the Save  button when finishing a task, rather than the Back , Close  or Cancel  buttons. Clicking the Save button tells the program you are finished with that particular function and to post the results. **Clicking on the cancel, back or close buttons ends your session on that screen without posting your work.** If you wish to undo or not save your additions or changes, simply use the Cancel, Back or Close buttons.

## Guideline 3: Required Fields and Error Icon

Some of the fields and items have a \* next to them with a \* **Required** near the top of the page, indicating that you cannot proceed to the next page until those fields are filled out. During the operation of any screen you may get the error icon . This indicates a problem with the data format or that required data has not been entered. Please check the field and any information it contains. Changing the data to conform to the correct parameters will allow you to proceed.

## Guideline 4: Delete and Edit

The delete and edit functions are extremely valuable tools, but are easily misused. **It is very rare that any item should actually require deletion and deleting data is strongly discouraged.** In most cases, (such as with medications) the item should be discontinued or (in the case of former staff) access disabled. Before you click on the delete icon  be sure that it is actually the proper item and should actually be completely removed from the system.

Delete functions cannot be undone. **Deleting a record, form or entry will completely and permanently remove the deleted item and all its associated information from the system.** This includes deleting (instead of discontinuing) current medications; the entire history of the medication will be permanently removed from the resident's record.
















In certain cases, some deleted information can be retrieved from the database storage before it is overwritten. If it is to be successful, BlueStep must be notified immediately that an object has been deleted in error. Data restoration, when possible, takes substantial engineering time and applicable charges will be billed to the organization.

The same cautions apply when using the edit icon . Editing in some areas can cause major, irreversible changes to your database, so be sure that you are editing the proper item in the proper way.















### Guideline 5: Screen Icons

Throughout all BlueStep™ products you will see icons that perform certain functions, provide links or convey information. The following describes the icons and their uses.














#### Information – signifies a fact or condition and is not ‘clickable’

-  Done – indicates task status is ‘Completed’
-  On Schedule – indicates task status is ‘On Schedule with Minimal Issues’
-  At Risk – indicates task status is ‘Schedule at Risk with Existing Issues’
-  Behind – indicates task status is ‘Behind Schedule with Significant Issues’
-  Low Priority – indicates task priority is ‘Low’
-  High Priority – indicates task priority is ‘High’
-  Priority – identifies the Task Priority column
-  Folder Open – indicates that folder is open and the contents are listed below the file title
-  Folder Closed – indicated that folder is closed and the contents are hidden
-  Required – indicates that the field must be filled in before the page can be saved
-  Error – indicates that a required field has not been filled in or is filled with incorrectly formatted data and that the page will not save until completed or corrected
-  Cannot Delete – indicates that a person, file, record or other item cannot be deleted
-  New Permission – indicates that permission does not exist anywhere else in unit
-  Overridden Permission – indicates that default permission has been overridden
-  Default – indicates that the permission is at unit default level

#### Function – performs an operation when clicked

-  Default Reset – resets the permissions to unit default, if it has been changed
-  Slideshow – activates a slideshow of all files in a selected folder
-  Expand – displays the contents of a folder or list
-  Collapse – hides the contents of a folder or list
-  Expand All - displays the contents of all folders or lists
-  Collapse All – hides the contents of all folders or lists
-  Day View – temporarily sets the calendar/schedule page to a single day
-  Week View – temporarily sets the calendar/schedule page to a week
-  Month View – temporarily sets the calendar/schedule page to a month
-  Delete/Remove – deletes/removes a file from Shared Files, a person from a screen, a task from a page, an issue from a list, an event from the calendar, etc.
-  Radio Button (selected and unselected) – records your on-screen choices
-  Checkbox (selected and unselected) – records your on-screen choices
-  Close – closes the window, pop-up or program, depending upon where it is used, and functions as a ‘Cancel’ if the work has not been saved
-  Button – all BlueStep™ system buttons appear as rounded gray bars and are labeled with the functions they perform

### Link – opens a screen, pop-up or drop-down when clicked

-  Edit – retrieves the original input screen so that field data can be edited
-  Signature – opens a screen for addition of digital signature to document
-  Users/Members – displays a list of users or members of a selected group
-  Sub-task – opens a screen to add a sub-task to a selected task
-  Mini-calendar – opens a mini-calendar of the current month, allowing clickable selection of a specific day
-  Attachment – retrieves an existing attachment to a file, task or issue
-  Version – accesses the various versions of a document that is stored in Shared Files, *if* your organization has purchased Document Versioning
-  Locked, Unlocked – opens a screen on which file locking/unlocking information is available
-  Reorder – opens a window in which you can rearrange the order of items on a list or tree
-  Reorder File – opens a window in which you can rearrange the order of files in a folder
-  Reorder Folder – opens a window in which you can rearrange the order of folders within the Root Folder
-  Media Library – opens a window to display the contents of the Media Library
-  Down Arrow Button – opens a drop-down selection list and is labeled with the name of the list or function

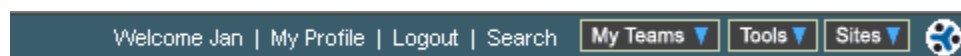
### Guideline 6: Navigation

BlueStep uses a triple-navigation system for most pages: the Dashboard, Main Navigation and Secondary navigation bars, as shown below. Additionally, there is a record navigation menu (left-side navigation) displayed where applicable.



### Dashboard

The appearance of the dashboard will change depending on your individual access. The standard configuration displays as below:



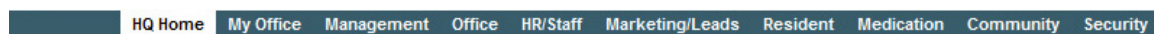
- Greeting – includes the first name of the person currently logged in
- My Profile – access to change your username, password, e-mail address and other personal information, usually including timecard
- Logout - takes you entirely out of the system and closes your session
- Search - performs selected searching functions throughout the current HQ

The next three buttons **My Teams** **Tools** **Sites** apply to Team™ and Connect™ functions, but also include your entry point to Relate™, if your organization has purchased any of these products. If you have not purchased them, the buttons will not be present on the dashboard.

When you place the mouse cursor over the Tools button without clicking it (referred to as “mousing over”), you’ll get a drop-down list that shows the tools to which the logged-in user has permission to access and may include Organization Administration, Organization Chart, HQ and Relate. The Sites button will give you a drop-down list of the past ten sites you have visited within the organization during this login session. It also gives you access to a site map to help you navigate those sites.

### Main Navigation Bar

The main navigation bar, shown below, lists modules that handle various aspects of the HQ™ system. Some of these change or disappear from the bar, reflecting the level of permission you have been granted.



To view the submenu items for any module, click on or mouse over (mouse cursor placed over the link without clicking) those titles. When you mouse over a title on the navigation bar, a drop-down list appears, such as the list for Management shown here. To access any of the items on the drop-down, simply click the drop-down name.



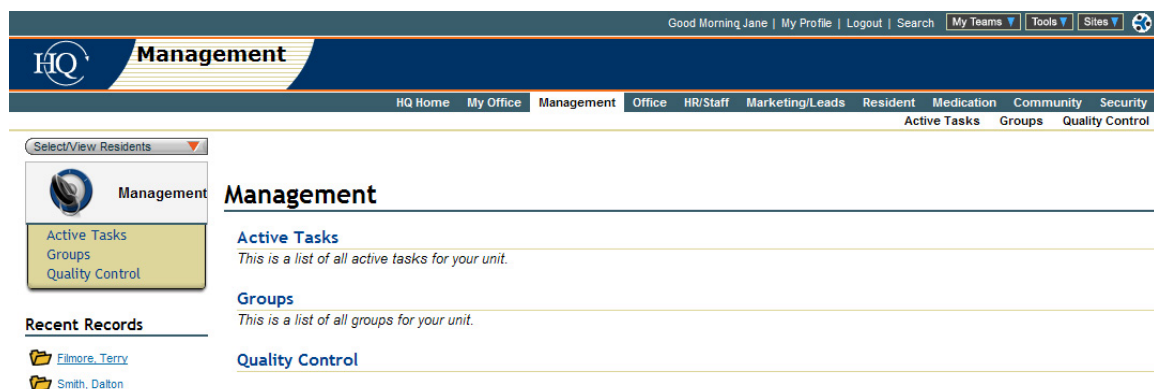
### Secondary Navigation Bar

There is usually a secondary navigation bar connected with the individual modules. When you click on the title on the main navigation bar, any existing drop-down items appear within the secondary bar, as shown here below the main bar.



For example, the secondary navigation options for Management are Active Tasks, Groups and Quality Control, just as they appeared in the Management drop-down. These remain in the lower bar until you click another title in the main navigation bar, which will replace these items with those from the drop-down for the new title you clicked.

If you have clicked on a main navigation title, you will be directed to a page containing the secondary items. For instance, the submenu page for the secondary items in (shown below) is the same as those items contained on the drop down.



### **Record Navigation Menu (Left-Hand Menu)**

Additionally, for most areas in HQ™, a record navigation menu appears to the left of the main screen, as seen in the example above. It allows you to access any area of the selected module and continues to display while you are performing actions in any of the submenu areas. This menu also appears on the individual and community Record Summaries, allowing you to quickly access, for viewing or editing, individual forms or reports containing information on that specific record.

### **Guideline 7: Permissions**

Administrators make the decision as to what permission level to allow any groups or individual users. However, other supervisors may have additional limited authority to allow or disallow permissions for those on their own level or subgroups.

If, as an individual, you are in need of expanded access and capabilities, please contact your organization's BlueStep administrator for help.



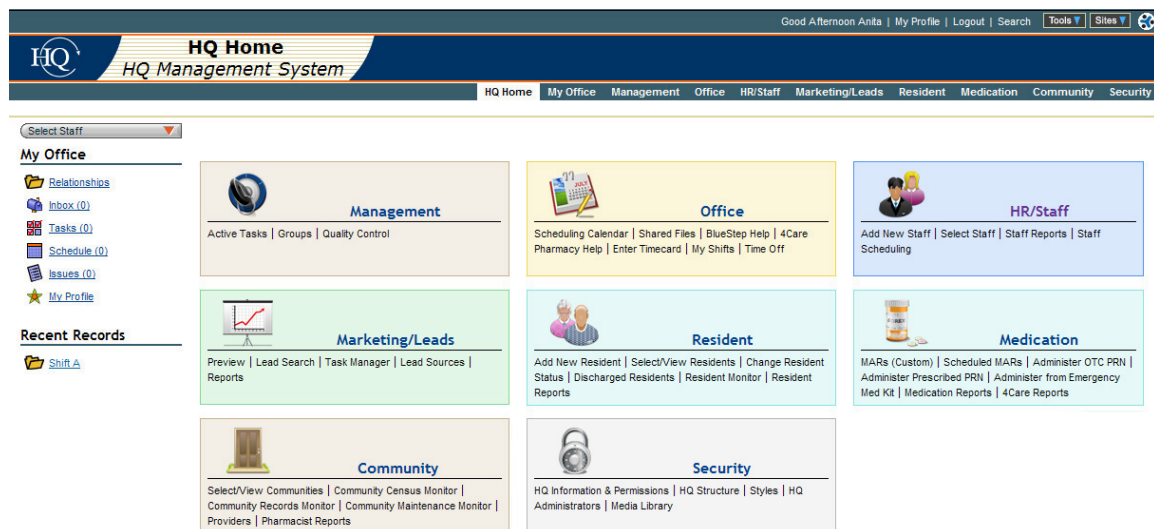


# HQ Home

The first available screen in the HQ Management System is called HQ Home, as seen below. It contains the main navigation for all HQ modules and direct access points for the major queries and reports. Also available are the My Office selections and, for ease of use, a dynamic list of the Recent Records visited by the logged-in individual.

Each of the HQ™ modules performs specific functions, which may be accessed from tabs on the main navigation bar or from the underlined links in each module section. Additionally, you may go directly to any of the functions under specific modules using the secondary navigation bar or the listings below each module title. For instance, under Management, the “Active Tasks | Groups | Quality Control” line is made up of three (3) clickable links to the three Management pages. All modules will display any available functions in this fashion.

Depending upon your permission level, as granted by the management at your organization, you may see fewer than the modules displayed here. No matter what is available on your screens, each will operate as described in the following pages.



The screenshot shows the HQ Home interface. At the top, there is a header with the HQ logo and the text "HQ Home HQ Management System". Below this is a navigation bar with tabs for "HQ Home", "My Office", "Management", "Office", "HR/Staff", "Marketing/Leads", "Resident", "Medication", "Community", and "Security". A secondary navigation bar includes a "Select Staff" dropdown and a "Shift A" button. The main content area is divided into several modules, each with a title, icon, and a list of links:

- My Office**: Relationships, Inbox (0), Tasks (0), Schedule (0), Issues (0), My Profile.
- Recent Records**: Shift A.
- Management**: Active Tasks | Groups | Quality Control.
- Office**: Scheduling Calendar | Shared Files | BlueStep Help | 4Care Pharmacy Help | Enter Timecard | My Shifts | Time Off.
- HR/Staff**: Add New Staff | Select Staff | Staff Reports | Staff Scheduling.
- Marketing/Leads**: Preview | Lead Search | Task Manager | Lead Sources | Reports.
- Resident**: Add New Resident | Select/View Residents | Change Resident Status | Discharged Residents | Resident Monitor | Resident Reports.
- Medication**: MARs (Custom) | Scheduled MARs | Administer OTC PRN | Administer Prescribed PRN | Administer from Emergency Med Kit | Medication Reports | 4Care Reports.
- Community**: Select/View Communities | Community Census Monitor | Community Records Monitor | Community Maintenance Monitor | Providers | Pharmacist Reports.
- Security**: HQ Information & Permissions | HQ Structure | Styles | HQ Administrators | Media Library.

**Accessing Modules** – click on the module name, such as “HR/Staff”, in either the main portion of the screen or the navigation bar. In most cases, the submenu screen will be displayed. Customized modules may retrieve other links specific to your facility.

**Accessing Reports/Queries/Wizards** – click on the name of the item, such as “Add New Resident” on the main portion of the screen or on the drop-down from the navigation bar. These will be listed under the module name and the link will return the item selected.

**Accessing My Office** – click the My Office link from the navigation menu to the left or on the navigation bar. Specific areas of My Office can be accessed from the links on the navigation menu or on the drop-down from the navigation bar.

**Accessing Recent Records** – click on the underlined name of the record in the Recent Records list. This list is dynamically created when the logged-in individual visits a record in the system. It will hold up to twelve (12) of the most-recently visited record links. Each logged-in user will only see the records they have accessed and not those of other users.



# My Office

My Office, as seen below, is an access point for several important processes that usually require review once each day or more often.

Cara Crane
Edit Page

**My Office**

- Relationships
- Inbox (0)
- Tasks (1)
- Schedule (1)
- Issues (0)
- My Profile

**Recent Records**

- Johnson, May

## My Office

---

**Relationships** 3 of 4

Name
Johnson, May
Johnson, Daniel
Smith, Bill

**Inbox (Unread Mail)** Compose Secure IntraMail   Compose Regular Email   0 of 0

Secure Subject	From	Delete
<i>There is no unread mail.</i>		

**Task** RSS 1 of 1

Name	! ✓	Due Date	Project
1: Review MAR Documentation	●	12/22/2007	Organization Project

**Schedule (Today)** RSS   New Event   1 of 1

Date	Time	Title	Description	Type	Attendance
12/18/2007	10:00AM MST	Staff Meeting	Focus Group on food quality and menu selections	Staff Schedules	

**Issues** RSS 0 of 0


Title	Description	Type	Status	!	Created On	Edit	Delete
<i>There are no quality control issues.</i>							

My Office contains modules for Relationships, IntraMail and external e-mail Inbox, Tasks, Today's Schedule, Issues and My Profile. These may be accessed individually by clicking the header links on the main page or links on the navigation menu to the left.



## My Office – Inbox



The My Office Inbox is an access point for both IntraMail and/or regular e-mail, as seen below. IntraMail is a secure mail system for electronic communication between users within the same organization. Since this mail does not go out onto the Web, it provides another layer of protection for your organization's privileged communication and sensitive documents. Both IntraMail and regular e-mail require initial configuration by the Organization Administrator and the user before they become active.

 It is important to note that IntraMail is secure, does not go through regular e-mail channels and, therefore, **cannot** be sent to addresses that are not BlueStep-hosted e-mail accounts.

### IntraMail - Inbox

Move To Folder... * <input type="button" value="Move Selected"/> <input type="button" value="Delete Selected"/>		<input type="button" value="Compose Secure IntraMail"/> <input type="button" value="Compose Regular Email"/>	
<input type="checkbox"/>    Subject	From	Sent	Edit Delete
1 - 27 of 27 <input type="button" value="Next"/> 			
<input type="checkbox"/> <a href="#">Leainers Special Invitation</a>	ISO	12/21/2007 11:55 AM	
<input type="checkbox"/> <a href="#">Connecting Evidence-based Research</a>	ammon	12/21/2007 11:06 AM	
<input type="checkbox"/> <a href="#">Staff training...</a>	Ken	12/21/2007 09:23 AM	
<input type="checkbox"/> <a href="#">Instant gift for slackers</a>	Tim	12/21/2007 09:21 AM	
<input type="checkbox"/>  <a href="#">VOIP phones</a>	Patrica	12/20/2007 10:11 PM	

### Creating E-mail

1. Click the 'Compose Secure IntraMail' button or the 'Compose Regular E-mail' button.
2. Type in the text of the message in the editor box labeled 'Body'.
3. To add individual recipients in the To, CC or BCC fields, click the single icon . To add a group of people as recipients, click the group icon .
4. Recipients are available based upon queries within the system and the view-permission of the sender. If the desired individual or group is not available for selection, contact your Organization Administrator.
5. Alternately, individual e-mail addresses may be typed into the fields.
6. Click the 'Send' button. Alternately, click 'Save As Draft' to postpone completion.

### Adding Attachments

1. Click the 'Attachments' link. Any file contained in the Attachments file can be selected for addition to the e-mail
2. If the desired file is not shown, click the 'Add File' button. From the pop-up, the system can be browsed or the document can be scanned to the Attachment file.

### **Moving Mail**

1. Click the checkboxes associated with each e-mail that needs to be moved.
2. To move the message(s) to a specific folder, select a folder from the drop-down.
3. Click the 'Move' button.

### **Deleting Mail**

1. Click the checkboxes associated with each e-mail that needs to be removed.
2. Click the 'Delete' button.



### **Accessing Mail**

1. Click on the underlined subject of the e-mail.
2. Any attachments can be accessed by clicking the underlined name of the attachment.
3. Also from the View Mail screen, deletions, replies and forwards can be initiated.



## My Office – Tasks

Tasks are created and assigned through the 'Active Tasks' link in the Operations Module. For ease of use, however, tasks assigned to individual users appear on their My Office Task List, as shown below. From this interface, any task can be reviewed, edited and updated.

 **Task List** sorted by priority 

<u>Name</u>	! ✓	<u>Due Date</u>	<u>Project</u>
1: <a href="#">Approve Orion Client</a>	! ▼	07/28/2003	Organization Project
2: <a href="#">Newest Upgrade</a>	↓ ●		Organization Project
3: <a href="#">Find additional vendors</a>	↓ ●		Organization Project

### Accessing Tasks

1. Click the underlined task name. A task pop-up will appear (see below), displaying the basic task information.
2. From this pop-up, notes may be added, priority adjusted, due date moved and 'Assigned To' individuals changed.
3. Additionally, non-compliance may be selected to report to specified individuals.

Task Info
Task Status
Attachments
Permissions

**\* Required**

Name \*

Sub Task of

Due Date   Priority  !

Assigned To  Assigned By

Notes

### Non Compliance

Update quality control in

Update performance log

Notify department leader

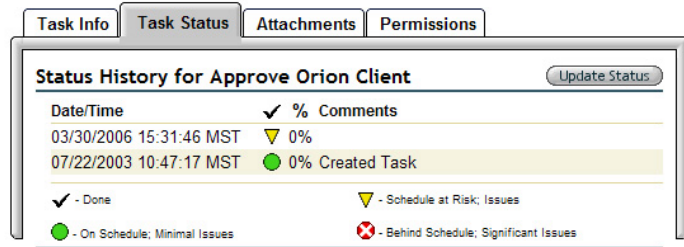
Notify supervisor

Notify top-level executive

Notify task owner

### Updating Status

1. Click on the 'Task Status' tab, which displays a status pop-up, seen at right.
2. Click the 'Update Status' button and enter any comments, adjust the status through the drop-down box and enter a number for the percentage completed.



### Adding Attachments

1. Click the 'Attachments' tab. Any file contained in the Attachments file can be selected for addition to the task.
2. If the desired file is not shown, click the 'Add Attachment' button. From the pop-up, the system can be browsed or the document can be scanned to the Attachment file.



# My Office – Schedule





The My Office Scheduling Calendar is a convenient place for each user to store appointment, event and meeting information. Events added to the HQ calendar will also be displayed on this view, if the specific user has been added to the event as an attendee.


## Scheduling Calendar

[New Event](#) 

Today's Date: [December 21, 2007](#)

[RSS](#)  



◀ December 21, 2007 ▶	
All Day	
8:00am	
9:00am	
10:00am	• 10:00AM to 12:00AM MST <a href="#">Year End Planning - Meeting</a>  
11:00am	
12:00pm	
1:00pm	• 1:00PM to 2:00PM MST <a href="#">Cleaning - Holiday</a>  
2:00pm	
3:00pm	
4:00pm	
5:00pm	

 - The event time/date has been converted to your local time zone. Click the event title for details.

Go To	November 2007	December 2007	January 2008	Go To
<a href="#">June 2007</a>	S M T W T F S 1 2 3	S M T W T F S 1	S M T W T F S 1 2 3 4 5	<a href="#">February 2008</a>
<a href="#">July 2007</a>	4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	<a href="#">March 2008</a>
<a href="#">August 2007</a>	11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	<a href="#">April 2008</a>
<a href="#">September 2007</a>	18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	<a href="#">May 2008</a>
<a href="#">October 2007</a>	25 26 27 28 29 30	23 24 25 26 27 28 29 30 31	27 28 29 30 31	<a href="#">June 2008</a>

[Go](#)  \* [Go Today](#)  
[Calendar Preferences](#)

### Viewing/Editing an Event

- To see information on a selected event, click the underlined name of the event. A pop-up will appear. When viewing is complete, click the 'Close' button on the pop-up.
- The user who originally created the event entry may also see and/or edit the event by clicking on the edit icon .
- The user who originally created the event entry may also delete the event by clicking the delete icon .

### Adding a New Event

- Click the 'New Event' button at the upper right.
- On the New Event Screen (example shown below) type a title for the event in the Title field. Enter a location and select an event type, if desired.
- Enter any information about the meeting in the Event Details editor box.



General Information Attendees Permissions

## New Event

\* Required

### General Information

Fill in a name, location, and details for your event.

Title \* Year-end Review

Location Conference Room, 2nd floor

Type Meeting

Event Details

Please bring schedule/assignment lists for the coming year.

### Date and Time

Fill in the date and time when this event will take place. If time of day does not apply to this event (e.g. New Years Day), check the all day event box.

Start Date & Time \* 12/03/2007 9:30am \*

End Date & Time \* 12/03/2007 10:30am \*

Time Zone \* (GMT-07:00) Mountain Time


This is an all day event.

### Repeating Events

Fill in these options to repeat your event on a regular basis.

Event Repeats The event repeats Event Is Not Recurring

Repeats Until until



- Use the current date, type in a date or use the calendar icon  to select a date for the event. Enter a time of day.
- Verify that the Time Zone is set to the correct zone.
- If the event is 'all day' or repeats on a set schedule, make the appropriate choices.
- When all fields are set as desired, click the 'Save' button.

### Changing Views

- The calendar defaults to the current day. To navigate to past or future days, click the arrows on either side of the header date, as in this example.

◀ November 26, 2007 ▶

To move ahead or back by months, click one of the links or month calendars at the bottom of the current view. Alternately, enter a specific date in the search field and click the 'Go' button.

- The calendar also defaults to the Day View. To see a full week, click the week icon  at the upper right. To see the full month, click on the month icon .

### Setting Calendar Preferences


- At the bottom of the screen, click the 'Calendar Preferences' button.
- On the resulting page, click the Time Zone drop-down and select the applicable zone for your facility.

## Calendar Preferences

---

### Time Zone

All times displayed on the calendar will be converted to the time-zone you specify.

(GMT-07:00) Mountain Time 


### Calendar Opening View

Select the view you want to start in when you go to calendar. This setting will not change your current calendar view.

Day View 


### Typical Work Day

Select the hours that start and end your typical work day. These settings determine the minimum amount of time represented on the Day View of the calendar.

8am  to 5pm 

### Interval on Day View

Select the time interval for the Day View of the calendar.

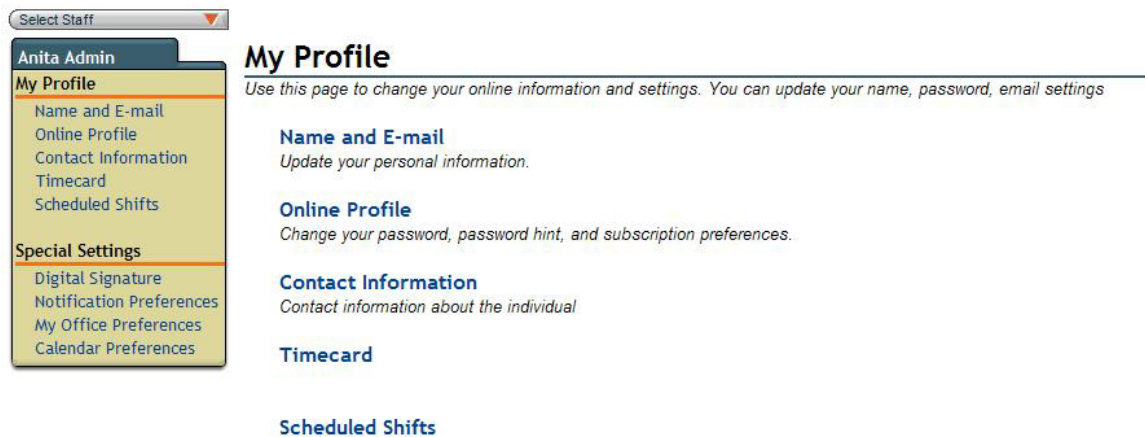
1 hour 

- Click the drop-down and select the desired starting view of the calendar, Day, Week or Month.
- Select starting hour and ending hour for the calendar display. If events are scheduled outside these default hours, the view will expand to include them.
- The Day View of the calendar may be set to increments of 10, 15, 20, 30 minutes or 1 hour. Click the drop-down and select the appropriate interval.
- When completed, click the 'Save' button at the bottom of the screen.



## My Office – My Profile

My Office contains a link to My Profile, the same destination as reached by the 'My Profile' link at the top of the screen. From this screen, a number of important areas can be accessed and edited or completed.



**My Profile**  
*Use this page to change your online information and settings. You can update your name, password, email settings*

**Name and E-mail**  
*Update your personal information.*

**Online Profile**  
*Change your password, password hint, and subscription preferences.*

**Contact Information**  
*Contact information about the individual*

**Timecard**

**Scheduled Shifts**

### Updating Information

1. Click on the form name link or the header – Name and E-mail, Online Profile or Contact Information.
2. Make any appropriate entries or edits to the fields and click the 'Save' button.

### Clocking In and Out on the Timecard

1. Select the 'Timecard' link or header and click the 'New Entry' button.
2. Click the Signature checkbox and the 'Save' button.
3. To clock out (for a break or for the day), click the edit icon for the current day's entry. **Do not** click 'New Entry' when clocking out.
4. Click the appropriate Signature checkbox and the 'Save' button.
5. During any edit, notes or mileage may be added to the appropriate fields.

### Applying for a Digital Signature\*

1. Click the 'Digital Signature' link under the Special Settings section.
2. The four-step process is outlined on the first page, as follows:
  - a. Verify your name and contact information
  - b. Enter a digital signature passphrase
  - c. Print and complete the BlueStep Digital Signature agreement (Read, sign, notarize and mail the agreement to BlueStep)
  - d. Upon receiving the agreement, BlueStep will activate your BlueStep Digital Signature account and you will be notified by e-mail

\* Be sure to enter a secure, but easily-remembered passphrase. This passphrase cannot be provided if forgotten, as it is encrypted on the servers and is irretrievable.

\* Some facilities elect to have each individual write his/her passphrase on paper, seal in separate, labeled envelopes and store in the facility safe.

\* If a passphrase cannot be remembered or retrieved, BlueStep should be notified. The Digital Signature will be disabled, allowing the individual to apply for a new passphrase and resubmit the documentation.



# Office - Timecard

## Clocking In on the Timecard

1. From the Office Module or the My Profile link, select the 'Timecard' link and click the 'New Entry' button.
2. On the Timecard page, as seen here, click the 'Clock In' signature checkbox.
3. If needed, enter any comments or notes, then click the 'Save' button at the bottom.


 **Timecard**
Last Modified: Never


---

Clock In	<input type="checkbox"/> Signature
Start Override	[no data]
Notes	<input style="width: 90%;" type="text"/>
IP Address	10.1.1.226

## Entering Breaks on the Timecard



1. To clock out for a break, click the edit icon for the current day's entry. **Do not** click the 'New Entry' button again.
2. Click the 'Start Break' signature checkbox, as seen below, and the 'Save' button.
3. The 'Override' fields are for the use of Organization Administrators and are auto-filled by the system. Do not change the data displayed.

 **Timecard**

 [Print](#)  
 Last Modified: Jan 4, 2008 5:06:22PM




---

**\* Required**

Clock In	Cara Crane, 01/04/2008 5:06:22PM
Start Override	<input style="width: 80%;" type="text" value="01/04/2008 5:06PM"/> 
Start Break	<input checked="" type="checkbox"/> Signature
Break Override	<input style="width: 80%;" type="text"/> 
Notes	<input style="width: 90%;" type="text"/>
Mileage	<input style="width: 50%;" type="text"/>
IP Address	10.1.1.226

4. To clock in after a break, click the edit icon for the current day's entry. **Do not** click the 'New Entry' button when clocking back in.
5. Click the 'End Break' signature checkbox, displayed below.
6. If needed, type in any notes or enter any mileage, then click the 'Save' button.





## Timecard

Clock In	Cara Crane, 01/04/2008 5:06:22PM
Start Override	<input type="text" value="01/04/2008 5:06PM"/> 
Start Break	Cara Crane, 01/04/2008 5:09:31PM
Break Override	<input type="text" value="01/04/2008 5:09PM"/> 
End Break	<input type="checkbox"/> Signature
Restart Override	<input type="text"/> 
Notes	<input type="text"/>
Mileage	<input type="text"/>
IP Address	10.1.1.226

### Clocking Out on the Timecard

1. To clock out for the day, click the edit icon for the current day's entry. **Do not** click 'New Entry' when clocking out.
2. Click the 'Clock Out' signature checkbox, seen below, and the 'Save' button.
3. During any edit, notes or mileage may be added to the appropriate fields.

## Timecard

Clock In	Cara Crane, 01/04/2008 5:06:22PM
Start Override	<input type="text" value="01/04/2008 5:06PM"/> 
Start Break	Cara Crane, 01/04/2008 5:09:31PM
Break Override	<input type="text" value="01/04/2008 5:09PM"/> 
End Break	Cara Crane, 01/04/2008 2:53:23PM
Restart Override	<input type="text" value="01/04/2008 2:53PM"/> 
Clock Out	<input type="checkbox"/> Signature
End Override	<input type="text"/> 
Notes	<input type="text"/>
Mileage	<input type="text"/>
IP Address	10.1.1.226



# Office - Helps

HQ has two basic default helps shown on every home page, 'BlueStep Help' and '4Care Pharmacy Help'. These two are links to each company's website and lead directly to the help pages on those sites.

## Accessing 4Care Pharmacy Online Help\*

1. From the HQ Home page, click the '4Care Pharmacy Help' link in the Office module.
2. The 4Care website, as seen below, will appear.

**4care** Home | About | Employment Application | Demo | FAQ | How To Join | Partners | Members | Pharmacy Help

If you need system assistance, call the BlueStep/4Care Pharmacy Administrator at your organization. For help with a medication question, please don't hesitate to contact us at the numbers below.

4Care Pharmacy 109 West Gentile Layton, UT 84041-3000	Name	Title	Extension	Direct Fax #	E-mail
(801) 336-3690 Main Line	Pam Whitaker	Tech	124	(866) 417-3645	<a href="mailto:pwhitaker@4carepharmacy.com">pwhitaker@4carepharmacy.com</a>
(877) 477-3229 Toll Free	Brent Croxford	Tech	104	(866) 694-7510	<a href="mailto:bcroxford@4carepharmacy.com">bcroxford@4carepharmacy.com</a>
(801) 336-3001 General Fax	Shauna Heyer	Tech	128	(866) 581-1910	<a href="mailto:sheyer@4carepharmacy.com">sheyer@4carepharmacy.com</a>
(801) 336-3690 After Hours	Natalie Perkins	Tech	138	(866) 401-7402	<a href="mailto:nperkins@4carepharmacy.com">nperkins@4carepharmacy.com</a>
	Janie Sevy	Tech	136	(866) 694-7549	<a href="mailto:jsevey@4carepharmacy.com">jsevey@4carepharmacy.com</a>
	Amy Anderson	Tech	126	(801) 823-2247	<a href="mailto:aanderson@4carepharmacy.com">aanderson@4carepharmacy.com</a>
	Zane Stanger	Tech	116	(866) 381-2219	<a href="mailto:zstanger@4carepharmacy.com">zstanger@4carepharmacy.com</a>
	Ranch Pratt	President	126	General Fax	<a href="mailto:ranch@4carepharmacy.com">ranch@4carepharmacy.com</a>
	Patsy Hoffer	Billing Mgr	121	(866) 572-0418	<a href="mailto:phoffer@4carepharmacy.com">phoffer@4carepharmacy.com</a>
	Larry Seamons	Purchasing	109	General Fax	<a href="mailto:lseamons@4carepharmacy.com">lseamons@4carepharmacy.com</a>

We have a series of helpful user guides in PDF format that you can access by clicking on each link below. Many of these guides have been added within the last year and others have been recently updated. On the list below, all of the new or revised guides and manuals are marked with ♦ preceding the document name. Please check the list below often, as new guides are also being added regularly.

### 4Care Pharmacy

- [4Care Procedures](#)
- [Initiating 4Care Pharmacy Services](#)
- [4Care Authorization Letter](#)
- [Prescription Purchase Authorization](#)
- [Pharmacy Privacy Practices](#)
- ♦ [4Care Policies and Procedures Manual](#)
- [Extra Policy/Procedures Signature Pages](#)
- [Medicare Beneficiary Complaints](#)
- ♦ [Medicare Capped Rental/Routine Purchase](#)
- ♦ [Medical Abbreviations](#)
- ♦ [Medication Expiration Guidelines](#)
- ♦ [Pharmacological Measurements](#)
- ♦ [Basic Guide to the Prescribed Medication Form](#)
- ♦ [Transferring Medications to 4Care](#)
- ♦ [Tracking Over-the-Counter Medications](#)
- [4Care Return Policy](#)
- [4Care Medication Fax Sheet](#)
- [Problem Report Fax Sheet](#)
- ♦ [Quick Guide to the Medication Prescribed Form](#)
- [4Care Ordering Instructions](#)



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### HQ™ User Manuals

- [HQ™ User's Manual](#)
- [HQ™ Basics](#)
- [HQ™ Quick Guide](#)
- ♦ [HQ™ Digital Signature](#)
- ♦ [HQ™ Using the MAR System](#)
- ♦ [HQ™ Using the Custom MAR](#)

### 4Care User Guides

- [Caregiver HQ Guide](#)
- [Physician HQ Guide](#)

### Medication Updates/Changes (PDF)

- [Alupent \(metaproterenol sulfate\) DC](#)
- [Seroquel XR \(quetiapine fumarate\)](#)

3. Listed on the page are a number of manuals and guides in PDF format.
4. The documents are organized into 4Care Pharmacy and HQ User Manuals.
5. Find the needed section and guide, then click on the name.

\* These documents may be printed, downloaded or e-mailed to those of your users or staff who may find them helpful.


\* New information is added to the 4Care website as new features and functions are created. Existing documents are also updated as needed.

\* Adobe Acrobat offers a free PDF Reader, if your computer is not already equipped to read PDF files. Click the Acrobat link (illustration at right) at the bottom of the 4Care help screen to reach the Adobe.com download page.



### Printing the 4Care Policies and Procedures Manual\*

\* Most state licensing entities require that assisted living, skilled nursing and some other facilities have a print copy of the pharmacy policy and procedure manual on the premises.

1. Click the '4Care Pharmacy Help' link on the HQ home page.
2. The 4Care Policies and Procedures manual is the sixth item in the 4Care Pharmacy section; see pointer in the example right.
3. Click the underlined link.
4. Depending upon your selection and the configuration of the computer, there will be a print icon  or print link Print in the program header. Click this link and proceed with printing as normal.
5. When completed, exit or close the page.
6. Any other document may be printed in the same manner.



### 4Care Pharmacy

- [4Care Procedures](#)
- [Initiating 4Care Pharmacy Services](#)
- [4Care Authorization Letter](#)
- [Prescription Purchase Authorization](#)
- [Pharmacy Privacy Practices](#)
- ◆ [4Care Policies and Procedures Manual](#)
- [Extra Policy/Procedures Signature Pages](#)
- [Medicare Beneficiary Complaints](#)
- ◆ [Medicare Capped Rental/Routine Purchase](#)
- ◆ [Medical Abbreviations](#)
- ◆ [Medication Expiration Guidelines](#)
- ◆ [Pharmacological Measurements](#)
- ◆ [Basic Guide to the Prescribed Medication Form](#)
- ◆ [Transferring Medications to 4Care](#)
- ◆ [Tracking Over-the-Counter Medications](#)
- [4Care Return Policy](#)
- [4Care Medication Fax Sheet](#)
- [Problem Report Fax Sheet](#)
- ◆ [Quick Guide to the Medication Prescribed Form](#)
- [4Care Ordering Instructions](#)

### Accessing BlueStep Online Help

1. From the HQ Home page, click the 'BlueStep Help' link in the Office Module.
2. The client care website (portion is seen below) will appear.

Good Afternoon Jan | My Profile | Logout | Search [My Teams](#) [Tools](#) [Close](#)

**Client Care**

Home [Fingerprint Support](#) [FAQ](#) [Ask a Bluestep Tech](#) [Relate](#) [Relate Script](#) [Family Connect Training](#) [SIF Help](#)

At BlueStep Systems, we are anxious to meet your needs and provide assistance and support. Please see our staff contact numbers listed to the right.

Also please note the help documentation available below. They cover a wide range of our features and include the most-asked questions. Each is offered in two formats and fully printable for future reference.

If you need assistance, the BlueStep Administrator at your organization is experienced with the functions of your system.

For further help, you may reach us at:

- Client Care Department (801) 336-3043
- Skilled Nursing Client Care (801) 336-3043 X 103
- Toll-free (800) 410-0257
- Fax (801) 336-3022
- After-hours tech support (801) 336-3043

We have a series of helpful user guides in PDF format that you can access by clicking on each link below. Many of these guides have been added within the last year and others have been recently updated. All of the new or revised guides are marked with ✦ preceding the document name. In the coming months, the older guides will be updated to reflect recent changes in our products. Please check the list below often, as new guides are also being added regularly.

For advanced users, please note the RelateScript™ link available under User Help Guides on the navigation bar. Full documentation for RelateScript™ is available for those with programming experience.

**HQ™ User Manuals**

- [HQ™ User's Manual](#)
- [HQ™ Basics](#)
- [HQ™ Quick Guide](#)
- [HQ™ Record Summaries](#)
- [HQ™ Document Library](#)
- [HQ™ Document Library Quick Guide](#)
- [HQ™ Digital Signature](#)
- [HQ™ Using the MAR System](#)
- [HQ™ Using the Custom MAR](#)
- [HQ™ Idaho UAINSA Instructions](#)

**BlueStep Enhancement and Feature Guides**

- [Adding Shopping Cart](#)
- [BlueStep™ Icons](#)
- [Building Variable Record Reports](#)
- [Concepts and FAQs](#)
- [Creating Custom Detail Reports](#)
- ✦ [Creating a Digital Signature](#)
- [The Media Library](#)
- [The BlueStep™ Editor](#)
- [The Record Summary](#)
- [RSS Feeds](#)



3. The second section on the page lists a large number of manuals and guides in PDF format.
4. The documents are organized into the sections, HQ User Manuals, 4Care Pharmacy, BlueStep Enhancements and Features, Connect, Team and BlueStep Newsletters.
5. Find the needed section and guide, then click on the preferred underlined selection, either PDF or Word.

\* These documents may be printed, downloaded or e-mailed to those of your users or staff who may find them helpful.

\* New information is added to the BlueStep website as new features and functions are created. Existing documents are also updated as needed.

\* Adobe Acrobat offers a free PDF Reader, if your computer is not already equipped to read PDF files. Click the Acrobat link (illustration at right) at the bottom of the BlueStep help screen to reach the Adobe.com download page.





# HR/Staff - Records

## Adding New Staff

1. Click the Add New Staff link for access to a series of four (4) screens in which information is entered, saved and stored in the staff member's record.
2. Enter as much data as is known, then click the Next button at the bottom of the screen.
3. On the fourth screen, click the Save button. The system will take you to the Record Summary, titled with the employee's name, which you may access other forms to add any additional information or to edit existing information.
- 4.

Aaronson, Andrew
+

### Record Summary

Use this page to get a quick snapshot of this record. To edit the information on this page, use the links on the left.

**Information**

- ▶ Summary
- Personal Information
- Certifications
- Contact Information
- Employment Information
- Goals
- Immunizations
- Medical Information
- Online Profile
- Performance Review
- Personal Contacts
- Personal Info

**Work with this Record**

- Relationships
- Change Record Category
- Change Unit
- Remove User Account
- Delete Record

Personal Information		
Name, First	Andrew	
Name, Last	Aaronson	
Email Address	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	

Certifications		
Certification Name	Date Issued	Date Expires

Contact Information		
Home Phone	(718) 234-4567	
Mobile Phone	(718) 456-7890	
Work Phone	(718) 345-6868	

Employment Information	
Employment Type	Full-Time
Date Hired	04/05/1991

Goals	
Title	Date Due
<a href="#">Increase bottom line</a>	12/30/2001
<a href="#">Pharmacology Update</a>	07/07/2003

Immunizations	
Immunization	Date
<a href="#">Hepatitis B</a>	04/04/2003
<a href="#">MMR</a>	09/09/2002

Medical Information	
Medical Conditions	Injured Achilles tendon

Online Profile	
Username	andrew

Performance Review	
Date	Title
<a href="#">07/01/2003</a>	Promotion
<a href="#">01/04/2003</a>	Yearly
<a href="#">10/10/2002</a>	Job Upgrade
<a href="#">07/01/2002</a>	Half-year
<a href="#">01/04/2002</a>	Yearly

Personal Contacts			
Last Name	First Name	Company	Work Phone
<a href="#">Aaronson</a>	Amber	Bestway	(817) 234-5678
<a href="#">Aaronson</a>	Arthur	Green Belt Products	(234) 234-2345

Personal Info	
Birth Date	03/04/1955

**Recent Records**

- [Aaronson, Andrew](#)
- [Grady, Gail](#)
- [Draper, Darla](#)
- [Bronson, Betty](#)
- [Eakins, Emma](#)
- [Foster, Frank](#)
- [Dunston, David](#)
- [Norris, Nolan](#)

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## Relationships









The Relationships link in the record navigation menu is used to establish a relationship between the record you are viewing and any other specific staff member, resident, responsible party, care partner or non-care partner within the HQ™ system.

The relationship screens provide controlled access when a unique, permanent relationship or assignment must be designated to an individual, without access to others or by others.

## Relationships

### Primary Relationships (i.e., Draper, Darla is Care Giver)

[New Primary Relationship](#)

Relationship	Edit	Delete
Draper, Darla is Staff over <a href="#">Marple, Mary</a>		
Draper, Darla is Staff over <a href="#">Foster, Frank</a>		
Draper, Darla is Staff over <a href="#">Hammond, Harry</a>		
Draper, Darla is Staff over <a href="#">James, Jeremy</a>		

### Secondary Relationships (i.e., Draper, Darla is Care Receiver)

[New Secondary Relationship](#)

Relationship	Edit	Delete
<a href="#">Aaronsen, Andrew</a> is Supervisor over Draper, Darla		

- A **Primary Relationship** is defined as an individual or organization over whom the person named on this record has responsibility.
- A **Secondary Relationship** is defined as an individual or organization that has responsibility over the person named on this record.

## Creating a New Relationship

1. Click on either the New Primary Relationship or New Secondary Relationship button.
2. On the resulting screen, click on one of the underlined category links in Related Person. This will produce a pop-up displaying all the possible record choices for that category.
3. Select a record.

## New Relationship

Related Person [\[none\]](#) [Select a Non-Care Partner](#) [Select a Discharged Client](#) [Select a Care Partner](#) [Select a Client](#)  
[Select a Inquiry](#) [Select a Responsible Party](#) [Select a Staff](#)

Relationship Type

4. Click on the Relationship Type drop-down and select one of the possible titles.
5. Click the Save button.
6. The new relationship will be added to the Relationships page for this record and will also be displayed on any relationship trees that include this record and/or the related person.

\* The relationship types visible on the drop-down were selected at the time HQ™ was configured for your organization. They may be changed by someone in your organization with a Relate™ license or by BlueStep™, upon request.

## Changing Record Categories

If a record in the HQ™ system needs to be moved from one category to another, the Change Record Category link will allow the move without reentering the data or loss of information.

1. Click the Change Record Category link on the record navigation menu. The resulting screen will show all categories that the present record is in and the data collection forms within those categories.
2. Click the Add Category link to see a drop-down of all available categories to which you may add this record.

3. Click on the appropriate category name. If there are fields of required information for the selected category (which have not been filled out for this individual) the forms containing those fields will be presented for you to complete. (If there are additional forms, but none of the fields are required to meet the category provisions, the record summary will appear.)
4. Click the Save button **Save** when done with any additional forms and you will be returned to the record summary.
5. If you click the Change Record Category link again, you will see that the new category has been added to the screen. In the example below, the record is now in the Resident category, as well as the Lead category.

6. In the rare instance when there is reason to delete a previous or unwanted category, click the Remove button to the right of the unneeded category. You may always check an individual's category by clicking the Change Record Category link.

## Changing Units

If a record in the HQ™ system needs to be moved from one unit to another, the Change Unit link will allow the move without reentering the data or loss of information.

### Change Unit


Use this form to change the unit that this record "belongs to." This allows you to move a record when an employee changes departments, a member changes chapters, etc.

<b>Record</b>	Bronson, Betty
<b>Moving From</b>	Consumer Education Association
<b>Move To</b>	<ul style="list-style-type: none"> <li>Consumer Education Association</li> <li>CEA Product Divisions TEAM Unit</li> <li>CEA Mobile Education Division Unit</li> <li>CEA MECP Unit Admin</li> <li>CEA HNIT Division Unit</li> <li>CEA Video Division Unit</li> <li>CEA Audio Division Unit</li> <li>CEA Technical Unit</li> <li>CEA Overlapping Unit</li> </ul>

1. Click the Change Unit link on the record navigation menu. The resulting screen, example above, displays the record name, the current unit and presents a drop-down listing all available units in your organization.
2. Click on the new unit name, then the Save button. You may always check an individual's unit by clicking this link and viewing the listed unit.

### Removing User Accounts

You may delete the user account of any record, thus denying login without deleting other stored information on the individual named in the record. This is useful whenever you must retain data on the individual or organization, but they no longer should have access to your system, such as in the case of a former employee.

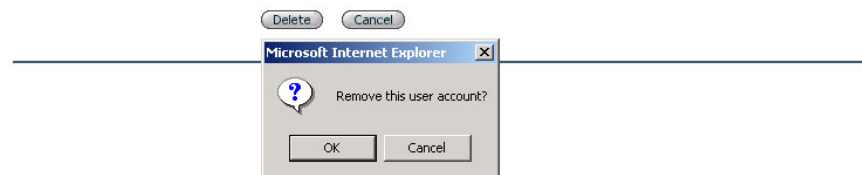
1. Click on the Remove User Account link in the record navigation menu. The resulting screen displays the account name.
2. If it is correct, click the Delete  button. A pop-up verifier will appear prompting you to reconsider this decision, as it will block the user's access to the system.
3. If you are sure you want to proceed, click the OK button.


### Remove User Account

*Use this page to remove a user's online account. The user's Relate information will remain intact, but the user will be unable to access the system.*

Caution: Removing a user account will block a user's access to the system.

User account to remove: Bronson, Betty



4. In certain instances, you may receive the red text message **"This user account cannot be removed, because it is in use in other parts of the system."** If that message appears, a list of User Groups appears below the text.
5. Click on each of the underlined group names, such as [Food Service](#) in the example below. Each link will take you to a User Group, where you can delete the individual's membership in the group, using the delete icon .
6. When all memberships have been deleted, you may return to this record summary and proceed removing the user account, as described above.

### Remove User Account

*Use this page to remove a user's online account. The user's Relate information will remain intact, but the user will be unable to access the system.*

Caution: Removing a user account will block a user's access to the system.

User account to remove: Bronson, Betty

This user account cannot be removed, because it is in use in other parts of the system:

[Food Service](#)

## Deleting Records

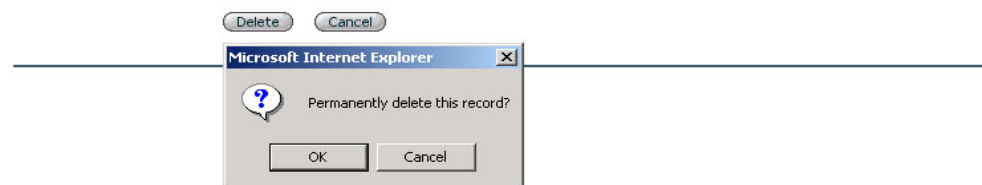
1. It may occasionally become necessary to entirely remove a record from the system, such as when duplicate records appear.
2. Click on the Delete Record link on the record navigation menu.
3. On the resulting screen, please take note of the red warning message **“Caution: Deleting this record is permanent.”** If you proceed and delete this record it will be permanently and irrevocably gone from the system. There is no way to undo the delete. If you find you do need the record after having deleted it, the only option is to recreate the record from the beginning again.


### Delete Record

*Use this page to remove a record from Relate. Deleting this record will remove all data from all forms. This operation cannot be undone.*

**Caution:** Deleting this record is permanent.

**Record to Delete:** Dunston, David



4. If you are certain you want to proceed with the deletion, click the OK button on the pop-up verifier.
5. In some cases, you may receive the red text message **“This record cannot be deleted, because it is in use in other parts of the system.”** If that message appears, a list of User Groups appears below the text. Click on each of the underlined group names, such as [Recreational](#), [Organization Administrators](#), [Groundskeeping](#), etc. in the example below. Each link will take you to a User Group, where you can delete the individual’s membership in the group, using the delete icon .
6. When all memberships have been deleted, you may return to the record and proceed with removing the record, as described above.

### Delete Record

*Use this page to remove a record from Relate. Deleting this record will remove all data from all forms. This operation cannot be undone.*

**Caution:** Deleting this record is permanent.

**Record to Delete:** Aaronson, Andrew

This record cannot be deleted, because it is in use in other parts of the system:

[Organization Administrators](#)

[Groundskeeping](#)

[Recreational](#)

[HQ Administrators](#)

[Therapy](#)

## Viewing and Selecting Staff

The Select Staff link under the manager icon gives you access to the All Staff screen, which lists every member of your organization who has been designated “Staff” (a member of the Staff record category). The page gives you a snapshot of the records of each individual, with a [Select](#) link to open each record summary.

## All Staff

Search By		Search For		
<input type="text" value="Name, First"/>	<input type="text" value="Starts With"/>	<input type="text"/>	<input type="button" value="Search"/>	
<input type="checkbox"/> Search within current results				

Select	<u>Name, Full</u>	<u>Email Address</u>	<u>Date Hired</u>	<u>Social Security Number</u>
<a href="#">Select</a>	Aaronson, Andrew	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	04/05/1991	345-67-8909
<a href="#">Select</a>	Bronson, Betty	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	05/05/1999	456-78-9098
<a href="#">Select</a>	Carlson, Cliff	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	12/12/2002	345-67-8909
<a href="#">Select</a>	Dunston, David	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	10/10/1990	345-34-3456
<a href="#">Select</a>	Eakins, Emma	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	08/09/2000	234-56-7890

The All Staff screen is set to alphabetize by last name as a default. You may click on any underlined column titles to reorder the records by Date Hired, Social Security Number or E-mail Address.

\* The display columns seen on this page were selected at the time HQ™ was configured for your organization. They may be changed by someone in your organization with a Relate™ license or by BlueStep™, upon request.

### Using a Search

If you have a long list of staff members, the Search function will be a useful timesaver in locating the record needed.

## All Staff

Search By		Search For		
<input type="text" value="Name, First"/>	<input type="text" value="Starts With"/>	<input type="text"/>	<input type="button" value="Search"/>	
<ul style="list-style-type: none"> <li>Name, First</li> <li>Name, Last</li> <li>Social Security Number</li> </ul>	<ul style="list-style-type: none"> <li>Starts With</li> <li>Contains</li> <li>Ends With</li> <li>Sounds Like</li> <li>Equals</li> <li>Not Equals</li> <li>Greater Than</li> <li>Less Than</li> <li>Greater Than or Equals</li> <li>Less Than or Equals</li> </ul>			

1. The Search By field contains a drop-down list of the fields on which you may conduct the search. In the example above, click on the down arrow, then on First Name, Last Name or Social Security number.
2. The next field (Starts With is the first selection) contains a much longer list of possible search operators. Select one of these options, then proceed to the Search For field.
3. Type an identifier (the name, partial name or number, in this case) for which you are searching and click the Search button .
4. The page will repaint with the records that most closely match your search criteria. Click the [Select](#) link and proceed to work with the record.

## My Staff

The My Staff link allows you access to a relationship tree, similar to that which is displayed in My Relationships under My Office. It contains the names of staff members in the system over whom you have responsibility or who have responsibility over you. You may access the record summary for any of the people listed by clicking on their underlined name. Those whose names are not underlined are a part of your relationship tree, but are not staff members.

The relationships displayed in My Staff are for informational viewing, reference and record summary retrieval. Making changes, additions or deletions to the people shown on your staff tree is handled through the Relationships link on your own record navigation menu or the menus of those individuals concerned.

## My Staff

---

[Collapse All](#) [Expand All](#)

[Andrew Aaronson](#)

**Who is Andrew over?**

Andrew is Staff over Gail Grady

**Who is Gail under?**

[Andrew Aaronson](#) is Staff over Gail

Andrew is Staff over Karl Koelberg

**Who is Karl under?**

[Andrew Aaronson](#) is Staff over Karl

Andrew is Supervisor over [Cliff Carlson](#)

**Who is Cliff over?**

Cliff is Staff over Frank Foster

**Who is Frank under?**

[Cliff Carlson](#) is Staff over Frank

Cliff is Staff over Harry Hammond

**Who is Harry under?**

[Cliff Carlson](#) is Staff over Harry

Cliff is Staff over Jeremy James

**Who is Jeremy under?**

[Cliff Carlson](#) is Staff over Jeremy

**Who is Cliff under?**

[Andrew Aaronson](#) is Supervisor over Cliff





# HR/Staff – Time Off Requests

## Requesting Time Off


1. From the My Profile link at the top of the screen, select the Time Off Request link.
2. On the resulting screen, example at right, enter the Beginning and Ending Dates.
3. Select a reason for the request from the drop-down list.
4. Add any additional pertinent information in the Notes field.
5. Click the Save button.
6. The administrator or HR manager at your community will review the request and approve or deny it.
7. To check the status of a Time Off Request, click the Time Off link in the Office module.
8. All requests that you have made will be listed, as in the example below.
9. 'Request Time Off' links are also offered in this view, should they be needed.


### Time Off Request


**\* Required**

Date Request Made 06/26/2009

**Request**

Beginning Date \* 04/13/2009 

Ending Date \* 04/17/2009   
*(Leave blank if only one day)*

Reason \* Vacation 

Note

**Status**

Status Pending

Manager Note

### Time Off Requests for Anita Aaronson

[Request Time Off](#)

Date Request Made	Date(s)	Reason	Status	Signature
05/06/2009	8/17/2009 - 8/21/2009	Vacation	Approved	Brandon Bagley, 05/15/2009 3:26:52PM
04/13/2009	4/16/2009 - 4/17/2009	Family Needs	Denied	Brandon Bagley, 04/13/2009 5:04:33PM

[Request Time Off](#)

## Reviewing a Request

1. HR administrators, staffing managers or Organization Administrators will have the access to approve or deny time off requests, as set by your organization.
2. Click on the Staff Scheduling link in the HR/Staff module.
3. Select 'Time Off Requests'.
4. A list of all 'Pending' status requests will be displayed.
5. Click the Select associated with the desired request.
6. On the resulting screen, example at right, select Approved or Denied in the Status field.
7. Enter any notes, then click the Manager signature.
8. Click Save and the system will return you to the pending requests page.

### Time Off Request

**\* Required**

Staff Name Nanette Nourse

Dates Requested 6/25/2009 - 6/26/2009

Reason Training

Notes [no data]

**Status**

Pending

Approved

Denied

Note

Manager Signature



# Marketing/Leads - Leads

The Marketing/Leads module is designed to track and store information about prospective residents, their statuses, general and specific marketing activities, staff relationships with prospective customers and to provide a launching pad for future marketing strategies and individual marketing/sales tasks.

## Using the Preview Page


The Preview screen consists of a web page that is available for administrators or marketing personnel to post comments, articles, guidelines, instructions or text of any sort. The pagelets may also contain shared files, Media Library items, site links and merge reports that have been built in Relate™ and added to the HQ Structure. The purpose of this page (additional pages may be added) is to provide a single place where the sales/marketing staff can share documents, ideas and information pertinent to the entire group.

## Lead Search

Clicking on the Lead Search link opens a page from which you can add a new lead to the system or search for and select an existing lead.

Add Lead

● Next task is scheduled  
▼ Next task is NOT scheduled  
✖ Task is PAST DUE

 **Lead Search (Open)**

[Edit Page](#)
[Export](#)
[Print](#)

**Search By**

Last Name

▼

Starts With

▼

Search

Search within current results


**Search For**

Select	Phase/Status	Primary Contact	Resident	Lead Source
Select	✖ Create 1st Task		<a href="#">Filmore, Terry</a>	<a href="#">Internet: Google Search</a>
	B Lead			
Select	● Post-Tour	<a href="#">Barry Russon</a>	<a href="#">Russon, Margerie</a>	<a href="#">Public relations: Magazine Write-Up</a>
	B Lead			
Select	▼ Deposit Made	<a href="#">Ronald Busby</a>	<a href="#">Busby, Ronald</a>	<a href="#">Public relations: Magazine Write-Up</a>
	A Lead			
Select	● Pre-Tour	<a href="#">Richard Morris</a>	<a href="#">Morris, Ricky</a>	
	A Lead			


## Adding a New Lead

5. Click the Add Lead button Add Lead at the upper right of the Lead Search screen.
6. Enter as much information on the 'Name and E-mail' form as you know, then select the Save button.
7. The screen will repaint with the Record Summary/Inquiry Information form. There are six (6) sections on the Inquiry Information form, two (2) of which, Primary Contact and Resident Contact, can be expanded and collapsed by clicking the **[+]** and **[-]** icons. Add additional information to each section as needed.

### Editing the Inquiry Information Section

1. Manually type or select the appropriate date from the calendar icon .
2. Activate the drop-down arrows and make selections from the option lists in the Inquiry Method, Lead Source, Decision Status, Assigned To, Lead Status and Sales Phase fields.

### Resident: Russon, Margerie

Inquiry Information	
Inquiry Date: 04/02/2009 	Lead Status: B Lead
Inquiry Method: Walk In	Who Took Inquiry: Jan Walker
Lead Source: Public relations: Magazine Write-Up <input type="button" value="Go"/>	
Decision Status: Consulting with Family	
Assigned To: Admin, Anita <input type="button" value="Go"/>	Sales Phase: Post-Tour

### Editing the Primary Contact Section

1. The Primary Contact section appears closed unless specifically opened by clicking the expand icon [+].
2. Complete the known information for each field. When the form is saved, the closed section will display the Primary Contact header bar, including the name entered as the contact.

[-] Primary Contact: Barry Russon	
Name: Barry Russon	Relationship: Son
Address: 1212 Buxton Place	Home Phone: (333) 444-5555
City: Fremont	Work Phone: (444) 555-6666
State: UT Zip: 84772	Mobile Phone: (555) 666-7777
Allow Contact: <input checked="" type="checkbox"/>	Fax Number: (666) 777-8888
Inquirer: <input checked="" type="checkbox"/> Mailing List: <input checked="" type="checkbox"/>	E-mail: br@nomail.com

### Editing the Resident Contact Section

1. The Resident Contact section appears closed unless specifically opened by clicking the expand icon [+].
2. Complete the known information for each field. When the form is saved, the closed section will display the Resident Contact header bar, including the name entered for the resident.

[-] Resident Contact: Margerie Russon	
Name: Margerie * Russon *	2nd Resident Name: none
Address: 1742 Dover Downs	Home Phone: (777) 888-9999
City: Silesow	Work Phone:
State: UT Zip: 84782	Mobile Phone:
Allow Contact: <input checked="" type="checkbox"/>	Fax Number:
Inquirer: <input type="checkbox"/> Mailing List: <input type="checkbox"/>	E-mail:

### Editing the Resident Profile

1. The Resident Profile section was designed to contain data required for success in meeting a prospective resident's needs. Make selections and enter as much data as known.
2. Amenities and Apartment Preference are drawn from Option Lists that can be customized (by those holding a Relate License or by the Organization Administrator) to reflect the choices available at your facility.

#### Resident Profile

Resident Gender: <input type="text" value="Female"/>	Date of Birth: <input type="text" value="01/01/2020"/>
Inquiry For: <input checked="" type="radio"/> Individual <input type="radio"/> Couple	Living Situation: <input type="text" value="Home (with Services)"/>
Marital Status: <input type="text" value="Widowed"/>	Time Frame: <input type="text" value="1 - 2 Weeks"/>
Amenities: <input type="checkbox"/> Resident Parking <input checked="" type="checkbox"/> Mini Kitchen <input type="checkbox"/> Pets Allowed <input checked="" type="checkbox"/> Walk-in Shower <input checked="" type="checkbox"/> Community Outings <input type="checkbox"/> Smoking <input type="checkbox"/> Full Kitchen	Apartment Preference: <input type="checkbox"/> Cottage/Villa <input type="checkbox"/> 2 Bedroom <input type="checkbox"/> Studio <input type="checkbox"/> Companion <input checked="" type="checkbox"/> 1 Bedroom
Hot Buttons: <input type="text" value="Non-smoking areas - has allergies&lt;br/&gt;Convenient to family and stores"/>	

3. Enter detailed data into the Hot Button memo field. This information is important to finding community solutions that will make the resident comfortable in choosing your facility.

### Editing the Financial Information Section

1. This section provides a brief outline of financial matters pertaining to the resident's ability and desire to enter the facility.
2. Make selections based on information obtained from the prospective resident.

#### Financial Information

Funding Type: <input type="text" value="Private"/>	Min. Budget: <input type="text" value="\$1,500"/>
Housing Ownership: <input checked="" type="radio"/> Own <input type="radio"/> Rent	Max. Budget: <input type="text" value="\$3,000"/>

### Adding Inquiry Tasks/Notes

Every task can be organized and tracked using the Inquiry Tasks/Notes section. Each contact with the potential resident and the results can be recorded as a Note.

Inquiry Tasks/Notes <span style="float: right;"><a href="#">Add Task/Note</a></span>					
Date Due	Priority	Task	Note	Complete	Edit
01/13/2009	Normal	Call	Positive response on second call. Will consult with family and have final soon	Yes	
01/07/2009	Normal	Home Visit	Left brochures and registration materials.	Yes	

1. Click the [Add Task/Note](#) link at the right of the header bar.

- The resulting screen will allow users to select a task, add notes, prioritize and add a deadline, as shown below.

**Tasks/Notes**

\* Required

Select Task \* Home Visit

Specify Task  
If "Other"

Note  
Left brochures and registration materials.  
Do follow-up call next week. Seems positive about the facility and location.

Priority  
 High  Normal  Low

Date Due \* 01/07/2009

Completed  
 Jane Wallen, 04/03/2004 2:51:40PM

Date Created 04/03/2004  
Created By Jane Wallen


- Add as many tasks and notes as are needed and the report displayed on the Inquiry Information summary will list each in order.
- Click the Save button when completed and the screen will return to the Inquiry Information summary.
- When all known data has been entered into Inquiry Information, click Save so that the entries are stored in the potential resident's record.

### Updating an Existing Lead

- From the Lead Search screen, edit or update an existing lead by clicking the [Select](#) link associated with the individual.
- Make any changes to fields on the Inquiry Information summary screen, including adding additional notes and/or tasks.
- Click the Save button when completed.

### Moving an Inquiry to Pending/Resident

When a contract has been signed, the Inquiry can be changed to Pending status or Resident status if the individual has moved into the facility.

- Click the [Select](#) associated with the individual.
- In the Navigation Menu, click open the Resident Wizards folder using the expand icon .
- If there is a lapse of time between signing the contract and moving into the facility, click the [Move Inquiry to Pending](#) link.
- The screen will repaint with the Resident Info form. Enter the known information and click Save at the bottom of the screen.
- This automatically places the individual into the Pending record category, preserving the data, but not adding him or her to the nursing and administrative reports.
- If the individual is moving into the facility immediately, click the [Move Pending to Resident](#) link.
- The Resident Info form and Individual Worksheet will be presented, one after another. Fill out the data for Resident Info

Russon, Margerie

Information

Summary

Name and E-mail

Contact Information

General Resident

Resident Info

Responsible Party

Resident Wizards

[Move Inquiry to Pending](#)

[Move Pending to Resident](#)

Inquiry

Deferred/Lost Inquiry

Lead

Tasks/Notes

Work with this Record

Document Library

Relationships

Schedule

Change Record Category

Change Unit

Delete Record

8. Click Next at the bottom of the screen.
9. Complete the Individual Worksheet and click Save at the bottom of the screen.
10. This places the individual into the Resident record category and add him/her to the nursing and administrative reports.

### Using the Move-in Financial Calculator

The Individual Worksheet contains a section that calculates the move-in fees for a resident and automatically produces a printable, signable Resident Initial Fee Agreement. The Fee Agreement may be customized by the Organization Administrator with your facility's verbiage and letterhead.



1. To produce this agreement, start by filling in the fields in the Move-in Financial Calculator section of the Individual Worksheet.

#### Move-in Financial Calculator

*To see rate and fee totals, enter amounts below, scroll to the bottom and click Save, then reopen the form. Totals will be automatically calculated and displayed.*

*To print a signable version of this section, change the View Layout (In upper right) to "Resident Fee Agreement".*

Daily Fee	*	<input type="text" value="\$0.00"/>
Number of occupancy days <i>In move-in month</i>	*	<input type="text" value="0"/>
Next month's service fee <i>If after 21st</i>		<input type="text"/>
Community fee		<input type="text"/>
Extra Services - Meals		<input type="text"/>
- Storage		<input type="text"/>
- Parking		<input type="text"/>
- Cable TV		<input type="text"/>
- Telephone		<input type="text"/>
Other fees		<input type="text"/>
Describe extra services		<input type="text"/>
Amount previously paid		<input type="text" value="\$0.00"/>

Payment check copied or scanned  
 No file selected.   [Document Library](#)

7. Enter the Daily Fee and Number of Occupancy Days (in move-in month). Charges for next month's service fee and a one-time community fee are optional.
8. The extra services fields should be completed with the charge *per month* for the service.
9. Any other services beyond meals, storage, parking, cable TV and telephone can be grouped in the Other Fees field and described in the Extra Services memo field.
10. If one of the default extra services is not offered or is included in the basic charges, it should be left blank.
11. If a down payment has been made, enter the amount of the check.
12. Review the numbers for accuracy, then click the Save button at the bottom of the screen.
13. When the summary screen returns, open the Individual Worksheet again and scroll to the Financial Calculator section. New calculated fields showing the multiplied daily rate, the total rent due, the pro-rated total of extra services and a final total due at move-in will be displayed.

### Accessing the Printable Resident Initial Fee Agreement

1. To access the Resident Initial Fee Agreement containing the entered and calculated amounts, activate the View Layout at the upper right and select 'Resident Initial Fee Agreement'.
2. A print icon will also appear at the upper right. When printed, this form allows for resident and a facility representative to sign and date the agreement.
3. When a check for the agreement amount is received, it may be scanned into the system using the Check Link field on the Individual Worksheet.

\* The display columns seen on this page were selected at the time HQ™ was configured for your organization. They may be changed by someone in your organization with a Relate™ license or by BlueStep™, upon request.

### Lead Sources



The Lead Sources link provides a way to track those businesses and individuals who refer prospective clients to your organization. This includes those who are professionals in your field or a related field and those who are private individuals, as well as sources such as published write-ups or Internet sites, etc. Additionally, records are categorized by current activity (currently referring/will refer) or inactive (no longer referring/have not referred).

### Viewing and Editing Professional Lead Sources (Active)

This screen, seen below, lists all active referring professionals. To edit any source record or view record details, click the [Select](#) link associated with the record.

[Add Professional Source](#)   •   [Inactive Professional Sources](#)   •   [Non-Professional Sources](#)




● Next task is scheduled  
▼ Next task is NOT scheduled  
✘ Task is PAST DUE

 **Professional Lead Sources (Active)**
 [Export](#)    [Print](#)

Search By      Search For

Search within current results

Select	Active Contact	Company	Work Phone	Category
<a href="#">Select</a>	 <a href="#">Boines, Carlin</a> Dunford, ME	Destiny Educational Services	(555) 444-3333	Rehabilitation Center
<a href="#">Select</a>	 <a href="#">Erras, Mark</a> SLC, UT	Quaified Services Inc	(333) 444-5555	Referral Agency
<a href="#">Select</a>	 <a href="#">Smith, Dalton</a> Calfax, NM	Sponsored Home Care	(888) 777-6666	Home Health

To add a source or access the other source categories, click on one of the six (6) links displayed on the Professional Lead Sources (Active) screen and other screens, • [Add Professional Source](#), • [Add Non-Professional Source](#), • [Inactive Professional Sources](#), • [Inactive Non-Professional Sources](#), • [Professional Sources](#), • [Non-Professional Sources](#)

### Adding a Professional Source

1. To add a source, click the • [Add Professional Source](#) link and provide the first and last name of the source individual. Click Save at the bottom of the screen and the record will be displayed, as shown below, allowing for further details to be entered.

- Notes may be added to this screen using the [Add Task/Note](#) link on the right end on the Tasks/Notes header bar. When all edits are complete, click Save.

**Lead Source Info (P)** View Layout: Professional Lead Source Contact

\* Required

**Professional Lead Source Contact**

Name: Dalton \* Smith \* Job Title: Trainer

Company: Sponsored Home Care

Address: 321 Spencer

City: Calfax

State: NM Zip:

Category: Home Health

Status: Active

Work Phone: (888) 777-6666

Home Phone: (888) 666-5555

Mobile Phone: (888) 555-4444

Fax Number: (888) 777-2222

E-mail: ds@nomail.com

**Tasks/Notes** [Add Task/Note](#)

Date Due	Priority	Task	Note	Complete
05/21/2009	Normal	Call	Check for questions about our service	No

### Adding a Non-Professional Source

Follow the same process for adding a non-professional source as for a professional source. The record screen will contain fewer fields and does not include separate notes, but a description field for all pertinent data, as seen below.

**Non-Professional Lead Source**

Category: Public relations \*

Name/Title: Magazine Write-Up

Start Date: 03/02/2009

End Date: 04/02/2009

Cost: \$0.00

Status: Active

Description: Provider Magazine

### Viewing Sources

Active Non-Professional Sources, Inactive Professional Sources, Inactive Non-Professional Sources are accessed through links at the top of any lead source screen and report a list of the names and organizations in the specified category. Any listed person/company may be accessed by clicking the [Select](#) associated with that record.

### Reports – Closed Leads

The Reports link provides a submenu of any lead/marketing reports designed for your organization. The default report is 'Closed Leads' and lists all of those leads that were marked as 'Closed – Lost Lead' in the Sales Phase field of the record. If a lead has been marked closed in error, it may be returned to active tracking by setting the Sales Phase field to any other setting besides 'Closed – Lost Lead'.





# Marketing/Leads - Tasks

## Tasks

Tasks are created for individuals in the Inquiry Tasks/Notes section of the Inquiry Information screen (accessed through selecting an individual on the Lead Search (Open) screen). These tasks are organized by date in four (4) ways – Today's Incomplete, All Tasks, Task Calendar–This Month, Task Calendar-Next Month.

## Task Manager – Today's Incomplete

The 'Today's Incomplete' screen (see below) displays all tasks that have been for completion by today's date and have not been marked as complete.

[View All Tasks](#)  
 [Task Calendar - This Month](#)  
 [Task Calendar - Next Month](#)

### Task Manager - Today's Incomplete

 [Export](#)    [Print](#)


Select	Date Due	Priority	Task	Note	Contact	Complete
<a href="#">Select</a>	05/21/2009	High	Tour	Still has questions about facility convenience/rooms	<a href="#">Busby, Ronald</a> Lead	No
<a href="#">Select</a>	05/21/2009	Normal	Home Visit	Left brochures and registration materials. Do follow-up... <a href="#">More</a>	<a href="#">Russon, Margene</a> Lead	No

## Reading and Accessing Tasks

- To read further notes about the task, add further notes or mark it as complete, click the [Select](#) associated with the task.
- Make any appropriate changes on the screen and click Save; see below. If the task has been signed as 'Complete', it will disappear from the Today's Incomplete list.

### Tasks/Notes

\* Required

Select Task	* <input type="text" value="Tour"/>
Specify Task If "Other"	<input type="text"/>
Note	<input type="text" value="Still has questions about facility convenience/rooms"/>
Priority	<input checked="" type="radio"/> High <input type="radio"/> Normal <input type="radio"/> Low
Date Due	* <input type="text" value="03/21/2009"/> 
Completed	<input type="checkbox"/> Signature
Date Created	03/02/2009
Created By	Jeremiah (Super) Johnson

3. To access the other dating formats, click on one of the three (3) links displayed on the All Tasks screen, • [View All Tasks](#), • [Task Calendar – This Month](#), • [Task Calendar – Next Month](#)

#### **Task Manager – All Tasks**

The 'All Tasks' screen displays in the same way as the 'Today's Incomplete' screen, but includes the completed items, plus any that were scheduled for the past and are scheduled for the future.

#### **Task Manager – This Month**

As named, this screen displays tasks that are due at any time during the current month and have not been completed.

#### **Task Manager – Next Month**

Also as named, this screen displays tasks that are due at any time during the next month and have not been completed.




# Resident – New Resident

## Adding a New Resident

1. When adding a resident, be sure that the record does not already exist in the system. Check for existing records by searching the 'All Inquiries' query (see link in the Marketing/Inquiry Database).
2. If the individual may already be a resident, also check the "Active Residents' query and the 'Pending Residents' query (see links in the Resident Database).
3. If the individual may have been a former resident, check the 'Discharged Residents' query (see link in the Resident Database).
4. The 'Add New Resident' link takes the user to a wizard – a series of forms that collects important information about the prospective resident.
5. Click the 'Add New Resident' link in the Resident Database.
6. On each of the three (3) forms in the wizard, fill out all fields for which information can be obtained. In general, the first form will be the 'Name and E-mail' form, example seen below.

## Add New Resident

Step 1 of 3 

### NAME AND E-MAIL -- Step 1

\* Required



First Name	*	<input type="text" value="Martin"/>
Preferred First Name		<input type="text" value="Marty"/>
Middle Name		<input type="text" value="Jones"/>
Last Name	*	<input type="text" value="Cove"/>
Name Suffix		<input type="text" value=""/>
Email		<input type="text" value="mjc@noemail.net"/>

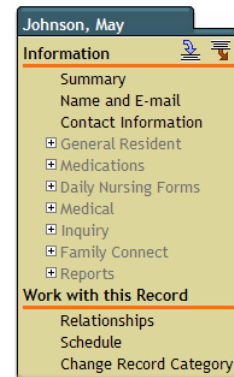
7. Fields marked with an asterisk \* must be filled out before progressing to the next form.
8. When each form is complete, click the 'Next' button at the bottom of the screen.
9. On the final form of the wizard, click the 'Save' button and the system will display the resident record just created.



# Resident - Notes

## Navigating a Record

1. Choose a resident from the 'Active Residents' query in the Resident Database by clicking the [Select](#) next to the resident's name.
2. On the Navigation Menu, example seen right, all folders are closed, as shown by the expand icon  next to them.
3. To open the folder click the expand icon  until the menu expands and the links stored in the folder are displayed.
4. Select the form or report desired by clicking on the link.



## Entering a Resident Note

1. In the 'General Resident' folder, click the 'Notes' link.
2. The resulting page will list all notes entered for the specific individual. Click the 'New Entry' button.
3. As in the example below, the Notes form will auto-fill with the current date and time. Change the date or time, if needed, by typing corrections into the field.

### Notes

Last Modified: Never

Note Date	<input type="text" value="07/09/2007 6:07AM"/>
Note Type	<input type="text" value="General"/>
Title	<input type="text" value="Emotional Concerns"/>
Note	<input type="text" value="May was concerned today because she has not heard from her family concerning her granddaughter. If this continues, we should contact the family for her."/>
Entered by:	<input type="checkbox"/> Staff signature <input type="checkbox"/> Post to Family Connect <input type="checkbox"/> Approved To Post to Family Connct



4. Select the note type by activating the drop-down and clicking on the appropriate selection. Each organization has its own list of types, which may include such items as, General, Admissions, Dietitian, Frequent Observations, Group Therapy, Home Health, Individual Therapy, Nursing, Office, Recreational Therapy, Refusals, Services, etc.
5. Enter a name for the note that is easily distinguishable from other notes that may have been entered or will be entered.

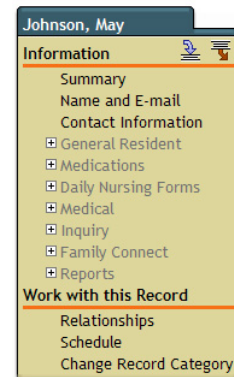
6. Type in the note message, being as clear and specific as possible and giving all relevant details.
7. Click the signature checkbox.
8. If the note should be shown on the Family Connect website page, check the 'Post to Family Connect' box.
9. If you are an administrator with Connect decision-making privileges, you may also check the 'Approved to Post' box.
10. When complete, click the 'Save' button at the bottom.



## Resident – Incident/Behavior


### Navigating a Record

1. Choose a resident from the 'Active Residents' query in the Resident Database by clicking the **Select** next to the resident's name.
2. On the Navigation Menu, example seen right, all folders are closed, as shown by the expand icon  next to them.
3. To open the folder click the expand icon  until the menu expands and the links stored in the folder are displayed.
4. Select the form or report desired by clicking on the link.



### Entering an Incident Report\*

\* Note that the Incident Report illustration below shows extensive incident reporting and a large number of fields, as per regulations in some states. This form is customizable per instruction from your organization's BlueStep Organization Administrator and will most likely be more concise with fewer fields than in the examples below.




1. In the 'Daily Nursing Forms' folder, click the 'Incident/Behavior Report' link.
2. The resulting page will list all incidents entered for the specific individual. Click the 'New Entry' button.
3. Fill in all fields with as much information as can be obtained.
4. On the date/time field, click the calendar icon . If needed, type in corrections to the date and time information.
5. Incident types are selected from among a group of radio buttons that contains such items as Injury, Runaway, Disruption, Medication Error, etc. Click the appropriate type on the list to make the selection.
6. Entering vital signs is usually only necessary if the incident is medical in nature or results in abnormal physical responses or complications.
7. As determined by instructions from your supervisors, administrators or state law, not all incidents must be reported to family or physicians.
8. When complete, check the signature box at the bottom and the 'Save' button.
9. A signature field is also provided for administrators or nursing supervisors to review and sign.

## Incident/Behavior Report

Fill out fields as appropriate to the incident. Not all fields required.

\* Required

### Incident Reporting

Resident's Name	<input type="text" value="Colfax, Beth"/>
Reported By	<input type="text" value="Gabrielle Donne"/>
Title of reporting person	<input type="text" value="Charge nurse"/>
Date and Time of incident	* <input type="text" value="12/10/2007 12:00PM"/> 
Location of incident	<input type="checkbox"/> Resident's room <input type="checkbox"/> Living Room <input type="checkbox"/> Other Resident's Room <input type="checkbox"/> Bathroom <input checked="" type="checkbox"/> Hall <input type="checkbox"/> Other <input type="checkbox"/> Shower <input type="checkbox"/> Dining Room <input type="checkbox"/> TV Room <input type="checkbox"/> Kitchen
List 'Other' location	<input type="text"/>
Who was present?	<input type="checkbox"/> Family <input checked="" type="checkbox"/> Staff <input checked="" type="checkbox"/> Other Residents <input type="checkbox"/> Visitors <input type="checkbox"/> Alone <input type="checkbox"/> Other
Name(s) of Staff Involved	<input type="text" value="Gabrielle Donne, Martin Forbes, Sylvia Sommer"/>
Incident Type	<input type="radio"/> Aggression <input type="radio"/> Resident Injury <input type="radio"/> Destructive <input type="radio"/> Resident-to-Resident Physical <input type="radio"/> Emergency Code Called <input checked="" type="radio"/> Resident-to-Resident Verbal <input type="radio"/> Emotional Change <input checked="" type="radio"/> Runaway/Elopement
Describe events leading up to incident	<input type="text" value="Sam Briggs was verbally abusive towards Beth"/>
Description of Incident	<input type="text" value="Beth left the dining room and went out the north side door."/>
Incident photo link	No file selected.   <a href="#">Document Library</a>

### Vitals




Complete only if incident is medical in nature.

Blood Pressure	<input type="text"/>
<i>Example: 130/90</i>	
Heart Rate	<input type="text"/>
Respiratory Rate	<input type="text"/>
Temperature	<input type="text"/>

### Actions Taken

First aid given?	<input type="checkbox"/> Yes
If 'Yes', specify	<input type="text"/>
Actions taken <i>What you did</i>	<input type="text"/>
Result	<input type="text"/>

### Person(s) Notified


Name of Family Member	<input type="text"/>
Date/Time Family Notified	<input type="text"/> 
Name of Administrator	<input type="text"/>
Date/Time Administrator Notified	<input type="text"/> 
Name of Physician	<input type="text"/>
Date/Time Physician Notified	<input type="text"/> 
Results of Notification	<input type="text"/>
Incident signature	<input checked="" type="checkbox"/> Jane Walker, 12/10/2007 4:21:08PM
Incident signature	<input type="checkbox"/> Administrator signature

### Reviewing an Incident Report

1. In the 'Daily Nursing Forms' folder, click the 'Incident Report' link.
2. As in the example below, the resulting page will list all incidents entered for the specific individual.

**Incident Report** New Entry

<u>Actions Completed By:</u>	<u>Date and Time of Incident</u>	<u>Edit</u>	<u>Delete</u>
Jesse Clay, 1/19/2006 8:36:56PM	10/09/2006 9:00PM		
Jesse Clay, 1/02/2007 10:27:57PM	10/02/2007 10:00PM		
Walt Woedl, 09/30/2007 6:32:01PM			
Anne Stangard, 09/30/2007 1:16:42PM	09/30/2007 12:30PM		



3. Click the edit pencil icon  associated with the incident in question.
4. Review and make additions or corrections as needed.
5. Click the review signature checkbox and the 'Save' button when completed.

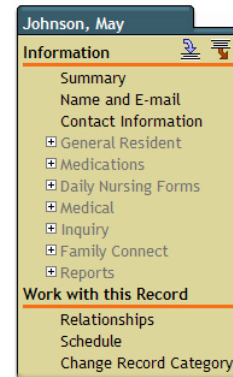




# Resident – Complaints

## Navigating a Record



1. Choose a resident from the 'Active Residents' query in the Resident Database by clicking the [Select](#) next to the resident's name.
2. On the Navigation Menu, example seen right, all folders are closed, as shown by the expand icon  next to them.
3. To open the folder click the expand icon  until the menu expands and the links stored in the folder are displayed.
4. Select the form or report desired by clicking on the link.




## Entering a Complaint\*


\* Note that the Complaint Registry a form customizable per organization and may not appear exactly as the example below.

1. In the 'Daily Nursing Forms' folder, click the 'Complaint Registry' link.
2. The resulting page will list all complaints entered for the specific individual.
3. Click the 'New Entry' button.


 **Complaint Registry**
 [Print](#)  
Last Modified: Never






**\* Required**

<b>Date Reported</b>	<input type="text" value="10/11/2007 12:00PM"/> 
<b>Describe Complaint</b>	<input style="width: 95%;" type="text" value="Room is too warm"/>
<b>Staff Signature</b>	<input type="text" value="Kevin Cook, 10/11/2007 4:17:21PM"/>
<b>Investigation Results</b>	<input style="width: 95%;" type="text" value="Adjusted thermostat and will watch temperature to see if maintenance needs to be called."/>
<b>Resolution</b>	<input checked="" type="checkbox"/> Complaint investigated
<b>Future Actions</b>	<input type="checkbox"/> Action taken
<b>Issue is</b>	<input type="checkbox"/> Resolved with resident

4. On the date reported field, click the calendar icon . If needed, type in corrections to the date and time information.
5. Fill in description field with as much information as can be obtained.
6. Check the 'Complaint taken' checkbox and the 'Save' button.

### Following up on a Complaint

1. In the 'Daily Nursing Forms' folder, click the 'Complaint Registry' link.
2. As in the example below, the resulting page will list all incidents entered for the specific individual. Select the incident requiring attention by clicking the edit icon .

 <b>Complaint Registry</b>		<a href="#">New Entry</a>	
<a href="#">Investigating</a>	<a href="#">Staff</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Cara Crane, 01/10/2008 4:18:18PM			
Kevin Cook, 07/12/2007 2:17:21PM			

3. Enter the Investigation Results, the Resolution and/or Future Actions information, as needed.
4. Click the signature checkbox associated with each completed memo field and the 'Save' button when done.



# Resident – Temporary Warnings

## Creating Temporary Warnings

1. Select the record of the resident for whom you wish to create a warning.
2. Click on the 'Temporary Warnings' link in the left-side Navigation Menu.
3. On the resulting page, seen below, you may select from Standard Messages, Custom Warnings or a combination.

### Temporary Warnings


<b>Standard Messages</b>	<input type="checkbox"/> Suicide watch	<input type="checkbox"/> Aggression risk	<input type="checkbox"/> Extreme anxiety
	<input type="checkbox"/> Substance abuse risk	<input type="checkbox"/> Currently infectious	<input type="checkbox"/> Severe depression
	<input checked="" type="checkbox"/> Wandering risk	<input checked="" type="checkbox"/> Dementia/Alzheimer's	<input type="checkbox"/> Hallucinations/Delusions
<b>Custom Warning</b>	<input checked="" type="checkbox"/> Select		
Enter text	<input type="text" value="Recovering from pneumonia"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text" value="Broken rib from fall on 3/9/06"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text"/>		
<b>Warning by</b>	Jane Wallace		

4. There are nine (9) Standard Messages at the top of the screen. Any of them can be activated by clicking the checkbox associated with the desired message.
5. Activation places the prompt in a red-bordered box at the top of the resident's face sheet and a large number of basic resident forms.
6. Deactivate (no longer display on the screens) by unchecking the associated Select box.

## Custom Warnings

1. There are spaces for five (5) Custom Warnings, if the Standard Messages do not cover the resident's situation.
2. Type in the appropriate information into the 'Enter text' box.
3. Activate the warning by clicking the Select checkbox.
4. When a warning is no longer needed, uncheck the Select box.

### Applying Temporary Warnings

1. When all data has been entered as needed for the resident, click the Save button  at the bottom of the screen.
2. The system will automatically record the name of the individual who entered the data. On subsequent changes to the warnings, the most recent name will be listed at the bottom of the screen.
3. Saving the example screen on the previous page results in the warning box shown below. Note that any checked warnings from the Temporary Warnings screen are displayed and any that are unchecked do not show.
4. The Temporary Warnings box will always display at the top of the screen on the resident's face sheet, to the left of the resident's photo and on many additional forms, depending upon your organizations configuration.

Annie Benson

Wandering risk  
Dementia/Alzheimer's  
Recovering from pneumonia





# Resident – Resident Reports

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## Using Resident Reports\*

\* Note that the illustration below contains the most common reports requested by Organization Administrators. Your organization may have a greater or fewer number of reports available, as per your management instructions.

1. Click the 'Resident Reports' link in the Resident Database or from the Resident drop-down on the navigation bar.
2. The submenu page, example below, will appear. It contains the names of all reports to which you have at least 'Reader' permissions.
3. View the desired report by clicking on the report name.

### Resident Reports

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[Shift Change Report Acknowledgement](#)

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[Add Shift Change Notes for All Residents](#)

Notes available to general staff and state inspectors. Also displayed on shift change report.

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[Add Nursing Notes to All Residents](#)

Notes only available to nursing and administrative staff. Also displayed on shift change report.

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[Incident Report by Date](#)

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[Incident Report by Resident](#)

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[Incident Log](#)

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[Complaint Registry](#)

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[Vital Signs Past 14 Days](#)

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[Group Vital Signs](#)

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[Upcoming Labs](#)

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[Mass Approve Family Connect Notes](#)

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[Resident Allergies](#)

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[Dietary Preferences](#)

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[Resident Interests](#)

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# Resident - Shift Change Report

## Using the Shift Change Report

2. Click on the 'Shift Change Report' name on the Resident Reports menu
3. On the resulting page, example for one resident below, the reports for all residents for the last three (3) days are displayed.
4. Included are:
  - a. Nursing Notes
  - b. Resident Notes
  - c. Discontinued Medications


## Shift Change Report - 3 Day

 [Print](#)

1 - 16 of 16


<a href="#">Select</a> Shift Change Report - 3 Day			
Preferred Full Name: Child, Julia			
<a href="#">Select</a>	Nursing Note		<a href="#">Signature</a>
Start Date: 11/15/2007	Would like to schedule a trip to the dentist.		Cara Crane, 01/15/2007 7:45:45PM
Start Date: 11/14/2007	Julia is feeling unimportant and worthless since her family is gone for Thanksgiving already. Further signs of a depressive state.		Cara Crane, 11/14/2007 4:47:24PM
Start Date: 11/13/2007	Shows beginning of depression. Watch for further behaviors.		Cara Crane, 11/13/2007 2:48:31PM
	Resident Note	<a href="#">Signature</a>	
Note Date: 11/13/2007 12:10PM	Jeremiah Johnson, 11/13/2007 1:38:03PM		
Discontinued Medications			
<a href="#">Medication</a>	<a href="#">Dosage</a>	<a href="#">DC sig</a>	<a href="#">DC Review</a>
Doxycycline	100 mg	Cara Crane, 11/15/2007 4:57:14PM	

## Adding a Nursing Note\*

1. Click the underlined [Select](#) link below the resident's name.
2. Click the 'New Entry' button to the upper right
3. The current date will auto-populate. Select an end date or enter a number of days the instructions are active.
4. Select a 'Note Type' by clicking the down-arrow  and selecting the appropriate type from the list, which includes such items as General, Precautions, Resident Request, etc.
5. Type in the note message in the 'Note' field and indicate if there are associated doctor's orders.
6. Click the 'Staff Signature' checkbox and the 'Save' button


\* Nursing Notes may also be added by navigating to the individual Resident Record and clicking the 'Nursing Notes' link in the 'Daily Nursing Forms' folder.

### Editing a Nursing Note



1. In some rare instances, it may be necessary to edit an existing note. Begin by clicking the underlined [Select](#) link below the resident's name.
2. If your permissions allow editing, an edit icon  will appear to the right of each note listed on the resulting page. Click to access the note.
3. Make any appropriate changes.
4. Click the 'Save' button when done.

### Adding a Resident Note\*

1. Click the underlined [Select](#) link below the resident's name.
2. In the 'General Resident' folder located on the navigation menu, click the 'Notes' link.
3. The resulting page will list all notes entered for the specific individual.
4. Click the 'New Entry' button.
5. As in the example below, the Notes form will auto-fill with the current date and time. Change the date or time, if needed, by typing corrections into the field.

 **Notes**
Last Modified: Never

---


<b>Note Date</b>	<input type="text" value="07/09/2007 6:07AM"/> 
<b>Note Type</b>	<input type="text" value="General"/> 
<b>Title</b>	<input type="text" value="Emotional Concerns"/>
<b>Note</b>	<div style="border: 1px solid gray; padding: 2px; min-height: 80px;">           May was concerned today because she has not heard from her family concerning her granddaughter. If this continues, we should contact the family for her.         </div>

**Entered by:**

Staff signature


Post to Family Connect

Approved To Post to Family Connct

6. Select the note type by activating the drop-down  and clicking on the appropriate selection. Each organization has its own list of types, which may include such items as, General, Admissions, Frequent Observations, Home Health, Individual Therapy, Office, Refusals, Services, etc.
7. Enter a name for the note that is easily distinguishable from other notes that may have been entered or will be entered.
8. Type in the note message, being as clear and specific as possible and giving all relevant details.
9. Click the signature checkbox.
10. If the note should be shown on the Family Connect website page, check the 'Post to Family Connect' box.
11. If you are an administrator with Connect decision-making privileges, you may also check the 'Approved to Post' box.
12. When complete, click the 'Save' button at the bottom.

\* Resident Notes may also be added by navigating to the individual Resident Record and clicking the 'Notes' link in the 'General Resident' folder.

## Reviewing a Discontinued Medication

1. If your responsibilities include reviewing discontinued medications and you want to view a single resident, start by clicking 'View/Select Residents' link in the Resident module, then the underlined [Select](#) link to the left of the resident's name.
2. In the 'Medication' folder located on the navigation menu, click the 'Discontinued Medication' link.
3. The resulting page will list all discontinued medications (DC) for the specific individual. Click the edit icon  associated with the medication needing review.
4. Locate the 'Authorizations' section about halfway down the page. As in the example below, the signature, date and time for the original DC is recorded and a checkbox is provided for the review.



### Authorizations

<b>Prescribed by</b> <i>Must be entered as a full name</i>	Dr. James Smithson
<b>DEA Number</b>	17778443
<b>Data entered by</b> <i>Does not place an order</i>	Trevor Fuhriman, 12/13/2007 4:20:17PM
<b>Nursing/Administrator Review</b> <i>Does not place an order</i>	<input type="checkbox"/> I certify this information complete and correct
<b>DC this medication</b> <i>Discontinue</i>	Jan Walker, 01/15/2008 4:57:14PM
<b>DC Review</b>	<input type="checkbox"/> RN/Administrator review signature

5. Review the medication and, if satisfied, check the 'DC Review' box.
6. Scroll to the bottom and click the 'Save' button.

## Reviewing All Discontinued Medications

1. If your responsibilities include reviewing discontinued medications and you want to view all residents at once, start by clicking 'Medication Reports' in the Medication module.
2. Select the 'DC Medication Nursing Review'
3. When the screen returns, see partial example below, with a listing of all discontinued drugs, sorted by resident name.

 **Discontinued Medications**  Print

Select	Medication	Admin	End Date	DC sig
<b>Full Name: Adams, Bella</b>				
<a href="#">Select</a>	Lorazepam cream		06/14/2007	Ellen Clinton, 06/14/2007 11:39:53AM
<a href="#">Select</a>	Halperidol		06/14/2007	Ellen Clinton, 06/14/2007 11:38:20AM
<b>Full Name: Adamson, Amy</b>				
<a href="#">Select</a>	Oxycodone		08/13/2008	Ellen Clinton, 08/13/2008 1:27:47PM
<a href="#">Select</a>	Tylenol		10/06/2008	Ellen Clinton, 10/06/2008 11:00:02AM
<a href="#">Select</a>	Coumadin		09/16/2008	Ellen Clinton, 09/16/2008 1:37:25PM
<a href="#">Select</a>	Coumadin		09/16/2008	Ellen Clinton, 09/16/2008 1:37:37PM
<b>Full Name: Adamson, Don</b>				
<a href="#">Select</a>	Catapress patch		03/20/2007	Ellen Clinton, 03/20/2007 10:47:48AM
<a href="#">Select</a>	Fentanyl patch		03/01/2007	Ellen Clinton, 03/01/2007 12:45:43PM
<a href="#">Select</a>	Furosemide		05/02/2007	Ellen Clinton, 05/02/2007 12:11:47PM
<a href="#">Select</a>	Hydrocodone		05/02/2007	Ellen Clinton, 05/02/2007 12:09:33PM

4. Clicking the [Select](#) next to any medication name will return the 'Medication-Review' screen, from which, as a nurse or administrator, you may sign off on discontinuances, as seen below.



## Medication Review - DC

 [Print](#)

### Medication Review Detail

<b>Lunesta 3mg</b>	<b>Scheduled: 7:00pm</b>	<b>Prescribed by:</b> Dr. Runyon
Start: 06/01/2008	End: 07/02/2009	<b>Disp. Instr.:</b> Give one tablet at bedtime
<b>Nursing Review:</b>		<b>Entered by:</b>
<input checked="" type="checkbox"/> I certify this information complete and correct		Ellen Clinton, 06/18/2008 7:43:59PM
<b>DC Review:</b>		<b>DC by:</b>
<input type="checkbox"/> RN/Administrator review signature		<input checked="" type="checkbox"/> Ellen Clinton, 07/02/2009 2:38:44PM

<b>Lantus 30 units</b>	<b>Scheduled: 8:00pm</b>	<b>Prescribed by:</b> Dr. Runyon
Start: 08/27/2007	End: 07/02/2009	<b>Disp. Instr.:</b> Inject 30 units once daily
<b>Nursing Review:</b>		<b>Entered by:</b>
<input checked="" type="checkbox"/> I certify this information complete and correct		Ellen Clinton, 06/18/2008 7:45:54PM
<b>DC Review:</b>		<b>DC by:</b>
<input type="checkbox"/> RN/Administrator review signature		<input checked="" type="checkbox"/> Ellen Clinton, 07/02/2009 2:34:58PM

5. Click the Nursing Review or DC Review checkbox, depending upon your responsibilities.
6. Click Save when completed.



# Resident - Incident Report/Date

## Using the Incident Report by Date

1. Click on the 'Incident Report by Date' link on the Resident Reports menu
2. On the resulting page, example below, the incidents for all residents are displayed, grouped by the day on which they occurred. This will alert you if circumstances within the facility on a particular day triggered multiple incidents or behaviors.
3. To view details of any specific incident, click the underlined [Select](#) link next to the resident's name.

## Incident Report by Date

 [Print](#)

1 - 3 of 3

<a href="#">Select</a>	<a href="#">Full Name</a>	<a href="#">Date and Time of Incident</a>	<a href="#">Reported By</a>	<a href="#">Incident Type</a>	<a href="#">Location of Incident</a>
<b>Date: 09/26/2007</b>					
<a href="#">Select</a>	Johnson, Daniel	09/26/2007 10:45AM	Debbie Johnson	Resident Injury	Resident room
<b>Date: 09/25/2007</b>					
<a href="#">Select</a>	Pelli, Nancy	09/25/2007 11:45AM	Jeremiah Johnson	Resident Injury	Residents room
<b>Date: 03/09/2007</b>					
<a href="#">Select</a>	Marle, Robert	03/09/2007 12:00PM	Nan Dadens	Medication Error	


## Adding a New Incident\*



1. Click the 'Select/View Residents' link in the Resident module.
2. Click the [Select](#) link next to the appropriate resident name.
3. Click the Incident Report link on the navigation menu. A summary of all incidents for this resident will appear. Click the 'New Entry' button at the upper right.
4. On the resulting form, example below, fill in all fields with as much information as can be obtained.

## Incident Report

Last Modified: Never


*Incident Report*




Reported By	<input type="text" value="Cara Crane"/>
Title of Person Reporting	<input type="text" value="Supervisor"/>
Date and Time of Incident	<input type="text" value="10/16/2007 12:00pm"/> 
Name(s) of Staff Involved	<input type="text" value="Barry Chron"/>
Names of Witnesses	<input type="text" value="Standford Bundt, Tessa Case, Marge Bastian"/>
Location of Incident	<input type="text" value="Dining room"/>
Incident Type	<input type="text" value="Non-Injury Occurance"/>
Description of Incident	<input type="text"/>
Facts Known	<input type="text"/>

5. On the date/time field, click the calendar icon . If needed, type in corrections to the date and time information.
6. Incident types are selected from a drop-down list that contains such items as Injury, Runaway, Disruption, Medication Error, etc. Activate the list by clicking the down arrow  on the field. Click the appropriate type on the list to make the selection.
7. When complete, check the signature box at the bottom and the 'Save' button.

\* New incidents may also be added by clicking the [Select](#) link next to any resident name reported on the 'Incident Report by Date' or 'Incident Report by Resident'. Once the resident record is available, select 'Incident Report' from the navigation menu, as described above.

### Reviewing an Incident Report

1. Click the [Select](#) link next to the resident name.
2. In the 'Daily Nursing Forms' folder, click the 'Incident Report' link.
3. As in the example below, the resulting page will list all incidents entered for the specific individual. Click the edit pencil icon  associated with the incident in question.

 Incident Report		<a href="#">New Entry</a>
<a href="#">Actions Completed By:</a>	<a href="#">Date and Time of Incident</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Jesse Clay, 1/19/2006 8:36:56PM	10/09/2006 9:00PM	 
Jesse Clay, 1/02/2007 10:27:57PM	10/02/2007 10:00PM	 
Walt Woedl, 09/30/2007 6:32:01PM		 
Anne Stangard, 09/30/2007 1:16:42PM	09/30/2007 12:30PM	 

4. Review and make additions or corrections as needed.
5. Click the review signature checkbox and the 'Save' button when completed.



# Resident - Incident/Resident

## Using the Incident Report by Resident

1. Click on the 'Incident Report by Resident' link on the Resident Reports menu.
2. On the resulting page, example below, the incidents for all residents are displayed, grouped by the resident's name. This will alert you if a particular resident is experiencing multiple incidents or behaviors that span shifts or cluster around specific events.
3. To view details of any specific incident, click the underlined [Select](#) link below the resident's name for the date you wish to view.

### Incident Report by Resident

 [Print](#)

Select	Date	Incident Details
<b>Full Name: Johnson, Daniel</b>		
<a href="#">Select</a>	12/17/2007	<p><b>Reported by:</b> Stan Dray      <b>Incident Date:</b> 12/17/2007 12:00PM</p> <p><b>Staff Involved:</b> Cara, Stan, Busby      <b>Incident Location:</b> Dining Room</p> <p><b>Details</b></p> <p><b>Incident Type:</b> Fighting</p> <p><b>Description:</b> Pushing food off plate and moving away from table. Spitting.</p> <p><b>Actions:</b> Counseled with resident. Removed from dining room briefly.</p> <p><b>Actions by:</b> Cara Crane, 12/17/2007 5:27:17PM</p>
<a href="#">Select</a>	09/26/2007	<p><b>Reported by:</b> Debbie Johnson      <b>Incident Date:</b> 09/26/2007 10:45AM</p> <p><b>Staff Involved:</b> None      <b>Incident Location:</b> Resident room</p> <p><b>Details</b></p> <p><b>Incident Type:</b> Resident Injury</p> <p><b>Description:</b> Found res on the ground in room at the side of the bed. Small skin tear on right elbow.</p> <p><b>Actions:</b> Bandaged skin tear with Neosporin. Checked for subsequent aches from fall.</p> <p><b>Actions by:</b> Debbie Johnson, 09/26/2007 5:08:06PM</p>

## Adding a New Incident\*

1. Click the [Select](#) link next to the resident name.
2. Click the Incident Report link in the Daily Nursing Forms folder on the navigation menu. A summary of all incidents for this resident will appear.
3. Click the 'New Entry' button at the upper right.
4. On the resulting form, example below, fill in all fields with as much information as can be obtained.

## Incident Report

Last Modified: Never

Incident Report

Reported By	Cara Crane
Title of Person Reporting	Supervisor
Date and Time of Incident	10/16/2007 12:00pm
Name(s) of Staff Involved	Barry Chron
Names of Witnesses	Standford Bundt, Tessa Case, Marge Bastian
Location of Incident	Dining room
Incident Type	Non-Injury Occurance
Description of Incident	
Facts Known	

- On the date/time field, click the calendar icon . If needed, type in corrections to the date and time information.
- Incident types are selected from a drop-down list that contains such items as Injury, Runaway, Disruption, Medication Error, etc. Activate the list by clicking the down arrow on the field. Click the appropriate type on the list to make the selection.
- When complete, check the signature box at the bottom and the 'Save' button.

\* New incidents may also be added by navigating to the individual Resident Record and clicking the 'Incident Report' link in the 'Daily Nursing Forms' folder. See instructions in the 'Incident/Behavior' section.

### Reviewing an Incident Report\*

- Click the [Select](#) link next to the resident name.
- In the 'Daily Nursing Forms' folder, click the 'Incident Report' link.
- As in the example below, the resulting page will list all incidents entered for the specific individual.

Incident Report		New Entry
Actions Completed By:	Date and Time of Incident	Edit Delete
Jesse Clay, 1/19/2006 8:36:56PM	10/09/2006 9:00PM	
Jesse Clay, 1/02/2007 10:27:57PM	10/02/2007 10:00PM	
Walt Woedl, 09/30/2007 6:32:01PM		
Anne Stangard, 09/30/2007 1:16:42PM	09/30/2007 12:30PM	

- Click the edit pencil icon associated with the incident in question.
- Review and make additions or corrections as needed.
- Click the review signature checkbox and the 'Save' button when completed.

\* Any incident may also be reviewed by navigating to the individual Resident Record and clicking the 'Incident Report' link in the 'Daily Nursing Forms' folder. See instructions in the 'Incident/Behavior' section.



# Resident - Complaint Registry

## Using the Complaint Registry

1. Click on 'Complaint Registry' link on the Resident Reports menu.
2. On the resulting page, example below, the complaints for all residents are displayed.
3. To view details of any specific complaint, click the underlined [Select](#) link next to the resident's name.

**All Complaints** [Edit](#) [RSS](#) [Export](#) [Print](#)

Search By: Last Name Starts With Search For:  Search

Search within current results

Select	Full Name	Date Rptd	Desc Complaint	Staff
<a href="#">Select</a>	Sterle, Wendy	09/08/2007 7:09PM	Her diamond jewelry has all gone missing. It was last seen on Saturday September 1st. Cheryl noticed it was missing on Semptember 8th. Cheryl also complained that she not get her shower on Friday.	
<a href="#">Select</a>	Home, Velma	09/04/2007 9:45PM	Medications were not prepared by 7:00 pm the night before she was to leave for 8 days. I explained to Mrs. Horne that I would be at the Beehive working the night shift and would have them prepared for John to pick up the next morning when he came. John called me on my cell phone around 7 - 7:30 pm demanding that her medications be ready NOW. I tried to explain that I could not come in now, but would be there during the night preparing her medications and assured him they would be ready in the morning. He stated that that was unacceptable and not an option. I then authorized Michelle to prepare medications.	
<a href="#">Select</a>	Deaver, Willi	06/14/2007 6:26AM	Rudy Terrey called Bee Hive for thinking that it was May 29th her call was asking for Bev as she had been referred by a family member for placement for her husband. It appear that when she called the staff who answered the telephone was very rude to her, not giving her information. When she hung up she was very concerned that if that is the way the phone is answered how are they going to take the best care of her husband.	
<a href="#">Select</a>	Child, Julia	04/18/2007 2:54PM	Room is too hot.	Kevin Cook, 01/17/2008 3:02:45PM

## Adding a Complaint\*

1. Click the [Select](#) link next to the resident name.
2. Click the 'Complaint Registry' link in the Daily Nursing Forms folder on the navigation menu. A summary of all complaints for this resident will appear.
3. Click the 'New Entry' button at the upper right.
4. On the resulting form, example below, the current date field will auto-fill with the current date and time. Change the date or time, if needed, by typing corrections into the field.

**Complaint Registry** [Print](#)  
Last Modified: Never

\* Required

Date Reported: 10/11/2007 12:00PM

Describe Complaint: Room is too warm

Staff Signature: Kevin Cook, 10/11/2007 4:17:21PM

Investigation Results:  Complaint investigated

Resolution:  Action taken

Future Actions:  Resolved with resident



Issue is:  Resolved with resident

5. Enter into the appropriate fields as much information as can be obtained.
6. Click the signature checkboxes below each section you have filled in.
7. Click the 'Save' button at the bottom

\* New complaints may also be added by navigating to the individual Resident Record and clicking the 'Complaint Registry' link in the 'Daily Nursing Forms' folder.



### Resolving a Complaint\*

1. Click the [Select](#) link next to the complaint needing investigation, resolution or further action.
2. Review and make additions or corrections as needed, example below.

 **Complaint Registry**
 [Print](#)  
Last Modified: Never

---

**\* Required**

<b>Date Reported</b>	10/11/2007 12:00PM 
<b>Describe Complaint</b>	Room is too warm 
<b>Staff Signature</b>	Kevin Cook, 10/11/2007 4:17:21PM
<b>Investigation Results</b>	Adjusted thermostat and will watch temperature to see if maintenance needs to be called. 
<b>Resolution</b>	<input checked="" type="checkbox"/> Complaint investigated 
<b>Future Actions</b>	<input type="checkbox"/> Action taken 
<b>Issue is</b>	<input type="checkbox"/> Resolved with resident 

3. Click the signature checkbox associated with any new information and the 'Save' button when completed.

\* Any complaint may also be reviewed or updated by navigating to the individual Resident Record and clicking the 'Complaint Registry' link in the 'Daily Nursing Forms' folder.



# Resident – Notes/All Residents

## Using the Notes for All Residents

1. The Add Notes feature is a group entry page that allows a user to add a copy of a note to every resident record with a single select-and-save function.
2. Click on the Add Notes for All Residents link on the Resident Reports menu.
3. On the resulting page, example below, all residents are displayed with the Select box checked.

## Group Entry For Add Notes for All Residents

**\* Required**

**Indicate records to receive the new data. \*** [Select All](#) | [Unselect All](#)

*Deselect any group records who should not receive the new data.*


<input checked="" type="checkbox"/> Smith, Bill	<input checked="" type="checkbox"/> Monse, Mick	<input checked="" type="checkbox"/> White, Judy	<input checked="" type="checkbox"/> Peterson, Betty
<input checked="" type="checkbox"/> Prosser, Rita	<input checked="" type="checkbox"/> Marle, Bob	<input checked="" type="checkbox"/> White, Nancy	<input checked="" type="checkbox"/> Johnson, May
<input checked="" type="checkbox"/> Johnson, Daniel	<input checked="" type="checkbox"/> Smith, Julia	<input checked="" type="checkbox"/> Pelli, Betty	<input checked="" type="checkbox"/> Sousa, Edna
<input checked="" type="checkbox"/> Reasen, Donald	<input checked="" type="checkbox"/> Child, Sally	<input checked="" type="checkbox"/> Post, Hallie	<input checked="" type="checkbox"/> Steed, Norma


4. If there are individuals on the page who should **not** have the note added to his/her record, uncheck the box next to the appropriate name. Alternately, click the '[Unselect All](#)' link and recheck those who **should** receive the note.
5. Click the 'Next' button at the bottom.

## Group Entry For Add Notes for All Residents

*Enter data to be added to each group record*

**\* Required**

Note Date:  

Note Type:  

Title:


Entered by:

- Staff signature
- Post to Family Connect
- Approved To Post to Family Connect

**Smith, Bill**

Note:




6. The resulting screen will appear in one of two formats, individualized or grouped, as configured by your organization. The example above is an abbreviated view of an individualized format.
  - a. The individualized format will list the form information followed by a 'Notes' field under a separate header for each resident selected. This allows customizable notes for each resident.
  - b. The grouped format will display the form information and include a single 'Notes' field. This configuration allows a single note to be copied directly to individual records without customization.
7. Enter a date or correct the date, as needed, in the 'Note Date' field.
8. Select a 'Note Type' by clicking the down-arrow  and selecting the appropriate type from the list OR, depending upon the configuration, manually enter in a type.
9. Type in a message into the 'Notes' field. If individualized, you may enter a different note into the field for each resident. If grouped, enter the note exactly as you want it to appear in every selected record.
10. When complete, click the 'Save' button at the bottom.



# Resident – Discharge

## Discharging Residents\*

1. Select the correct record from the 'Select/View Residents' screen
2. On the Navigation Menu, click the Expand icon  next to the 'Resident Wizard' folder, if it is not already open
3. Click the 'Discharge This Resident' link
4. As in the example at right, enter the information appropriate for the resident's current situation. Do not be concerned about fields that are not applicable to this move-out/transfer
5. Edit the default date that appears in the 'Move/Trans Date' field, if necessary
6. If the possibility exists for the resident to return to the facility, select 'No' in the 'Discontinue Medications' field
7. The nursing staff will need to mark the MAR exceptions field as 'Absent' each day; however, when the resident returns, all medication records will still be active in the system and will **not** need to be reentered
8. Fill out as many other fields as are needed
9. At the bottom of the screen, indicate if the room should be held for the resident or released for reassignment
10. Review the entries and click the Save button when done
11. Print the resident's Record Summary (Face Sheet) and send with the resident if this is a medical transfer
12. Collect and print any other data needed for the current transfer situation

\* Any medication discontinuation will be reflected in tomorrow's MAR; all other processes will take effect immediately, including an automatic change in the resident's record category.

## Discharge This Resident

MOVE-OUT/TRANSFER	
* Required	
Move/Trans Date	07/02/2009
Type of Move/Transfer	Medical Transfer
Family notified	<input checked="" type="checkbox"/> Notified of move-out or transfer
Specify family member notified	Carlson Cane
Discontinue Medications?	<input checked="" type="radio"/> No <input type="radio"/> Yes
Reasons for move/transfer	Arrhythmia
List destination and address	Hobson Memorial Hospital 1717 Jenkins Ave Sylvester, Hobson
Forward mail to:	Hold for return
New phone	
Method of transfer	Ambulance
Relocation assistance provided	
Written notice of move/transfer	<input type="checkbox"/> Given to resident/responsible party
Personal property Describe disposition of property at move/transfer.	Discharged
List refund(s) owed to resident	None
Post-Residence Survey link Respite only	
<b>Emergency Medical Transfer Only</b>	
M.D. Issuing Orders	Dr. Portland
Orders to Nursing Staff	<input checked="" type="checkbox"/> Transfer orders received
Administrative Staff	<input checked="" type="checkbox"/> Notified of orders
Specify Admin Staff Notified	Adrienne Jensen
<b>Physician Arranged Admission to Medical Facility</b>	
Transfer Checklist	<input checked="" type="checkbox"/> Physician arranges admission to medical facility <input type="checkbox"/> Family completes admission with hospital <input type="checkbox"/> Hospital Admissions notifies us of bed availability <input checked="" type="checkbox"/> Nursing staff arranges for transfer <input checked="" type="checkbox"/> Transfer completed
<b>Send Documentation to Hospital</b>	
Documentation Checklist <i>Mark each when sent</i>	<input checked="" type="checkbox"/> Current Labs <input checked="" type="checkbox"/> Resident Info Form <input checked="" type="checkbox"/> Current Medications <input checked="" type="checkbox"/> Nursing Assessment <input checked="" type="checkbox"/> Medication History <input type="checkbox"/> Psychosocial Assessment <input checked="" type="checkbox"/> Medical Information <input type="checkbox"/> Neurological Screening <input checked="" type="checkbox"/> Medical History <input checked="" type="checkbox"/> Next of Kin Form <input checked="" type="checkbox"/> Treatment Plan <input checked="" type="checkbox"/> Transfer Form
<b>Status at Time of Transfer</b>	
Resident Chief Complaint	Chest pain
History of Event	Onset evening 12/2/07
Current Precautions	
<b>Follow-Up Notifications by Nursing Staff</b>	
Physician	<input type="checkbox"/> Notified transfer is complete, date, time of transfer
Specify Physician(s) Notified	
Administrative Staff	<input type="checkbox"/> Notified transfer is complete, date, time of transfer
Specify Admin Staff Notified	
Business Office Staff	<input type="checkbox"/> Notified transfer is complete, date, time of transfer
Specify Office Member Notified	
Hold This Room Will this Resident will be returning	<input type="radio"/> No Do NOT hold this room <input checked="" type="radio"/> Yes HOLD This Room



# Medication – Custom MARs

## Using Custom MARs\*

- \* Users may choose to use either Custom or Scheduled MARs or a combination of both.
1. To access the Custom MARs for today, click the 'MARs (Custom)' link in the Medication Module.
  2. The Med Pass Setup screen will appear, as shown below.

### Med Pass Setup

Med Pass	<input checked="" type="checkbox"/> AM	<input type="checkbox"/> 9:00am	<input type="checkbox"/> 1:30pm	<input type="checkbox"/> 6:00pm	<input type="checkbox"/> 10:30pm
	<input type="checkbox"/> PM	<input type="checkbox"/> 9:30am	<input type="checkbox"/> 2:00pm	<input type="checkbox"/> 6:30pm	<input type="checkbox"/> 11:00pm
	<input type="checkbox"/> Bedtime	<input type="checkbox"/> 10:00am	<input type="checkbox"/> 2:30pm	<input type="checkbox"/> 7:00pm	<input type="checkbox"/> 11:30pm
	<input checked="" type="checkbox"/> 6:00am	<input type="checkbox"/> 10:30am	<input type="checkbox"/> 3:00pm	<input type="checkbox"/> 7:30pm	<input type="checkbox"/> 12:00am
	<input checked="" type="checkbox"/> 6:30am	<input type="checkbox"/> 11:00am	<input type="checkbox"/> 3:30pm	<input type="checkbox"/> 8:00pm	<input type="checkbox"/> 2:00am
	<input checked="" type="checkbox"/> 7:00am	<input type="checkbox"/> 11:30am	<input type="checkbox"/> 4:00pm	<input type="checkbox"/> 8:30pm	<input type="checkbox"/> 4:00am
	<input checked="" type="checkbox"/> 7:30am	<input type="checkbox"/> 12:00pm	<input type="checkbox"/> 4:30pm	<input type="checkbox"/> 9:00pm	<input checked="" type="checkbox"/> PRN
	<input checked="" type="checkbox"/> 8:00am	<input type="checkbox"/> 12:30pm	<input type="checkbox"/> 5:00pm	<input type="checkbox"/> 9:30pm	
	<input type="checkbox"/> 8:30am	<input type="checkbox"/> 1:00pm	<input type="checkbox"/> 5:30pm	<input type="checkbox"/> 10:00pm	

3. Select as many medication administration times as you would like to have displayed on the administration screen.
4. The system will remember these choices each time you return to Custom MARs until you manually change selections on the setup screen. This is especially time-saving if your shift routinely covers specific med pass times.
5. Click Save at the bottom of the screen.
6. On the Daily Meds Report (Custom) screen, seen below, displays the administration times selected on the setup screen, **if** there are any medications to be administered at those times. Each individual requiring medication is listed separately and each medication is grouped under the name, with amount and administration instructions displayed.


### Daily Meds Report (Custom)

Select	Full Name	Med Pass	MARs
Select	Benson, Annie	AM	Brandisept (C2) 20mg 01 Oral (PO) Twice daily Quafeminn 30mg 01 Oral (PO) Give twice daily with water
		8:00am	Conicidin 123mg 01 Oral (PO) Take one
Select	Colfax, Elizabeth	8:00am	Lortab (C2) 20 mg 01 Oral (PO) Give with plenty of water, twice daily
Select	Newman, Nikki	8:00am	Toprol (metoprolol ) XR 50 mg 01 Oral (PO) One every morning
Select	Randall, Isabelle	8:00am	Furosemide 20mg 01 Oral (PO) Take 1 tab by mouth daily Seniplax 30 mg bid
Select	Sommerfeld, Nona	AM	Warfarin 5 mg 01 Oral (PO) twice daily
		8:00am	Glimepiride 2mg 01 Oral (PO) Take 1 tablet by mouth in the morning

## Recording a Medication Administration\*

1. On the 'Daily MAR Edit (Custom)' page, example below, all medications for the selected times are displayed for the individual.

Crush medications before administering  
 Mix medications with food  
**DO NOT ADMINISTER** Aspirin



**Medications to be Administered Today, Monday 06/08/2009**

Medication    MAR Detail

Sched Admin Time: 8:00am

<u>Furosemide</u>	<input type="checkbox"/> Staff signature <input style="width: 100px;" type="text"/>	Instructions: Take 1 tab by mouth daily
	Dosage: <input style="width: 50px;" type="text" value="20mg"/> *      Diagnosis: <input style="width: 50px;" type="text" value="Edema"/> Exception: <input style="width: 50px;" type="text"/> Notes: <input style="width: 100px;" type="text"/>	
<u>Seniplay</u>	<input type="checkbox"/> Staff signature <input style="width: 100px;" type="text"/>	Instructions: bid
	Dosage: <input style="width: 50px;" type="text" value="30 mg"/> *      Diagnosis: <input style="width: 50px;" type="text"/> Exception: <input style="width: 50px;" type="text"/> Notes: <input style="width: 100px;" type="text"/>	

**Medications Previously Administered Today**

Sched Admin Time	Medication	Date/Time Administered	Exception	Signature
Breakfast	<u>Wellbutrin</u>	06/16/2006 6:00AM		Jane Wallace, 06/16/2006 8:29:44AM

2. Those needing to be administered are in the section labeled 'Medications to be Administered Today' followed by the day and date.
3. Read any 'Medication Prompts' that appear in the blue box at the top of the screen for important, general medication administration instructions.
4. Administer the appropriate medication(s).
5. Click the 'Staff signature' checkbox for each medication administered.
6. Click the 'Save' button at the bottom when complete.
7. The system will return you to the 'Daily Meds Report (Custom)' screen. On that screen the medication just administered will no longer be on the list.
8. Repeat this process for all resident administrations shown on the 'Daily Meds Report (Custom)'.


\* For reference purposes, medications that have already been administered on the current day are in the section titled 'Medications Previously Administered Today'.

\* Please note that the administration time recorded for this MAR is copied from the 'Staff signature' field at the time that 'Save' is clicked.

\* 'Medication Prompts', in the blue box at the top of the screen, are entered on the resident's Medication Prompts form and will be displayed at the top of all MAR administration screens for that individual.

## Medications Recorded After Administration Time\*

\* In rare instances, users may not be able to record the medication administration at the time it occurs. A date/time field is provided for this situation.

1. Administer the appropriate medication(s) for the time.
2. Click the 'Staff signature' checkbox.
3. Click the calendar icon  and select today's date.

4. Edit the field information to display the correct time of administration.
5. Click the 'Save' button.

\* Please note that the manually entered date and time overrides the time usually copied from the signature.

#### **Recording Administration Exceptions\***

\* A medication may not be administered for a number of reasons. The 'Exception' field is provided for any time this situation occurs.

1. Attempt to administer the appropriate medication(s) for the time.
2. Click the 'Staff signature' checkbox. This signifies that the attempt to administer was made.
3. Click the down-arrow on the 'Exception' field and select the appropriate exception reason.
4. Click the 'Save' button.

#### **Changes in Administered Dosage\***

\* It may happen that a smaller or larger dosage from that displayed on the MAR must be given the resident. The dosage field is editable for this purpose.

1. Administer the appropriate medication(s) for the time.
2. Click the 'Staff signature' checkbox.
3. Change the number/amount displayed in the 'Dosage' field.
4. Click the 'Save' button.



# Medication – Scheduled MARs

## Using Scheduled MARs\*

\* Scheduled MARs is provided for an alternate method of listing and accessing medications to be administered. As opposed to the Custom MAR, Scheduled MARs displays **all** scheduled medication administration times for the current day, excluding those that have already been administered.

Using the Custom MAR to administer medications is recommended, but users or administrators may choose to use the Scheduled MARs periodically throughout the day or at the end of a shift to be sure no medications have been missed.

13. To access the scheduled MARs for today, click the 'Scheduled MARs' link in the Medication Module.
14. All residents needing medications at any time during the day will be displayed on the list, example below, grouped by the time the medications are to be administered.

## Daily Meds Report (All)


 [Print](#)

Select	Full Name	Medication	Dosage
<b>Sched Admin Time: 6:00am</b>			
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Dihydromine</a>	40 mg
<b>Sched Admin Time: 8:00am</b>			
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Sulfonate (C2)</a>	20 mg
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Aspirin</a>	81mg
<b>Sched Admin Time: 4:00pm</b>			
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Dihydromine</a>	40 mg
<b>Sched Admin Time: 6:00pm</b>			
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Drixoral</a>	20mg
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Guaifenisin</a>	30mg
<a href="#">Select</a>	Smith, Jane	<a href="#">Guaifenisin</a>	30mg
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Drixoral</a>	20mg
<a href="#">Select</a>	Smith, Jane	<a href="#">Broxmed</a>	20 mg
<b>Sched Admin Time: 9:00pm</b>			
<a href="#">Select</a>	Reasen, Terri	<a href="#">Guaifenisin</a>	30mg
<a href="#">Select</a>	Reasen, Terri	<a href="#">Drixoral</a>	20mg
<a href="#">Select</a>	Smith, Jane	<a href="#">Broxmed</a>	20 mg

### Recording a Medication Administration\*

1. On the scheduled MARs (Daily Meds Report-All), find the scheduled administration time on which you are working. In the example above, the choices are 6:00 AM, 8:00 AM, 4:00 PM, 6:00 PM and 9:00 PM.
2. Click on the appropriate resident's name. (If there are multiple entries for the same person, select any one of them.)
3. The resulting 'Daily MAR Edit Report' is exactly the same screen as described under 'Daily MAR Edit (Custom)' and operates in the same manner, performing the same functions as those described above.

### Items to Note

- \* Any needed manual entries to the MAR (the date/time field next to the calendar icon , the 'Dosage', 'Exception' and 'Notes' fields) should be made before saving, not in separate operations, because...
- \* Once a MAR is saved, only Organization Administrators can make changes to the data, which will now be in 'Medications Previously Administered Today'.
- \* If there are any comments or notes concerning the administration of medication, these may be added in the 'Notes' field and will save in the resident's MAR record. This field appears small, but will accept and save several hundred characters.
- \* If the facility has loaded resident photographs into the system, they will appear on the MAR to help prevent administration of medication to the wrong individual.
- \* Administration instructions for each drug are shown on the MAR to help prevent administration errors.
- \* State law requires that a diagnosis appear with each medication for the purpose of verifying appropriateness of each drug.
- \* Medications administered on days other than the day and date shown on the MAR **cannot** be recorded on this form.



# Medication – OTC PRNs

## Administering an OTC PRN

1. Click the 'Administer OTC PRN' link in the Medication Module
2. Access the appropriate resident by clicking the [Select](#) next to his/her name.
3. Click the 'New Entry' button.
4. On the resulting screen, example below, carefully read the 'Contraindicated by Physician' field. Any medications listed in this field MUST NOT BE GIVEN TO THE RESIDENT, so contact the supervisor.

### Medications - OTC PRNs

Last Modified: Never

These medications are **floor stock** and must be -  
 Over-the-counter AND Non-prescribed AND Not regularly scheduled  
 For all others, use Medications-Prescribed form

**\* Required**

Contraindicated by physician  
**DO NOT ADMINISTER**


Tylenol, Aspirin

**Select Medication**

- A&D w/ Zinc Cream     Cranberry Capules     Imodium 2mg     Sleep Aid
- Acetaminophen 500mg     Fleets     Neosporin Ointment     Tylenol 500mg
- Benadryl     Ibuprofen 200mg     Psyllium Natural Fiber     Other

Name/Dosage if "Other"

Administration Time

01/28/2008 1:13PM 

Administered by

Jane Wilkes

### Medication Instructions

- |   |  |
|---|--|
| <p>A&amp;D w/Zinc Cream - Apply as needed</p> <p>Acetaminophen 325mg - 1-2 tabs q 4-6 hours</p> <p>Acetaminophen 500mg - 1 tab q 4-6 hours</p> <p>Benadryl - 1-2 tabs q 4-6 hours</p> <p>Cranberry Capsules - As directed</p> <p>Ducolax Suppository 1 PR daily (if tabs unsuccessful)</p> <p>Fleets - 1 PR if suppository &amp; tab unsuccessful</p> <p>Ibuprofen 200mg - 1-2 tabs q 4-6 hours</p> | <p>Imodium 2mg - 1-2 tabs after each loose stool, up to 8 tabs/24 hr</p> <p>Laniseptic - Apply as needed</p> <p>Neosporin Ointment -</p> <p>Psyllium Natural Fiber -</p> <p>Sleep Aid - 1-2 tabs q 4-6 hours</p> <p>Tums - 1-2 tabs</p> <p>Tylenol 500mg -</p> <p>Tylenol PM - 1 tab daily at HS</p> |
|---|--|

### OTC Medication Follow-up Assessment

Effectiveness of OTC Med

Staff Signature

Follow Up Signature



5. Read the 'Medication Instructions' for the drug needed by the resident.
6. Following these instructions, administer the medication.
7. Click the radio button next to the name of the medication administered.
8. Click the 'Save' button.

#### **OTC PRN Follow Up**

1. When 30 minutes have elapsed, contact the resident.
2. Evaluate the effectiveness of the medication and enter the results in the 'Effectiveness' field.
3. Click the 'Follow Up Signature' checkbox.
4. Click the 'Save' button.



# Medication – Prescribed PRNs

## Administering a Prescribed PRN\*

11. Click the 'Administer Prescribed PRN' link in the Medication Module.
12. All residents with prescribed PRNs will be displayed. Access the appropriate resident by clicking the [Select](#) next to his/her name.
13. Click the 'New Entry' button.
14. On the resulting screen, example below, find the current day (Creation Date) and click the edit icon of the PRN medication.

Creation Date: 10/17/2007

<a href="#">Drixoral</a>	20mg		
<a href="#">Guaifenisin</a>	123mg		

Creation Date: 10/16/2007

<a href="#">Drixoral</a>	20mg	PM	10/16/2007 3:11PM		
<a href="#">Drixoral</a>	20mg	AM	10/16/2007 8:20AM		
<a href="#">Guaifenisin</a>	123mg	PM	10/16/2007 3:16PM		
<a href="#">Guaifenisin</a>	123mg	AM	10/16/2007 8:10AM		

Creation Date: 10/15/2007

<a href="#">Drixoral</a>	20mg	PM	10/15/2007 5:51PM		
<a href="#">Drixoral</a>	20mg	AM	10/15/2007 8:10AM		
<a href="#">Guaifenisin</a>	123mg	PM	10/15/2007 5:15PM		
<a href="#">Guaifenisin</a>	123mg	AM	10/15/2007 8:10AM		

15. When the screen repaints, be sure that the 'View Layout' field (upper right) reads 'Enhanced MAR Edit' and displays similarly to the example below.

### Medication - MAR

View Layout: [Enhanced MAR Edit](#)   
Last Modified: May 25, 2005 10:02:59PM

\* Required



Take blood pressure before administering meds  
Take glucose (blood sugar) level before administering meds  
**DO NOT ADMINISTER** Aspirin, blood thinners other than prescribed

#### PRNs Previously Administered Today

Medication	Dosage	Date/Time Administered	Signature
No Records Found			

Medication: \* [Warfarin](#)

<input type="checkbox"/> Staff signature	<input type="text"/>	Instructions: twice daily
Dosage: <input type="text" value="5 mg"/> *	Diagnosis: <input type="text" value="Blood clots"/>	
Exception: <input type="text"/>	Notes: <input type="text"/>	

#### All Medications Previously Administered Today

Sched Admin Time	Medication	Date/Time Administered	Exception	Signature
No Records Found				

16. Check the 'PRNs Previously Administered Today' section to be sure that the medication has not already been taken or that it is not being given too soon after the last administration.
  17. Read the 'Medication Prompts' box (in blue) to be sure the desired PRN has not been restricted.
  18. The desired PRN should be displayed in the 'Medication' field. If it is not, click the drop-down arrow and select from the list. If the medication is not on the list, it has not been entered into the system as a prescribed medication, so contact the supervisor.
  19. If it is appropriate to give the drug, proceed as with any other medication administration:
    - a. Administer the medication.
    - b. Click the 'Staff signature' checkbox.
    - c. Click the 'Save' button.
- \* As with other administration records, dosages may be changed, notes may be added or the date/time field may be edited prior to saving the record.



# Medication – Prescribed Form

## Entering a New Medication\*

1. On the navigation menu of a resident record, open the Medications folder.
2. Click the 'Medication-Prescribed' form link.
3. Click the 'New Entry' button. See example of 'Medication-Prescribed' form below.

### Medication - Prescribed

#### Medication Information

Medication	* [Broxmed (C2)]
Dosage	* [20 mg]
Drug Dosage Type	* [Tablet]
Medication Classification	<input checked="" type="radio"/> C2 <input type="radio"/> C3 or C4 <input type="radio"/> C5 <input type="radio"/> Standard
Diagnosis	[ ]
Reason for this medication	[ ]
Route of Administration	* [01 Oral (PO)]
Administration Type	* <input checked="" type="radio"/> Regularly administered <input type="radio"/> PRN (as needed)
Administration Instructions	* [Twice daily]
Appears on the MARs	[ ]
Refills Allowed	[ ]
Pharmacy Dispensing	<input checked="" type="radio"/> Substitution permitted <input type="radio"/> Dispense as written
Assistance needed	* <input checked="" type="checkbox"/> Self-Administer <input type="checkbox"/> Reminder to take <input type="checkbox"/> Open container <input type="checkbox"/> Significant (Total)

#### MAR Scheduling

Administration Start Date	* [12/16/2007]
Number of Admin Days -OR-	[200]
Administration End Date	[07/02/2008]
Scheduled Admin Time	<input checked="" type="checkbox"/> AM <input type="checkbox"/> 7:30am <input type="checkbox"/> 10:30am <input type="checkbox"/> 1:30pm <input type="checkbox"/> 4:30pm <input type="checkbox"/> 7:30pm <input type="checkbox"/> 10:30pm <input checked="" type="checkbox"/> PM <input type="checkbox"/> 8:00am <input type="checkbox"/> 11:00am <input type="checkbox"/> 2:00pm <input type="checkbox"/> 5:00pm <input type="checkbox"/> 8:00pm <input type="checkbox"/> 11:00pm <input type="checkbox"/> Bedtime <input type="checkbox"/> 8:30am <input type="checkbox"/> 11:30am <input type="checkbox"/> 2:30pm <input type="checkbox"/> 5:30pm <input type="checkbox"/> 8:30pm <input type="checkbox"/> 11:30pm <input type="checkbox"/> 6:00am <input type="checkbox"/> 9:00am <input type="checkbox"/> 12:00pm <input type="checkbox"/> 3:00pm <input type="checkbox"/> 6:00pm <input type="checkbox"/> 9:00pm <input type="checkbox"/> 12:00am <input type="checkbox"/> 6:30am <input type="checkbox"/> 9:30am <input type="checkbox"/> 12:30pm <input type="checkbox"/> 3:30pm <input type="checkbox"/> 6:30pm <input type="checkbox"/> 9:30pm <input type="checkbox"/> 2:00am <input type="checkbox"/> 7:00am <input type="checkbox"/> 10:00am <input type="checkbox"/> 1:00pm <input type="checkbox"/> 4:00pm <input type="checkbox"/> 7:00pm <input type="checkbox"/> 10:00pm <input type="checkbox"/> 4:00am

For periodic (non-daily) administration use either day-of-week field OR interval field - not both.

Periodic Administration Days -OR-  Su  M  Tu  W  Th  F  Sa

By administration interval  
Enter a between-administration interval number.

[ ]

#### Authorizations

Prescribed by	* [Ryan K. Forsberg]
Must be entered as a full name	[ ]
DEA Number	[920162697]
Data entered by	* <input checked="" type="checkbox"/> Ryan K. Forsberg, 12/19/2007 4:08:50PM
Does not place an order	[ ]
DC this medication	<input type="checkbox"/> Staff signature
Discontinue	[ ]

#### 4Care Prescription Ordering Information

First time 4Care ordering must include a faxed copy of the original script or complete transfer information.

Fills Remaining	1
Including this fill	[ ]
Order fill/refill	<input checked="" type="checkbox"/> Ryan K. Forsberg, 12/19/2007 4:08:50PM
Memo to Pharmacy	[ ]
Memo from Pharmacy	[no data]

4. Fill in **all** the fields marked with an asterisk \*.
5. Additionally, enter choices for the following fields:
  - a. Medication Classification, if known
  - b. Diagnosis
  - c. Refills Allowed
  - d. Pharmacy Dispensing
  - e. Administration End Date - **only** if a limited script, such as a 10-day antibiotic, etc.
  - f. Scheduled Admin Time – **do not** select time if medication is a PRN (given as needed)
  - g. Periodic Administration – only if **not** administered each day
  - h. DEA Number
  - i. Order fill/refill
  - j. Any additional fields for which you desire to enter information
6. Verify correctness and completion of information
7. Scroll to the bottom of the screen and click the 'Save' button


\* Medications entered into the 'Medication-Prescribed' form should be one of the following:

1. A prescription medication
2. An OTC medication that has been prescribed
3. A regularly scheduled medication, whether prescription or OTC
4. A medication for which the need should be assessed before administration or on a regular basis

\* For a description of how to fill in each field on the 'Medication-Prescribed' form, see the Medication – Form Details section.

### Discontinuing a Medication\*

**\* Important to note: Do not delete any medications! This will delete the resident's entire administration history of the drug. Use the discontinue (DC) process instead.**

1. On the navigation menu of the resident record, open the Medications folder.
2. Click the 'Medication-Prescribed' form link.
3. Click the edit icon  associated with the name of the medication to be discontinued.
4. Scroll to the Authorizations section and click the 'DC this medication' checkbox.
5. You may also edit the following fields, if desired:
  - a. Assistance Needed
  - b. Administration End Date
  - c. Scheduled Administration Time
  - d. Memo to Pharmacy
6. Scroll to the bottom of the screen and click the 'Save' button



## Medication – Form Details

---

A guide for filling out the Medication-Prescribed form. Physicians must fill out those fields marked with an asterisk\* and should review those fields marked with an °.

### Medication Information Section

- \* **Medication** – Enter the complete name of the medication, including drug name extension, such as DM, LA, XL, etc.
- \* **Dosage** – Enter the prescribed dosage, a number followed by extension, such as mg, cc, etc.
- \* **Drug Dose Type** – The default is “Tablet”. Activate the drop-down to choose another dose type.
- \* **Medication Classification** – Select the classification appropriate for this drug.
- \* **Diagnosis** – Type in the reason for which this medication was prescribed.
- \* **Route of Administration** – “By Mouth” default. Click the drop-down to choose another route.
- \* **Administration Type** – Select either “Regularly scheduled” (a medication that should appear on the MARs) or “Non-scheduled” (a prescribed medication that is to be given as needed).
- \* **Administration Instructions** – Type in any directions/instructions. These instructions will appear on the MARs each time the medication is scheduled. Include such things as directions to take with food, not to administer in combination with other drugs, or a sliding scale for insulin injections, etc.
- \* **Refills Allowed** – Enter the number of refills you will allow the pharmacy to provide.
- \* **Pharmacy Dispensing** – Choose either ‘Substitution permitted’ (the default setting) or ‘Dispense as written’.
- \* **Assistance Needed** – Check the appropriate box, if known.

### MAR Scheduling Section

- \* **Administration Start Date** – Enter the date on which administration is to start.
- ° **Number of Administration Days OR** – Enter a number of days to administer the drug OR...
- ° **Administration End Date** – Enter any specified date for ending administration. If not filled in, the field defaults to 100 years, which will keep the prescription available on the MARs for as long as needed.
- ° **Scheduled Administration Time** – Check one or more times during the day, if this medication is to be administered in a schedule. These checkboxes control the times at which this medication appears on the Daily MARs report. **Do not** check any if medication is PRN (given as needed), unless the nursing staff should regularly assess if the drug is required at the scheduled time.
- ° **Periodic Administration Days OR** – Use this field or the one below if the medication is not to be given every day. Check the day(s) of the week, such as MWF for three days administration per week, or other combination of days OR...

- ° **By Administration Interval** – Use this field or the one above if the medication is not to be given every day. Enter a number. For instance, if 3 is entered, administration will appear on the MARs starting the next day (or on the “Start Date”) and on every third day after that (two days between administration). Entering 28 will provide for administration once every month. Entering 7 will place the medication on the MAR once a week, beginning with the start date.

### Authorizations Section

- \* **Prescribed by** – Type in your full name, i.e. Ryan K. Forsberg, David J. Merrill, etc.
- \* **DEA Number** – Enter your number.
- \* **Entered by** – Check to certify correctness and completion. Clicking this field will **not** automatically order the medication.
- DC this medication** – Check here to discontinue this medication or if this form has been ‘saved’ with an error. If there is an outstanding order with 4Care Pharmacy for this drug, notify the pharmacy that the drug has been discontinued.

### 4Care Prescription Ordering Information

- Fills Remaining** – Read-only field displaying the number of fills currently left for this medication. It will display [no data] when form is first filled out.
- \* **Order fill/refill** – Check the box to order from 4Care Pharmacy.
- Memo to Pharmacy** – Type in any instructions, clarifications or concerns for the pharmacy to know about.
- Memo from Pharmacy** – Read any instructions or responses from the pharmacy. It will display [no data] when form is first filled out.

### Prescription Transfer Information Section

- Pharmacy Name** – Type in name of current pharmacy.
- Pharmacy Phone** – Enter phone number, including area code.
- Transfer Pharmacy Rx #** - Type in the Rx# from the current medication package.

### 4Care Pharmacy Only Section

- Next Ship Date** – Read only field that displays the date of next shipment for this drug. It will display [no data] when form is first filled out.
- Order History** – Read only field that displays the history of all orders, fills and shipments for this drug. It will display [no data] when form is first filled out.

**! Remember to always review the form for accuracy before clicking the ‘Save’ button at the bottom of the screen. Saved errors can only be corrected by discontinuing the medication and entering the data again through the ‘New Entry’ button.**



# Medication - Prompts

## Creating Medication Prompts

1. Select the record of the resident for whom you wish to create a prompt.
2. Click on the 'Medication Prompts' link in the left-side Navigation Menu.
3. On the resulting page, seen below, you may select from Standard Prompts, Medication Contraindications, Custom Prompts or any combination.

### Medication Prompts

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**Standard Prompts**

- Crush medications before administering
- Mix medications with food
- Take blood pressure before administering meds
- Take glucose (blood sugar) level before administering meds
- Take O2 saturation level before administering meds

**Medication Contraindications**

Enter medications (at the direction of physician or pharmacy) that interact with currently prescribed medications or other therapeutics the resident is taking. Medications to which the resident is allergic may also be contraindicated.

**Contraindicated**

Select

Enter medications:

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**Custom Prompts**

Custom Prompt	<input type="checkbox"/> Select
Enter text	<input type="text" value="Hold Coumadin until after surgery 12/4/07"/>
Custom Prompt	<input checked="" type="checkbox"/> Select
Enter text	<input type="text" value="Watch swallow reflex"/>
Custom Prompt	<input type="checkbox"/> Select
Enter text	<input type="text"/>
Custom Prompt	<input type="checkbox"/> Select
Enter text	<input type="text"/>
Custom Prompt	<input type="checkbox"/> Select
Enter text	<input type="text"/>

Prompt by: Janet Holder

4. There are seven (7) Standard Prompts at the top of the screen. Any of them can be activated by clicking the checkbox associated with the desired prompt.
5. Activation places the prompt in a blue-bordered box at the top of any medication administration screen.
6. Deactivate (no longer display on the screens) by unchecking the associate Select box.

## Medication Contraindications

1. Medication Contraindications are those drugs that should **not** be administered to the resident, either because of **drug interaction**, **negative side effects**, **negative**




**interaction with other therapeutics** (herbal, holistic, etc.) or **allergy**. Any contraindication recommendations received from a physician or pharmacist should be entered here. This field represents a critical safeguard for your resident's well being.

2. Medications in the Contraindication field will appear in the Medication Prompts box and in red on the resident's face sheet when the Select box is checked.
3. One or more items entered into the Contraindications field may need to be deactivated at some point. Either uncheck the Select box to hide contraindications entirely or leave the Select box checked and edit the data to be current.

### Custom Prompts

1. There are spaces for five (5) Custom Prompts, if the Standard Prompts do not cover the resident's situation.
2. Type in the appropriate information into the 'Enter text' box.
3. Activate the prompt by clicking the Select checkbox.
4. When a prompt is not longer needed, uncheck the Select box.

### Applying Medication Prompts

1. When all data has been entered as needed for the resident, click the Save button  at the bottom of the screen.
2. The system will automatically record the name of the individual who entered the data. On subsequent changes to the prompts, the most recent name will be listed at the bottom of the screen.
3. Saving the example screen on the previous page results in the prompt box shown below. Note that any checked prompts from the Medication Prompts screen are displayed and any that are unchecked do not show.
4. The Medication Prompts box will always display either to the left or right of the resident's photo on all individual medication administration screens, such as those reached through the Custom MAR or Scheduled MAR.



Crush medications before administering  
 Watch swallow reflex  
**DO NOT ADMINISTER** Asprin



# Medication - Administered Today

## Viewing Meds Administered Today

1. Click the 'Medication Reports' link in the Medication Module.
2. Click the 'Meds Administered Today' report link.
3. On the resulting screen, example below, every medication that has been administered on the current date is listed, sorted by the assigned administration time.
4. Notice that the names of the residents are shown, as well as the medications, date/time of administration, any exceptions noted and the dated signatures of the administering individual.

## Meds Administered Today

Select	Full Name	Medication	Date/Time Administered	Exception	Signature
<b>Sched Admin Time: 6:00am</b>					
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Dihydromine</a>	01/22/2007 6:02AM		Jane Wilkes, 01/22/2007 6:02:12AM
<b>Sched Admin Time: 6:30am</b>					
<a href="#">Select</a>	Smith, Jane	<a href="#">Corapamil</a>	01/22/2007 6:38AM		Scott Walker, 01/22/2007 6:38:02AM
<b>Sched Admin Time: 8:00am</b>					
<a href="#">Select</a>	Peterson, Elizabeth	<a href="#">Aspirin</a>		PRN not needed	Jane Wilkes, 01/22/2007 8:35:45AM
<a href="#">Select</a>	Reasen, Terri	<a href="#">Guaifenisin</a>	01/22/2007 8:32AM		Brian Kelley, 01/22/2007 8:32:59AM
<a href="#">Select</a>	Reasen, Terri	<a href="#">Broxmed</a>	01/22/2007 8:35AM		Brian Kelley, 01/22/2007 8:35:59AM
<a href="#">Select</a>	Reasen, Terri	<a href="#">Drixoral</a>	01/22/2007 8:13AM		Jane Wilkes, 01/22/2007 8:13:23AM
<a href="#">Select</a>	Reasen, Terri	<a href="#">Broxmed</a>	01/22/2007 8:16AM		Brian Kelley, 01/22/2007 8:16:12AM
<a href="#">Select</a>	Smith, Jane	<a href="#">Diovan</a>	01/22/2007 8:00AM		Jane Wilkes, 01/22/2007 8:00:23AM
<a href="#">Select</a>	Smith, Jane	<a href="#">Diovan</a>	01/22/2007 8:15AM		Jane Wilkes, 01/22/2007 8:15:44AM
<a href="#">Select</a>	Smith, Jane	<a href="#">Diovan</a>	01/22/2007 8:17AM		Brian Kelley, 01/22/2007 8:17:07AM
<a href="#">Select</a>	Smith, Jane	<a href="#">Amoxicillin</a>	01/22/2007 8:15AM		Jane Wilkes, 01/22/2007 8:15:44AM
<b>Sched Admin Time: 12:00pm</b>					
<a href="#">Select</a>	Reasen, Terri	<a href="#">Dihydromine</a>	01/22/2007 12:31PM		Brian Kelley, 01/22/2007 12:31:59PM
<a href="#">Select</a>	Reasen, Terri	<a href="#">Guaifenisin</a>	01/22/2007 12:17PM		Brian Kelley, 01/22/2007 12:17:27PM
<a href="#">Select</a>	Reasen, Terri	<a href="#">Dihydromine</a>	01/22/2007 12:16PM		Brian Kelley, 01/22/2007 12:16:12PM
<a href="#">Select</a>	Reasen, Terri	<a href="#">Drixoral</a>	01/22/2007 12:22PM		Brian Kelley, 01/22/2007 12:22:59PM
<b>Sched Admin Time: 2:00pm</b>					
<a href="#">Select</a>	Reasen, Terri	<a href="#">Guaifenisin</a>	01/22/2007 2:16PM		Brian Kelley, 01/22/2007 4:16:38PM
<a href="#">Select</a>	Smith, Jane	<a href="#">Corapamil</a>	01/22/2007 2:29PM		Scott Walker, 01/22/2007 2:59:43PM
<b>Sched Admin Time: 5:30pm</b>					
<a href="#">Select</a>	Smith, Jane	<a href="#">Amoxicillin</a>	01/22/2007 5:14PM		Scott Walker, 01/22/2007 5:14:02PM
<b>Sched Admin Time: 8:30pm</b>					
<a href="#">Select</a>	Smith, Jane	<a href="#">Corapamil</a>	01/22/2007 8:29PM		Scott Walker, 01/22/2007 8:59:39PM



# Medication - Not Administered

## Viewing Meds Not Yet Administered

1. Click the 'Medication Reports' link in the Medication Module.
2. Click the 'Meds Not Yet Administered' report link.
3. On the resulting screen, example below, every medication that should still be administered on the current day is listed (including the resident's name) and is sorted by the assigned administration time.
4. Click the [Select](#) link next to a resident's name for the individual MAR record, allowing the medication administration to be recorded.



## Meds Not Yet Administered

 [Print](#)

1 - 13 of 13

<a href="#">Select</a> <a href="#">Full Name</a>	<a href="#">Medication</a>
<b>Sched Admin Time: 8:00am</b>	
<a href="#">Select</a> Post, Hallie	<a href="#">Hydrocodone</a>
<a href="#">Select</a> Johnson, David	<a href="#">Vitamin D</a>
<a href="#">Select</a> Child, Julia	<a href="#">Warfarin</a>
<a href="#">Select</a> White, Daniel	<a href="#">Tylenol</a>
<a href="#">Select</a> Smith, Bill	<a href="#">Tylenol</a>
<a href="#">Select</a> Smith, Sally	<a href="#">Nexium</a>
<b>Sched Admin Time: 12:00pm</b>	
<a href="#">Select</a> Post, Hallie	<a href="#">Hydrocodone</a>
<b>Sched Admin Time: 4:00pm</b>	
<a href="#">Select</a> Post, Hallie	<a href="#">Hydrocodone</a>
<b>Sched Admin Time: 8:00pm</b>	
<a href="#">Select</a> Monse, Nick	<a href="#">Lortab (C2)</a>
<a href="#">Select</a> Johnson, David	<a href="#">Tylenol PM</a>
<a href="#">Select</a> Johnson, David	<a href="#">Ambien</a>
<a href="#">Select</a> Regan, Don	<a href="#">Warfirin</a>
<b>Sched Admin Time: 9:00pm</b>	
<a href="#">Select</a> Child, Julia	<a href="#">Tylenol PM</a>



# Medication - C2 Inventory

## Viewing the C2 Medication Inventory

1. Select the 'C2 Medication Inventory' link from the 'Medication Reports' submenu.
2. This report, example below, covers the last 30 day's inventory.

### 

 [Print](#)

Select 30 Day C2 Inventory

Full Name: Peterson, Elizabeth


<a href="#">Select</a>	Date/Time	Sulfonate (C2)
	01/31/2008 8:58:12AM	28.0
	01/31/2008 3:58:37PM	27.0
	01/31/2008 9:43:59PM	26.0

Full Name: Smith, Jane

<a href="#">Select</a>	Date/Time	Broxmed (C2)	Diovan (C2)
	01/22/2008 11:26:36AM	30.0	
	01/29/2008 4:09:43PM	16.0	
	01/30/2008 9:11:20PM	25.0	34.0

Full Name: Stoddard, Kim

<a href="#">Select</a>	Date/Time	Rastamax (C2)
	01/31/2008 3:56:26PM	22.0

3. To print for internal audit, state reporting, etc., use the print link  [Print](#) at the upper right.
4. For a full inventory history on a specific person, click [Select](#) on the line under the resident's name.



# Medication – C2 Inventory Count

## Conducting a C2 Medication Count\* – First staff member

\*Note that state and federal laws require that C2 medication counts are conducted by two (2) individuals. The first person logs in, counts and records all medications in the presence of the other person. When completed, the second individual logs in, counts and adds his/her signature to the count screen.

1. Click the 'C2 Inventory Count Needed' link on the Medication Reports page, example below.


### C2 Inventory Count Needed [Edit](#) [Export](#) [Print](#)

1 - 3 of 3

Select	Medication	Dosage
Full Name: Reasen, Terri		
<a href="#">Select</a>	Seniplex (C2)	20mg
Full Name: Smith, Jane		
<a href="#">Select</a>	Danival (C2)	30 mg
<a href="#">Select</a>	Broxmed (C2)	20 mg

2. Access the medication by clicking the [Select](#) next to any of the medication names under a specific resident.
3. Verify that medication to be counted is the same name and dosage as shown on the screen, example below, then count.

## C2 Inventory Report

 [Print](#)

\* Required

### C2 Medication Inventory Detail

Medication	Broxmed
Dosage	20 mg
Current Count	<input type="text" value="16.0"/>
Count By	<input checked="" type="checkbox"/> Staff Signature
Comments	<input type="text"/>

4. Enter the number in the 'Current Count' field, as shown above.
5. Click the 'Count By' checkbox and the 'Save' button.
6. Alternately, if a single individual's medications are being counted, click the 'Save and Refresh' button so that the second staff member can login and finish the count.

### Verifying the Count\* – Second staff member

\*Note that state and federal laws require that C2 medication counts are conducted by two (2) individuals. The first person logs in, counts and records all medications in the presence of the other person. When completed, the second individual logs in, counts and adds his/her signature to the count screen.

1. Click the 'C2 Inventory Count Needed' link on the Medication Reports page.
2. Access the medication by clicking the [Select](#) next to the medication name.
3. Verify that medication to be counted is the same name and dosage as shown on the screen, example below, then count.

## C2 Inventory Report



\* Required

### C2 Medication Inventory Detail

Medication	Broxmed
Dosage	20 mg
Difference	-1.0
Current Count	16.0
Count By	Teresa Amberlyn, 01/29/2008 4:09:43PM
Assisted By	<input checked="" type="checkbox"/> Assisted Signature
Comments	<input type="text"/>

Retract count

4. Verify that the count entered is the same, as shown above.
5. Click the 'Assisted By' checkbox and the 'Save' button.

\*Note that the difference between the current count and the previous count is automatically calculated. In this case it indicates that, one (1) tablet was administered since the last count.

### Recording Count Differences\* – Second staff member

\*Please note that the 'Retract Count' process provides legal protection for staff members in the event of count discrepancies.

1. If the second count does not agree with the original count, click the 'Retract count' checkbox.
2. This cancels the original count recording and allows the first staff member to begin the process again.



# Medication – Emergency Med Kit

## Recording Administration from the Emergency Med Kit


1. In the event that drugs and supplies are administered from the Emergency Med Kit, it is important that the usage be documented.
2. Select the appropriate community from the 'View/Select Community' link in the Community module.
3. On the Navigation Menu, click the 'Administer from Emergency Kit' link. This will open up a screen that displays all items that have been setup in the kit in alphabetical order, as seen in the partial screen below.
4. For any non-prescribed items, enter the resident's name into the name field. Prescribed items will have the resident's name prefilled and non-editable.


### Administer from Emergency Kit




**\* Required**  
[Dosage](#) Med Administering Staff

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**Medication: Aspirin**  
 30 mg Date: \* 03/22/2009 1:00pm  Resident Name:  Nature of Emergency:   
 Staff signature Curr Amt: 20.0 Tablet Amt Admin:  Tablet

**Medication: Bandages**  
 1" x 2" Date: \* 03/29/2009 1:15pm  Resident Name: Elizabeth Rushton Nature of Emergency: Cover EpiPen injection site  
 Staff signature Curr Amt: 12.0 Unknown Amt Admin: 1.0 Unknown

**Medication: EpiPen**  
 20 CC Date: \* 03/29/2009 1:20pm  Resident Name: Elizabeth Rushton Nature of Emergency: Allergic reaction of walnuts in cookies.  
 Staff signature Curr Amt: 2.0 Injection Amt Admin: 1.0 Injection

5. The Date field populates with the current date/time and may be edited using the mini-calendar or typing in the appropriate data, if necessary.
6. Enter 'Nature of Emergency' details.
7. Lastly, click the Staff Signature field for each item used and the Save button at the bottom.



# Medication – 31-Day Backup MAR

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The 31-Day Backup MAR is used in cases of emergency when power or computer access is not available. This system provides a temporary paper MAR on which to record data. Following the use of the Backup MAR, the hand-recorded information must be manually entered into the online system so that resident records are complete and correct.

## Preparing the 31-Day MAR

1. On the last day of every month, open the 31-Day MAR report
2. Using the print icon in the upper right corner, print the entire report
3. Close the 31-Day MAR report
4. Open the 31-Day MAR – Reverse
5. Remove the printed documents, turn them over and reinsert in the printer
6. Using the print icon, print the medication notes grid on the reverse side of the MAR
7. Close the 31-Day MAR – Reverse report
8. Store in a labeled binder or folder for emergency use

## Using the 31-Day MAR

1. In the event power or computer access is suspended, fill out by hand the paper records and return them to the binder
2. As soon as possible after computer operation has been restored, open the 31Day Backup Medication Entry report
3. Locate the paper record for the first individual on the report
4. On the screen, find the first date on which hand-reporting was done
5. Choose any medication for that date and click the [Select](#) link
6. By referencing the paper documents, fill out the information for all medications for that date and any subsequent emergency days
7. It is critical that you **NOT** leave the date field blank, but enter the correct date/time the medication was administered and click the Staff Signature checkbox
8. When done, click the Save button
9. Repeat the recording process for as many individuals for whom you have paper records





# Community – Maintenance

## Preventive Maintenance

The Preventive Maintenance system in BlueStep allows administrators and maintenance personnel to select those maintenance issues that must be addressed on a recurring basis and provides an interface for maintenance staff to record completion of such tasks. A summary screen is available for reviewing the current status of preventive maintenance projects.

Before configuring the maintenance tasks, there are five (5) Option Lists that should be modified to meet the specific needs of your facility. They are for Annual-Summer, Annual-Winter, Monthly, Quarterly and Semi-Annual tasks.

## Modifying Maintenance Task Lists

8. From the Tools button drop-down, select the Relate link.
9. Mouse over the Admin tab and select 'Option Lists'.

### Edit Option List

**\* Required**


Name \* Preventive Maintenance Tasks - Ann

Description

Folder Location \* Option Lists

**List Items** Reorder Add Add Multiple

Label	Export Value	Edit	Delete
Life Safety - Fire Alarm	Fire Alarm		
Life Safety - Kitchen Hood	Kitchen Hood		
Life Safety - Fire Extinguishers	Fire Extinguishers		
Life Safety - Fire Sprinklers	Fire Sprinklers		
Life Safety - Back Flow Preventor	Back Flow Preventor		
Main Kitchen - Range Hood	Range Hood		
Main Kitchen - Gas	Gas		
Building Ext. - Wash Exterior	Wash Exterior		
Generator - Antifreeze	Antifreeze		
Generator - Tune-up	Tune-up		



10. Click the Edit Pencil icon  associated with the Preventive Maintenance Tasks – Annual-Summer list. The current options on the list will be displayed, as seen above.
11. For any of the displayed options that do not match the tasks needed annually in the summer, click the associated Edit Pencil icon.
12. A small pop-up screen will appear, as seen at right.
13. Highlight and delete the existing data in the Label field. Type in appropriate information.
14. Enter an export value similar to the label, but unique to that option item. See the illustration above for examples.
15. Be sure to click the Save button *at the bottom of the pop-up.*

### Edit Option Item


**\* Required**

Label \* Life Safety - Fire Alarm

Export Value Fire Alarm

16. If more option items are needed, click the Add button  for one more item, or click the Add Multiple button  for a larger field that allows several more items to be entered at one time.
17. Push the Enter key after each line entry.
18. Be sure to click the Save button *at the bottom of the pop-up*.


### Changing the Order of Option Items (Reorder)

1. Click the Reorder link  on the list for which you want to edit the order.
2. When the pop-up appears, use the right-side keys to organize the list items.
3. Be sure to click Save *at the bottom of the pop-up* when done.

Follow the same procedure to modify the remaining four lists: Preventive Maintenance Tasks – Annual-Winter, Preventive Maintenance Tasks – Monthly, Preventive Maintenance Tasks – Quarterly and Preventive Maintenance Tasks – Semi-Annual lists. When all five lists accurately describe the required tasks at your facility, proceed to setting up the maintenance schedule.

### Maintenance Selection

9. Click the Select Community link in the Community module.
10. Select the appropriate community and click ‘Setup: Maintenance’ on the Navigation Menu.
11. The maintenance items entered on the Option Lists will be displayed. Make appropriate selections, as seen in the example below.

**Setup: Maintenance** 

**Preventive Maintenance Setup**

Select Monthly Tasks

<input checked="" type="checkbox"/> Life Safety - Check Fire Doors	<input checked="" type="checkbox"/> Main Kitchen - Dishwasher	<input type="checkbox"/> Equipment - Vacuum/Extractor	<input checked="" type="checkbox"/> Building Int. - Floor Drains
<input checked="" type="checkbox"/> Life Safety - Check Exit Alarms	<input checked="" type="checkbox"/> Main Kitchen - Fridge/Freezers	<input type="checkbox"/> Equipment - Workspace	<input checked="" type="checkbox"/> Generator - Coolant Level
<input type="checkbox"/> Life Safety - Check MSDS	<input checked="" type="checkbox"/> Mechanical - Air Filters	<input type="checkbox"/> Building Ext. - Front Entry	<input checked="" type="checkbox"/> Generator - Fuel Supply
<input type="checkbox"/> Life Safety - Fire Extinguisher Inspection	<input checked="" type="checkbox"/> Mechanical - Blower Motor	<input checked="" type="checkbox"/> Building Ext. - Dumpster	<input type="checkbox"/> Generator - Hoses
<input checked="" type="checkbox"/> Life Safety - Drain Condensation	<input checked="" type="checkbox"/> Mechanical - Outside coils	<input type="checkbox"/> Landscaping - Sprinklers	<input checked="" type="checkbox"/> Generator - Heater
<input type="checkbox"/> Life Safety - Test Flashlights	<input checked="" type="checkbox"/> Mechanical - Water Softener	<input checked="" type="checkbox"/> Roof & Attic - Attic Heaters	<input type="checkbox"/> Generator - Leaks
<input type="checkbox"/> Life Safety - Update ER Book	<input checked="" type="checkbox"/> Mechanical - Elevator	<input type="checkbox"/> Building Int. - Appliances	<input checked="" type="checkbox"/> Generator - Exhaust Line
<input checked="" type="checkbox"/> Life Safety - Check Emergency Med Kits	<input type="checkbox"/> Equipment - Wheelchairs	<input checked="" type="checkbox"/> Building Int. - Whirlpool Bath	<input checked="" type="checkbox"/> Generator - Battery Charger

Select Quarterly Tasks

<input type="checkbox"/> Main Kitchen - Range/Ovens	<input checked="" type="checkbox"/> Mechanical - Mixing Valves	<input checked="" type="checkbox"/> Mechanical - HVAC
<input checked="" type="checkbox"/> Main Kitchen - Grease Trap	<input type="checkbox"/> Mechanical - Sewer Lift Stations	<input type="checkbox"/> Equipment - Carpet Machine
<input type="checkbox"/> Main Kitchen - Vinyl Floor	<input checked="" type="checkbox"/> Mechanical - Central Exhaust	<input checked="" type="checkbox"/> Life Safety - Consulting Pharmacist Facility Review

Please select the month in which to start quarterly tasks:

Select Semi-Annual Tasks

<input checked="" type="checkbox"/> Building Ext. - Windows	<input checked="" type="checkbox"/> Building Ext. - Window Leaks	<input checked="" type="checkbox"/> Landscaping - Siding	<input type="checkbox"/> Building Int. - Carpet
<input type="checkbox"/> Building Ext. - Main Sign	<input type="checkbox"/> Landscaping - Sprinkler	<input type="checkbox"/> Landscaping - Fertilize	<input checked="" type="checkbox"/> Building Int. - Back-Flow

Please select the month in which to begin semi-annual tasks:

Select Annual Summer Tasks

<input checked="" type="checkbox"/> Life Safety - Fire Alarm	<input checked="" type="checkbox"/> Life Safety - Fire Sprinklers	<input type="checkbox"/> Main Kitchen - Gas	<input checked="" type="checkbox"/> Generator - Tune-up
<input checked="" type="checkbox"/> Life Safety - Kitchen Hood	<input checked="" type="checkbox"/> Life Safety - Back Flow Preventor	<input type="checkbox"/> Building Ext. - Wash Exterior	
<input checked="" type="checkbox"/> Life Safety - Fire Extinguishers	<input type="checkbox"/> Main Kitchen - Range Hood	<input checked="" type="checkbox"/> Generator - Antifreeze	

Please select the month for summer tasks:

Select Annual Winter Tasks

<input checked="" type="checkbox"/> Winterization - Gutters	<input checked="" type="checkbox"/> Winterization - Fire Sprinkler	<input checked="" type="checkbox"/> Winterization - Train Staff
<input checked="" type="checkbox"/> Winterization - Vacant Units	<input checked="" type="checkbox"/> Winterization - Vents	

Please select the month for winter tasks:

12. Select the months in which quarterly, semi-annual, summer and winter tasks from the drop-down lists below each task-selection section.
13. When complete, click the Save at the bottom of the screen.

## Editing Maintenance Tasks

Once the initial maintenance tasks have been setup, additional tasks or task modification is done through the 'Edit Maintenance Tasks' link.

- From the Community module, click the Select/View Communities and choose the appropriate facility.
- In the Navigation Menu, click 'Edit Maintenance Tasks'. As seen in the partial screen below, all the current maintenance tasks are listed.

**Edit Maintenance Tasks**
[New Entry](#)

<a href="#">Task Type</a>	<a href="#">Task</a>	<a href="#">Month Cycle Starts</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
<b>Period: Annual - Once a Year</b>				
Life Safety	Fire Alarm	June		
Life Safety	Fire Extinguishers	June		
Life Safety	Kitchen Hood	June		
Winterization	Fire Sprinkler	November		
Winterization	Vents	November		
<b>Period: Monthly</b>				
Life Safety	Check Emergency Med Kits	January		
Life Safety	Check Exit Alarms	January		
Life Safety	Check Fire Doors	January		
Life Safety	Check MSDS	January		
Life Safety	Drain Condensation	January		
Life Safety	Fire Extinguisher Inspection	January		
Life Safety	Test Flashlights	January		
Life Safety	Update ER Book	January		

- To create a new task, select the New Entry button [New Entry](#) at the upper right.
- Select a Task Type from the drop-down.\*
- Enter the specific action into the Task field, as in the example below. Select how often and, if appropriate, in what month the task should be completed.
- Click the Save button when finished.

**Edit Maintenance Tasks**
 [Print](#)

**\* Required**

**Task Type** \*

**Task** \*

**How often?** \*

Monthly  
 Quarterly - Every 3 Months  
 Semi-Annual - Every 6 Months  
 Annual - Once a Year


**Start in:**

For quarterly, semi-annual and annual tasks

\* In the rare instance that a new Task Type is required, add the type to the Preventive Maintenance Types option list.

## Changing Task Assignment Months \*

- To change how often or in what month a task should be done, select the Edit icon
- The Edit Task screen will appear, as above, on which you can make the desired changes.
- Click the Save button when done.

\* It is advisable to delete tasks for which the Task Type and Task fields must be changed or those default tasks that have no application at your facility. To delete such a task from the schedule, click the Delete icon  associated with that item.

### Tracking/Completing Maintenance Tasks \*

1. Select the Community Maintenance Monitor in the Community module
2. Click the Maintenance Checklist on the submenu.

#### Maintenance Checklist



##### Maintenance Items for Current Month

Task	Due Date	Period	Maintenance Completed	Maintenance Notes
<b>Type: Life Safety</b>				
Fire Sprinklers	06/30/2009	Annual - Once a Year	<input checked="" type="checkbox"/> Janet Holder, 03/19/2009 3:30:51PM	Sprinkler in west hallway replaced.
Fire Alarm	06/30/2009	Annual - Once a Year	<input type="checkbox"/> Check here if completed	
Check Fire Doors	06/30/2009	Monthly	<input checked="" type="checkbox"/> Check here if completed	
Check Exit Alarms	06/30/2009	Monthly	<input checked="" type="checkbox"/> Check here if completed	Made volume adjustment.
<b>Type: Mechanical Systems</b>				
Outside coils	06/30/2009	Monthly	<input type="checkbox"/> Check here if completed	
Blower Motor	06/30/2009	Monthly	<input type="checkbox"/> Check here if completed	

##### Previous Unsigned Maintenance Items

Type	Task	Maintenance Completed	Maintenance Notes
<i>No Records Found</i>			

3. The checklist, as in the partial example above, will list all tasks by type and display the due date. Any tasks that were previously completed will show the name of the individual, date and time the data was entered.
4. To mark a task as completed, check the associated checkbox
5. Enter any appropriate notes.
6. Click the Save button when done.
7. Once the end of the current month has passed, these maintenance tasks will no longer appear on the list and it will not be possible to check them as completed.
8. The bottom section of the checklist is a report of any maintenance items that remained uncompleted after the due date. Ideally, this list should remain empty, as this would indicate that all tasks were completed on time.
9. Any maintenance personnel or others with recurring tasks (consulting pharmacist, head nurse, kitchen staff, dietitian, etc.) should have access to this checklist.

### Checking the Preventive Maintenance Review

1. The maintenance status can be reviewed at any time by selecting the Community Maintenance Monitor in the Community module.
2. Click the Preventive Maintenance Review. This report shows all maintenance items for the past six months and for one month into the future, a portion of which can be seen in the example on the next page.

## Preventive Maintenance Review - Last 6 + 1 months

[Print](#)

1 - 68 of 68

Select	Task	Period	Completed	Notes
<b>Community: Harvest Home Care Center</b>				
<b>Due Date: 03/31/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Check Fire Doors	Monthly	Chaz Jones, 03/19/2009 4:34:35PM	
<a href="#">Select</a>	Update ER Book	Monthly	Jane Wallace, 03/19/2009 2:23:30PM	
<a href="#">Select</a>	Fire Extinguishers	Annual - Once a Year	Chaz Jones, 03/19/2009 3:34:53PM	
<a href="#">Select</a>	Drain Condensation	Monthly		
<a href="#">Select</a>	Check MSDS	Monthly	Anita Aaronson, 03/19/2009 2:34:35PM	
<a href="#">Select</a>	Fire Alarm	Annual - Once a Year	Jane Wallace, 03/19/2009 2:23:30PM	
<a href="#">Select</a>	Test Flashlights	Monthly		
<a href="#">Select</a>	Fire Extinguisher Inspection	Monthly	Chaz Jones, 03/19/2009 4:34:53PM	
<a href="#">Select</a>	Check Exit Alarms	Monthly	Chaz Jones, 03/19/2009 2:24:55PM	
<a href="#">Select</a>	Fire Alarm	Annual - Once a Year		
<a href="#">Select</a>	Kitchen Hood	Annual - Once a Year	Anita Aaronson, 03/19/2009 4:34:25PM	
<b>Due Date: 02/28/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Check Emergency Med Kits	Monthly	Anita Aaronson, 02/19/2009 1:34:15PM	
<a href="#">Select</a>	Check Fire Doors	Monthly	Chaz Jones, 02/19/2009 4:34:35PM	
<a href="#">Select</a>	Test Flashlights	Monthly	Chaz Jones, 02/19/2009 4:31:51PM	
<a href="#">Select</a>	Fire Extinguisher Inspection	Monthly	Chaz Jones, 02/19/2009 4:34:45PM	
<a href="#">Select</a>	Update ER Book	Monthly	Anita Aaronson, 02/19/2009 4:34:55PM	
<a href="#">Select</a>	Check MSDS	Monthly	Jane Wallace, 02/14/2009 2:23:30PM	
<a href="#">Select</a>	Drain Condensation	Monthly	Chaz Jones, 02/19/2009 1:31:55PM	
<a href="#">Select</a>	Check Exit Alarms	Monthly	Chaz Jones, 02/19/2009 4:34:53PM	
<b>Due Date: 01/31/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Restock the Emergency Med Kit: Tylenol was administered from the Emergency Med Kit on 01/06/2009.		Dan Rasband, 01/06/2009 9:01:54AM	Tylenol restocked on... <a href="#">More</a>

- Note that the date/time of completion is listed, along with the name of the person who checked-off the task.



## **Provider (Physician) Guide**

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# HQ HQ Modules

Each of the HQ™ modules performs specific functions, which may be accessed from tabs on the main navigation bar or from the underlined links in each module section. Additionally, you may go directly to any of the functions under specific modules using the secondary navigation bar or the listings below each module title. For instance, under Management, the “Active Tasks | Groups | Quality Control” line is made up of three (3) clickable links to the three Management pages. All modules will display any available functions in this fashion.

Depending upon your permission level, as granted by the management at your organization, you may see fewer than the modules displayed here. No matter what is available on your screens, each will operate as described in the following pages.

The screenshot displays the HQ Home Management System interface. At the top, there is a header with the HQ logo and the text "HQ Home HQ Management System". To the right of the header, there is a user profile section showing "Good Afternoon Anita" and links for "My Profile", "Logout", "Search", "Tools", and "Sites". Below the header is a main navigation bar with tabs for "HQ Home", "My Office", "Management", "Office", "HR/Staff", "Marketing/Leads", "Resident", "Medication", "Community", and "Security".

On the left side, there is a sidebar with a "Select Staff" dropdown menu. Below this, there are two sections: "My Office" and "Recent Records". The "My Office" section includes links for "Relationships", "Inbox (0)", "Tasks (0)", "Schedule (0)", "Issues (0)", and "My Profile". The "Recent Records" section includes a link for "Shift A".

The main content area is divided into several modules, each with a title and a list of functions:

- Management**: Active Tasks | Groups | Quality Control
- Office**: Scheduling Calendar | Shared Files | BlueStep Help | 4Care Pharmacy Help | Enter Timecard | My Shifts | Time Off
- HR/Staff**: Add New Staff | Select Staff | Staff Reports | Staff Scheduling
- Marketing/Leads**: Preview | Lead Search | Task Manager | Lead Sources | Reports
- Resident**: Add New Resident | Select/View Residents | Change Resident Status | Discharged Residents | Resident Monitor | Resident Reports
- Medication**: MARs (Custom) | Scheduled MARs | Administer OTC PRN | Administer Prescribed PRN | Administer from Emergency Med Kit | Medication Reports | 4Care Reports
- Community**: Select/View Communities | Community Census Monitor | Community Records Monitor | Community Maintenance Monitor | Providers | Pharmacist Reports
- Security**: HQ Information & Permissions | HQ Structure | Styles | HQ Administrators | Media Library



## HQ Access

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### Logging in to BlueStep's HQ Management System

Each facility has its own URL (web address) and each physician has his/her own login. Prior to a physician using the system, the facility must set up physician access (see Facility section) and provide login information to the physician. Once this information is received, follow the steps below to access the system.

1. Type the facility's URL address into the address bar of your web browser. Google's Chrome browser or Microsoft's Internet Explorer 6.0 or higher are recommended. Firefox for MAC users is also acceptable.
2. Save this address in your browser's 'Favorites' for easy access in the future.
3. When the login screen appears, example below, type in your assigned username and password in the fields provided.
4. If the 'Remember Me' checkbox is clicked, your computer will be "cookied" to remember your login for future sessions.
5. Click the 'Login' button to reach the HQ Home page.

### HQ - Harbor Homes

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 You must log in to view this site.

#### Login

*Usernames and passwords are case-sensitive.*

Username \*

Password \*

Remember Me

\* Required

#### Need Help?

*If you can't remember your username or password, we can look it up for you.*

[▶ Can't remember your Username or Password?](#)

[▶ Locked out or unable to find information from a Site or Team?](#)

[▶ Need to change your Username, Password or Email?](#)

[▶ Why do I need to Login?](#)

[▶ Need technical help from BlueStep client care?](#)

6. Also available from this screen are links to access the automated 'Lookup System' ("Can't remember your Username or Password?") and other helps.



## Customized View

The first available screen in the HQ Management System is called HQ Home, as seen in basic physician version below. Also available are the My Office selections and, for ease of use, a dynamic list of the Recent Records visited by the logged-in individual. The view that an individual physician sees will vary depending upon the facility's configuration. However, the pertinent sections of the Resident Database and Medication Module are available to all physicians.



**Accessing Modules** – click on the module name, such as “Resident/Resident Database”, in either the main portion of the screen or the navigation bar. In most cases, the last resident record visited will be displayed. Customized modules may retrieve other links specific to the facility.

**Accessing Submenus/Reports/Queries** – click on the name of the item, such as “Medication Reports” on the main portion of the screen or on the drop-down from the navigation bar. These will be listed under the module name and the link will return the item selected.

**Accessing My Office** – click the My Office link from the navigation menu to the left or on the navigation bar. Specific areas of My Office can be accessed from the links on the navigation menu or on the drop-down from the navigation bar.

**Accessing Recent Records** – click on the underlined name of the record in the Recent Records list. This list is dynamically created when the logged-in individual visits a record in the system. It will hold up to twelve (12) of the most-recently visited record links. Each logged-in user will only see the records they have accessed and not those of other users.



# Resident - Records

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## Accessing a Resident Record\*

1. Click the 'My Residents' link in the Resident Database shown on the HQ Home page.
2. On the resulting page, all residents who have a database relationship with the logged-in physician will be displayed.
3. Click the underlined name of the resident to access his/her record.

## My Residents

---

[Collapse All](#)
 [Expand All](#)

Ryan Forsberg

**Who is Ryan over?**

Ryan is Primary Physician over [Elizabeth Peterson](#)

**Who is Elizabeth under?**

Teresa Amberlyn is CNA over Elizabeth

Nancy Nourse is Nurse over Elizabeth

Ryan Forsberg is Primary Physician over Elizabeth

Ryan is Primary Physician over [Jane Smith](#)

**Who is Jane under?**

Teresa Amberlyn is Administrator over Jane

Ryan Forsberg is Primary Physician over Jane

Nancy Nourse is Therapist over Jane

\* The resulting screen can take many formats, as selected by the organization. The most common format is a face sheet style (see example on the following page) with sections covering resident identification, medical data, contact persons, preferences, medications and vital signs.

Newman, Nikki

Information

- Summary
- Name and E-mail
- Contact Information
- General Resident
- Medications
- Daily Nursing Forms
- Medical
- New Mexico State Forms
- Family Connect

Work with this Record

- Document Library
- Relationships
- Schedule
- Change Record Category
- Change Unit
- Delete Record

## Record Summary

Nikki Newman



### Resident Identification

Current Date: 06/09/2009

Date of Birth: 11/30/1900  
 Age: 108  
 Social Security #: 000-00-0000  
 Medicare #: 111223333A  
 VA Benefits: No  
 Additional Insurance: Deseret Mutual  
 Policy #: 565652658  
 Group #: 5626  
 Rx Insurance: Deseret Mutual  
 Policy #: 565652658  
 Group #: 5626

Room #: 101A  
 Location #: W Wing - Alzheimer's  
 Phone #: (211) 333-5555  
 Admission Date: 05/05/2007  
 Final Discharge Date: [Move/Trans Date](#)  
 No Records Found

Move/Transfer Info: [Type Move/Trans](#)  
 No Records Found

Forwarding Address: [Forward mail to:](#)  
 No Records Found

### Medical Data for Nikki Newman

Code Status: **Resuscitate**

Medication Contraindications: **Asprin**

Do Not Resuscitate Order: [Document Library.doc](#)  
 Adv Health Care Directive: [Document Library.doc](#)  
 End of Life Directive: [Document Library.doc](#)  
 Document Type: [no data]  
 Past/Current Medical Conditions: **Hallucinations, Chronic cough, Fainting/dizziness, Hallucinations**  
 Other Health Concerns: [no data]  
 Surgeries: [no data]  
 Diagnosis on current prescriptions: **Diabetes, Sleeplessness, Irregular heartbeat**  
 Medical Devices: [no data]  
 Allergies: **Sulfa, PCN, Shellfish**  
 Dietary Needs: **small portions requested**

Primary Care Physician: Dr. Corry  
 Phone: (211) 232-6565  
 Other Provider: Dr. Dennison  
 Service/Specialty: [no data]  
 Phone: (211) 232-6565  
 Dentist: Dr. Tavioian  
 Phone: (435) 586-0123  
 Optometrist: [no data]  
 Phone: (435) 586-0123  
 Audiologist: Dr. Sully  
 Phone: (435) 586-0123  
 Physical Therapist: Dr. Hall  
 Phone: (211) 232-6565  
 Pharmacy: 4Care Pharmacy  
 Phone: (801) 336-3690  
 Fax: (801) 336-3001

### Contact Persons for Nikki Newman

Full Name	Relationship to Resident	Type of Contact	Home Phone	Cell Phone	Work Phone
Connie Newman	Daughter	Emergency contact	(211) 333-5566		
Dennis Newman	Son	Emergency contact	(211) 666-7777	(211) 666-8888	
Joye Newman	Daughter	Emergency contact, Financially responsible party, Main family notification	(211) 999-1111	(211) 211-2222	
Marva Newman	Daughter	Emergency contact	(211) 222-3333	(211) 333-4444	

### Preferences for Nikki Newman

Religious Preference: **Christian**  
 Clergy: [no data]  
 Phone: [no data]  
 Other Friend/Leader: [no data]  
 Relationship: [no data]  
 Phone: [no data]

Home Care/Hospice: **Roswell Hospice**  
 Phone: (211) 333-4444  
 Hospital: **Roswell General**  
 Phone: (211) 333-4444  
 Mortuary: **Rest In Pieces**  
 Phone: (211) 333-4444

### Medications Administered Today to Nikki Newman

Medication	Dosage	Date/Time Administered
Creation Date: 08/01/2008		
<a href="#">Colace (Docusate Sodium)</a>	100 mg	08/01/2008 9:34AM
<a href="#">Bisacodyl</a>	5 mg	08/01/2008 9:34AM
<a href="#">Lortab (C2)</a>	20 mg	08/01/2008 9:34AM
<a href="#">Prozac</a>	20mg	08/01/2008 9:34AM

### Current Medications for Nikki Newman

Medication	Dosage	Administration Instructions	Rt of Admin	Administration Type	Sched Admin Time
Acetaminophen	325mg	Take 2 tabs every 4 hours as needed for pain	01 Oral (PO)	Regularly administered	
Bisacodyl	5 mg	Take 1 tablet if not had a bowel movement in 2 days	01 Oral (PO)	PRN (as needed)	12:00pm
Colace (Docusate Sodium)	100 mg	Give with plenty of water	01 Oral (PO)	PRN (as needed)	5:00pm
Lortab (C2)	20 mg	Give with plenty of water, twice daily	01 Oral (PO)	Regularly administered	8:00am, 8:00pm
Lunesta	3mg	Take one tablet at bedtime	01 Oral (PO)	Regularly administered	7:00pm
Prozac	20mg	BID	01 Oral (PO)	Regularly administered	8:00pm

### Current ADL Assistance/Level of Care for Nikki Newman

Medication: Semi-Independent/Limited Assist \*  
 Bath: Semi-Independent/Limited Assist \*  
 Oral: Semi-Independent/Limited Assist \*  
 Incontinence: Semi-Independent/Limited Assist \*

Eating: Semi-Independent/Limited Assist \*  
 Dress: Semi-Independent/Limited Assist \*  
 Diet: Significant/Total Assist  
 Vitals: Semi-Independent/Limited Assist \*

### Vital Signs/Last 60 Days for Nikki Newman

Time	Blood Pressure	Heart Rate	Respiratory Rate	Temperature	Weight	Glucose	O2 Sats	O2 /min	Observations
Date: 06/23/2008									
3:39PM	115/95	66.0	25	97.7	110.0				
Date: 03/14/2008									
8:04AM	115/94	67.0	25	98.7	110.0				
Date: 03/03/2008									
3:00PM	119/94	63.0	32	98.4	110.3				
Date: 02/27/2008									
8:47AM	123	63.6	20	100.0					
1:23PM	123	63.6	20	100.0					
8:46PM	123	63.0	25	100.0					

End of data for Nikki Newman

### Reading the Record Summary\*

\* If the facility has chosen to use the face sheet style of Record Summary, as in the example on the previous page, there is a wealth of information available at a glance. Some information may be blank, due to security restrictions. Fields that display [no data] have not yet been filled out by the facility staff. Note the following sections and some of the pertinent data fields available to you:

#### Resident Identification Section

Date of birth	Room number
Social Security number	Location
Admission date	

#### Medical Data Section

Code status (either Resuscitate or Do Not Resuscitate in red)	Surgeries
Medication contraindications (displayed in red)	Allergies
Links for viewing up to three (3) advance health care directives	Current diagnosis
Past/Current medical conditions	Dietary needs
Health care provider information	Medical devices

#### Contact Persons Section

Name of contact person	Home phone
Relationship	Cell phone
Type of contact	Work phone

#### Preferences Section

Religious preference	Hospice & phone
Clergy & phone	Hospital & phone
Friend & phone	Mortuary & phone

#### Medications Administered Today Section


This report automatically updates throughout each day and lists the medication name, dosage and time given.

#### Current Medications Section



Medication name & dosage	Administration type
Administration instructions	Route of administration
Scheduled administration time	

#### Vital Signs/Last 60 Days

Date/time vitals taken	Heart rate
Weight	Temperature
Blood pressure	O2 Sats
Glucose level	



\* This data automatically updates throughout the day, as information is added to the resident record. The report may be printed as needed - for your records or to accompany the resident on outpatient or admitted health visits. Use the print link  at the upper right of the screen.

### Navigating a Record\*

1. Click the 'My Residents' link on the HQ Home page.
2. Select the appropriate resident by clicking the underlined name.
3. Click the name of the needed form, report or wizard within the gold navigation menu at the left side of the record.
4. If the needed folder is closed, as designated by an expand icon  in front of the folder name, click the icon and the folder will open to display its contents.
5. To see the contents of all folders, click the expand all icon  **Expand All** at the top of the menu.
6. Once the folders are open, select the name of the form, report or wizard, as above.

\* Note that physicians may access such forms as Vital Signs, Medical History, Labs, Incident Report, Next of Kin, Nursing Notes, Medication Side Effects, etc., any of which may provide information helpful in caring for the resident.

Peterson, Beth

**Information**  

- ▶ Summary
- Name and E-mail
- Contact Information
- ▢ General Resident
  - Resident Info
  - Individual Worksheet
  - Nursing Notes
  - Next of Kin
  - Move-Out/Transfer
- ▢ Resident Wizards
- ▢ Medications
  - Medication - Prescribed
  - Medication - MAR
  - Medication - OTC PRNs
  - Current Prescribed Medications
  - Discontinued Medication
  - Medication - History
  - Physicians Refill Authorization
  - Physicians Qrtly Med Review**
  - Medication Side Effects
- ▢ Daily Nursing Forms
  - Vital Signs
  - Toileting
  - Labs
  - Incident/Behavior Report
- ▢ Medical
  - Doctors' Orders
  - Standing Orders/Recert
  - Physician Roster
  - Medical History
  - Immunizations
  - Printable Hospice Variance

**Work with this Record**

- Relationships
- Schedule
- Change Record Category




# Resident – Forms and Reports

## Using Resident Forms and Reports\*


\* Forms exist in two formats, single entry and multi-entry. When the link for a single entry form is clicked, the form and its data will appear. When a multi-entry form is selected a summary page of all the copies of that form will appear, as in the Vital Signs example below.

### Vital Signs

<u>Date/Time Taken</u>	<u>Blood Pressure</u>	<u>Respiratory Rate</u>	<u>Heart Rate</u>	<u>Temperature</u>	<u>View</u>
01/11/2008 11:57AM	98/110	16	44.0	98.0	
01/11/2008 10:13AM	98/110	22	44.0	98.0	
01/11/2008 10:13AM	98/110	34	45.0	98.0	





1. To see any one of the individual records, click the view icon .
2. When finished viewing, click the 'Done' button at the bottom.

\* Most forms and reports provide information for the physician's use in treating the resident. However, some forms allow physicians to record data permanently in the system. This is advantageous to the resident and the nursing staff at the patient's facility, as there are no faxes to be lost or verbal instructions to be misinterpreted. Additionally, information is immediately available to all concerned parties without the need for transcription.

\* If a form is available for data entry by the physician or his/her staff, edit icons  will appear next to each record entry, such as in the Medication-Prescribed form example below.

### Medication - Prescribed

[New Entry](#)

<u>Medication</u>	<u>Dosage</u>	<u>Sched Admin Time</u>	<u>Administration Instructions</u>	<u>Admin Start Date</u>	<u>Order fill/refill</u>	<u>Edit</u>
Aspirin	81mg	8:00am	One tab by mouth daily	04/24/2007	01/28/2008 2:33:56PM	
Dihydromine	40 mg	6:00am, 4:00pm	Take one by mouth daily.	05/01/2007	01/23/2008 10:41:41AM	
Mycitracin	20mg		BID	01/30/2008	01/28/2008 2:33:56PM	
Sulfonate	20 mg	8:00am	Take one by mouth daily.	03/22/2007	01/23/2008 10:41:41AM	

1. To **view** any one of the individual records, click the edit icon.
2. When finished viewing, click the 'Cancel' button at the bottom.
3. To **edit** an existing form, click the edit icon.
4. When finished editing, click the 'Save' button.
5. To **create** a new version, click the 'New Entry' button.
6. When completed, click the 'Save' button.

### Physician-Editable Forms List

Individual Worksheet  
 Medication-Prescribed  
 Physician's Refill Authorization  
 Physician's Quarterly Medication Review

Doctor's Orders  
 Standing Orders/Recertifications  
 Physician's Roster  
 Immunizations

### Using View Layouts\*

\* Some forms have more than one version, accessible through the 'View Layout' feature. When this is the case, the 'View Layout' box will appear and directions at the top or bottom of the screen will explain what is needed, as in the example below.

1. Click the down-arrow on the 'View Layout' box and select the layout as directed.

**Standing Orders/Recert** View Layout: [Generic] Last Modified: Never

**Please change View Layout (at upper right) to "Printable Standing Orders"**  
 Check any needed orders; uncheck any undesired treatments.

Date: 02/05/2008

Resuscitation:  Do Not Resuscitate  Resuscitate

Durable Medical Equipment:  As needed  As ordered

DME orders: [Dropdown]

2. After selecting the layout, the screen will display a report with features not accessible from the [Generic] view, as in the example below.

**Standing Orders/Recert** View Layout: Printable Standing Orders/Recertification Last Modified: Never

**Physician Standing Orders/Recertification**

**Patient Information**

Name: Nikki Newman Date: 06/09/2009  
 Attending Physician: Dr. Cory Medical Record #: 6565  
 Physician Phone: (211) 232-6565 Allergies/Drug Allergies: Shellfish / Sulfa, PCN  
 Pharmacy: 4Care Pharmacy Pharmacy Phone: (211) 232-6565

**Treatments/Orders** - Check any desired treatments/orders; uncheck unwanted items

Durable med equip:  As needed  As ordered Diet:  As tolerated  Food supplements

DME orders: [Dropdown] Diet orders: [Dropdown]

Skin care:  Massage  Powder Oral care:  Standard  Antibiotic treatments  
 Cream, lotion  Dressings  Mouthwash treatments

Skin orders: [Dropdown] Oral orders: [Dropdown]

Respiratory care:  CPAP  Medication nebulizer Pain management:  OTC medications  Heating pad/ice pack  
 Oxygen  Medication as prescribed  Physical therapy

Respiratory orders: [Dropdown] Pain orders: [Dropdown]

Nausea/Vomiting:  New medication  Medication as prescribed Allergy:  Remove allergen  Medication as prescribed  
 Topical medication  Compress  
 OTC medication  Heat/cold control



Nausea/Vomit orders: [Dropdown] Allergy orders: [Dropdown]

**Current Prescribed Medications:**

Medication	Dosage	Diagnosis	Prescribed by	Sched Admin Time
Lantus	30 units	Diabetes	Dr. Runyon	8:00pm
Lunesta	3mg	Sleeplessness	Dr. Runyon	7:00pm
Toprol (metoprolol ) XR	50 mg	Irregular heartbeat	Dr. Runyon	8:00am

Certification period:  2 weeks  30 days  60 days  90 days  4 months  6 months  yearly  
 Recertification Date: [no data]

### Printing a View Layout

1. When using a 'View Layout' other than [Generic], the form **MUST** be saved before the screen will print in proper format and display the needed data. Click the 'Save' button at the bottom.
2. When the screen repaints, select the copy of the form you just created with the edit icon .
3. Click the print icon  at the upper-right.





# Medication – Prescribed Form

## Entering a New Medication\*

8. On the navigation menu of a resident record, open the Medications folder.
9. Click the 'Medication-Prescribed' form link.
10. Click the 'New Entry' button. See example of 'Medication-Prescribed' form below.

### Medication - Prescribed

#### Medication Information

Medication	* [Broxmed (C2)]
Dosage	* [20 mg]
Drug Dosage Type	* [Tablet]
Medication Classification	<input checked="" type="radio"/> C2 <input type="radio"/> C3 or C4 <input type="radio"/> C5 <input type="radio"/> Standard
Diagnosis	[ ]
Reason for this medication	[ ]
Route of Administration	* [01 Oral (PO)]
Administration Type	* <input checked="" type="radio"/> Regularly administered <input type="radio"/> PRN (as needed)
Administration Instructions	* [Twice daily]
Appears on the MARs	[ ]
Refills Allowed	[ ]
Pharmacy Dispensing	<input checked="" type="radio"/> Substitution permitted <input type="radio"/> Dispense as written
Assistance needed	* <input checked="" type="checkbox"/> Self-Administer <input type="checkbox"/> Reminder to take <input type="checkbox"/> Open container <input type="checkbox"/> Significant (Total)

#### MAR Scheduling

Administration Start Date	* [12/16/2007]
Number of Admin Days -OR-	[200]
Administration End Date	[07/02/2008]
Scheduled Admin Time	<input checked="" type="checkbox"/> AM <input type="checkbox"/> 7:30am <input type="checkbox"/> 10:30am <input type="checkbox"/> 1:30pm <input type="checkbox"/> 4:30pm <input type="checkbox"/> 7:30pm <input type="checkbox"/> 10:30pm <input checked="" type="checkbox"/> PM <input type="checkbox"/> 8:00am <input type="checkbox"/> 11:00am <input type="checkbox"/> 2:00pm <input type="checkbox"/> 5:00pm <input type="checkbox"/> 8:00pm <input type="checkbox"/> 11:00pm <input type="checkbox"/> Bedtime <input type="checkbox"/> 8:30am <input type="checkbox"/> 11:30am <input type="checkbox"/> 2:30pm <input type="checkbox"/> 5:30pm <input type="checkbox"/> 8:30pm <input type="checkbox"/> 11:30pm <input type="checkbox"/> 6:00am <input type="checkbox"/> 9:00am <input type="checkbox"/> 12:00pm <input type="checkbox"/> 3:00pm <input type="checkbox"/> 6:00pm <input type="checkbox"/> 9:00pm <input type="checkbox"/> 12:00am <input type="checkbox"/> 6:30am <input type="checkbox"/> 9:30am <input type="checkbox"/> 12:30pm <input type="checkbox"/> 3:30pm <input type="checkbox"/> 6:30pm <input type="checkbox"/> 9:30pm <input type="checkbox"/> 2:00am <input type="checkbox"/> 7:00am <input type="checkbox"/> 10:00am <input type="checkbox"/> 1:00pm <input type="checkbox"/> 4:00pm <input type="checkbox"/> 7:00pm <input type="checkbox"/> 10:00pm <input type="checkbox"/> 4:00am

*For periodic (non-daily) administration use either day-of-week field OR interval field - not both.*

Periodic Administration Days -OR-  Su  M  Tu  W  Th  F  Sa

By administration interval  
Enter a between-administration interval number. [ ]

#### Authorizations

Prescribed by	* [Ryan K. Forsberg]
Must be entered as a full name	[ ]
DEA Number	[920162697]
Data entered by	* <input checked="" type="checkbox"/> Ryan K. Forsberg, 12/19/2007 4:08:50PM
Does not place an order	[ ]
DC this medication	<input type="checkbox"/> Staff signature
Discontinue	[ ]

#### 4Care Prescription Ordering Information

*First time 4Care ordering must include a faxed copy of the original script or complete transfer information.*

Fills Remaining	1
Including this fill	[ ]
Order fill/refill	<input checked="" type="checkbox"/> Ryan K. Forsberg, 12/19/2007 4:08:50PM
Memo to Pharmacy	[ ]
Memo from Pharmacy	[no data]

11. Fill in **all** the fields marked with an asterisk \*.
12. Additionally, enter choices for the following fields:
  - a. Medication Classification, if known
  - b. Diagnosis
  - c. Refills Allowed
  - d. Pharmacy Dispensing
  - e. Administration End Date - **only** if a limited script, such as a 10-day antibiotic, etc.
  - f. Scheduled Admin Time – **do not** select time if medication is a PRN (given as needed)
  - g. Periodic Administration – only if **not** administered each day
  - h. DEA Number
  - i. Order fill/refill
  - j. Any additional fields for which you desire to enter information
13. Verify correctness and completion of information
14. Scroll to the bottom of the screen and click the 'Save' button


\* Medications entered into the 'Medication-Prescribed' form should be one of the following:

5. A prescription medication
6. An OTC medication you wish to prescribe
7. A regularly scheduled medication, whether prescription or OTC
8. A medication for which the need should be assessed before administration or on a regular basis

\* For a description of how to fill in each field on the 'Medication-Prescribed' form, see the Medication – Form Details section.

### Discontinuing a Medication\*

\* **Important to note: Do not delete any medications! This will delete the resident's entire administration history of the drug. Use the discontinue (DC) process instead.**

7. On the navigation menu of the resident record, open the Medications folder.
8. Click the 'Medication-Prescribed' form link.
9. Click the edit icon  associated with the name of the medication to be discontinued.
10. Scroll to the Authorizations section and click the 'DC this medication' checkbox.
11. You may also edit the following fields, if desired:
  - a. Assistance Needed
  - b. Administration End Date
  - c. Scheduled Administration Time
  - d. Memo to Pharmacy
12. Scroll to the bottom of the screen and click the 'Save' button

### Prescription Refill Authorization

1. On the navigation menu of the resident record, open the Medications folder.
2. Click the 'Physicians Refill Authorization' form link. Every medication for this resident that needs to be refilled, will be displayed on the screen. The example below displays one such medication.

### Physicians Refill Authorization

 [Print](#)



(801) 336-3690  
(877) 477-3229  
(866) 449-6949

Physician: **Dr. Joseph Jensen**

C2 Medications

**Client Name: Jane Smith**

DOB: 12/12/1912

Facility: Template - Assisted Living

Medications needing refill authorization:

Medication	Dosage	Dispensing Instructions	Qty in fill	# of refills
Seniplax (C2)	30 mg	bid		0

Please review medications and make appropriate changes, if needed.  
Sign, date and fax to 4Care Pharmacy at 866-449-6949.

Five refills will be given on C3-5 and PRN refills on all non-controlled medications unless otherwise indicated.  
C2 medications are not refillable

Dr. Joseph Jensen's Signature: \_\_\_\_\_ DEA#: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_


Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_



3. Note the medications needing refill authorization.
4. Click the 'Medication-Prescribed' link.
5. Click the 'New Entry' button and create a new prescription for each of the needed medications, filling the form as described above.

**Alternately at step 4...**

4. Click the print link  [Print](#) on the 'Refill Authorization' screen.
9. For each medication that should be refilled, sign and date the form, quantity in fill, DEA number. Enter contact information for at least one of the medications in this batch.
10. Make any other changes as needed.
11. Submit these by fax to 4Care Pharmacy at (801) 336-3001.

## Conducting a Quarterly Medication Review\*

1. From the HQ Home page, click the Medication Reports link.
2. Click the 'Physicians Quarterly Medication Review' link. The resulting page, example below, will display residents in the facility with medications.

 **Physicians Quarterly Medication Review**  [Print](#)

---

Physicians Qrtly Med Review

Full Name: Peterson, Elizabeth

Select Facility: Template - Assisted Living Date: 02/04/2008

Medication	Dosage	Med Class	Rt of Admin	Administration Instructions
Aspirin	81mg		01 Oral (PO)	One tab by mouth daily
Dihydromine	40 mg		01 Oral (PO)	Take one by mouth daily
Mycitracin	20mg	Standard	01 Oral (PO)	BID
Sulfonate (C2)	20 mg	C2	01 Oral (PO)	One tab by mouth daily

Code Status: **Do NOT Resuscitate (DNR)** Assistance: Self-Directed Diet:


Cross out any medications to be deleted; note changes to dosage or administration instructions. Medications will be refilled for six (6) months, unless otherwise noted.

Physician Signature: \_\_\_\_\_ DEA #: \_\_\_\_\_ Date: \_\_\_\_\_

Additional Information: \_\_\_\_\_

3. Review the medications for each of your residents.
4. If there are no changes to any medications, no action is required.
5. If there **are** changes to any medications listed, note these and click the 'Medication-Prescribed' form link.
6. Go to the medication needing a change and click the 'DC this medication' checkbox.
7. Click the 'New Entry' button and create a new prescription for each of the medications needing a change, filling the form as described in 'Entering a New Medication', above.

### Alternately from step 5...

5. If there **are** changes to any medications listed, print the Review using the print icon  [Print](#) at the top-right of the page.
6. Make corrections on the page as needed, then sign, date and add DEA number.
13. Submit these by fax to 4Care Pharmacy at (801) 336-3001.

\* Medications are not limited to review each quarter. This report may be run at any time desired and will list all currently prescribed medications for each resident.



## Medication – Form Details

---

A guide for filling out the Medication-Prescribed form. Physicians must fill out those fields marked with an asterisk\* and should review those fields marked with an °.

### Medication Information Section

- \* **Medication** – Enter the complete name of the medication, including drug name extension, such as DM, LA, XL, etc.
- \* **Dosage** – Enter the prescribed dosage, a number followed by extension, such as mg, cc, etc.
- \* **Drug Dose Type** – The default is “Tablet”. Activate the drop-down to choose another dose type.
- \* **Medication Classification** – Select the classification appropriate for this drug.
- \* **Diagnosis** – Type in the reason for which this medication was prescribed.
- \* **Route of Administration** – “By Mouth” default. Click the drop-down to choose another route.
- \* **Administration Type** – Select either “Regularly scheduled” (a medication that should appear on the MARs) or “Non-scheduled” (a prescribed medication that is to be given as needed).
- \* **Administration Instructions** – Type in any directions/instructions. These instructions will appear on the MARs each time the medication is scheduled. Include such things as directions to take with food, not to administer in combination with other drugs, or a sliding scale for insulin injections, etc.
- \* **Refills Allowed** – Enter the number of refills you will allow the pharmacy to provide.
- \* **Pharmacy Dispensing** – Choose either ‘Substitution permitted’ (the default setting) or ‘Dispense as written’.
- \* **Assistance Needed** – Check the appropriate box, if known.

### MAR Scheduling Section

- \* **Administration Start Date** – Enter the date on which administration is to start.
- ° **Number of Administration Days OR** – Enter a number of days to administer the drug OR...
- ° **Administration End Date** – Enter any specified date for ending administration. If not filled in, the field defaults to 100 years, which will keep the prescription available on the MARs for as long as needed.
- ° **Scheduled Administration Time** – Check one or more times during the day, **if** this medication is to be administered in a schedule. These checkboxes control the times at which this medication appears on the Daily MARs report. **Do not** check any if medication is PRN (given as needed), unless the nursing staff should regularly assess if the drug is required at the scheduled time.
- ° **Periodic Administration Days OR** – Use this field or the one below if the medication is not to be given every day. Check the day(s) of the week, such as MWF for three days administration per week, or other combination of days OR...

- ° **By Administration Interval** – Use this field or the one above if the medication is not to be given every day. Enter a number. For instance, if 3 is entered, administration will appear on the MARs starting the next day (or on the “Start Date”) and on every third day after that (two days between administration). Entering 28 will provide for administration once every month. Entering 7 will place the medication on the MAR once a week, beginning with the start date.

### Authorizations Section

- \* **Prescribed by** – Type in your full name, i.e. Ryan K. Forsberg, David J. Merrill, etc.
- \* **DEA Number** – Enter your number.
- \* **Entered by** – Check to certify correctness and completion. Clicking this field will **not** automatically order the medication.
- DC this medication** – Check here to discontinue this medication or if this form has been ‘saved’ with an error. If there is an outstanding order with 4Care Pharmacy for this drug, notify the pharmacy that the drug has been discontinued.

### 4Care Prescription Ordering Information

- Fills Remaining** – Read-only field displaying the number of fills currently left for this medication. It will display [no data] when form is first filled out.
- \* **Order fill/refill** – Check the box to order from 4Care Pharmacy.
- Memo to Pharmacy** – Type in any instructions, clarifications or concerns for the pharmacy to know about.
- Memo from Pharmacy** – Read any instructions or responses from the pharmacy. It will display [no data] when form is first filled out.

### Prescription Transfer Information Section

- Pharmacy Name** – Type in name of current pharmacy.
- Pharmacy Phone** – Enter phone number, including area code.
- Transfer Pharmacy Rx #** - Type in the Rx# from the current medication package.

### 4Care Pharmacy Only Section

- Next Ship Date** – Read only field that displays the date of next shipment for this drug. It will display [no data] when form is first filled out.
- Order History** – Read only field that displays the history of all orders, fills and shipments for this drug. It will display [no data] when form is first filled out.

**! Remember to always review the form for accuracy before clicking the ‘Save’ button at the bottom of the screen. Saved errors can only be corrected by discontinuing the medication and entering the data again through the ‘New Entry’ button.**



# Medication - Reports

## Using Medication Reports\*

\* A number of reports are available to the physician, giving an overview of the care that the patient is receiving within the facility. Any fields that have not yet had information entered into them by the facility staff will appear as [no data]. Each report is named to reflect the data being presented.

1. Click the 'Medication Reports' link in the Medication Module. The Medication Reports submenu page is shown below.

### Medication Reports

[Physicians Quarterly Medication Review](#)

[Resident Allergies](#)

[Weight/Glucose/BP MAR Administration Notes](#)

[MAR Notes Report](#)

[Medication Fax Sheet](#)

[All Active Medications](#)

[OTC PRNs Administered](#)

[Meds Administered Today](#)

[Meds Not Yet Administered](#)



[Yesterday's Missed Medications](#)

[Missed Medications for Past Week](#)

[Missed Medications for Last 2 Weeks](#)

[Discontinued Medications](#)



2. Click on the name of the desired report. The results will display in varying formats, depending upon the data contained. In the example below, all allergies for current residents are listed.

 Resident Allergies		 Print
<a href="#">Select</a> Drug Allergies	Allergies	
Full Name: Reasen, Terri		
<a href="#">Select</a> Penicillin	Nuts	
Full Name: Smith, Jane		
<a href="#">Select</a> Aspirin	Latex	

3. To view the details for any specific resident, click the [Select](#) associated with the record.

### Using the Physician's Quarterly Medication Review\*

1. From the HQ Home page, click the Medication Reports link.
2. Click the 'Physicians Quarterly Medication Review' link. The resulting page, example below, will display residents in the facility who have been prescribed medications.

 **Physicians Quarterly Medication Review**  [Print](#)

---

Physicians Qrtly Med Review

Full Name: Peterson, Elizabeth

Select Facility: Template - Assisted Living Date: 02/04/2008

Medication	Dosage	Med Class	Rt of Admin	Administration Instructions
Aspirin	81mg		01 Oral (PO)	One tab by mouth daily
Dihydromine	40 mg		01 Oral (PO)	Take one by mouth daily
Mycitracin	20mg	Standard	01 Oral (PO)	BID
Sulfonate (C2)	20 mg	C2	01 Oral (PO)	One tab by mouth daily

Code Status: **Do NOT Resuscitate (DNR)** Assistance: Self-Directed Diet:


Cross out any medications to be deleted; note changes to dosage or administration instructions. Medications will be refilled for six (6) months, unless otherwise noted.

Physician Signature: \_\_\_\_\_ DEA #: \_\_\_\_\_ Date: \_\_\_\_\_

Additional Information: \_\_\_\_\_

3. Review the medications for each of your residents.
4. If there are no changes to any medications, no action is required.
5. If there are changes to any medications listed, note these and click the 'Medication-Prescribed' form link.
6. Go to the medication needing a change and click the 'DC this medication' checkbox.
7. Click the 'New Entry' button and create a new prescription for each of the medications needing a change, filling the form as described in 'Entering a New Medication' in the Medication section of this guide.

Alternately from step 5...

5. If there **are** changes to any medications listed, print the Review using the print icon  [Print](#) at the top-right of the page.
6. Make corrections on the page as needed, then sign, date and add DEA number.
7. Submit these by fax to 4Care Pharmacy at (801) 336-3001.

\* Medications are not limited to review each quarter. This report may be run at any time desired and will list all currently prescribed medications for each resident.





# Office - Helps

HQ has two basic default helps shown on every home page, 'BlueStep Help' and '4Care Pharmacy Help'. These two are links to each company's website and lead directly to the help pages on those sites.

## Accessing 4Care Pharmacy Online Help\*

1. From the HQ Home page, click the '4Care Pharmacy Help' link in the Office module.
2. The 4Care website, as seen below, will appear.



**4care** Home | About | Employment Application | Demo | FAQ | How To Join | Partners | Members | Pharmacy Help

If you need system assistance, call the BlueStep/4Care Pharmacy Administrator at your organization. For help with a medication question, please don't hesitate to contact us at the numbers below.

4Care Pharmacy 109 West Gentile Layton, UT 84041-3000	Name	Title	Extension	Direct Fax #	E-mail
(801) 336-3690 Main Line	Pam Whitaker	Tech	124	(866) 417-3645	<a href="mailto:pwhitaker@4carepharmacy.com">pwhitaker@4carepharmacy.com</a>
(877) 477-3229 Toll Free	Brent Croxford	Tech	104	(866) 694-7510	<a href="mailto:bcroxford@4carepharmacy.com">bcroxford@4carepharmacy.com</a>
(801) 336-3001 General Fax	Shauna Heyer	Tech	128	(866) 581-1910	<a href="mailto:sheyer@4carepharmacy.com">sheyer@4carepharmacy.com</a>
(801) 336-3690 After Hours	Natalie Perkins	Tech	138	(866) 401-7402	<a href="mailto:nperkins@4carepharmacy.com">nperkins@4carepharmacy.com</a>
	Janie Sevy	Tech	136	(866) 694-7549	<a href="mailto:jsevy@4carepharmacy.com">jsevy@4carepharmacy.com</a>
	Amy Anderson	Tech	126	(801) 823-2247	<a href="mailto:aanderson@4carepharmacy.com">aanderson@4carepharmacy.com</a>
	Zane Stanger	Tech	116	(866) 381-2219	<a href="mailto:zstanger@4carepharmacy.com">zstanger@4carepharmacy.com</a>
	Ranch Pratt	President	126	General Fax	<a href="mailto:ranch@4carepharmacy.com">ranch@4carepharmacy.com</a>
	Patsy Hoffer	Billing Mgr	121	(866) 572-0418	<a href="mailto:phoffer@4carepharmacy.com">phoffer@4carepharmacy.com</a>
	Larry Seamons	Purchasing	109	General Fax	<a href="mailto:lseamons@4carepharmacy.com">lseamons@4carepharmacy.com</a>

We have a series of helpful user guides in PDF format that you can access by clicking on each link below. Many of these guides have been added within the last year and others have been recently updated. On the list below, all of the new or revised guides and manuals are marked with ♦ preceding the document name. Please check the list below often, as new guides are also being added regularly.

### 4Care Pharmacy

- [4Care Procedures](#)
- [Initiating 4Care Pharmacy Services](#)
- [4Care Authorization Letter](#)
- [Prescription Purchase Authorization](#)
- [Pharmacy Privacy Practices](#)
- ♦ [4Care Policies and Procedures Manual](#)
- [Extra Policy/Procedures Signature Pages](#)
- [Medicare Beneficiary Complaints](#)
- ♦ [Medicare Capped Rental/Routine Purchase](#)
- ♦ [Medical Abbreviations](#)
- ♦ [Medication Expiration Guidelines](#)
- ♦ [Pharmacological Measurements](#)
- ♦ [Basic Guide to the Prescribed Medication Form](#)
- ♦ [Transferring Medications to 4Care](#)
- ♦ [Tracking Over-the-Counter Medications](#)
- [4Care Return Policy](#)
- [4Care Medication Fax Sheet](#)
- [Problem Report Fax Sheet](#)
- ♦ [Quick Guide to the Medication Prescribed Form](#)
- [4Care Ordering Instructions](#)

### HQ™ User Manuals

- [HQ™ User's Manual](#)
- [HQ™ Basics](#)
- [HQ™ Quick Guide](#)
- ♦ [HQ™ Digital Signature](#)
- ♦ [HQ™ Using the MAR System](#)
- ♦ [HQ™ Using the Custom MAR](#)

### 4Care User Guides

- [Caregiver HQ Guide](#)
- [Physician HQ Guide](#)

### Medication Updates/Changes (PDF)

- [Alupent \(metaproterenol sulfate\) DC](#)
- [Seroquel XR \(quetiapine fumarate\)](#)



Download free Adobe Acrobat PDF Reader

3. Listed on the page are a number of manuals and guides in PDF format.
4. The documents are organized into 4Care Pharmacy and HQ User Manuals.
5. Find the needed section and guide, then click on the name.


\* These documents may be printed, downloaded or e-mailed to those of your users or staff who may find them helpful.

\* Adobe Acrobat offers a free PDF Reader, if your computer is not already equipped to read PDF files. Click the Acrobat link (illustration at right) at the bottom of the 4Care help screen to reach the Adobe.com download page.



### Printing the 4Care Policies and Procedures Manual\*

\* Most state licensing entities require that assisted living, skilled nursing and some other facilities have a print copy of the pharmacy policy and procedure manual on the premises.

1. Click the '4Care Pharmacy Help' link on the HQ home page.
2. The 4Care Policies and Procedures manual is the sixth item in the 4Care Pharmacy section; see pointer in the example right.
3. Click the underlined link.
4. Depending upon your selection and the configuration of the computer, there will be a print icon  or print link Print in the program header. Click this link and proceed with printing as normal.
5. When completed, exit or close the page.
6. Any other document may be printed in the same manner.



### 4Care Pharmacy

- [4Care Procedures](#)
- [Initiating 4Care Pharmacy Services](#)
- [4Care Authorization Letter](#)
- [Prescription Purchase Authorization](#)
- [Pharmacy Privacy Practices](#)
- ◆ [4Care Policies and Procedures Manual](#)
- [Extra Policy/Procedures Signature Pages](#)
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- ◆ [Medicare Capped Rental/Routine Purchase](#)
- ◆ [Medical Abbreviations](#)
- ◆ [Medication Expiration Guidelines](#)
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- ◆ [Basic Guide to the Prescribed Medication Form](#)
- ◆ [Transferring Medications to 4Care](#)
- ◆ [Tracking Over-the-Counter Medications](#)
- [4Care Return Policy](#)
- [4Care Medication Fax Sheet](#)
- [Problem Report Fax Sheet](#)
- ◆ [Quick Guide to the Medication Prescribed Form](#)
- [4Care Ordering Instructions](#)

### Accessing BlueStep Online Help

1. From the HQ Home page, click the 'BlueStep Help' link in the Office Module.
2. The client care website (upper portion is seen below) will appear.

Search  **Client Care**

Home [Fingerprint Support](#) [Relate Script](#) [Family Connect Training](#) [SMF Help](#)

At BlueStep Systems, we are anxious to meet your needs and provide assistance and support. Please see our staff contact numbers listed to the right.

Also please note the help documentation available below. They cover a wide range of our features and include the most-asked questions. Each is fully printable for future reference.

If you need assistance, the BlueStep Administrator at your organization is experienced with the functions of your system.

For further help, you may reach us at:  
 Client Care Department (801) 336-3043  
 Skilled Nursing Client Care (801) 336-3043 X 103  
 Toll-free (800) 410-0257  
 Fax (801) 336-3022  
 After-hours tech support (801) 336-3043

We have a series of helpful user guides in PDF format that you can access by clicking on each link below. Many of these guides have been added within the last year and others have been recently updated. All of the new or revised guides are marked with ↕ preceding the document name. In the coming months, the older guides will be updated to reflect recent changes in our products. Please check the list below often, as new guides are also being added regularly.

**HQ™ User Manuals**

- [HQ™ User's Manual](#)
- [HQ™ Basics](#)
- [HQ™ Quick Guide](#)
- [HQ™ Record Summaries](#)
- [HQ™ Document Library](#)
- [HQ™ Document Library Quick Guide](#)
- [HQ™ Digital Signature](#)
- [HQ™ Using the MAR System](#)
- [HQ™ Using the Custom MAR](#)
- [HQ™ Idaho LIA/NSA Instructions](#)

**BlueStep Enhancement and Feature Guides**

- [Adding Shopping Cart](#)
- [BlueStep™ Icons](#)
- [Building Variable Record Reports](#)
- [Concepts and FAQs](#)
- [Creating Custom Detail Reports](#)
- ✦ [Creating a Digital Signature](#)
- [The Media Library](#)
- [The BlueStep™ Editor](#)
- [The Record Summary](#)
- [RSS Feeds](#)

3. The second text section on the page lists a large number of manuals and guides in PDF format.
4. The documents are organized into the sections, HQ User Manuals, 4Care Pharmacy, BlueStep Enhancements and Features, Connect, Team and BlueStep Newsletters.
5. Find the needed section and guide, then click on the preferred underlined selection, either PDF or Word.

\* These documents may be printed, downloaded or e-mailed to those of your users or staff who may find them helpful.

\* New information is added to the BlueStep website as new features and functions are created. Existing documents are also updated as needed.

\* Adobe Acrobat offers a free PDF Reader, if your computer is not already equipped to read PDF files. Click the Acrobat link (illustration at right) at the bottom of the BlueStep help screen to reach the Adobe.com download page.





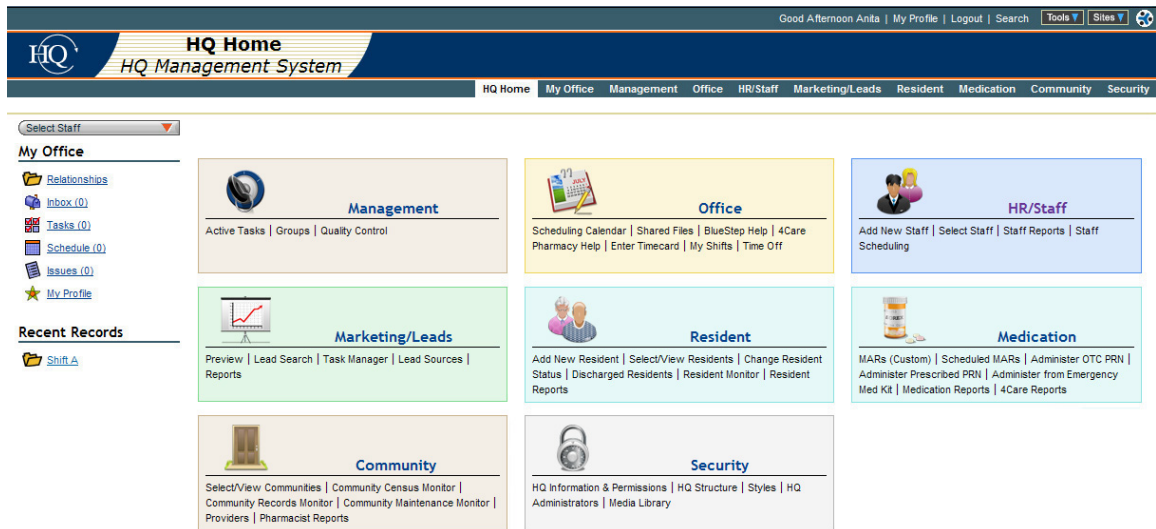
## **Provider (Consulting Pharmacist) Guide**

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# HQ HQ Modules

Each of the HQ™ modules performs specific functions, which may be accessed from tabs on the main navigation bar or from the underlined links in each module section. Additionally, you may go directly to any of the functions under specific modules using the secondary navigation bar or the listings below each module title. For instance, under Management, the “Active Tasks | Groups | Quality Control” line is made up of three (3) clickable links to the three Management pages. All modules will display any available functions in this fashion.

Depending upon your permission level, as granted by the management at the community, you may see fewer than the modules displayed here. No matter what is available on your screens, each will operate as described in the following pages.



The screenshot displays the HQ Home Management System interface. At the top, there is a header with the HQ logo and the text "HQ Home HQ Management System". To the right of the header, there is a user profile section showing "Good Afternoon Anita" and links for "My Profile", "Logout", "Search", "Tools", and "Sites". Below the header is a main navigation bar with tabs for "HQ Home", "My Office", "Management", "Office", "HR/Staff", "Marketing/Leads", "Resident", "Medication", "Community", and "Security".

On the left side, there is a sidebar with a "Select Staff" dropdown menu. Below this, there are two sections: "My Office" and "Recent Records". The "My Office" section includes links for "Relationships", "Inbox (0)", "Tasks (0)", "Schedule (0)", "Issues (0)", and "My Profile". The "Recent Records" section includes a link for "Shift A".

The main content area is divided into several modules, each with a title and a list of functions:

- Management**: Active Tasks | Groups | Quality Control
- Office**: Scheduling Calendar | Shared Files | BlueStep Help | 4Care Pharmacy Help | Enter Timecard | My Shifts | Time Off
- HR/Staff**: Add New Staff | Select Staff | Staff Reports | Staff Scheduling
- Marketing/Leads**: Preview | Lead Search | Task Manager | Lead Sources | Reports
- Resident**: Add New Resident | Select/View Residents | Change Resident Status | Discharged Residents | Resident Monitor | Resident Reports
- Medication**: MARs (Custom) | Scheduled MARs | Administer OTC PRN | Administer Prescribed PRN | Administer from Emergency Med Kit | Medication Reports | 4Care Reports
- Community**: Select/View Communities | Community Census Monitor | Community Records Monitor | Community Maintenance Monitor | Providers | Pharmacist Reports
- Security**: HQ Information & Permissions | HQ Structure | Styles | HQ Administrators | Media Library



# HQ Access

## Logging in to BlueStep's HQ Management System

Each facility has it's own URL (web address) and each pharmacist has his/her own login. Prior to a pharmacist using the system, the facility must setup pharmacist access and provide login information to the pharmacist. Once this information is received, follow the steps below to access the system.

1. Type the facility's URL address into the address bar of your web browser. Google's Chrome browser and Microsoft's Internet Explorer 6.0 or higher are recommended. Firefox for MAC users is also acceptable.
2. Save this address in your browser's 'Favorites' for easy access in the future.
3. When the login screen appears, example below, type in your assigned username and password in the fields provided.
4. If the 'Remember Me' checkbox is clicked, your computer will be "cookied" to remember your login for future sessions.
5. Click the 'Login' button to reach the HQ Home page.

### HQ - Harbor Homes

 You must log in to view this site.

#### Login

*Usernames and passwords are case-sensitive.*

Username \*

Password \*

Remember Me

\* Required

#### Need Help?

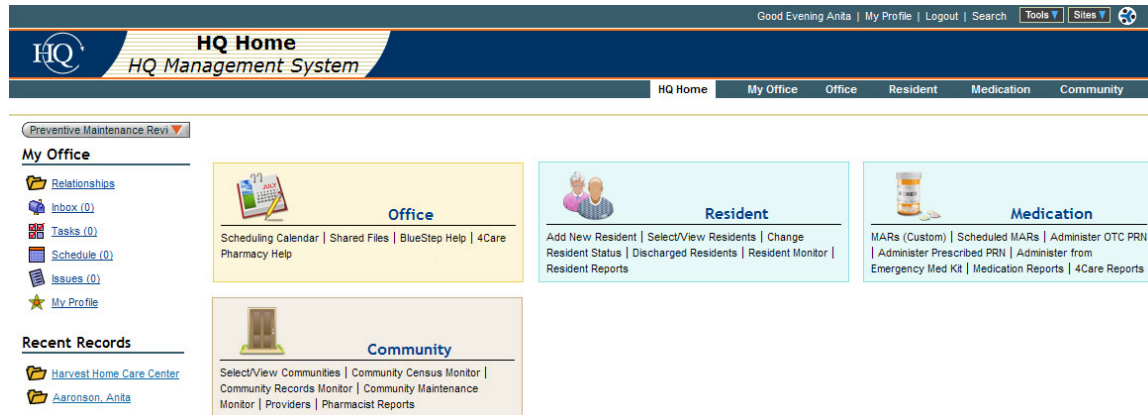
*If you can't remember your username or password, we can look it up for you.*

- [▶ Can't remember your Username or Password?](#)
- [▶ Locked out or unable to find information from a Site or Team?](#)
- [▶ Need to change your Username, Password or Email?](#)
- [▶ Why do I need to Login?](#)
- [▶ Need technical help from BlueStep client care?](#)

6. Also available from this screen are links to access the automated 'Lookup System' ("Can't remember your Username or Password?") and other helps.

## Customized View

The first available screen in the HQ Management System is called HQ Home, as seen in basic pharmacist version below. Also available are the My Office selections and, for ease of use, a dynamic list of the Recent Records visited by the logged-in individual. The view that an individual pharmacist sees will vary depending upon the facility's configuration. However, the pertinent sections of the Resident, Medication and Community modules are available to all pharmacists.



**Accessing Modules** – click on the module name, such as “Resident”, in either the main portion of the screen or the navigation bar. In most cases, the last resident record visited will be displayed. Customized modules may retrieve other links specific to the facility.

**Accessing Submenus/Reports/Queries** – click on the name of the item, such as “Medication Reports” on the main portion of the screen or on the drop-down from the navigation bar. These will be listed under the module name and the link will return the item selected.

**Accessing My Office** – click the My Office link from the navigation menu to the left or on the navigation bar. Specific areas of My Office can be accessed from the links on the navigation menu or on the drop-down from the navigation bar.

**Accessing Recent Records** – click on the underlined name of the record in the Recent Records list. This list is dynamically created when the logged-in individual visits a record in the system. It will hold up to twelve (12) of the most-recently visited record links. Each logged-in user will only see the records they have accessed and not those of other users.



## Community – Emergency Med Kit

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Pharmacists and Consulting Pharmacists will find specialized links and reports in the 'Pharmacist Reports' section of the Community module. These are designed to help pharmacists conduct medication reviews and other functions quickly and thoroughly with a minimum of navigation through the system and to provide all pertinent information in a meaningful format.


### Emergency Med Kit



Each community will need to have a 'setup' performed for the emergency med kit when the BlueStep program is being initialized. Once the setup is complete and signed by a pharmacist, it will never need to be repeated.

Contents of the kit fall into three (3) categories: 1) prescription drugs to meet the emergency needs of specific individuals (such as, EpiPens, digitalis tablets, etc.), 2) non-prescription drugs (both taken internally and applied externally), and 3) non-drug supplies (such as, dressings, stethoscopes, scissors, latex gloves, hot/cold packs, etc.).

If the facility stores resident's medications in a med cart or an area with fast and easy access, the facility may choose to store the emergency prescription drugs with the resident's other medications in an emergency drug section. In that case, the emergency kit would contain only non-prescription drugs and supplies, and the emergency prescription drugs would need to be checked separately.

### Setup: Emergency Med Kit \*

\* If the setup has already been created by an administrator or nurse, a licensed pharmacist will need to sign each entry. If that is the case, access each entry by using the Edit Pencil icon  and click the '(Re)Stocked by' signature checkbox. No further setup action is required.

1. Select the appropriate community from the 'Select/View Communities' query in the Community monitor.
2. Click the 'Setup: Emergency Med Kit' link in the left-side Navigation Menu.
3. If any default medications appear on the list, use the Delete icon  to remove them.
4. Click the New Entry button at the upper right of the screen.
5. On the resulting setup screen, example seen below, the date will prefill with the current date and the expiration will prefill with one year from the current date. Edit either of these, if needed, by using the mini-calendar icon  or by typing in the appropriate date. The Expiration Date entered should be the expiration date printed on the drug packaging.



- Type in the name and dosage of the medication and the quantity that will be in the kit.
- Select the dosage type from the drop-down.
- If the drug is prescribed for a specific individual, enter the name of the resident and the prescriber of that drug.
- When completed, click the Pharmacist Signature checkbox and the Save button.
- Click the New Entry button for each medication or supply item to be carried in the kit or stored separately and complete the form as above.

### Setup: Emergency Med Kit

**\* Required**

Date \* 03/22/2009 10:12am

Medication/Supply \* Aspirin

Dosage # of mg, cc, etc. \* 30 mg

Expiration Date 03/22/2010

Quantity approved for kit \* 20.0  
*Amount of medication, product, etc.*

Drug Dosage Type \* Tablet

Resident's Name

Prescriber's Name

(Re)Stocked by  Pharmacist signature

### Using Pharmacist Reports

The 'Pharmacist Reports' submenu, seen below, contains six (6) links for operations pharmacists need to regularly perform for the facility. They are most convenient when simply accessed from top to bottom.

#### Pharmacist Reports

- [Emergency Med Kit Contents](#)
- [Restock Emergency Med Kit](#)
- [Emergency Med Kit History](#)
- [Select Resident for Individual Medication Review](#)
- [Pharmacists Medication Review](#)
- [Consulting Pharmacist Report](#)

### Restocking Emergency Med Kit

- Click the 'Emergency Med Kit Contents' link to view the current status of the med kit.
- If any current quantities do not match approved quantities, click the 'Restock Emergency Med Kit' link on the Pharmacist Reports submenu.
- Physically place the restock items in the kit.
- Click the signature checkbox for each restocked item (example below) and the Save button.
- In the case where quantities should be changed from the initial setup quantities, edit the amounts shown in the 'Amt Stocked to:' field. This will reset the approved quantity of the item for subsequent kit usage, display and restocking.

#### Restocking Emergency Kit Print

**\* Required**

[Dosage](#) [Consulting Pharmacist](#)

Medication: Aspirin 30 mg	Date: * 03/29/2009 2:47PM	Amt Stocked To: * 20.0 Tablet	Res Name, if prescribed: [no data]
<input type="checkbox"/> Pharmacist signature		Current Amt: 20.0 Tablet	Prescriber's Name: [no data]
Medication: Bandages 2" x 3"	Date: * 03/29/2009 2:47PM	Amt Stocked To: * 12.0 Unknown	Res Name, if prescribed: [no data]
<input checked="" type="checkbox"/> Pharmacist signature		Current Amt: 11.0 Unknown	Prescriber's Name: [no data]
Medication: EpiPen 20 CC	Date: * 03/29/2009 2:47PM	Amt Stocked To: * 2.0 Injection	Res Name, if prescribed: Elizabeth Rushton
<input checked="" type="checkbox"/> Pharmacist signature		Current Amt: 1.0 Injection	Prescriber's Name: Dr. Brian Decker

### **Recording the Completed Task**

Each community has a Maintenance Monitor to track recurring tasks. 'Check the Emergency Med Kits' and 'Restock the Emergency Med Kit' are both listed, by default, as community maintenance tasks. Consulting pharmacists must check off completion of the Med Kit tasks for the maintenance system to work correctly.

1. Select 'Community Maintenance Monitor' from the Community module.
2. Click 'Preventive Maintenance Review'.
3. Locate 'Check the Emergency Med Kits' in the list of regularly scheduled tasks and items beginning 'Restock' in a separate area.
4. Choose the associated [Select](#) with any one of these.
5. Click the 'Completed' checkbox and the Save button for each med kit item.

### **Emergency Med Kit History**

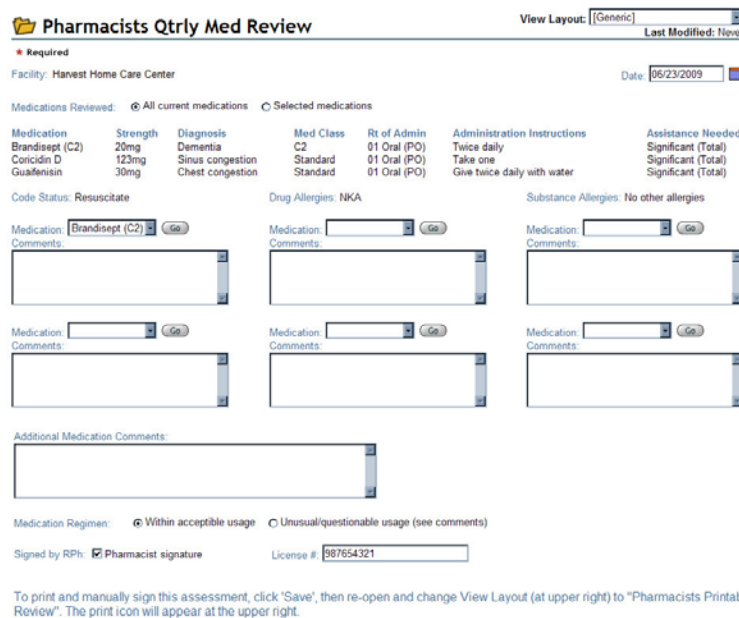
A listing of the entire history of the Med Kit can be viewed or printed using the 'Emergency Med Kit History' link on the Pharmacist Reports submenu. Each Med Kit transaction is displayed, giving date, item, quantity, action (administration or restocking) and 'nature of emergency' details.



# Community – Medication Review

## Individual Medication Review

1. Click the 'Select Resident for Individual Medication Review' link on the Pharmacist Reports submenu.
2. On the resulting page, all current residents in the facility will be displayed.
3. Click the [Select](#) next to a resident's name to access his/her record.
4. Click the 'Pharmacists Qtrly Med Review' link on the Navigation Menu.
5. All previous reviews will display, one per line. For details, you may click the Edit icon.
6. Click the New Entry button at the top right.
7. In the View Layout field (top right) change the selection to read [Generic], if it is not already set.
8. All medications currently prescribed for the individual are displayed on the page, see example below.



**Pharmacists Qtrly Med Review** View Layout: [Generic] Last Modified: Never

Required  
 Facility: Harvest Home Care Center Date: 06/23/2009

Medications Reviewed:  All current medications  Selected medications

Medication	Strength	Diagnosis	Med Class	Rt of Admin	Administration Instructions	Assistance Needed
Brandisep (C2)	20mg	Dementia	C2	01 Oral (PO)	Twice daily	Significant (Total)
Coricidin D	123mg	Sinus congestion	Standard	01 Oral (PO)	Take one	Significant (Total)
Guaafenesin	30mg	Chest congestion	Standard	01 Oral (PO)	Give twice daily with water	Significant (Total)

Code Status: Resuscitate Drug Allergies: NKA Substance Allergies: No other allergies

Medication: Brandisep (C2) Go  
 Comments: [Text Area]

Medication: [Dropdown] Go  
 Comments: [Text Area]


Medication: [Dropdown] Go  
 Comments: [Text Area]


Additional Medication Comments: [Text Area]

Medication Regimen:  Within acceptable usage  Unusual/questionable usage (see comments)

Signed by RPh:  Pharmacist signature License #: 987654321

To print and manually sign this assessment, click 'Save', then re-open and change View Layout (at upper right) to "Pharmacists Printable Review". The print icon will appear at the upper right.

9. Click the radio buttons to select if all medications or only some will be reviewed.
10. Activate the Medication drop-down by clicking the down arrow  and select a medication from the list.
11. Enter any comments, advice or warnings in the Comments box and proceed to the next section until all medications or the medications you have selected are reviewed.
12. If more than six drugs are reviewed, enter additional information into the 'Additional Medication Comments' field.
13. Assign either 'Acceptable' or 'Questionable' usage to the medication regimen.
14. Click the 'Signed by RPh' checkbox and enter pharmacist's license number.
15. Click the Save button at the bottom of the screen.
16. Repeat the review process as needed for additional residents.

\* If additional information about a medication is needed, click the Go button  next to the medication drop-down that displays the appropriate drug. Additional information about the resident and his/her condition is recorded in several forms in the resident's Navigation Menu. See "Navigating a Record" for additional information.

\* Some communities are turning to paperless data storage; however, if a signed paper copy of this review is needed, a formatted report is available. If a signed paper copy of **all** medication reviews is needed, a separate report in the Community module is available.

### Printing a Single Medication Review

1. Reopen the review by clicking on the Edit icon.
2. Change the View Layout (upper right) to read 'Pharmacists Printable Review'.
3. When the screen repaints, it will contain all of the data entered on the previous screen.
4. Click the Print icon at the upper right.
5. A pop-up will allow you to select a printer associated with the computer in use.
6. When done, close the print pop-up and hand-sign the printed document.

### Printing All Medication Reviews

1. To print all reviews for the Community in which you are working, click Pharmacist Reports in the Community module.
2. Click 'Pharmacists Medication Review' on the submenu.
3. It may take a moment for all the records in the facility to formulate the report. See example of resident Medication Review below.

Full Name: Armstrong, Isabelle  
Birth Date: 09/22/1930

[Select](#)



#### Medication Review for Isabelle Jane Armstrong

Facility: Harvest Home Care Center Date: 02/11/2009

Medications Reviewed: All current medications Regimen: Within acceptable usage

Medication	Strength	Diagnosis	Med Class	Rt of Admin	Administration Instructions	Assistance Needed
Broxmed	20 mg		Standard	01 Oral (PO)	Twice daily	Self-Administer
Corapamil	1mg		C3 or C4	01 Oral (PO)	Give with plenty of water	Self-Administer
Furosemide	20mg	Edema	Standard	01 Oral (PO)	Take 1 tab by mouth daily	Self-Directed
Lunesta	3 mg	Sleeplessness	Standard	01 Oral (PO)	Take one tablet at bedtime	Self-Administer
Seniplax	30 mg		Standard	By mouth (PO)	bid	Reminder to take, Family/Designated Person

Code Status: Do NOT Resuscitate (DNR) Drug Allergies: NKDA Substance Allergies: No food allergies

[Broxmed](#) May be discontinued when symptoms subside

[Corapamil](#) Dosage may be reduced with permission of physician

[Furosemide](#) [no data]

[Lunesta](#) [no data]

[Seniplax](#) Can be changed to PRN unless symptoms increase.

Pharmacist Signature: \_\_\_\_\_ License #: \_\_\_\_\_


Don Preston, 09/23/2006 2:46:12PM 1234567

4. When the screen repaints, click the Print icon in the upper right.
5. A pop-up will allow you to select a printer associated with the computer in use. Each resident's review will print on a separate page.
6. When done, close the print pop-up and hand-sign the printed documents.



# Community – Facility Report


## Consulting Pharmacist Facility Report \*


1. Most states have a requirement for quarterly, on-site pharmacist evaluations of general medication management by the facility.
2. In the Community module, click the Pharmacist Reports link.
3. Select 'Consulting Pharmacist Report'.
4. All past reports will be listed and can be viewed by clicking the Edit icon.
5. To do a new evaluation, click the New Entry button  at the top right.
6. A list of 'Yes/No' questions and spaces for notes are displayed.
7. Answer each question and enter any comments, instructions or evaluation notes that are necessary.
8. Enter the next review date and click the 'Pharmacist Signature' checkbox.
9. Click Save at the bottom of the screen.

\* The default questions on the Facility Report cover the standard issues requested by most states. If additional information is required by the state in which the facility is located, please have the facility's administrator contact BlueStep and we will be happy to add the needed items. See "List of Facility Questions" below.

## Printing a Facility Report

1. Reopen the report by clicking on the Edit icon.
3. Change the View Layout (upper right) to read 'Printable Facility Report'.
4. When the screen repaints, it will contain all of the data entered on the previous screen. See partial-screen example below.
5. Click the Print icon at the upper right.
6. A pop-up will allow you to select a printer associated with the computer in use.
7. When done, close the print pop-up and hand-sign the printed document.

 Consulting Pharmacist Facility Report

View Layout: Printable Facility Report   
 Last Modified: Jun 23, 2009 4:55:44PM

---

**Consulting Pharmacist Facility Report** with Signature

**Licensing**

Facility licensed posted: Yes	Consulting pharmacist license posted: Yes
License notes: <i>[no data]</i>	

**Reference Materials**

Medication reference available: Yes	Policy/Procedure Manual available: Yes
Abbreviations/conversions available: Yes	
Reference material notes: Put second copy of Pharmacy Manual in west wing.	



**Medication Storage**

Medication storage locked: Yes	Refrigerated medications locked: Yes
Storage temperatures optimal: Yes	Refrigeration temperature 36° to 46°F: Yes
Open vials marked w/ first-use date: No	Resident's medications stored separately: Yes
External/Internal stored separately: No	To-be-destroyed medications stored separately: Yes
Food not stored w/ medications: Yes	Storage organized/neat/clean: Yes
Medication storage notes: <i>[no data]</i>	

### List of Facility Review Questions

- Is the facility licensed posted?
- Is the consulting pharmacist license posted?
- Is a medication reference available?
- Is the Pharmacy Policy and Procedures Manual available?
- Are medications stored in a locked cabinet or room?
- Are refrigerated medications locked?
- Is the drug storage temperature acceptable?
- Is the drug refrigeration temperature between 36° and 46° Fahrenheit or 2° and 8° Celsius?
- Are opened vials labeled with the first-use date?
- Is each resident's medication stored separately?
- Are discontinued, expired and unused medications stored separately for disposal?
- Are medications stored separately from food?
- Is medication storage organized, neat and clean?
- Are prescription medications properly labeled?
- Are prescription labels legible and unaltered?
- Is the expiration date printed on the prescription label?
- Do the medication administration instructions match the physician's orders?
- Are the medication administration times appropriate?
- Are vital signs checked when required to administer specific medications?
- Are tests given when required to administer specific medications?
- Are all received medications checked in to the facility?
- Are medication quantities appropriate?
- Are controlled substances identified and inventoried?
- Is medication destruction recorded and signed?
- Are sample medications on the premises?
- Is prescription floor stock on the premises?
- Has the Pharmacy Policy and Procedure Manual been signed by the consulting pharmacist?
- Are consulting pharmacist reports available for the last three (3) years?
- Are receipt of medication reports available for the last three (3) years?
- Are medication destruction reports available for the last three (3) years?

### Navigating a Record\*

1. Click the 'Select Resident for Individual Medication Review' link on the Pharmacist Reports submenu.
2. Click [Select](#) for the appropriate resident.
3. Click the name of the needed form, report or wizard within the gold Navigation Menu at the left side of the record.
4. If the needed folder is closed, as designated by an expand icon  in front of the folder name, click the icon and the folder will open to display its contents.
5. To see the contents of all folders, click the Expand All icon  **Expand All** at the top of the menu.
6. Once the folders are open, select the name of the form or report as needed.

\* Note that pharmacists may access such forms as Vital Signs, Medical History, Labs, Incident Report, Nursing Notes, Medication Side Effects, etc., any of which may provide information helpful in caring for the resident.



# Medication - Reports

## Using Medication Reports\*

\* A number of reports are available to the pharmacist, giving an overview of the care that the patient is receiving within the facility. Any fields that have not yet had information entered into them by the facility staff will appear as [no data]. Each report is named to reflect the data being presented.

1. Click the 'Medication Reports' link in the Medication Module. The Medication Reports submenu page is shown below.

### Medication Reports

[Physicians Quarterly Medication Review](#)

[Resident Allergies](#)

[Weight/Glucose/BP MAR Administration Notes](#)

[MAR Notes Report](#)

[Medication Fax Sheet](#)

[All Active Medications](#)

[OTC PRNs Administered](#)

[Meds Administered Today](#)

[Meds Not Yet Administered](#)


[Yesterday's Missed Medications](#)

[Missed Medications for Past Week](#)

[Missed Medications for Last 2 Weeks](#)

[Discontinued Medications](#)

2. Click on the name of the desired report. The results will display in varying formats, depending upon the data contained. In the example below, all allergies for current residents are listed.

Resident Allergies		 <a href="#">Print</a>
Select	Drug Allergies	Allergies
Full Name: Reasen, Terri		
<a href="#">Select</a>	Penicillin	Nuts
Full Name: Smith, Jane		
<a href="#">Select</a>	Asprin	Latex

3. To view the details for any specific resident, click the [Select](#) associated with the record.



# Office - Helps

HQ has two basic default helps shown on every home page, 'BlueStep Help' and '4Care Pharmacy Help'. These two are links to each company's website and lead directly to the help pages on those sites.

## Accessing 4Care Pharmacy Online Help\*

From the HQ Home page, click the '4Care Pharmacy Help' link in the Office module.

1. The 4Care website, as seen below, will appear.



**4care** Home | About | Employment Application | Demo | FAQ | How To Join | Partners | Members | Pharmacy Help

If you need system assistance, call the BlueStep/4Care Pharmacy Administrator at your organization. For help with a medication question, please don't hesitate to contact us at the numbers below.

4Care Pharmacy 109 West Gentile Layton, UT 84041-3000	Name	Title	Extension	Direct Fax #	E-mail
(801) 336-3690 Main Line	Pam Whitaker	Tech	124	(866) 417-3645	<a href="mailto:pwhitaker@4carepharmacy.com">pwhitaker@4carepharmacy.com</a>
(877) 477-3229 Toll Free	Brent Croxford	Tech	104	(866) 694-7510	<a href="mailto:bcroxford@4carepharmacy.com">bcroxford@4carepharmacy.com</a>
(801) 336-3001 General Fax	Shauna Heyer	Tech	128	(866) 581-1910	<a href="mailto:sheyer@4carepharmacy.com">sheyer@4carepharmacy.com</a>
(801) 336-3690 After Hours	Natalie Perkins	Tech	138	(866) 401-7402	<a href="mailto:nperkins@4carepharmacy.com">nperkins@4carepharmacy.com</a>
	Janie Sevy	Tech	136	(866) 694-7549	<a href="mailto:jsevy@4carepharmacy.com">jsevy@4carepharmacy.com</a>
	Amy Anderson	Tech	126	(801) 823-2247	<a href="mailto:aanderson@4carepharmacy.com">aanderson@4carepharmacy.com</a>
	Zane Stanger	Tech	116	(866) 381-2219	<a href="mailto:zstanger@4carepharmacy.com">zstanger@4carepharmacy.com</a>
	Ranch Pratt	President	126	General Fax	<a href="mailto:ranch@4carepharmacy.com">ranch@4carepharmacy.com</a>
	Patsy Hoffer	Billing Mgr	121	(866) 572-0418	<a href="mailto:phoffer@4carepharmacy.com">phoffer@4carepharmacy.com</a>
	Larry Seamons	Purchasing	109	General Fax	<a href="mailto:lseamons@4carepharmacy.com">lseamons@4carepharmacy.com</a>

We have a series of helpful user guides in PDF format that you can access by clicking on each link below. Many of these guides have been added within the last year and others have been recently updated. On the list below, all of the new or revised guides and manuals are marked with ♦ preceding the document name. Please check the list below often, as new guides are also being added regularly.

### 4Care Pharmacy

- [4Care Procedures](#)
- [Initiating 4Care Pharmacy Services](#)
- [4Care Authorization Letter](#)
- [Prescription Purchase Authorization](#)
- [Pharmacy Privacy Practices](#)
- ♦ [4Care Policies and Procedures Manual](#)
- [Extra Policy/Procedures Signature Pages](#)
- [Medicare Beneficiary Complaints](#)
- ♦ [Medicare Capped Rental/Routine Purchase](#)
- ♦ [Medical Abbreviations](#)
- ♦ [Medication Expiration Guidelines](#)
- ♦ [Pharmacological Measurements](#)
- ♦ [Basic Guide to the Prescribed Medication Form](#)
- ♦ [Transferring Medications to 4Care](#)
- ♦ [Tracking Over-the-Counter Medications](#)
- [4Care Return Policy](#)
- [4Care Medication Fax Sheet](#)
- [Problem Report Fax Sheet](#)
- ♦ [Quick Guide to the Medication Prescribed Form](#)
- [4Care Ordering Instructions](#)

### HQ™ User Manuals

- [HQ™ User's Manual](#)
- [HQ™ Basics](#)
- [HQ™ Quick Guide](#)
- ♦ [HQ™ Digital Signature](#)
- ♦ [HQ™ Using the MAR System](#)
- ♦ [HQ™ Using the Custom MAR](#)

### 4Care User Guides

- [Caregiver HQ Guide](#)
- [Physician HQ Guide](#)

### Medication Updates/Changes (PDF)

- [Alupent \(metaproterenol sulfate\) DC](#)
- [Seroquel XR \(quetiapine fumarate\)](#)



Download free Adobe Acrobat PDF Reader

2. Listed on the page are a number of manuals and guides in PDF format.
3. The documents are organized into 4Care Pharmacy and HQ User Manuals.
4. Find the needed section and guide, then click on the name.




\* These documents may be printed, downloaded or e-mailed to those of your users or staff who may find them helpful.

\* Adobe Acrobat offers a free PDF Reader, if your computer is not already equipped to read PDF files. Click the Acrobat link (illustration at right) at the bottom of the 4Care help screen to reach the Adobe.com download page.



### Printing the 4Care Policies and Procedures Manual\*

\* Most state licensing entities require that assisted living, skilled nursing and some other facilities have a print copy of the pharmacy policy and procedure manual on the premises.

1. Click the '4Care Pharmacy Help' link on the HQ home page.
2. The 4Care Policies and Procedures manual is the sixth item in the 4Care Pharmacy section; see pointer in the example right.
3. Click the underlined link.
4. Depending upon your selection and the configuration of the computer, there will be a print icon  or print link Print in the program header. Click this link and proceed with printing as normal.
5. When completed, exit or close the page.
6. Any other document may be printed in the same manner.



### 4Care Pharmacy

- [4Care Procedures](#)
- [Initiating 4Care Pharmacy Services](#)
- [4Care Authorization Letter](#)
- [Prescription Purchase Authorization](#)
- [Pharmacy Privacy Practices](#)
- ◆ [4Care Policies and Procedures Manual Extra Policy/Procedures Signature Pages](#)
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- [4Care Return Policy](#)
- [4Care Medication Fax Sheet](#)
- [Problem Report Fax Sheet](#)
- ◆ [Quick Guide to the Medication Prescribed Form](#)
- [4Care Ordering Instructions](#)

### Accessing BlueStep Online Help

1. From the HQ Home page, click the 'BlueStep Help' link in the Office Module.
2. The client care website (upper portion is seen below) will appear.

Search

**Client Care**

Home | Fingerprint Support | Relate Script | Family Connect Training | SIF Help

**At BlueStep Systems, we are anxious to meet your needs and provide assistance and support. Please see our staff contact numbers listed to the right.**

**Also please note the help documentation available below. They cover a wide range of our features and include the most-asked questions. Each is fully printable for future reference.**

**If you need assistance, the BlueStep Administrator at your organization is experienced with the functions of your system.**

**For further help, you may reach us at:**  
 Client Care Department (801) 336-3043  
 Skilled Nursing Client Care (801) 336-3043 X 103  
 Toll-free (800) 410-0257  
 Fax (801) 336-3022  
 After-hours tech support (801) 336-3043

We have a series of helpful user guides in PDF format that you can access by clicking on each link below. Many of these guides have been added within the last year and others have been recently updated. All of the new or revised guides are marked with ◆ preceding the document name. In the coming months, the older guides will be updated to reflect recent changes in our products. Please check the list below often, as new guides are also being added regularly.

**HQ™ User Manuals**

- [HQ™ User's Manual](#)
- [HQ™ Basics](#)
- [HQ™ Quick Guide](#)
- [HQ™ Record Summaries](#)
- [HQ™ Document Library](#)
- [HQ™ Document Library Quick Guide](#)
- [HQ™ Digital Signature](#)
- [HQ™ Using the MAR System](#)
- [HQ™ Using the Custom MAR](#)
- [HQ™ Idaho UAH/NSA Instructions](#)

**BlueStep Enhancement and Feature Guides**

- [Adding Shopping Cart](#)
- [BlueStep™ Icons](#)
- [Building Variable Record Reports](#)
- [Concepts and FAQs](#)
- [Creating Custom Detail Reports](#)
- ◆ [Creating a Digital Signature](#)
- [The Media Library](#)
- [The BlueStep™ Editor](#)
- [The Record Summary](#)
- [RSS Feeds](#)

3. The second text section on the page lists a large number of manuals and guides in PDF format.
4. The documents are organized into the sections, HQ User Manuals, 4Care Pharmacy, BlueStep Enhancements and Features, Connect, Team and BlueStep Newsletters.
5. Find the needed section and guide, then click on the preferred underlined selection, either PDF or Word.

\* These documents may be printed, downloaded or e-mailed to those of your users or staff who may find them helpful.

\* New information is added to the BlueStep website as new features and functions are created. Existing documents are also updated as needed.

\* Adobe Acrobat offers a free PDF Reader, if your computer is not already equipped to read PDF files. Click the Acrobat link (illustration at right) at the bottom of the BlueStep help screen to reach the Adobe.com download page.





## **Administrator Guide**

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## Introduction

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BlueStep™ has developed a family of exceptional web-based tools created to bring programs, information and people together. Through this unique approach to increasing productivity, the power of cutting-edge engineering is put to work for you. These tools include:

**Connect™ - a flexible web site infrastructure creator**

**Relate™ - a customizable relationship management database**

**Team™ - a dynamic online collaborative platform**

**HQ™ - a fully automated health and human services operating system**

Each of these is preeminently functional and effective standing alone, but combining them creates a world-class suite designed to promote efficient communication and strengthen your organization's focus and efficiency.

The BlueStep™ suite brings the power of the Internet to your organization, providing an anywhere/anytime access to information that is critical to achieving your goals. Our creative and accessible engineering models allow communication to occur as an Internet, Intranet or Extranet, supporting the needs of the user as defined by your own organization. These tools create interconnected levels of cooperation within an organizational structure, whether it is a large corporation, a national association, a smaller company or a local nonprofit organization. Imagine being able to simply and easily:

- Manage your web presence without costly technical charges
- Provide relevant and dynamic data with immediacy
- Exchange and track data on key relationships
- Communicate across limitless boundaries in a positive and proactive manner
- Track projects and tasks within a group
- Store vital information with customizable security to meet policy requirements







That is the power of the BlueStep™ family of products.

The purpose of this manual is to help you understand how to most effectively use your BlueStep™ tools, make the most of your resources and provide a quick reference to help you as you learn.

Listed below are a few concepts that will be helpful to you in using this guide and understanding the BlueStep™ tools.

### Concept 1: User Guide Icons





The icon keys below are found throughout the user guide. They provide you with a visual key for:

-  Definitions – Arrows highlighting the points in a list of important distinctions, issues or concepts to remember
-  Tips – Useful information about how to use a feature included in HQ™ or a quick and easy method to accomplish the task or organize the project
-  Step-by-Step – Brief instructions that walk you through the fastest way to perform individual functions
-  Notes – Useful information, important to the proper functioning of the HQ™ database and applicable in a variety of situations
-  Caution – Items to be considered carefully before performing the operation, as certain actions may have serious consequences to your database and its information
-  Information – Important database conditions that need to be kept in mind while designing, editing or collecting data in HQ™


### Concept 2: Browser

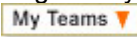



Currently BlueStep™ products can be best viewed when using Windows™ 98/2000/XP and Microsoft Internet Explorer™ 5.7 or 6.0. Browsers other than Internet Explorer™ will give you some access to BlueStep™ products, but will impose limits on the usability and occasionally create load and usage problems. Using the latest version of any browser will increase your ability to quickly and accurately surf the web, as well as optimize your use of BlueStep™ tools. If you don't have the most current Internet Explorer™ version, there is a free download from the browser corporate site, [www.microsoft.com](http://www.microsoft.com).

### Concept 3: Save vs. Cancel, Back or Close Buttons

Always remember to use the Save  button when finishing a task, rather than the Back , Close  or Cancel  buttons. Clicking the Save button tells the program you are finished with that particular function and to post the results. Clicking on the cancel, back or close buttons ends your session on that screen without posting your work. If you wish to undo or not save your additions or changes, simply use the Cancel, Back or Close buttons.

### Concept 4: Log In/Log Out

To use many aspects of the BlueStep™ system, you must be logged in, starting with a click on the Login  button. The system requires a username and password and prompts you to type in that information in the appropriate fields. When initially signing up for an account, you have the opportunity to select your own username and password. You are also at that time asked to select a question that can be used to verify your identity should you forget your password.

If you login successfully, but receive a message that you are not authorized to view the site, you will also see one, two or three button links    that will allow you to navigate to the Teams or Sites where you do have permission to view. These buttons vary, depending upon the products your organization has purchased. Lastly, for security reasons, it is important that you log out at the end of your work session. Logging out is immediate when you click on the Logout link  at the top of the screen.

## Concept 5: Screen Icons

Throughout all BlueStep™ products you will find icons displayed on the screen. These perform certain functions, provide links or convey information. The following describes the icons shown on general screens and their uses. For icons specific to the editor box, see **The Editor Box** in **Administrative Options**.














**Information** – signifies a fact or condition and is not ‘clickable’

- ✓ Done – indicates task status is ‘Completed’
- On Schedule – indicates task status is ‘On Schedule with Minimal Issues’
- ▼ At Risk – indicates task status is ‘Schedule at Risk with Existing Issues’
- ⊗ Behind – indicates task status is ‘Behind Schedule with Significant Issues’
- ↓ Low Priority – indicates task priority is ‘Low’
- ! High Priority – indicates task priority is ‘High’
- ! Priority – identifies the Task Priority column
- 📁 Folder Open – indicates that folder is open and the contents are listed below the file title
- 📁 Folder Closed – indicated that folder is closed and the contents are hidden
- \* Required – indicates that the field must be filled in before the page can be saved
- ! Error – indicates that a required field has not been filled in or is filled with incorrectly formatted data and that the page will not save until completed or corrected
- 🗑️ Cannot Delete – indicates that a person, file, record or other item cannot be deleted
- ✳️ New Permission – indicates that permission does not exist anywhere else in unit
- ✳️ Overridden Permission – indicates that default permission has been overridden
- 🔄 Default – indicates that the permission is at unit default level


**Function** – performs an operation when clicked

- 🔄 Default Reset – resets the permissions to unit default, if it has been changed
- 🔍 Slideshow – activates a slideshow of all files in a selected folder
- ⊕ Expand – displays the contents of a folder or list
- ⊖ Collapse – hides the contents of a folder or list
- ☰ Expand All - displays the contents of all folders or lists
- ☷ Collapse All – hides the contents of all folders or lists
- 📅 Day View – temporarily sets the calendar/schedule page to a single day
- 📅 Week View – temporarily sets the calendar/schedule page to a week
- 📅 Month View – temporarily sets the calendar/schedule page to a month
- 🗑️ Delete/Remove – deletes/removes a file from Shared Files, a person from a screen, a task from a page, an issue from a list, an event from the calendar, etc.
- 🔘 Radio Button (selected and unselected) – records your on-screen choices
- ☑️ Checkbox (selected and unselected) – records your on-screen choices
- ✕ Close – closes the window, pop-up or program, depending upon where it is used, and functions as a ‘Cancel’ if the work has not been saved
- 📄 Button – all BlueStep™ system buttons appear as rounded gray bars and are labeled with the functions they perform

**Link** – opens a screen, pop-up or drop-down when clicked

-  Edit – retrieves the original input screen so that field data can be edited
-  Signature – opens a screen for addition of digital signature to document
-  Users/Members – displays a list of users or members of a selected group
-  Sub-task – opens a screen to add a sub-task to a selected task
-  Mini-calendar – opens a mini-calendar of the current month, allowing clickable selection of a specific day
-  Attachment – retrieves an existing attachment to a file, task or issue
-  Version – accesses the various versions of a document that is stored in Shared Files, *if* your organization has purchased Document Versioning
-  Locked, Unlocked – opens a screen on which file locking/unlocking information is available
-  Reorder – opens a window in which you can rearrange the order of items on a list or tree
-  Reorder File – opens a window in which you can rearrange the order of files in a folder
-  Reorder Folder – opens a window in which you can rearrange the order of folders within the Root Folder
-  Media Library – opens a window to display the contents of the Media Library
-  Down Arrow Button – opens a drop-down selection list and is labeled with the name of the list or function


### Concept 6: Required Fields and Error Icon

Some of the fields and items have a \* next to them with a \* **Required** near the top of the page, indicating that you cannot proceed to the next page until those fields are filled out. During the operation of any screen you may get the error icon . This indicates a problem with the data format or that required data has not been entered. Please check the field and any information it contains. Changing the data to conform to the correct parameters will allow you to proceed.


### Concept 7: Browser Session Timeout

HQ™ has a timeout length that is associated with your connection or “session” on the web site. Timeouts are designed to maximize utilization on the web servers and for our resident’s security and protection of their data. BlueStep™ sets the timeout on our web servers to one-half (½) hour. Performing an activity in which you navigate within the site or save work at least once every half-hour ensures that you will not lose your session. When a timeout occurs, it means that your connection is no longer running. If that happens, the next time you click on a link, you will be returned to the login page. Once you have logged in again, you will need to navigate back to the page on which you were previously working. In most cases, your work **will not** be saved from before the session timed out.

### Concept 8: Delete and Edit

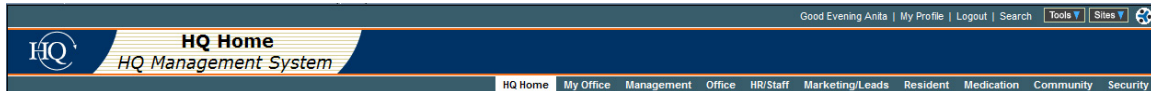
The delete and edit functions are extremely valuable tools, but are easily misused. Before you click on the delete icon  be sure that it is actually the proper item. Delete functions cannot be undone, so be very careful. Deleting a record, record category, subcategory, field or form completely and permanently removes the deleted item **and all its associated information**

Total Operations
Departments
Processes
Active Tasks
Groups

from the system. The same cautions apply when using the edit icon . Editing in some areas can cause major, irreversible changes to your database, so be sure that you are editing the proper item in the proper way.

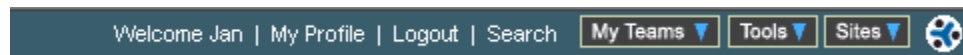
### Concept 9: Navigation

In this manual, you will find common references to three navigation bars. They are the Dashboard, Main Navigation and Secondary navigation bars, as shown below. Additionally, there is a record navigation menu visible on most pages.

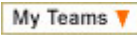




### Dashboard


The appearance of the dashboard will change depending on certain variables. The standard configuration would be seen like this:



On the left, the dashboard shows a greeting using the first name of the user who is logged in. The second link from the left links you to your profile, where you can change your username, password, e-mail address and other personal information. Third from the left is the Logout link. Clicking it will take you entirely out of the system. Fourth from left is the Search link, which performs selected searching functions throughout the teams and sites of your organization.

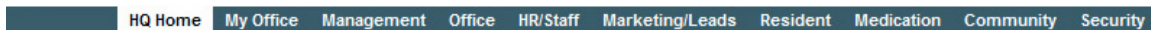
The next three buttons    apply to Team™ and Connect™ functions, but also include your entry point to Relate™, if you have purchased any of these products. If you have not purchased them, the buttons will not be present on the dashboard.

When you place the mouse cursor over the My Teams button without clicking it (referred to as “mousing over”), you’ll get a drop-down list, including Teams List, My View and Team Landing (a generic Team page with links to your Teams). The Tools button also gives you a drop-down list that shows the tools to which the logged-in user has permission to access and may include Organization Administration, Organization Chart, Organization Tree, HQ and Relate, with possible further listings for Dialog, Reach/Fax Blast and Donors. The Sites button will give you a drop-down list of the past ten sites you have visited within the organization during this login session. It also gives you access to a site map to help you navigate those sites.

The farthest right hand button  will link you directly to the BlueStep™ corporate home page.

### Main Navigation Bar

The main navigation bar, shown below, lists modules that handle various aspects of the HQ™ system. Some of these change or disappear from the bar, reflecting the level of permission you have to view various areas.

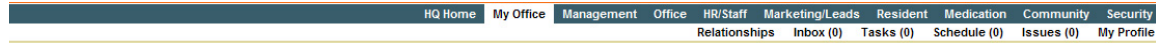


To view the submenu items for any module, click on or mouse over (mouse cursor placed over the link without clicking) those titles. When you mouse over a title on the navigation bar, a drop-down list appears, such as the list for Total Operations Management shown here. To access any of the items on the drop-down, simply click the drop-down name.



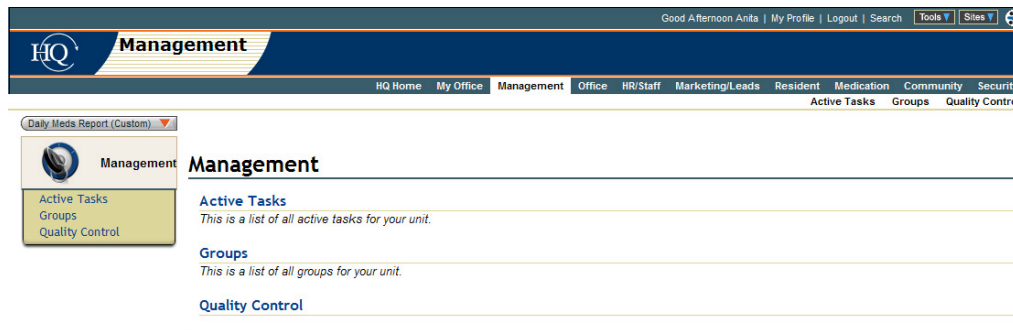
## Secondary Navigation Bar

There is usually a secondary navigation bar connected with the individual modules. When you click on the title on the main navigation bar, any existing drop-down items appear within the secondary bar, as shown here below the main bar.



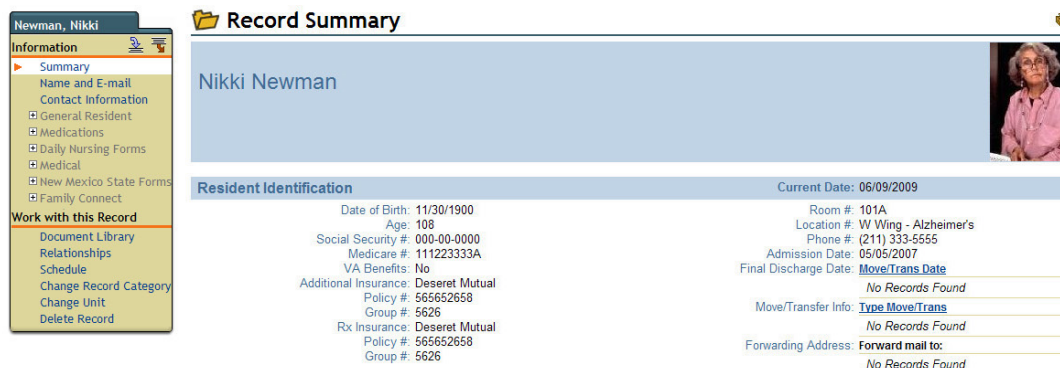
For example, as you can see in the above image, the secondary navigation options for Total Operations Management are Departments, Processes, Active Tasks and Groups, just as they appeared in the Total Operations Management drop-down. These remain in the lower bar until you click another title in the main navigation bar, which will replace these items with those from the drop-down for the new title you clicked.

If you have clicked on a main navigation title, you will be directed to a page containing the secondary items. For instance, the submenu page for the secondary items in (shown below) is the same as those items contained on the drop down.



## Record Navigation Menu (Left-Hand Menu)

Additionally, for most areas in HQ™, a record navigation menu appears to the left, as seen in the example above. It allows you to access any area of the selected module and continues to display while you are performing actions in any of the submenu areas. This menu also appears on individual or community Record Summaries, as seen in the partial-record example below, allowing you to quickly access individual forms or reports containing information specific to that record.



### Concept 10: Permissions

One of the important features of BlueStep™ products is the unequalled caliber of security that can be applied to the system in flexible ways. At virtually every level of Connect™, Relate™, Team™ and HQ™, the administrator has the option of restricting or allowing use of data or any functions/features at multiple points. Anything from a single field to the entire system may be included or excluded for entire groups or individual users. By selecting the Permissions tab

**Permissions**

on any screen where it appears, you can access five levels of permission:

- **No Access** – no admission of any sort to the item
- **Reader** – permission to view contents only
- **Participant** – permission to respond to content
- **Author** – permission to create and add content
- **Editor** – full permission to add, edit and delete content in any way

As administrator, you make the decision as to what permission level to allow any groups or individual users. Since all BlueStep™ products are hierarchical, decisions by those administrators at the top of the organization flow down to other levels. However, other supervisors and team leaders have additional limited authority to allow or disallow permissions for those on their own level, their own Team or subgroups under their leadership, without overriding the decisions made by top management.

Associated with permissions is the concept of explicit, implicit and "flow down". In the hierarchical structure, if permissions are expressly or **explicitly** set on any object, those permissions will flow down to objects below them in the structure. The objects below would then have implied or **implicit** permissions from the parent container.

If you move an object from one position to another, it will retain the permissions assigned to it in its old location *if* the permissions on that container were explicit. If they were inherited or implicit, the moved object will inherit the new permissions of the unit to which they have been moved.

There are two guidelines for good security management. The first is to establish security as high as practicable in the organization structure and let it flow down from there. The second is to create groups that will assign security levels to large numbers of users. It is by far easier to add users to groups and thereby allow them access to resources than it is to individually assign those rights to all of the possible users in all possible places.

Users or groups may be added or deleted as needed or their permission levels changed at any time. Please heed the warnings concerning edit and deletion powers granted by permission, and the serious consequences they can have to the database in the hands of unknowledgeable individuals.

### Concept 11: Links

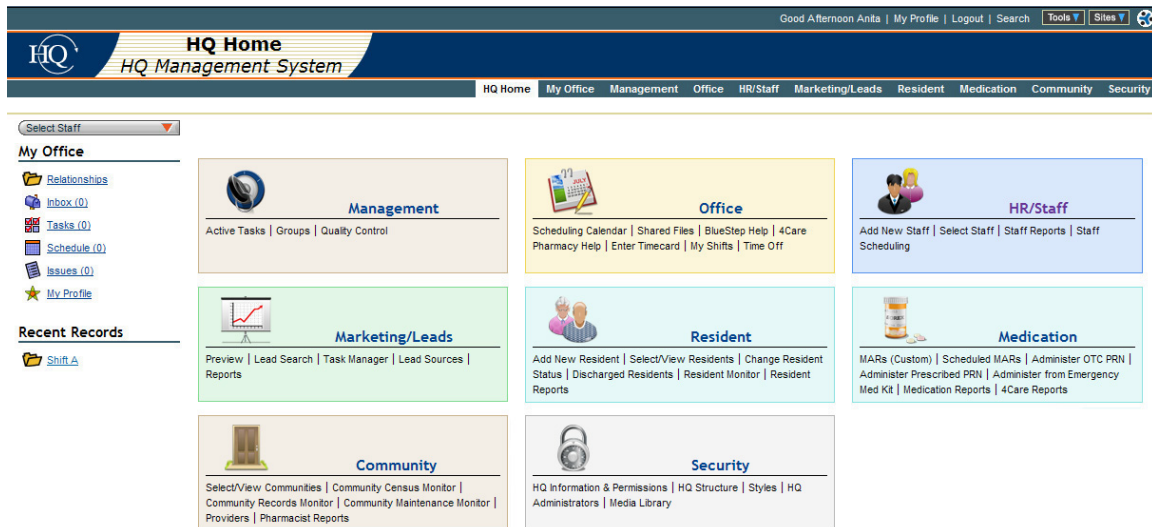
One of the strengths of the BlueStep™ system is the multitude of connections between various areas of the application. These are referred to as links and clicking them will retrieve selected portions of the database for your use. They appear in several ways throughout all BlueStep™ products. Bold titles that appear in blue, such as **Online Profile**, are clickable links that turn red **Online Profile** when activated. Links to create mail for selected e-mail addresses appear as [noemail@bluestep.net](mailto:noemail@bluestep.net) and shift to red [noemail@bluestep.net](mailto:noemail@bluestep.net) when used. Other underlined links, such as [Select](#), [Wayne Wakefield](#), [Introductory Chapter](#), [1/04/2002](#), retrieve the record on the selected line, retrieve the record stored by name, retrieve the record stored by title or retrieve the record stored by date. These each will also appear red when activated.



# HQ Management System

BlueStep HQ™ is the first fully automated health and human services operating system and development platform. It is designed to improve top-line growth while increasing bottom-line results. HQ™ automates and streamlines core business processes, integrating resident management, operations, customer support, data capturing and reporting, resident services, human resource and other basic functions. Data is entered only once and automatically shared, depending on security levels, enterprise-wide in real time. All HQ™ systems “talk to each other” ensuring that information and reports are always current. Data is secure and available 24/7, even from remote locations. Families, consultants and referring professionals are automatically updated on resident issues and progress.

The HQ™ user is presented with a user-friendly interface consisting of customizable modules. These modules correspond to job functions found in traditional health and human service organizations and contain a knowledge engine specific to their individual functions. Using this modular approach, HQ™ is able to give an organization a high degree of flexibility and allows your organization to grow to meet its future needs.



The screenshot displays the HQ Management System interface. At the top right, it shows the user's name "Good Afternoon Anita", "My Profile", "Logout", "Search", "Tools", and "Sites". The main navigation bar includes "HQ Home", "My Office", "Management", "Office", "HR/Staff", "Marketing/Leads", "Resident", "Medication", "Community", and "Security". A "Select Staff" dropdown is visible. The "My Office" section includes "Relationships", "Inbox (0)", "Tasks (0)", "Schedule (0)", "Issues (0)", and "My Profile". The "Recent Records" section includes "Shift A". The main dashboard features several modules:
 

- Management**: Active Tasks | Groups | Quality Control
- Office**: Scheduling Calendar | Shared Files | BlueStep Help | 4Care Pharmacy Help | Enter Timecard | My Shifts | Time Off
- HR/Staff**: Add New Staff | Select Staff | Staff Reports | Staff Scheduling
- Marketing/Leads**: Preview | Lead Search | Task Manager | Lead Sources | Reports
- Resident**: Add New Resident | Select/View Residents | Change Resident Status | Discharged Residents | Resident Monitor | Resident Reports
- Medication**: MARs (Custom) | Scheduled MARs | Administer OTC PRN | Administer Prescribed PRN | Administer from Emergency Med Kit | Medication Reports | 4Care Reports
- Community**: Select/View Communities | Community Census Monitor | Community Records Monitor | Community Maintenance Monitor | Providers | Pharmacist Reports
- Security**: HQ Information & Permissions | HQ Structure | Styles | HQ Administrators | Media Library

Each of the HQ™ modules performs specific functions, which may be accessed from tabs on the main navigation bar or from the underlined links in each module section. Additionally, you may go directly to any of the functions under specific modules using the secondary navigation bar or the listings below each module title. For instance, under Management, the “Active Tasks | Groups | Quality Control” line is made up of three (3) clickable links to the three Management pages. All modules will display any available functions in this fashion.

Also visible is the My Office menu, which offers shortcuts to all the functions specific to you and your day-to-day activities, such as Inbox, Tasks, Schedule, etc. Below My Office is Recent Records, which provides links for records with which you have recently worked, allowing quick access to them from any screen in the HQ™ system.

This section of the HQ manual briefly covers general user functions. However, it provides a more in-depth discussion of those functions that are not common to general users, but rather to managers or administrators, so that they may become a resource for the users within their organization.



# My Office

My Office is designed to gather together in one convenient place all the elements of the HQ™ system that apply directly and specifically to you, and with which you will be working on a regular basis. These are each automatically updated as relationships are built, e-mail is received, tasks are assigned and other changes take place in your organization. Click on the My Office link on the main navigation bar and the My Office page appears, seen below.

**Andrew Aaronson** My Office [Edit Page](#)

**Relationships** [3 of 3](#)

Name  
[Grady, Gail](#)  
[Koelberg, Karl](#)  
[Carlson, Cliff](#)

**Inbox (Unread Mail)** [Compose Secure InMail](#) [Compose Regular Email](#) [0 of 0](#)

Secure Subject From Delete  
 There is no unread mail.

**Task** [1 of 1](#)

Name	!	✓	Due Date	Project
1: <a href="#">Pharmacy Research</a>		●	05/05/2004	Organization Project

**Schedule (Today)** [New Event](#) [3 of 4](#)

Date	Time	Title	Description	Attendance
05/28/2004	8:00AM MDT	<a href="#">Breakfast Board Meeting</a>		●
05/28/2004	10:00AM MDT	<a href="#">Intermountain Therapists Conference</a>		●
05/28/2004	3:00PM MDT	<a href="#">Brief Counseling Session</a>		●

**Issues** [1 of 1](#)

Title	Description	Type	Status	Priority	Created On	Edit	Delete
Playground Fight	Fight over baseball equipment with Pat Prewitt	Services	Assigned	High	May 12, 2004		

Click on titles within the record navigation menu to the left or on any of the section titles for access to the pages summarized on the My Office screen.

## Relationships

Your relationships are shown as a list of individuals on the My Office screen. These are people over whom you have responsibility or who have responsibility over you.

The list displays the top three (3) names from your entire relationship tree. Clicking on their individual names brings up the Record Summary page for that person (if you have been granted permissions for this access). Clicking on the relationship title or the numbers to the right of the section, such as the '3 of 3' shown above, displays the hierarchical tree of relationships in which you have a place, titled with your name. See the illustration below. Again, clicking on the individual names will retrieve the Record Summary for that person, if your permissions level allows.

The relationships displayed in My Office are for informational viewing, reference and record summary retrieval. Making changes, additions or deletions to the people shown on your relationships tree is handled through the Resident module, if

## Andrew Aaronson

### Relationships

[Collapse All](#) [Expand All](#)

Andrew Aaronson

Who is Andrew over?

Andrew is Staff over [Gail Grady](#)

Who is Gail under?

[Andrew Aaronson](#) is Staff over Gail

Andrew is Staff over [Karl Koelberg](#)

Who is Karl under?

[Andrew Aaronson](#) is Staff over Karl

Andrew is Supervisor over [Cliff Carlson](#)

Who is Cliff over?

Cliff is Staff over [Frank Foster](#)

Who is Frank under?

[Cliff Carlson](#) is Staff over Frank

Cliff is Staff over [Harry Hammond](#)

Who is Harry under?

[Cliff Carlson](#) is Staff over Harry

Cliff is Staff over [Jeremy James](#)


Who is Jeremy under?

[Cliff Carlson](#) is Staff over Jeremy

Who is Cliff under?

[Andrew Aaronson](#) is Supervisor over Cliff

the individual is currently a resident in your organization. If the individual is a staff member, that function is accessed through the Staff module. See the **Resident** and **Staff** module sections for further details.

 Please note that if you are logged in as a superuser, Relationship functions are not available. Relationship functions are available for all other users, including Organization and Unit Administrators.

## Inbox

Inbox allows easy access to standard e-mail and to your secure IntraMail accounts – those accounts that operate internally within your organization and send to/receive from other members of your organization. It functions similarly to standard e-mail sent through Outlook™, Eudora™ or other e-mail services, but is secured with encryption and does not pass from our server to any external (unsecured) servers. Just as with other e-mail residents, IntraMail can have multiple accounts and folders and be customized to suit your working preferences. The Inbox link also lets you compose, send, receive and store standard e-mails to and from external, non-secure sources to recipients either inside or outside of your organization.



The screenshot shows the IntraMail interface. On the left is a sidebar with 'Folders' (Inbox, Drafts, Sent, Trash) and 'Settings' (Manage Accounts, Manage Folders, Receive External Mail). The main area is titled 'IntraMail' and 'Inbox'. It features a table with columns for Subject, From, and Sent. A single email is listed: Subject: Deliveries, From: Jeremy James, Sent: 5/5/04. Below the table are buttons for 'Move To Folder...', 'Move Selected', and 'Delete Selected'. At the top right of the main area are buttons for 'Compose Secure IntraMail' and 'Compose Regular Email'.

## Tasks

Any tasks that you have been assigned, either to yourself as a reminder or by others in the organization, will appear listed on My Office screen and also the Tasks screen, where the full list is stored.

## Andrew Aaronson

Task List				sorted by priority
<u>Name</u>	! ✓	<u>Due Date</u>	<u>Project</u>	
1: <a href="#">Pharmacy Research</a>	●	05/05/2004	Organization Project	

For more information on each of the tasks, click the underlined task name. Doing so will take you to a pop-up of the original screen on which the task was created, as seen below.

**Task Name:** Pharmacy Research      **Due Date:** 05/05/2004  
**Assigned to:** Andrew Aaronson      **Status:** ● 20%

**Task Info** | Task Status | Attachments | Permissions

**\* Required**

**Name** \* Pharmacy Research

**Sub Task of** ▼

**Due Date** 05/05/2004      **Priority** Normal ▼

**Assigned To** Aaronson, Andrew ▼      **Assigned By** Jan Walker

**Notes**  
 Locate a pharmacy with 24/7 access.

---

**Non Compliance**

**Update quality control in** None ▼

Update performance log

Notify department leader

Notify supervisor

Notify top-level executive

Notify task owner

---

**\* Required**      Save and Close      Cancel

You may make changes to this screen and the associated screens from this pop-up. However, if you need to initiate a new task, that is done under the Management. For a full discussion of Task Info, Task Status, Attachments and Permissions see **Management**.

### Schedule

The Schedule section gives a snapshot view of those events slated for the current day. By clicking on the Schedule title, the entire day is presented in planner format.

**Aaronson, Andrew** [New Event](#)

Today's Date: **May 28, 2004** ◀ ▶

All Day	Event
8:00am - 9:00am	Breakfast Board Meeting - Aaronson, Andrew <span style="float: right;">🗑️</span>
9:00am - 10:00am	
10:00am - 2:00pm	Intermountain Therapists Conference - Aaronson, Andrew <span style="float: right;">🗑️</span>
2:00pm - 3:00pm	
3:00pm - 4:00pm	Grief Counseling Session - Aaronson, Andrew <span style="float: right;">🗑️</span>
4:00pm - 5:00pm	Systems Class - Aaronson, Andrew <span style="float: right;">🗑️</span>

**Go To**

- [November 2003](#)
- [December 2003](#)
- [January 2004](#)
- [February 2004](#)
- [March 2004](#)

S	M	T	W	T	F	S
	1	2	3			
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

S	M	T	W	T	F	S
		1				
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					



**Go To**

- [July 2004](#)
- [August 2004](#)
- [September 2004](#)
- [October 2004](#)
- [November 2004](#)

Go 05/28/2004 \* Go Today

Calendar Preferences

## Calendar Navigation

To view the details on any calendar item, click on its underlined name. A summary giving the Event Time, Location, Event Type, and full Event Details will be presented. Selecting the edit icon  returns the original data entry page, where you may make any changes needed. Clicking the delete icon  removes this event from the calendar.

A list of attendees for each event is also displayed in this view. To see the full list of attendees, including their Attendee Statuses for this event, click on an underlined attendee name.

The date displayed in the dark bar at the top of the schedule identifies the date to which the schedule applies (it defaults to the present day). On either side of the date are arrows allowing quick navigation to previous and future days. The Today's Date link returns you to the present day, if you are currently displaying a past or future schedule.

The schedule defaults to a one-day-at-a-time view. To temporarily change views to display an entire week or entire month, use the three buttons on the upper right.



Displays the entire current month



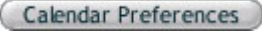
Displays the entire current week



Returns to the current day

Below the schedule are miniature calendars of the present, preceding and next month with links to jump back or forward five months, making the entire twelve-month schedule easily accessible. You may also select any specific date and enter it into the field below the miniature calendars or use the Go Today button to return to today's schedule if you have been viewing other dates.

## Using Calendar Preferences

The Calendar Preferences button  opens a screen with options to set display variables for your My Office schedule and the calendar view in Office Manager.

### Calendar Preferences

#### Time Zone

All times displayed on the calendar will be converted to the time-zone you specify.

(GMT-07:00) Mountain Time

#### Calendar Opening View

Select the view you want to start in when you go to calendar. This setting will not change your current calendar view.

Month View

#### Typical Work Day

Select the hours that start and end your typical work day. These settings determine the minimum amount of time represented on the Day View of the calendar.

8am to 5pm

#### Interval on Day View


Select the time interval for the Day View of the calendar.

30 min.

## Time Zone

For events to record accurately for your location, it is important to set the Time Zone field. When set properly, events that are scheduled in other time zones will auto-correct for time differences when seen on your schedule. For instance, you may be party to a telephone conference at 10:00 AM Eastern Time. If your time zone is two-hours behind Eastern Time, the event will display at 8:00 AM on your schedule.



 **Important Note about Time:** When you are setting up a new computer to use with the BlueStep System, it is critical that you set the time and time zone correctly on the computer's clock **before** accessing any BlueStep sites.

The BlueStep database interacts with your computer settings when you access any page for the first time. If the time and time zone are incorrect on the computer, the database will store the wrong information about your organization. Such things as medication administration times and staff timecard entries will retain the wrong data, based on your machine's incorrect initial settings.

### Calendar Opening View

The Calendar view seen in Office Manager is set in this field. Please note that it does **not** reset the schedule view as seen on the My Office Schedule (Today) or the screen that is accessed from the Schedule link. Month, Week and Day Views are available.

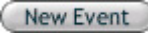
### Typical Work Day

This field lets you customize the span of hours that will be shown on the daily schedule. The span selected for the sample schedule page seen above is 8 AM to 5 PM.

### Interval on Day View

You may set the time intervals displayed during the day with this field. The schedule may be divided into 10, 15, 20 or 30 minute periods or into one-hour intervals. The interval selected for the sample schedule page seen above is 30 minutes.

### Adding New Events

To add a new event to the calendar, click the New Event button . On the resulting New Event screen, seen on the next page, the event Title, Start Date & Time, End Date & Time and Time Zone fields are required. All others are optional.

Under General Information, choose a title for your event, type in its location and select a type from the list previously created (see **Types** discussed in **Office**).

The editor box is provided for you to enter all details pertinent to the event, such as a speaker's name, materials required, appropriate graphics, links to documents stored on your site or elsewhere available on the Internet, etc. Icons are available to perform standard word processing functions, such as font style and size, text colors, bulleting, inserting tables, etc.

General Information
Attendees
Permissions

### New Event

\* Required

---


**General Information**  
*Fill in a name, location, and details for your event.*

Title \*

Location

Type

**Event Details**



We'll be discussing quarterly updates. Also, bring your financials.  
Marsha Mason from Central will be attending.

**Date and Time**  
*Fill in the date and time when this event will take place. If time of day does not apply to this event (e.g. New Years Day), check the all day event box.*

Start Date & Time \*

End Date & Time \*

Time Zone \*

This is an all day event.

**Repeating Events**  
*Fill in these options to repeat your event on a regular basis.*

Event Repeats The event repeats  Event Is Not Recurring

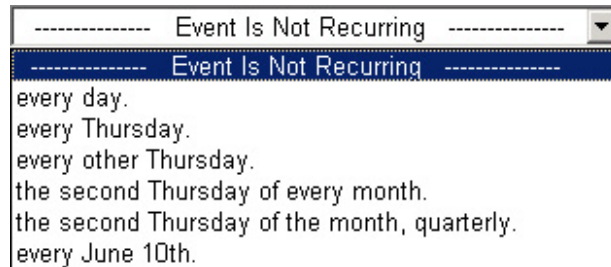
Repeats Until until

If you choose to add a graphic to the Event Details, the recommended size is 200 X 200 pixels or 1.4 X 1.4 inches.

Under Date and Time, enter the start and end dates and the time for each, then check to be sure the time zone field is correct for your time zone, so that events will record accurately on organization-wide calendars. There is also a box to indicate that an event lasts for a full day.

When set properly, events that are scheduled in the Office Manager will auto-correct for time differences when seen on all attendee's schedules. For instance, if your office is hosting a telephone conference at 10:00 AM Eastern Time and participants are in a time zone two hours behind Eastern Time, the event will display at 8:00 AM on the participant's schedule.

Under Repeating Events, you can identify those meetings, classes and appointments that reoccur and place them on the schedule with a single new event submission. The drop-down in the Event Repeats field has several options, based upon either the day you have entered in the Start Date & Time or on the current date. As in the illustration here, if you have selected June 10<sup>th</sup>, which is also a Thursday, the options include repeating the event on every June 10<sup>th</sup>, on various Thursday possibilities or every day.



If there is an end to the event recurrence, enter the ending date in the field provided below the Event Repeats box, labeled Repeats Until.

If you do not select specific attendees at this point, be sure to click the Save button when finished with the New Event page.

### Attendees

If there are no attendees selected for an event, the calendar function places the event on the Office Manager calendar, but does not distribute it to any user's My Office schedules.

To add this event to the individual calendars seen through My Office, click the Attendees tab, to the right of General Information. If you have already saved the event, access it again through the edit icon , then go to Attendees.

Using the New Attendee button, you may add as many or as few attendees to the event as you wish from a My Relationships screen.

The options on this screen allow you to select from any category of individuals, using the Source drop-down, seen here. Click on a category of individuals shown on the drop-down. The relationship tree for the chosen category will display on the main part of the page and you may click on any underlined individual to add them as an attendee.

The Attendees screen will reappear, where you may select a status from the drop-down (see **Attendee Statuses** discussed in **Office**). Remember to click Save when done and you will be returned to the main calendar view.



Friar Woods hike		
Name	Status	Remove
Aaronson, Andrew	Attending	
Grady, Gail	- Select a status -	
Carlson, Cliff	Available	
James, Jeremy	Attending	
Hammond, Harry	Schedule Conflict	

## Issues

Any issues that you have been assigned, either to yourself as a reminder or by others in the organization, will appear listed on My Office screen and also the Issues screen, where the full list is stored.

For more information on each of the issues, click the underlined issue name. Doing so will take you to a pop-up of the original screen on which the issue was created, as seen below.

Edit Issue	
* Required	
<b>General Information</b>	
<i>Fill in a name, description, and other details for your issue.</i>	
Name *	<input type="text" value="Playground Fight"/>
Description *	<input type="text" value="Fight over baseball equipment with Pat Prewitt"/>
Assigned To	Andrew Aaronson <a href="#">Select Assigned To</a>
Who About	Koelberg, Karl <a href="#">Select Who About</a>
Type *	<input type="text" value="Services"/>
Status *	<input type="text" value="Assigned"/>
Priority *	<input type="text" value="High"/>

You may make changes to this screen and the associated screen from this pop-up. However, if you need to initiate a new issue, that is done under the Management section. For a full discussion of **Issues**, see **Management**. For a full discussion of **Permissions**, see **Administrative Options**.

## My Profile

Not displayed in the main section of the screen, but available in the navigation menu to the left (and the dashboard), is the My Profile link. This is a valuable resource for keeping your online profile and personal information up-to-date.

The My Profile screen is a quick way to access, review and edit your own personal information

## My Profile

*Use this page to change your online information and settings. You can update your name, password, email settings*

### Personal Information

*Update name, address, email address, and contact information.*

### Online Profile

*Change your password, password hint, and subscription preferences.*

### Contact Information

*Contact information about the individual.*

### Personal Contacts

*Personal Contact List*

that is stored in the Staff Manager. The four links displayed let you change your name, address, e-mail address, password, password hint, e-mail subscription preferences, home and work contact information and any persons you have listed as contacts. As with all data entry screens, if you make changes, you must click the Save button for the changes to be posted.

### Recent Records

Below the My Office links is a section, example seen right, that can contain up to eight (8) shortcut links to the recent records with which you have worked. These are automatically saved in the list as you visit each one, with the most currently visited appearing at the top as you work with the records. Please note that if you have access to more than one unit in your organization, accessing a record in another unit will take you out of the current unit and transfer you to the unit of the record you are using.

### Recent Records

---

-  [Bronson, Betty](#)
-  [Foster, Frank](#)
-  [James, Jeremy](#)
-  [Hammond, Harry](#)
-  [Grady, Gail](#)
-  [Eakins, Emma](#)
-  [Dunston, David](#)
-  [Koelberg, Karl](#)



## Step-by-Step in My Office

### Viewing Relationships

- Click the Relationships title in the record navigation menu (on the left) **or**
- Click the Relationships section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined name of the individual in the section or on the relationship tree

### Viewing E-mail

- Click the Inbox title in the record navigation menu (on the left) **or**
- Click the Inbox section header **or**
- Click the underlined numbers to the right of the section header

### Composing Secure IntraMail

- Click the Compose Secure IntraMail button
- Enter recipients secure e-mail address (also CC and BCC, if desired)
- Type in a subject
- Click the Regarding link and select an individual
- If attachments are needed, click the attachment link and browse to select file
- Type body of message
- Click Send, Save As Draft or Cancel

### Viewing Tasks

- Click the Task title in the record navigation menu (at the left) **or**
- Click the Task section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined name of the specific Task

### Viewing Today's Schedule

- Click the Schedule title in the record navigation menu (to the left) **or**
- Click the Schedule section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined title of the event

### Editing Events

- Select an event
- Click the edit icon and make desired changes or the delete icon to remove
- When done, click the Save button

### Setting Calendar Preferences

- Click the Calendar Preferences button
- Select your time zone from the drop-down
- Set the opening view from the drop-down (resets only Office Manager, **not** My Office)
- Select start and end time for a typical work day from drop-downs
- Select preferred intervals from drop-down
- Click the Save button

### Adding a New Event

- Click the New Event button
- Enter a title and location
- Select a type from the drop-down
- Enter any event details
- Enter the start date/time, end date/time and time zone
- If event is repeating, select the appropriate listing from the drop-down
- If event recurrence ends, enter an end date
- Add attendees, if desired
- Click the Save button

### Adding Attendees

- Click New Event button and create an event or select an existing event using the edit icon
- Click the Attendees tab
- Click the New Attendee button
- Select a category of individuals from the Source drop-down
- Click on the desired name
- Select a status from the Status drop-down
- Click the Save button when done adding all attendees

### Viewing Issues

- Click the Issues title in the record navigation menu (to the left) **or**
- Click the Issues section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined name of the specific issue

### Editing or Adding My Profile Information

- Click the My Profile link
- To edit your name, address, e-mail address or contact information, click Personal Information
- To edit your password, password hint or subscription preferences, click Online Profile
- To edit your contact information, click Personal Contact
- Make changes or additions, as needed
- Click the Save button




# Management



The Management module serves as a place to set up and control some of the most basic operational functions for the entire organization, including the creation and maintenance of Active Tasks, Groups and Quality Control. These areas integrate and work together, providing a smooth and functional basis for foundational operations.

## Active Tasks




Active Tasks is an extremely useful feature that allows any user within the system (provided they have the proper permissions) to create tasks and sub-tasks that will lead to smooth functioning of the organization. As with Processes, Active Tasks formalize and solidify the necessary operations to ensure that goals are met, solutions to problems are implemented, operations happen at the right time and those assigned to the tasks are not only reminded of the job at hand but accountable for its completion.



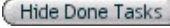
Active Tasks organize and assign functions in areas such as, program admission and discharge, resource allocation, business and financial procedures, facilities maintenance, inventory monitoring, safety practices, certification reviews, marketing strategies, regulatory compliance, etc.

All the current Active Tasks for your organization are displayed on the Active Tasks page, see below, with the items that are assigned to the logged-in user appearing in bold type. Tasks are listed by name and may be followed by the attachment icon  , which opens any existing attachments. The next column displays the Priority for the task.

- (blank) Normal
-  High Priority
-  Low Priority

The Status column always contains an icon, which describes the current status of the task.

-  Done
-  On Schedule/Minimal Issues
-  Schedule at Risk/Issues
-  Behind Schedule/Significant Issues

Other columns contain 'Percentage-done' figures, the due dates and assignees. You may add a sub-task to any task using the sub-task icon  or change the order in which the tasks appear on the list with the reorder icon . Clicking the Hide Done Tasks button  at the lower left visually removes all tasks with a Done status from the list. They are not deleted, however, and can be recalled by clicking the button again.

## Active Tasks

[Edit Page](#)

This is a list of all active tasks for your unit.


Task List											
!	✓	%	Due Date	Assigned to	Add SubTask	Reorder	Edit	Delete			
<input type="checkbox"/>		0%	01/10/2004	Andrew Aaronson							
<input type="checkbox"/>		20%	05/05/2004	Andrew Aaronson							
<input type="checkbox"/>		0%	01/10/2004	Andrew Aaronson							
<input type="checkbox"/>		100%	01/10/2004	Andrew Aaronson							
<input type="checkbox"/>		0%	12/30/2004	Elisabeth Eller							
<input type="checkbox"/>		0%	12/30/2004	Bryan Butler							
<input type="checkbox"/>		0%	12/30/2004	Jeff Jerome							
<input type="checkbox"/>		0%	12/30/2004	Betty Bronson							
<input type="checkbox"/>		0%	12/30/2004	William Whalen							


[Hide Done Tasks](#)

### Creating a New Task

To create a new task, start by clicking the New Task button at the upper right. A pop-up window appears with a series of fields for defining and assigning the task. Establish a name for the task and whether or not it is a sub-task of an existing task. Enter the due date and the priority (see priority icons, above). The Assigned To field opens to a drop-down, which allows you to select anyone whose record is contained in your organization to be the assignee. The logged in user's name automatically appears as the person Assigned By. If there are notes for the task, they can be entered in the Note field.

The Non-Compliance section lets you select options for reporting a failure to meet the due date. This may be anything from a reminder to the task owner to a negative report on the owner's performance log to a personal notification of the top-level executive in your organization. As shown below, more than one option may be selected, if desired.

The Task Status tab allows you to set current status (see status icons above) or to update a status if the task is underway. The Attachments tab gives you the option of uploading and attaching a pertinent file to the task. You may also click the Permissions tab and allow or restrict access to the task as necessary. As with all data entry or function creation screens, remember to click the Save button  to post your work.

The new task you created will appear on the Active Tasks list, where you may edit it using the edit icon . Editing is the function that allows you to reenter the task screen and change task status as progress is made towards completion, in addition to any other corrections or additions that need to be made.

Task Info
Attachments
Permissions

**\* Required**

**Name** \*

**Department** \*

**Assign to**

department head

relationship

**Relationship Type**

**Relationship Title**

**Trigger** \*

(Changing the date in this field could have unintended results.)

**Start date for triggering** \*

**Priority**

**Time allowed to complete**  \*

**Frequency**

**Description**

---

**Non Compliance**

**Update quality control in**

Update performance log

Notify department leader

Notifv supervisor


Notify top-level executive

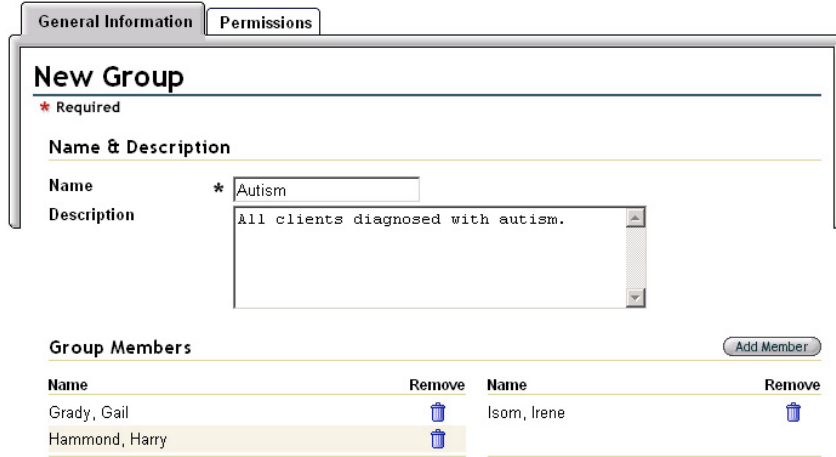
Notify task owner





## Groups

In many cases, you will have a need to organize your residents/students/patients groups to facilitate management, staff communication and data storage. The Groups function allows you to quickly and easily create groups that fit your exact requirements and then assign as many or as few members as needed. Please note that these groups do not act as security groups.


### Create a New Group

To create a new group, click the New Group button . On the resulting screen, you can easily establish a name for the group, describe its function or purpose and add as many members of the group as appropriate.













General Information		Permissions	
<b>New Group</b>			
* Required			
<b>Name &amp; Description</b>			
Name	*	Autism	
Description		All clients diagnosed with autism.	
<b>Group Members</b> <span style="float: right;"></span>			
<b>Name</b>	<b>Remove</b>	<b>Name</b>	<b>Remove</b>
Grady, Gail		Isom, Irene	
Hammond, Harry			

Each group you create will be listed on the Group screen, example below.



From this screen, you can access the group for any edits that you need to do by using the edit icon . Additionally, a roster of all members of the group is available by clicking the underlined name of the group.

## Groups

*This is a list of all groups for your unit.*

Name	Description	Edit	Delete
<a href="#">Handicapped Support Group</a>	All physically handicapped		
<a href="#">Bi-Polar Group</a>	Bi-Polar exploratory group		
<a href="#">Speech Group</a>	All those needing speech therapy		
<a href="#">Staff Group</a>	All staff members		
<a href="#">Autism Group</a>	All clients diagnosed with autism		

### Adding a Group Member

You may add members to a group as it is being created or after it is added to the Groups screen. To add members to an existing group, click the edit icon . This will return you to the original screen you used when creating the group. Whether you are editing or creating the group, click the Add Member button . A relationship pop-up will appear, where you may select the category of individuals you would like to add to the group using the Source drop-down.

### Select a Record

#### My Relationships

 Collapse All  Expand All

[Andrew Aaronson](#)

Who is Andrew over?

Andrew is Staff over [Gail Grady](#)

Who is Gail under?

[Andrew Aaronson](#) is Staff over Gail

Andrew is Staff over [Karl Koelberg](#)

Andrew is Supervisor over [Daria Draper](#)

Andrew is Supervisor over [Jeremy James](#)

Andrew is Supervisor over [Laura Linn](#)

Andrew is Supervisor over [Oliver Overson](#)

Who is Oliver under?

[Betty Bronson](#) is Staff over Oliver

[Andrew Aaronson](#) is Supervisor over Oliver

Andrew is Supervisor over [Ron Randle](#)

Who is Ron under?

[David Dunston](#) is Staff over Ron

[Andrew Aaronson](#) is Supervisor over Ron

Source:

- My Relationships
- Groups
- All Staff
- All Clients
- All Inquiries
- All Discharged Clients
- All Responsible Parties
- All Care Partners
- All Non-Care Partners



Click on the name of the category. The relationship tree for the chosen category will display on the main part of the page and you may click on any underlined individual shown there to add them as a group member. Do this as many times as needed to fill the group with members. When finished, remember to click the Save button.

### Quality Control

The Quality Control function creates a constant, reliable focal point for all occurrences that require recording and tracking within your organization. Under the Quality Control section, problem areas can be identified, qualified and quantified, then assigned to the appropriate individual. Each assignee receives instant notification of the issue assignment and all the associated documentation. Documenting resident or organizational issues provides the basis for creating tasks, promoting accountability and facilitating solutions. Further, an up-to-date, accurate history of past problems creates a foundation for solving today's problems and preventing their recurrence tomorrow.

The Quality Control screen consists of two sections: Search and Issues. Prior to using either of these functions, however, Types and Statuses need to be established. Organization Administrators or those with knowledge of the operational structure of your organization are usually the best qualified to decide the content of these two lists.

### Issue Types

The New Type button opens a screen that will let you enter and save each new type, which then appears on a list similar to that shown below. The types of issues entered may be defined in any way that seems appropriate for your situation. These designations can be as small and detailed or as broad and general as needed to effectively separate one kind of issue from another. There must be at least one type, but you need only select as many as will serve your purposes and divide Issues into meaningful groups.



One useful method of organizing issues is to divide them into types that correspond to groups, departments or branches in your organization. Another is to select types that correspond to specific functions or operations in your organization.

## Quality Control

[Reorder](#)

[New Type](#)

### Issue Types

Issue Type Name	Edit	Delete
Administrative		
Interpersonal		
Physical Facilities		
Services		
Therapeutic		

### Issue Statuses

Statuses may also be defined as best suits your organization and the departments or branches within it.



You may devise statuses that reflect the individual way each department operates (parts ordered, care partner notified, financials completed or task assigned, etc.) or make statuses general descriptive terms (Assigned, Evaluated, Pending, In Process, Finished, etc.).

## Quality Control

Reorder

New Status

### Issue Statuses

Issue Status Name	Edit	Delete
Assigned		
In process		
Investigated		
On order		
Reassigned		
Reported		
Suspended		
Waiting for notification		

Types and Statuses need to be created only once in the system. When this is done, these items become available for use in entering any subsequent new Issues and retrieving them through Search. Types and Statuses are easily added, edited or deleted at any time, by those with the proper permissions. This means that the Quality Control Manager can always respond to the changing requirements of your organization.

## Quality Control

Edit Types

Edit Statuses

Edit Page

### Search Criteria

Search For

Type

Status

Priority

Assigned To

Regarding

Created By

Search


### Issues

New Issue

Issue Name	Description	Assigned To	Regarding	Type	Status	Priority	Created By	Created On	Edit	Delete
Playground Fight	Fight over baseball equipment with Pat Prewitt	Andrew Aaronson	Koelberg, Karl	Services	Assigned	High	Andrew Aaronson	May 12, 2004		

### Adding a New Issue


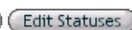

Issues is the area where you will enter any data that is necessary to define and record the issue at hand. Click the New Issue button to access the entry screen. You will be asked to name and describe the issue, as well as make an assignment, which will appear in the assignee's Issues section of My Office. Click the [Select Assigned To](#) link for a list of those staff members to which you can assign this issue. If appropriate, you may also click the [Select Who About](#) link for a list of residents to reference on this issue.

The Type and Status drop-downs will show all the line items that have been previously entered on these lists (see **Issue Types** and **Issue Statuses**, above). The Priority drop-down is pre-populated with High, Medium, Low and Done selections. As with all data entry screens, remember to click the Save button  when you have completed recording the issue. The Issue will appear in the full list of issues when you return to the Quality Control screen.



### Conducting a Search

The Search section allows you to find any issue that has been entered into the system through the above screen. There are a variety of ways in which to search for the needed issues using the issue name field or the Type, Status, Priority, Assigned To, Regarding or Created By drop-downs. The defaults for each of these fields are blank when you open the Quality Control screen. You do not need to fill in all of them, but at least one and only those that apply to the item you are trying to locate or those that seem most characteristic of the issue for which you are looking. Click the Search button and the screen will repaint with the results displayed under the Issues title, replacing the full list of issues.

## Quality Control

### Search Criteria

Once you have located the requested issue, the edit icon  is available so that you may view the original issue entry form and make any necessary changes and the delete icon  to remove the issue entirely from the system.



## Step-by-Step in Management

### Creating an Active Task

- Click New Task button
- Enter a name, sub-task of (if appropriate), due date, priority, assigned to, assigned by, and any notes that are needed.
- Check any applicable non-compliance notifications
- Click the Save button

### Updating an Active Task

- On the Active Tasks screen, click the edit icon opposite the task
- Make any needed changes to Task Info
- **If** no other changes needed, click the Save and Close button
- To change a task status, click the Task Status tab
- Click Update Task Status button and select a new status from the status drop-down
- **If** no other changes needed, click the Save and Close button
- To add an attachment to the task, click the Attachment tab
- Click the Add Attachments button (you may then click the Add Multiple Files button)
- Browse for the correct file, click on it when located
- Type in a new description, if desired
- Enable version control, if desired (only available if this option has been purchased)
- Click the Upload button
- **If** no other changes needed, click the Save and Close button
- To change permissions level for this task, click on the permissions tab
- Edit permissions as desired using the radio buttons and/or Add User or Add Group buttons
- **If** all updating is complete, click the Save and Close button

### Adding Members to a Group

- Click the edit icon opposite the name of the group
- Click the Add Member button
- Select a category of individuals from the Source drop-down
- Click an underlined name from the resulting relationships tree
- Repeat for any additional members
- Click Save when done

### Adding a New Issue

- Click the New Issue button
- Fill in a name, description, an assignee, a who about person, a type, a status and a priority
- Click the Save button

### Search for an Issue

- Choose one or more search criteria from the drop-downs or type in an issue name
- Click the Search button
- Those issues that most closely match your search criteria will appear in the lower section of the screen, replacing the full issues list

### Making an Issue Assignment

- Enter a new issue or select an existing issue using the edit icon
- On the New Issue (or Edit Issue) screen, click the [Select Assigned To](#) link
- On the resulting pop-up window, click the [Select](#) link for the individual
- Click the Save button



# Office

The Office module has two basic features, Scheduling Calendar and Shared Files, which each provide important coordination functions for the entire organization. Using the Office Manager, calendar items and file information are both easily available to users from a single, consolidated point. Further, the Office Manager keeps these elements organized and up-to-date, secure and accessible, comprehensive and specific, by using flexible, customizable folders and layouts.

Clicking the Office link retrieves a page with thumbnails of the calendar and files, side by side, as seen below.

Scheduling Calendar							Shared Files																																																																																																								
5 of 23...							5 of 5																																																																																																								
<table border="1"> <thead> <tr> <th colspan="7">June 2004</th> <th colspan="7">July 2004</th> </tr> <tr> <th>S</th><th>M</th><th>T</th><th>W</th><th>T</th><th>F</th><th>S</th> <th>S</th><th>M</th><th>T</th><th>W</th><th>T</th><th>F</th><th>S</th> </tr> </thead> <tbody> <tr> <td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> <td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td> </tr> <tr> <td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td> <td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td> </tr> <tr> <td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td> <td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td> </tr> <tr> <td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td> <td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td> </tr> <tr> <td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td><td></td> <td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td> </tr> </tbody> </table>							June 2004							July 2004							S	M	T	W	T	F	S	S	M	T	W	T	F	S			1	2	3	4	5					1	2	3	6	7	8	9	10	11	12	4	5	6	7	8	9	10	13	14	15	16	17	18	19	11	12	13	14	15	16	17	20	21	22	23	24	25	26	18	19	20	21	22	23	24	27	28	29	30				25	26	27	28	29	30	31	<a href="#">Update News June 2004 (Update News June 2004.doc)</a> <a href="#">Troubleshooting Guide (Troubleshooting Guide.doc)</a> <a href="#">HQ FAQs 2004 (HQ FAQs 2004.doc)</a> <a href="#">General Intro &amp; FAQs 2004 (General Intro &amp; FAQs 2004.doc)</a> <a href="#">A4DS User Set-up Process (A4DS User Set-up Process.doc)</a>						
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<p><i>Events occurring within the next 90 days.</i></p> <p>06/10/2004 10:00AM MDT <a href="#">Friar Woods hike</a></p> <p>06/11/2004 All day -- <a href="#">Therapists Convention</a></p> <p>06/16/2004 8:00AM MDT <a href="#">Weekly Staff</a></p> <p>06/17/2004 11:00AM MDT <a href="#">In-service Training</a></p> <p>06/19/2004 12:00PM MDT <a href="#">Company Picnic</a></p>																																																																																																															

The **Scheduling Calendar** pagelet displays the current month and next month, with the next five (5) events (of those occurring within the next 90 days) summarized in a date/time list. You may directly access information on any event listed by clicking its underlined title. For the full calendar, click on the Scheduling Calendar title or the numbers to the right of it. The **Shared Files** pagelet lists the five (5) most recently uploaded files by title and document name. To directly access the document, click on the underlined title. For the complete files list, click the Shared Files title or the numbers to the right of it.

## Scheduling Calendar

The event calendar stored in the Office module contains all the events that have been entered by and for every person, organization-wide. This allows for a central scheduling individual, one who has all the information necessary to conveniently coordinate meetings and make appointments for individuals or groups.

The pagelet lists the next five (5) events for all schedules. To see the full calendar, as below, click on the Scheduling Calendar title or on the numbers to the right of the title.

## Scheduling Calendar

[New Event](#)
[Edit Event Types](#)
[Edit Attendee Statuses](#)
[Edit Page](#)

Today's Date: [June 09, 2004](#)



June 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2 8:00AM MDT <a href="#">Weekly Staff</a>	3	4	5
6	7	8	9 8:00AM MDT <a href="#">Weekly Staff</a>	10 10:00AM MDT <a href="#">Friar Woods hike</a>	11 All day -- <a href="#">Therapists Convention</a>	12
13	14	15	16 8:00AM MDT <a href="#">Weekly Staff</a>	17 11:00AM MDT <a href="#">In-service Training</a>	18	19 12:00PM MDT <a href="#">Company Picnic</a>
20 9:00AM MDT <a href="#">DFT Board Meeting</a>	21	22	23 8:00AM MDT <a href="#">Weekly Staff</a>	24	25 4:00PM MDT <a href="#">Reindance Phone Conference</a>	26
27	28	29	30 8:00AM MDT <a href="#">Weekly Staff</a>	1 11:00AM MDT <a href="#">In-service Training</a>	2	3
Sun	Mon	Tue	Wed	Thu	Fri	Sat

<a href="#">Go To</a>	<a href="#">May 2004</a>	<a href="#">July 2004</a>	<a href="#">Go To</a>
<a href="#">December 2003</a>	S M T W T F S	S M T W T F S	<a href="#">August 2004</a>
<a href="#">January 2004</a>		4 5 6 7 8	<a href="#">September 2004</a>
<a href="#">February 2004</a>	2 3 4 5 6 7 8	11 12 13 14 15 16 17	<a href="#">October 2004</a>
<a href="#">March 2004</a>	9 10 11 12 13 14 15	18 19 20 21 22 23 24	<a href="#">November 2004</a>
<a href="#">April 2004</a>	16 17 18 19 20 21 22	25 26 27 28 29 30 31	<a href="#">December 2004</a>
	23 24 25 26 27 28 29		
	30 31		

Go  \* Go Today




[Calendar Preferences](#)

### Calendar Navigation

To view the details on any calendar item, click on its underlined name. A summary giving the Event Time, Location, Event Type, and full Event Details will be presented. Selecting the edit icon  returns the original data entry page, where you may make any changes needed. Clicking the delete icon  removes this event from the calendar.

The date displayed in the dark bar at the top of the schedule identifies the date to which the schedule applies (date defaults to the present day). On either side of the date are arrows allowing quick navigation to previous and future days. The Today's Date link returns you to the present day, if you are currently displaying a past or future schedule.

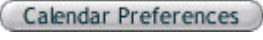
The schedule view defaults to the view set through the Calendar Preferences button (see **Using Calendar Preferences** below). To temporarily change views to display an entire week or entire month, use the three buttons on the upper right.

-  Displays the entire current month
-  Displays the entire current week
-  Returns to the current day

Below the schedule are miniature calendars of the present, preceding and next month with links to jump back or forward five months, making the entire twelve-month schedule easily accessible.

You may also select any specific date and enter it into the field below the miniature calendars or use the Go Today button to return to today's schedule if you have been viewing other dates.

## Using Calendar Preferences

The Calendar Preferences button  opens a screen with options to set display variables for your My Office schedule and the calendar view in Office Manager.

### Calendar Preferences

---

#### Time Zone

All times displayed on the calendar will be converted to the time-zone you specify.

(GMT-07:00) Mountain Time

#### Calendar Opening View

Select the view you want to start in when you go to calendar. This setting will not change your current calendar view.

Month View

#### Typical Work Day

Select the hours that start and end your typical work day. These settings determine the minimum amount of time represented on the Day View of the calendar.

8am to 5pm


#### Interval on Day View

Select the time interval for the Day View of the calendar.

30 min.

## Time Zone

For events to record accurately for your location, it is important to set the Time Zone field. When set properly, events that are scheduled in other time zones will auto-correct for time differences when seen on your schedule. For instance, you may be party to a telephone conference at 10:00 AM Eastern Time. If your time zone is two hours behind Eastern Time, the event will display at 8:00 AM on your schedule.

 **Important Note about Time:** When you are setting up a new computer to use with the BlueStep System, it is critical that you set the time and time zone correctly on the computer's clock **before** accessing any BlueStep sites.

The BlueStep database interacts with your computer settings when you access any page for the first time. If the time and time zone are incorrect on the computer, the database will store the wrong information about your organization. Such things as medication administration times and staff timecard entries will retain the wrong data, based on your machine's incorrect initial settings.

## Calendar Opening View

The Calendar view seen in Office Manager is set in this field. Please note that it does **not** reset the schedule view as seen on the My Office Schedule (Today) or the screen that is accessed from the Schedule link. Month, Week and Day Views are available.

## Typical Work Day

This field lets you customize the span of hours that will be shown on the daily schedule. The span selected for the sample schedule page seen above is 8 AM to 5 PM.

## Interval on Day View


You may set the time intervals displayed during the day with this field. The schedule may be divided into 10, 15, 20 or 30 minute periods or into one-hour intervals. The interval selected for the sample schedule page seen above is 30 minutes.

## New Events

Prior to entering any new events, the Event Types and Attendee Status lists need to be created. Organization Administrators or those who are familiar with your organization and its planning practices are usually the best qualified to decide the content of these two lists.



## Event Types

The Edit Event Types button























 opens a screen that will let you enter and save each new type, which then appears on a list similar to that shown below. You should have at least one type, but may add as many others as needed.

 One useful method to organize event types is to select those that correspond to groups, departments or branches in your organization. Another is to select types that correspond to specific functions or operations in your organization. As with all creation screens, please remember to click the Done button  at the bottom of the screen.

## Scheduling Calendar


 Reorder 


### Event Types

Event Type Name	Edit	Delete
Administration Meeting		
Medical Meeting		
Therapist's Meeting		
Board Meeting		
Conference		
Convention		
Client Activity		
Company Holiday		
Government Holiday		
Client Field Trip		
Corporate Retreat		



## Attendee Statuses

For many events that your organization holds, you will want to track attendance. The Edit Attendee Statuses button allows you to create a customizable list based on the need you have for attendance statistics.















 Attendee Statuses can be used to monitor staff creation, attendance and participation in events, for instance. In that case, you would list such items as, "Initiated Event", "Organized Event", "Attended Event", "Conducted Event", etc. Or it may be your organization's policy to charge residents based upon their request for or attendance at various events. In that case, you would list such items as, "Requested Meeting", "Requested, but did not attend", "Attended", "Participated", etc.

 Types and Statuses need to be created only once in the system. When this is done, these items become available for use in entering any subsequent new Events. Types and Statuses are easily added, edited or deleted at any time, by those with the proper permissions. This means that the Scheduling Manager can always respond to the changing calendar requirements of your organization.

## Scheduling Calendar

 Reorder 


### Attendee Statuses

Attendee Status Name	Edit	Delete
Committed		
Cancelled		
Assigned		
Available		
Unavailable		
Attending		
Schedule Conflict		



## Adding New Events

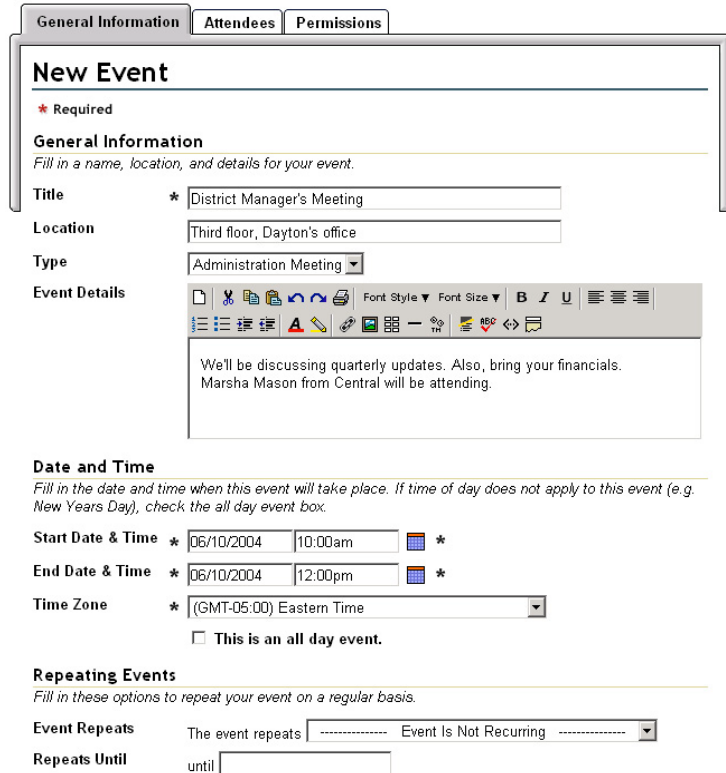
To add a new event to the calendar, click the New Event button

. On the resulting screen, the event Title, Start Date & Time, End Date & Time and Time Zone fields are required. All others are optional.

Under General Information, choose a title for your event, type in its location and select a type from the list previously created (see **Event Types**, above). The editor box is a place where you can enter all details pertinent to the event, such as a speaker's name, materials required, appropriate graphics, links to documents stored on your site or elsewhere available on the Internet, etc. Icons are available to perform standard word processing functions, such as font style and size, text colors, bulleting, inserting tables, etc.



If you choose to add a graphic to the Event Details, the recommended size is 200 X 200 pixels or 1.4 X 1.4 inches.



**General Information** Attendees Permissions

### New Event

\* Required

**General Information**  
*Fill in a name, location, and details for your event.*

Title \* District Manager's Meeting

Location Third floor, Dayton's office

Type Administration Meeting

**Event Details**

Font Style Font Size B I U

We'll be discussing quarterly updates. Also, bring your financials. Marsha Mason from Central will be attending.

**Date and Time**  
*Fill in the date and time when this event will take place. If time of day does not apply to this event (e.g. New Years Day), check the all day event box.*

Start Date & Time \* 06/10/2004 10:00am \*

End Date & Time \* 06/10/2004 12:00pm \*

Time Zone \* (GMT-05:00) Eastern Time


This is an all day event.

**Repeating Events**  
*Fill in these options to repeat your event on a regular basis.*

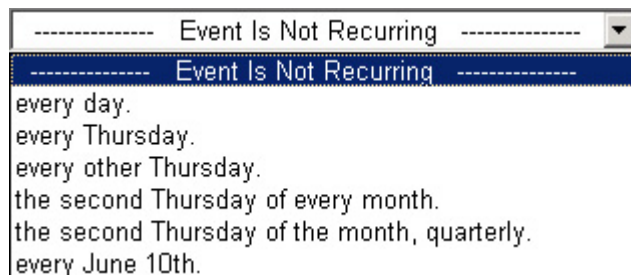
Event Repeats The event repeats Event Is Not Recurring

Repeats Until until

Under Date and Time, enter the start and end dates and the time for each, then check to be sure the time zone field is correct for your time zone, so that events will record accurately on organization-wide calendars. There is also a box to indicate that an event lasts for a full day.

 When set properly, events that are scheduled in the Office Manager will auto-correct for time differences when seen on all attendee's schedules. For instance, if your office is hosting a telephone conference at 10:00 AM Eastern Time and participants are in a time zone a two-hours behind Eastern Time, the event will display at 8:00 AM on the participant's schedule.

Under Repeating Events, you can identify those meetings, classes and appointments that regularly reoccur and place them on the schedule with a single new event submission. The drop-down in the Event Repeats field has several options, based upon either the day you have entered in the Start Date & Time or on the current date. As in the illustration below, if you have selected June 10<sup>th</sup>, which is also a Thursday, the options include repeating the event on every June 10<sup>th</sup>, on various Thursday possibilities or every day.



Event Is Not Recurring

every day.

every Thursday.



every other Thursday.

the second Thursday of every month.

the second Thursday of the month, quarterly.

every June 10th.

If there is an end to the event recurrence, enter the date in the field provided below the Event Repeats box, labeled Repeats Until.

 If you do not select specific attendees at this point, be sure to click the Save button  when finished with the New Event page.

### Attendees

If attendees have not been selected for a specific event, the calendar function places the event on the Office Manager calendar, but does not distribute it to any user's My Office schedules. To add this event to individual calendars seen through My Office, click the Attendees tab to the right of General Information. If you have already saved the event, access it again through the edit icon , then go to Attendees. Using the New Attendee button on the upper right, you may add as many or as few attendees to the event as you wish from a My Relationships screen.

### Select a Record




#### My Relationships


Source:

- My Relationships
- Groups
- All Staff
- All Clients
- All Inquiries
- All Discharged Clients
- All Responsible Parties
- All Care Partners
- All Non-Care Partners

-  Collapse All  Expand All
- [Andrew Aaronson](#)
    - Who is Andrew over?**
      - Andrew is Staff over [Gail Grady](#)
        - Who is Gail under?**
          - [Andrew Aaronson](#) is Staff over Gail
        - Andrew is Staff over [Karl Koelberg](#)
        - Andrew is Supervisor over [Darla Draper](#)
        - Andrew is Supervisor over [Jeremy James](#)
        - Andrew is Supervisor over [Laura Linn](#)
        - Andrew is Supervisor over [Oliver Overson](#)
      - Who is Oliver under?**
        - [Betty Bronson](#) is Staff over Oliver
        - [Andrew Aaronson](#) is Supervisor over Oliver
    - Andrew is Supervisor over [Ron Randle](#)
      - Who is Ron under?**
        - [David Dunston](#) is Staff over Ron
        - [Andrew Aaronson](#) is Supervisor over Ron


The options on this screen allow you to select from any category of individuals, by clicking on the category name in the Source drop-down. The relationship tree for the chosen category will display on the main part of the page and you may click on any underlined individual shown there to add them as an attendee.

This will return you to the Attendees screen, as shown below, where you may select a status from the drop-down (see **Attendee Statuses**, above). The Remove button  deletes all attendees from the event. To delete a single individual, click the delete icon  opposite the individual's name. Remember to click Save  when done and you will be returned to the main calendar view, where the new event will be shown.

Friar Woods hike		
Name	Status	Remove
Aaronson, Andrew	Attending	
Grady, Gail	- Select a status -	
Carlson, Cliff	Available	
James, Jeremy	Attending	
Hammond, Harry	Schedule Conflict	


### Shared Files

The Shared Files pagelet displays the five (5) most recently posted documents by title and document name. To directly access the document, click on the underlined title/name. To view the complete list of files, click on the Shared Files section title or the numbers to the right of it. To

view any jpeg images or gif graphics contained in Shared Files in a slide show format, click on the slideshow icon  at the bottom of the list (also see **Slideshow**, below).


**Shared Files** 5 of 7...

[Ostrich egg photo \(Ostrich2.jpg\)](#)  
[Armenian carved vase \(vase1.jpg\)](#)  
[Update News June 2004 \(Update News June 2004.doc\)](#)  
[Troubleshooting Guide \(Troubleshooting Guide.doc\)](#)  
[HQ FAQs 2004 \(HQ FAQs 2004.doc\)](#)



### Working with Shared Files

On the main Shared Files page, you will find a list and description of every file that has been uploaded through HQ™ for your organization, which also includes the size of the file, the name of the person who posted it and the date it was uploaded. These files can be accessed, edited, deleted, locked or unlocked, organized into folders and rearranged to meet your organization's information needs.



















 The image below is from the standard Shared Files (List) format. If your Administrator has changed the format from List to Icon, the page will appear with each folder or file represented by an icon and the associated function icons displayed below it. See **Edit Page – Shared Files in Administrative Options**, below, for details and illustrations. Please note that all of the following functions are applicable, the page is simply displayed in a different layout.

Any of these columns may be visible or hidden, depending upon the permissions level you have been granted. For instance, if you have Reader permissions, the Delete column will not appear, since deleting requires Editor permissions. Additionally, a column, such as Description, may be hidden if no file descriptions have been entered for any file. Also, any file or folder may be visible or hidden to you, depending upon the security assigned to that specific file or folder.

## Shared Files





[Add File](#) [Add Multiple Files](#) [New Folder](#) [Edit Page](#)









 [Collapse All](#)  [Expand All](#)

	Description	Size	Posted By	Modified	Slides	Versions	Lock	Reorder	Edit	Delete
 Root Folder										
 Contracts										
 <a href="#">Business Partner.doc</a>	Business Partner	140 KB	Andrew Aaronson	07/08/2004						
 <a href="#">Subcontractor.doc</a>	Subcontractor	51 KB	Andrew Aaronson	07/08/2004						
 Images										
 <a href="#">Ostrich2.jpg</a>	Ostrich egg photo	7 KB	Andrew Aaronson	07/08/2004						
 <a href="#">Vase1.jpg</a>	Armenian carved vase	15 KB	Andrew Aaronson	07/08/2004						
 <a href="#">Mini jewel box.jpg</a>	Miniature Rose Jewel Box	39 KB	Andrew Aaronson	07/08/2004						
 <a href="#">HQ Quick Guide 2004.doc</a>	HQ Quick Guide 2004	89 KB	Andrew Aaronson	07/08/2004						
 <a href="#">A4DS User Set-up Process.doc</a>	A4DS User Set-up Process	51 KB	Andrew Aaronson	07/08/2004						
 <a href="#">General Intro &amp; FAQs 2004.doc</a>	Introductory Chapter	1149 KB	Andrew Aaronson	07/08/2004						
 <a href="#">Troubleshooting Guide.doc</a>	Troubleshooting Guide	819 KB	Andrew Aaronson	07/08/2004						
 <a href="#">Update News June 2004.doc</a>	Update News June 2004	472 KB	Andrew Aaronson	07/08/2004						


[Instructions for accessing Shared Files via Web Folders \(WebDAV\).](#)

## File Navigation

Each folder, if it contains any documents or subfolders, has an expand icon  next to it. Clicking it will display all the documents or folders within that folder and change the expand icon to a collapse icon . To close the folder, click the collapse icon. If you wish to expand or collapse all folders on the page, click either the Expand All or Collapse All tabs  **Collapse All**  **Expand All**.

You may access any document, graphic or file contained on the Shared Files tree, by clicking on its underlined name. To open the slideshow, click on the slideshow icon  (see **Slideshow**, below). To work with document version control, if you have purchased this option (see **Document Versioning**, below), click on the version icon  to the right of the posted date. The locked and unlocked icons   allow you to perform file locking or unlocking functions, if you have been granted the proper permissions. You may reorder any file or folder on the Shared Files tree using the two reorder icons   (see **File and Folder Reordering**, below). To edit the original File Upload page for any given document, click the edit icon  opposite the document's name. If you wish to entirely delete the document, click the delete icon .

## Slideshow

The slideshow icon  at the bottom of the Shared Files pagelet allows you to view graphic files in a slideshow version. On the main Shared Files page, magnifier icons appear opposite all files. If you click on any magnifier icon, all the files contained in that specific folder will be displayed, starting with the one you clicked.

If you would like to see every file in every folder, click the icon across from the root folder, then click the  **Include Sub-Folders** box at the bottom of the slideshow screen, see below. The images will each appear, one after another, centered on the slideshow screen, formatted according to your choices in speed and size.

**Images**      Speed:       Size:      


---



[Miniature Rose Jewel Box](#)  
(3 of 3)

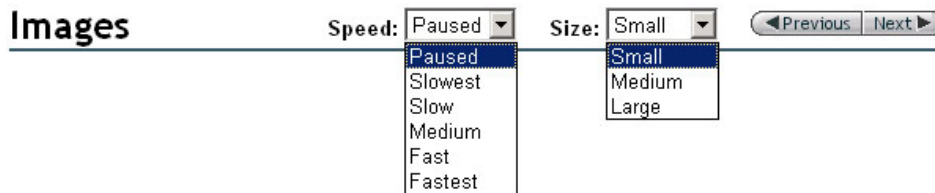
---

Include Sub-Folders     

 Any files that are not graphical format or are unsupported by the browser (Internet Explorer™, etc.), will appear as only as an icon representing Word, Excel or other program, not as images of the document. The slideshow was designed to produce images from graphical files only.

The slideshow options for image display speed are accessed from the Speed drop-down and include: Paused, Slowest, Slow, Medium, Fast and Fastest. The options for image display size


are accessed from the Size drop-down and include: Small, Medium and Large. The Previous/Next button moves your view forward or backward by one image.




### Document Versioning

By purchasing Document Versioning, members/users/employees can make edits and additions to any document, while maintaining the integrity of the original version and tracking data on each of the updated versions. With every version, administrators gain valuable insight into the importance of specific issues to users, along with their comments and changes.

To apply versioning to a document, you must upload the file to your Shared Files using the Add File button, the Add Multiple Files button or through Web Folders (see **Adding Files and Data Vault using WebDAV**, below). The enable versioning box  **Enable Version Control** appears on the bottom of the File Upload screen, which you may check at this time or at any time in the future.

If the file has already been uploaded, you may turn on versioning by finding the document title on the Shared Files listing, then clicking the edit icon  to the far right of the title. On the Edit File screen, click the Enable Version Control box, followed by the Save button. With Version Control enabled, you or anyone in your organization with Editor level permissions can perform version controlled edits to that document.

### Using Version Control

To use versioning for any document, be sure that Version Control has been enabled. Click on the version icon  to the right of the document name. This brings up the Version Directory.

## HQ Quick Guide 2004.doc Version Directory

[Manage Lock](#)

Version	Name	Size	Posted By	Date
1	<a href="#">HQ Quick Guide 2004.doc</a>	92 KB	Jan Walker	08/09/2004

Click on the underlined name of the document. If this document has multiple versions, you may click on any version in order to re-edit that version. Re-edited versions will always appear at the

bottom of the list when saved.

Save the document to your hard drive or file system (opening a file from Shared Files without saving to disk is 'View Only' – no screen changes are recorded). Make whatever changes are desired throughout the document while it is on your computer.

While you are working with this document, it is effectively locked from use by any others (see **Locking and Unlocking**, below). If someone else desires to edit the same document at the same time, they may make edits on the copy contained on their own computer, but will not be able to upload them to shared files until the lock you have in place through your use has been released.

### HQ Quick Guide 2004.doc Version Directory Manage Lock

Version	Name	Size	Posted By	Date	Delete
1	<a href="#">HQ Quick Guide 2004.doc</a>	92 KB	David Patey	08/09/2004	
2	<a href="#">HQ Quick Guide 2004.doc</a>	91 KB	Jan Walker	08/09/2004	

### Uploading the New Version

When you are finished with your edits, you are ready to upload the new version to Shared Files. Go to the Shared Files screen and click the edit icon associated with the document with which you are working. On the resulting Edit File screen, use the Browse button Browse... to find the new version. Select the version and make any other changes needed on the edit screen.

General Information Permissions

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### Edit File

Current File: [HQ Quick Guide 2004.doc](#)

Updated File:  Browse... (Max upload is 20 MB)

Rename To:

File Location:

File Description:


Enable Version Control    [Version Directory](#)

Click the Save button when done and the new version will be added to the Version Directory screen.

### HQ Quick Guide 2004.doc Version Directory Manage Lock



Version	Name	Size	Posted By	Date	Delete
1	<a href="#">HQ Quick Guide 2004.doc</a>	92 KB	David Patey	08/09/2004	
2	<a href="#">HQ Quick Guide 2004.doc</a>	91 KB	Jan Walker	08/09/2004	
3	<a href="#">HQ Quick Guide 2004.doc</a>	90 KB	Elise Rasband	08/09/2004	

Once a document version has been created, the versioning data, both in the document and on the Version Directory screen, cannot be changed. You may always check out the document again and make further edits, creating a new version, but the existing text, Version number, Size, Posted By, and Date information is permanent.

 To view any of the versions without checking out for editing purposes, simply click on the underlined document name.

### Locking and Unlocking Files

The locking/unlocking feature of Shared Files exists to prevent several users from making multiple file/folder changes simultaneously, some of which would override or supersede others, without regard to the permission status of the user or the importance of the edits.

Locked folders or files are designated on the Shared Files screen by the locked icon ; unlocked folders or files are designated by the unlocked icon , seen opposite the file or folder name.

The lock function of Shared Files operates under a series of universal rules from the WebDAV protocol (not designed by BlueStep), which all WebDAV-compliant systems must follow. These can be stated as a series of conditions, as described in BlueStep terminology.

### Lock Types

There are four kinds of locks: **Primary, Secondary, Dependent-on-Parent, Dependent-on-Child.**

Locks, like BlueStep permissions, depend upon a hierarchical structure. The 'Parent' in Dependent-on-Parent refers to a folder that is in a direct line above the subject file/folder. The 'Child' in Dependent-on-Child refers to a file or folder that is in a direct line below the subject folder.

- ▶ A **Primary Lock** is the only type of lock a user may add or remove. A Primary Lock fully restricts every modifying action (except by the lock owner) concerning the file/folder, but not viewing. A Primary Lock may be activated by the author of a file/folder and removed by the same person. Additionally, anyone with Editor permissions for this particular resource may also unlock the file. All other lock types are added/removed through the functioning of this lock.
- ▶ A **Secondary Lock** restricts every modifying action, but must be unlocked from the Primary Lock position
- ▶ A **Dependent-on-Parent Lock** is a secondary lock and restricts deletion, renaming or moving of files or folders. However, all other modifying actions (editing, new content, locking, changing permissions, adding files or folders, etc.) are allowed.
- ▶ A **Dependent-on-Child Lock** is a secondary lock and restricts deletion, renaming or moving of folders, changing permissions and recursive locking. All other modifying actions (editing, new content, adding files or folders to a folder, etc.) are allowed.

### Locks and Locking Performance

Locks and their performance are affected by:

- ▶ The type of resource being locked – folder, file or versioned file
- ▶ The person who currently owns the specific lock on this resource
- ▶ The process (BlueStep™ Shared Files web interface, Microsoft Office™, Web Folders, WebDrive, etc.) being used at the time of locking
- ▶ The permission level of the person working with the resource
- ▶ The type of lock that is applied to this resource

## Locking Interface

Different locking interfaces are employed by every WebDAV compliant software application. All Microsoft Office 2000™ (and later) products lock a file when they open it and unlock it by closing. In WebDrive™, locking and unlocking is controlled through a tab on the Properties dialog box, after locking has been specifically enabled. Other residents/programs/processes support some form of locking and unlocking, but the interface and its functioning is controlled by the structure of the program and its specific configuration on your computer, not by BlueStep.

## Locking Files

A fully locked (Primary or Secondary Lock) file or versioned file is restricted in regards to adding content, editing, deleting, renaming, moving location and changing permissions. A versioned file can be locked by anyone with at least Author permissions. Non-versioned files require Editor permissions of the locking individual. A fully locked file results in other types of locks being activated on other file(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject file back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that are direct line, remain unlocked.


## Locking Folders

Any locking of folders must be done by users with at least Author permissions. A fully locked folder results in other types of locks being activated on other folder(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject folder back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that *are* direct line, remain unlocked.

Folders may be locked either recursively or non-recursively. For a Recursive Lock, a Secondary Lock is created for all sub-folders and sub-files below the subject resource, flowing *down* through all levels of the hierarchy. For a Non-Recursive Lock, a Dependent-on-Parent Lock is created for all files and folders on the level immediately below the subject resource, but not for any hierarchical levels below the immediate level.



## Unlocking Files and Folders

If you are the lock owner for the lock on any given resource, you may unlock the resource whenever and from wherever (from Shared Files, Web Folders, WebDrive, etc.) desired. You will always be able to go to BlueStep™ Shared Files and unlock it from there, in case the other processes have operated or closed abnormally. Users with Editor permissions may override locks, no matter who owns the lock.

 *If at any time you receive an on-screen message stating that a particular function cannot be performed with a file/folder in a Web Folder or if a Web Folder function fails to operate, go directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item.*

Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.

## Shared Files Manage Lock Screen

The Manage Lock screen is accessed from the lock/unlock icons   in BlueStep's Shared Files page and the Manage Lock link on the Version Directory. The Manage Lock screen is divided into two basic areas, Locks Affecting This Folder and Available Actions.

The Locks Affecting This Folder section is informational in nature. You may see what locks, if any, apply to what file or folder functions and who owns the lock.



The Available Actions section lists varying checkboxes that you may use to work with the lock. If you are not the lock owner, there may be no actions available to you, in which case, you would need to contact the lock owner for assistance in making file or folder changes.

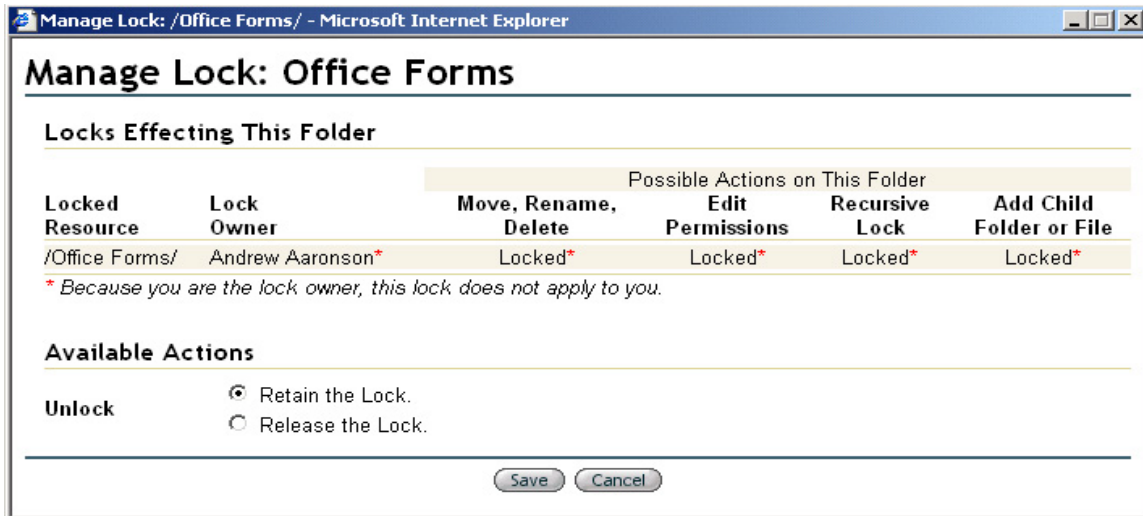
The Manage Lock screen can display many variations for each file/folder within the Shared Files system. This makes for dozens of possible informational combinations on the screen. A couple of basic screens are displayed below.

### Example 1 – A Non-Locked Folder



This Manage Lock screen is for a folder entitled Office Forms. When no locks are present, you will see the No Locks notation under Locked Resource and that the actions Move, Rename, Delete, Edit Permission, Add Recursive Lock and Add a Child Folder or File are available, if you so choose. There are two locking actions that you may select under Available Actions. The first is a lock on the folder, the second makes the lock a recursive lock, if it was activated. These two checkboxes operate in tandem, depending upon the selections made.

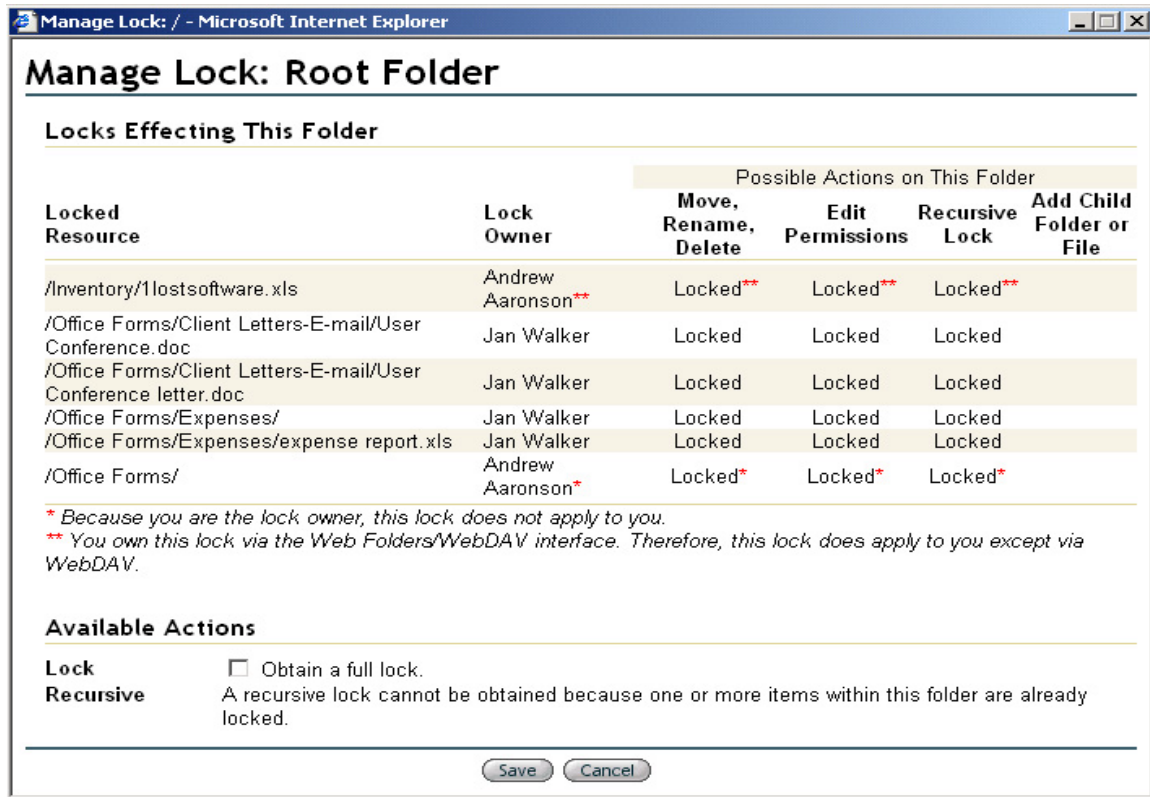
### Example 2 – A Locked Folder, as seen by the lock owner



This screen is for the same folder as above, but displays the lock information. If you are the lock owner, red asterisks \* explain that the locking functions will not prevent your actions, only those of others. If you are not the lock owner, no asterisks will appear and you will see that your only

recourse is to contact the lock owner for release of the lock. If you have Editor permissions, you will see locking override under Available Actions and will be able to proceed with unlocking.

### Example 3 – Multiple Locks in Shared Files, as seen from the Root Folder



By going to the Root Folder in Shared Files, you can see all the locks throughout the Shared Files system. There are dozens of possible locking configurations, depending upon the number of files/folders and the factors listed above under Locks and Locking Performance, such as type of resource being locked, the lock owner, the type of lock used, etc.

### Data Vault using WebDAV

WebDAV support is integrated into many of the latest operating systems on current computer systems and networks. When files and folders are stored on a remote server, such as those in BlueStep's Shared Files modules, the WebDAV protocol allows users of Windows, Mac or UNIX computers to access these items with the same ease as accessing the desktop on the user's own computer. BlueStep™ platform-tailored version of WebDAV is named Data Vault.

Data Vault, similar to Microsoft's Web Folders, may only be used with operating systems and programs that have WebDAV support. These include Windows™ 98/2000/NT/ME/XP and Microsoft Office 2000™ (including later versions). Mac OS X™, Goliath™ for Mac OS 8.1, WebDrive™, Adobe GoLive™, Macromedia Dreamweaver™ and many others also support WebDAV.

### Data Vault Functions

Data Vault provide several distinct advantages and valuable benefits, including:

- Drag-and-Drop functionality between user's computer and online shared files
- Multiple uploads and downloads of files and folders
- File and folder locking to prevent simultaneous updates by multiple users

- Easy availability and integration with the user's desktop
- Same online username/password for Data Vault access as for BlueStep access
- No need to use a browser for direct access of online files\*

*\* There are some advanced file and folder functions within Team™, Connect™ and HQ™ that only BlueStep sites support. You will still need to use a browser to perform these functions.*

In HQ™, any file may be posted through an online browse-and-upload procedure. Using Data Vault WebDAV, any file or folder may be added to Shared Files, accessed, moved, edited and deleted using a drag-and-drop method (or other standard keyboard cut-and-paste technique). You may use either method (browser-based or desktop) at any time to perform these functions - using one does not preclude using the other when it is more convenient to do so.

### Creating Data Vault

Users of BlueStep™ products may have access to one or many Shared Files, depending upon the number of Teams, Connect™ sites or HQ™ systems available through their organizations. For each Shared File you would like to have available on your desktop, you will need to create a Data Vault. Once a vault is created for a specific Shared File page, you need never do so again. The Data Vault will be available on your desktop (or other area in your file system) and continue to reflect the current state of the online Shared Files unless you disconnect the vault.

At the bottom of each Shared Files page in BlueStep™, you will see a link [Instructions for Accessing via Web Folders \(WebDAV\)](#). Open this link and find the instructions that apply to the system you are using. Instructions are included for Windows 2000, XP, 98, NT, Mac OS X, Mac OS 8.1 or Dreamweaver.

Any operating system may be configured in a variety of ways on any given computer. We have made every effort to offer instructions that are specific, yet point you in the correct direction should your OS vary from the usual set up. The important item in the instructions is the link (beginning with "http..."). Please be sure to copy-and-paste or type it into the appropriate field *exactly* as shown, excluding quotation marks.


### Using Data Vault

Once you have created a desktop Data Vault (instructions include adding a vault shortcut to your desktop in most cases, but you may place it anywhere desired in your file system), you may open it and use any of several methods to add, delete or move files, including drag-and-drop, Ctrl C/Ctrl V, etc. Any actions that you take in the desktop vault will also occur within the Team™, Connect™ or HQ™ Shared Files pages.

As noted above, there are some advanced file and folder functions within Team™, Connect™ and HQ™ that only BlueStep sites support. You will still need to access the Shared Files pages online in order to perform these functions. They include: setting file and folder permissions and overriding a file lock. Additionally, most WebDAV residents (Windows, GoLive, etc.) will also not allow you to create a slideshow or use advanced locking capabilities, so you will also need to access the Shared Files pages online for these features. You will need to explore the capabilities of your specific WebDAV resident and its configuration to determine which features are available to you, as they are not exclusive to BlueStep and not controlled by our Data Vault interface.

### Securing Data Vault


As with all BlueStep™ products, security is one of the prime concerns. All permissions and locks available on the standard Shared Files pages are in force in the Data Vault. For instance, online Shared Files that you do not have permission to edit will still be unavailable for editing when contained in the Web Folder. Any folders that are locked in Shared Files will still be locked in the Data Vault. Conversely, any permissions you have been granted to the files/folders in Shared Files will also be fully granted in Data Vault.


 If at any time you receive an on-screen message stating that you may not perform a particular function with a file/folder in a Data Vault or if a Data Vault function fails to operate, go directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item.

Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.



### File Moving


You may wish to move a file from one folder to another. This is accomplished either through Data Vault, as described above in **Data Vault using WebDAV and Web Folders**, or the Shared Files screen through online functions.


On the Shared Files screen, start by clicking the edit icon  associated with the file. In the resulting pop-up window, click the drop-down for File Location. All folders in the Shared Files system will appear and you can select the new location for the file. Click the Save button when you are satisfied with the selection.


In some cases, you may receive the error message  Duplicate name: \_\_\_\_\_. Please choose another name or location for this file. This is caused by attempting to move a file into a folder containing an existing file of the same name. To correct this, either change the name of the folder or move it to another folder where there will be no naming conflict.

### File and Folder Reordering

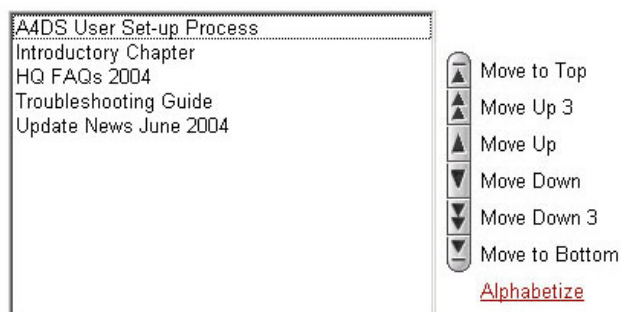
You may change the order in which files and folders appear on the Shared Files tree. Any document that you post will become the last file in its selected folder. Any folder you create will become the last folder in the root folder or the last sub-folder within an existing folder. You can move folders into any order and move their contents into any order by using the two reorder icons  .

The reorder files icon  will appear to the right of all folders on your Shared Files tree. Click it for a pop-up window displaying any documents/graphics that are in that folder, along with the movement function keys. If there are no files inside this folder, the pop-up will be blank. In that case, either there is nothing in the folder at all or the folder only contains other folders.

The reorder folder icon  will appear to the right of all folders on your Shared Files tree. Click it for a pop-up, example at right, that contains the list of all folders, along with the movement function keys. If there are no folders inside this folder, the pop-up will be empty. In this case, either there is nothing in the folder at all or the folder only contains files.


 The reorder folder function is particularly useful in the case of the icon associated with the root folder. Using it will reorder the main folders in your system to a format that is meaningful to you and your organization.

### Order





To select multiple items **click-and-drag** or press **Ctrl** while clicking.

### Editing Files

The edit icon  may be used to edit any file, assuming you have the correct permissions to perform that function for the specific file. The edit icon opens a pop-up window very similar to the

New File screen, on which you can rename the file, change its location (to the root folder or any other existing folder) or provide a different file description. See the example below and also see **Adding Files**, below, for comparison.

 *Editing files from the edit icon **does not** allow you to change the content of the file. To edit content, open the file and save it to a local drive on your computer. Open it from the local drive and make any editing changes desired.*

In some cases, you may receive the error message  **Duplicate name: \_\_\_\_\_**. Please **choose another name or location for this file**. This is caused by one of two (2) operations:

- Attempting to **rename** a file of the same name as an existing file in the current folder
- Attempting to **move** a file into a folder containing an existing file of the same name

To correct this, either change the name of the file or move it to another folder where there will be no naming conflict.


### New Files and Folders

New files and folders may be added to HQ™ Shared Files through either the Web Folders application, as discussed above, or the Shared Files screen through online functions.

The Shared Files page always contains a root folder, created when HQ™ was configured for your organization. Any other files and folders that appear on the page have been added to the root by administrators or by users in the organization who have the proper permissions. Whether you are an administrator who is initially creating the folders/files for the Shared Files page or a user adding new files to an existing Shared Files tree, the same process is used to build and populate Shared Files.

### Adding Folders

To effectively store files, it is most likely you will want to sort them into folders. Organization Administrators or those who are familiar with your organization and its data storage needs are usually the best qualified to decide which folders are needed and in what order they should appear.

To add a folder, click the New Folder button  on the upper right. On the New Folder screen, enter a title for the folder as desired. The Folder Destination drop-down allows you to select any of the folders that exist in your Shared Files tree as a destination for the new folder. If there have been no other folders created, only the Root Folder will show in the drop-down. If you want the new folder to be one of the major folders in the system, select Root Folder as its destination. If you want it to be a sub-folder of an existing folder, click on the appropriate folder name.

General Information Permissions

## New Folder

\* Required




**General Information**  
Enter the name of the new folder.


Folder Name \*

Folder Destination \* --Root Folder--

\* Required

- Root Folder--
- Sales Team Folder
- Client Implementation
- Client Proposals
  - Proposal Templates
  - Completed Proposals
- Client Contracts
  - Contract Templates
  - Completed Contracts
- Client Licenses
  - License Templates

When done, click Save. The new folder will appear on the Shared Files tree at the bottom of the root folder or the bottom of the selected destination folder. You may reorder the folders now or at any time in the future using the reorder icons  (see **File and Folder Reordering**, above). You may also at any time rename the folder or move its destination to the root or another folder by clicking the edit icon  that appears opposite the folder name. To delete the folder entirely **and all its contents**, click the delete icon  associated with it.


In some cases, you may receive the error message  **Duplicate name: \_\_\_\_\_**. Please **choose another name or location for this folder**. This is caused by one of four (4) operations:

- Attempting to **create** a folder using the same name as an existing folder in the current folder
- Attempting to **create** a folder using the same name as an existing file
- Attempting to **rename** a folder the same name as an existing folder in the current folder
- Attempting to **move** a folder into the current folder, which contains an existing folder of the same name

To correct this, either change the name of the folder or move it to another folder where there will be no naming conflict.

### Adding Files

Once any necessary folders have been created, you may upload files to store in them. Any files you wish to add to Shared Files must exist somewhere on your computer, on a CD in your CD drive, on a floppy disk inserted in your floppy drive or accessible through network connections.

Click the Add File button  at the upper right of the Shared Files screen. On the New File screen, seen below, click the Browse button. This will open a pop-up window displaying files, folders, drives and networks on your computer, allowing you to navigate to the file you wish to upload. If the file does not exceed 20 megabytes, click on the file name, which will place it in the File to Upload field. If you choose to have the file known by a different name in Shared Files from the original name in the source, type the new name into the Rename To field.

The File Location drop-down displays a list of all folders in your Shared files tree. You may select any folder to contain the document or select Root Folder if the document is to be outside the created folders. In either event, the file will upload as the last item in the selected folder or the Root Folder. Enter a description in the File Description field, if desired.

If you have purchased the Version Control option, you may select to enable versioning at this point or return to this screen later to enable versioning (see **Document Versioning**, for details).

In some cases, you may receive the error message **! Duplicate name: \_\_\_\_\_**. Please choose another name or location for this file. This is caused by one of three (3) operations:

- ▶ Attempting to **upload** a file that already exists under this name in the current folder
- ▶ Attempting to **rename** a file the same name as an existing file in the current folder
- ▶ Attempting to **move** a file into a folder containing an existing file of the same name

To correct this, either change the name of the file or move it to another file where there will be no naming conflict. Also note that folders may not be named the same as an existing file name.

### File Permissions

By default, file security is inherited from the permissions set on the Shared Files screen or from higher in the organization structure. If you desire to set security for this specific file separate from other files, click the Permissions tab. On the resulting screen you may choose from any of five (5) permissions settings using the radio buttons.

General Information **Permissions**

### Permissions

Use this page to control the level of access to content and functionality. Think in terms of publishing an article in a newspaper: "Readers" can view content, "Participants" can respond to the content, "Authors" can create new content, and "Editors" can modify or remove all the content in the newspaper.

[Add Group](#) [Add User](#)

	No Access	Reader	Participant	Author	Editor	Remove
All Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Everyone	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
HQ Licensees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Registered Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Unit Admins	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

**Legend**

Default Permission    Overridden Permission    Reset to Default    Remove  
 New Permission    Cannot Remove

[Save](#) [Cancel](#)

Additionally, using the Add Group and/or Add User buttons allow you to provide specific access to this document for people and groups other than those listed, such as All Staff, Everyone, HQ Licensees, etc., as seen above. Remember to click the Save button when done. Also see **Permissions in Administrative Options**.

Click the Upload button [Upload](#) at the bottom of the screen. The maximum upload size for any file is 20 MB. Please be patient. Large files could take several minutes to complete, particularly if being pulled from a floppy disk or through a network connection.

**Please click the Upload button only once.** Clicking it more than once may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

When loaded, you may reorder the files using the reorder icons (see **File and Folder Reordering**, above). You may also at any time rename the file or move its destination to the root or another folder by clicking the edit icon that appears opposite the document name. To delete the file entirely, click the delete icon associated with it.

### Multiple File Upload

If you have several files to upload at once, the Add Multiple Files button [Add Multiple Files](#) or the multiple files link [Add Multiple Files](#) will speed the process. The button is available on the upper right of the Shared Files screen. The button and link are both seen on the File Upload screen.

This screen functions similarly to the individual File Upload screen (see **Adding Files**, above), allowing you to browse your computer for the needed file, select a location and add a description. However, there is no function to enable version control for any of these files at this time. After the files have been uploaded, you may reenter the files individually from the Shared Files screen. Using the edit icon, enter the Edit File screen, then click  **Enable Version Control**. See **Document Versioning**, above.




## Multiple File Upload

Select the files to upload and type in a description. Large files could take several minutes to complete. After your upload is finished, the next page will appear.





Files to upload (max upload is 20 MB for all files)	Location	Description
C:\Documents and Settings\jwalker\ Browse...	Manuals	Getting Started, Chapter 1
C:\Documents and Settings\jwalker\ Browse...	Manuals	Graphics
C:\Documents and Settings\jwalker\ Browse...	Root Folder	Cheat Sheet
C:\Documents and Settings\jwalker\ Browse...	Contracts	Pricing
C:\Documents and Settings\jwalker\ Browse...	Root Folder	Partners
Browse...	Root Folder	
Browse...	Root Folder	
Browse...	Root Folder	
Browse...	Root Folder	
Browse...	Root Folder	

Upload Cancel

As you are selecting the files you need (up to ten (10) at a time) verify that the megabyte total does not exceed 20 MB. If it does not, click the Upload button  at the bottom of the screen. Please be patient. Large files could take several minutes to complete, particularly if being pulled from a floppy disk or through a network connection.



*Please click the Upload button only once.* Clicking it more than that may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

When loaded, you may reorder any individually files using the reorder icons   (see **File and Folder Reordering**, above). You may also at any time rename the files or move the destination to the root or another folder by clicking the edit icon  that appears opposite each file name. As above, you may also enable version control from the Edit File screen. To delete a file entirely, click the delete icon  associated with it.



## Step-by-Step in Office

### Adding New Events

- Click the New Event button
- Enter a title and location. Select a type from the drop-down,
- Enter any event details, start date/time, end date/time and time zone or repeating data.
- Click the Save button
- To add attendees, see below

### Adding Attendees

- Click New Event button and create an event or select an existing event using the edit icon
- Click the Attendees tab
- Click the New Attendee button

- Select a category of individuals from the Source drop-down
- Click on the desired name
- Select a status from the Status drop-down
- Click the Save button when done adding all attendees

#### **Adding New Files**

- Click the Add File button
- Click the Browse button
- Navigate to the file you wish to add, click on its name
- Type a new name, if wish the file to be know by a different name than the source document
- Select a location from the drop-down
- Enter a file description, if desired
- Check Enable Version Control, if desired (only available if this option has been purchased)
- Click the Upload button and be patient

#### **Enabling and Using Document Versioning** (Only available if your organization has purchased this option)

- From the Shared Files screen, click the Add File button or select an existing file from the list using the version or edit icon
- Check the Enable Version Control box
- Click Upload if this is a new file or click Save if this is an existing file
- Click on the underlined name of the desired file
- Save to your computer
- Make any edits necessary, then save the document on your computer
- Navigate to the Shared Files screen
- Click the edit icon for the document you are working with
- Click the Browse button
- Select the edited file, then click Upload



# HR/Staff

The HR/Staff module serves as a single, centralized place to store and track all data associated with your full-time and part-time employees. While forms and fields for data storage may be added and customized to fit your specific needs, the staff default allows for the recording of many types of information, including personal data (such as, birthday, social security number, marital status, languages spoken, etc.), employment information (dates, salary, contract, notes, etc.), employee-earned certifications, work and personal goals, employee contact information, personal contact reference data, brief medical records (immunizations, blood type, medical conditions, etc.) and job performance reviews.

## Adding New Staff

Start by clicking the 'Add New Staff' in the HR/Staff module. This provides access to a series of four (4) screens in which information is entered, saved and stored in the staff member's record. On each page, enter as much data as is known, then click the Next button at the bottom of the screen. On the fourth screen, click the Save button. The system will take you to the Record Summary, titled with the employee's name. You may access other forms to add any additional information or to edit existing information from the Navigation Menu at the left.

Aaronson, Andrew

Information

Record Summary

Use this page to get a quick snapshot of this record. To edit the information on this page, use the links on the left.

**Information**

- ▶ Summary
- Personal Information
- Certifications
- Contact Information
- Employment Information
- Goals
- Immunizations
- Medical Information
- Online Profile
- Performance Review
- Personal Contacts
- Personal Info

**Work with this Record**

- Relationships
- Change Record Category
- Change Unit
- Remove User Account
- Delete Record

**Personal Information**

Name, First	Andrew
Name, Last	Aaronson
Email Address	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>

**Certifications**

Certification Name	Date Issued	Date Expires

**Contact Information**

Home Phone	(718) 234-4567
Mobile Phone	(718) 456-7890
Work Phone	(718) 345-6868

**Employment Information**

Employment Type	Full-Time
Date Hired	04/05/1991

**Goals**

Title	Date Initiated	Date Due
<a href="#">Increase bottom line</a>	08/08/2001	12/30/2001
<a href="#">Pharmacology Update</a>	04/04/2003	07/07/2003

**Immunizations**

Immunization	Date
<a href="#">Hepatitis B</a>	04/04/2003
<a href="#">MMR</a>	09/09/2002

**Medical Information**

Medical Conditions	Injured Achilles tendon
--------------------	-------------------------

**Online Profile**

Username	andrew
----------	--------

**Performance Review**

Date	Title
<a href="#">07/01/2003</a>	Promotion
<a href="#">01/04/2003</a>	Yearly
<a href="#">10/10/2002</a>	Job Upgrade
<a href="#">07/01/2002</a>	Half-year
<a href="#">01/04/2002</a>	Yearly

**Personal Contacts**

Last Name	First Name	Company	Work Phone
<a href="#">Aaronson</a>	Amber	Bestway	(817) 234-5678
<a href="#">Aaronson</a>	Arthur	Green Belt Products	(234) 234-2345

**Personal Info**

Birth Date	03/04/1955
------------	------------

**Recent Records**

- [Aaronson, Andrew](#)
- [Grady, Gail](#)
- [Draper, Darla](#)
- [Bronson, Betty](#)
- [Eakins, Emma](#)
- [Foster, Frank](#)
- [Dunston, David](#)
- [Norris, Nolan](#)

## Changing Record Categories

If a record in the HQ™ system needs to be moved from one category to another, the Change Record Category link will allow the move without reentering the data or loss of information. This is particularly important if a staff member has been discharged.

On the staff member's record, click the Change Record Category link on the Navigation Menu. The resulting screen will show the current categories and the data collection forms within those categories. Mouse over the Add Category link to see a drop-down of the categories that may be added to the record. See the example below.

**Change Record Category**

Use this form to change the categories to which a record belongs. Categories can be used to group similar and to capture additional information about the record.

**Inquiry**

Prospective Clients

[Contact Information](#)

[Inquiry](#)

[Personal Info](#)

- User
- Staff
- Responsible Party
- Care Partner
- Non-Care Partner
- Client
- Discharged Client

Click the appropriate category name. If there are fields of required information for the selected category (which have not been filled out for this individual) the forms containing those fields will be presented for you to complete. (If there are additional forms, but none of the fields are required to meet the category provisions, the record summary will appear.) Click the Save button  when done with any additional forms and you will be returned to the record summary.

In the rare instance when there is reason to delete a previous or unwanted category from a record, click the Remove button to the right of the unneeded category. You may always check an individual's category by clicking this link and viewing the listed category.

## Changing Units

If a record in the HQ™ system needs to be moved from one unit to another, the Change Unit link will allow the move without reentering the data or loss of information.

### Change Unit

Use this form to change the unit that this record "belongs to." This allows you to move a record when an employee changes departments, a member changes chapters, etc.

**Record** Bronson, Betty

**Moving From** Consumer Education Association

**Move To**


- Consumer Education Association
- CEA Product Divisions TEAM Unit
- CEA Mobile Education Division Unit
- CEA MECOP Unit Admin
- CEA HNIIT Division Unit
- CEA Video Division Unit
- CEA Audio Division Unit
- CEA Technical Unit
- CEA Overlapping Unit

Click the Change Unit link on the record navigation menu.

The resulting screen, example above, displays the record name, the current unit and presents a drop-down listing all available units in your organization. Click on the new unit name, then the Save button. You may always check an individual's unit by clicking this link and viewing the listed unit.

## Removing User Accounts

To deny login access without damaging a record or data, such as in the case of a former employee, remove the User Account for the individual. This allows you to retain data, such as employment records, but do not want the individual or organization to continue having access to your system.

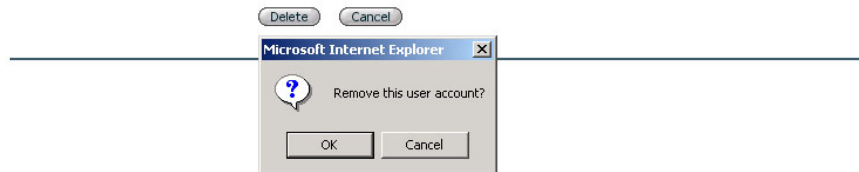
Click on the Remove User Account link on the Navigation Menu. The resulting screen displays the record name. Be sure the name is correct before clicking the Delete  button. A pop-up verifier will appear prompting you to reconsider this decision, as it will completely and immediately block the user's access to the system. If you are sure you want to proceed, click the OK button.


## Remove User Account

*Use this page to remove a user's online account. The user's Relate information will remain intact, but the user will be unable to access the system.*

Caution: Removing a user account will block a user's access to the system.

User account to remove: Bronson, Betty



In certain instances, you may receive the red text message **"This user account cannot be removed, because it is in use in other parts of the system."** If that message appears, a list of User Groups appears below the text. Click on each of the underlined group names, such as [Food Service](#) in the example below. Each link will take you to a User Group, where you can delete the individual's membership in the group, using the delete icon .

When all memberships have been deleted, you may return to this record summary and proceed removing the user account, as described above.

## Remove User Account

*Use this page to remove a user's online account. The user's Relate information will remain intact, but the user will be unable to access the system.*

Caution: Removing a user account will block a user's access to the system.

User account to remove: Bronson, Betty

This user account cannot be removed, because it is in use in other parts of the system:

[Food Service](#)

## Deleting Records

On rare instances, it may become necessary to entirely remove a record from the system, such as when duplicate records appear. This should be considered most carefully before proceeding.

Click on the Delete Record link on the record navigation menu. On the resulting screen, please take note of the red warning message **"Caution: Deleting this record is permanent."** If you proceed and delete this record, it will be permanently and irrevocably gone from the system. There is no way to undo the delete. If you find you do need the record after having deleted it, the only option is to recreate the record from the beginning again.

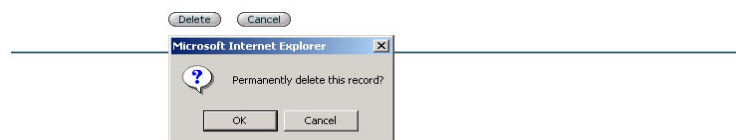
If you are certain you want to proceed with the deletion, click the OK button on the pop-up verifier.


## Delete Record

Use this page to remove a record from Relate. Deleting this record will remove all data from all forms. This operation cannot be undone.

Caution: Deleting this record is permanent.

Record to Delete: Dunston, David



In some cases, you may receive the red text message “This record cannot be deleted, because it is in use in other parts of the system.” If that message appears, a list of User Groups appears below the text. Click on each of the underlined group names, such as [Recreational](#), [Organization Administrators](#), [Groundskeeping](#), etc. in the example below. Each link will take you to a User Group, where you can delete the individual’s membership in the group, using the delete icon .

## Delete Record

Use this page to remove a record from Relate. Deleting this record will remove all data from all forms. This operation cannot be undone.

Caution: Deleting this record is permanent.

Record to Delete: Aaronson, Andrew

This record cannot be deleted, because it is in use in other parts of the system:

- [Organization Administrators](#)
- [Groundskeeping](#)
- [Recreational](#)
- [HQ Administrators](#)
- [Therapy](#)

When all memberships have been deleted, you may return to the record and proceed with removing the record, as described above.

## Viewing and Selecting Staff

The Select Staff link under the manager icon gives you access to the All Staff screen, which lists every member of your organization who has been designated “Staff” (a member of the Staff record category). The page gives you a snapshot of the records of each individual, with a [Select](#) link to open each record summary.

### All Staff

Select	Name, Full	Email Address	Date Hired	Social Security Number
<a href="#">Select</a>	Aaronson, Andrew	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	04/05/1991	345-67-8909
<a href="#">Select</a>	Bronson, Betty	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	05/05/1999	456-78-9098
<a href="#">Select</a>	Carlson, Cliff	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	12/12/2002	345-67-8909
<a href="#">Select</a>	Dunston, David	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	10/10/1990	345-34-3456
<a href="#">Select</a>	Eakins, Emma	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	08/09/2000	234-56-7890

The All Staff screen is set to alphabetize by last name as a default. You may click on any underlined column titles to reorder the records by Date Hired, Social Security Number or E-mail Address.

\* The display columns seen on this page were selected at the time HQ™ was configured for your organization. They may be changed by someone in your organization with a Relate™ license or by BlueStep™, upon request.

### Using a Search

If you have a long list of staff members, the Search function will be a useful timesaver in locating the record needed.

**All Staff**


Search By: Name, First (selected), Name, Last, Social Security Number

Starts With: Starts With (selected), Contains, Ends With, Sounds Like, Equals, Not Equals, Greater Than, Less Than, Greater Than or Equals, Less Than or Equals

Search For: [ ] Search

The Search By field contains a drop-down list of the fields on which you may conduct the search. In the example above, click on the down arrow, then on First Name, Last Name or Social Security number.

The next field (Starts With is the first selection) contains a much longer list of possible search operators. Select one of these options, then proceed to the Search For field.

Type an identifier (the name, partial name or number, in this case) for which you are searching and click the Search button .

The page will repaint with the records that most closely match your search criteria. Click the [Select](#) link and proceed to work with the record.



## Step-by-Step in HR/Staff

### Adding New Staff

- Click the Add New Staff link under HR/Staff on the home page or secondary navigation bar
- Enter required and optional data on the data entry screens, clicking the Next button after each

- Click the Save button

### **Searching for Staff Records**

- Click the Select Staff link under HR/Staff on the home page or secondary navigation bar
- Choose a Search By criterion from the first drop-down
- Select a criterion from the second drop-down
- In Search For, enter a name, partial name or number (depending on the Search By choice)
- Click the Search button

### **Editing Staff Records**

- Perform a search, as described above
- Click the Select opposite the desired record
- On the record navigation menu, locate and click the title of the form containing the information you desire to edit
- Scroll to the correct field and type in any changes
- Click the Save button
- Select any other sections and fields to edit, saving each time





# Marketing/Leads

The Marketing/Leads module is designed to track and store information about prospective residents, their statuses, general and specific marketing activities, staff relationships with prospective customers and to provide a launching pad for future marketing strategies and individual marketing/sales tasks.

## Using the Preview Page

The Preview screen consists of a web page that is available for administrators or marketing personnel to post comments, articles, guidelines, instructions or text of any sort. The pagelets may also contain shared files, Media Library items, site links and merge reports that have been built in Relate™ and added to the HQ Structure. The purpose of this page (additional pages may be added) is to provide a single place where the sales/marketing staff can share documents, ideas and information pertinent to the entire group.

## Lead Search

Clicking on the Lead Search link opens a page from which you can add a new lead to the system or search for and select an existing lead.

[Add Lead](#)

● Next task is scheduled  
▼ Next task is NOT scheduled  
✘ Task is PAST DUE

[Edit Page](#)   [Export](#)   [Print](#)

**Lead Search (Open)**

Search By: Last Name   Starts With   Search For:    [Search](#)


Search within current results

Select	Phase/Status	Primary Contact	Resident	Lead Source
<a href="#">Select</a> ✘	Create 1st Task B Lead		<a href="#">Filmore, Terry</a>	<a href="#">Internet: Google Search</a>
<a href="#">Select</a> ●	Post-Tour B Lead	<a href="#">Barry, Russon</a>	<a href="#">Russon, Margerie</a>	<a href="#">Public relations: Magazine Write-Up</a>
<a href="#">Select</a> ▼	Deposit Made A Lead	<a href="#">Ronald Busby</a>	<a href="#">Busby, Ronald</a>	<a href="#">Public relations: Magazine Write-Up</a>
<a href="#">Select</a> ●	Pre-Tour A Lead	<a href="#">Richard Morris</a>	<a href="#">Morris, Ricky</a>	


## Adding a New Lead

Administrators or marketing staff begin by clicking the Add Lead button [Add Lead](#) at the upper right of the Lead Search screen. On the resulting screens, enter as much information on the 'Name and E-mail' form as is known, then select the Save button. The screen will repaint with the Record Summary/Inquiry Information form. There are six (6) sections on the Inquiry Information form, two (2) of which, Primary Contact and Resident Contact, can be expanded and collapsed by clicking the **[+]** and **[-]** icons. Add additional information to each section as needed.

### Editing the Inquiry Information Section

On the Inquiry Information Section, data can be changed or added at any time. Manually type or select the appropriate date from the calendar icon . Activate the drop-down arrows and make selections from the option lists in the Inquiry Method, Lead Source, Decision Status, Assigned To, Lead Status and Sales Phase fields.

### Resident: Russon, Margerie

Inquiry Information	
Inquiry Date: 04/02/2009 	Lead Status: B Lead
Inquiry Method: Walk In	Who Took Inquiry: Jan Walker
Lead Source: Public relations: Magazine Write-Up <input type="button" value="Go"/>	
Decision Status: Consulting with Family	
Assigned To: Admin, Anita <input type="button" value="Go"/>	Sales Phase: Post-Tour

### Editing the Primary Contact Section

Similarly, the Primary Contact section can be edited at any time. It appears closed unless specifically opened by clicking the expand icon [+]. Complete the known information for each field. When the form is saved, the closed section will display the Primary Contact header bar, including the name entered as the contact.

[-] Primary Contact: Barry Russon	
Name: Barry Russon	Relationship: Son
Address: 1212 Buxton Place	Home Phone: (333) 444-5555
City: Fremont	Work Phone: (444) 555-6666
State: UT Zip: 84772	Mobile Phone: (555) 666-7777
Allow Contact: <input checked="" type="checkbox"/>	Fax Number: (666) 777-8888
Inquirer: <input checked="" type="checkbox"/> Mailing List: <input checked="" type="checkbox"/>	E-mail: br@nomail.com

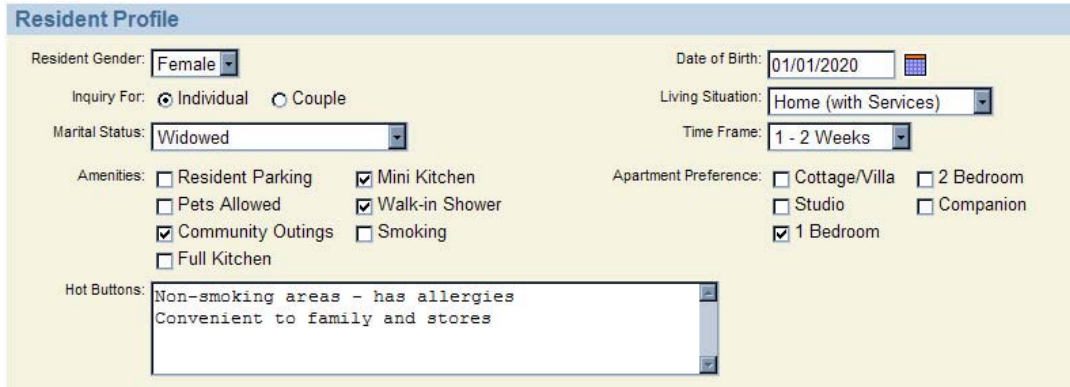
### Editing the Resident Contact Section

The Resident Contact section also appears closed unless specifically opened by clicking the expand icon [+]. Complete the known information for each field. When the form is saved, the closed section will display the Resident Contact header bar, including the name entered for the resident.

[-] Resident Contact: Margerie Russon	
Name: Margerie * Russon *	2nd Resident Name: none
Address: 1742 Dover Downs	Home Phone: (777) 888-9999
City: Silesow	Work Phone:
State: UT Zip: 84782	Mobile Phone:
Allow Contact: <input checked="" type="checkbox"/>	Fax Number:
Inquirer: <input type="checkbox"/> Mailing List: <input type="checkbox"/>	E-mail:

### Editing the Resident Profile

The Resident Profile section was designed to contain data required for success in meeting a prospective resident's needs. Make selections and enter as much data as known. The Amenities and Apartment Preference options are drawn from Option Lists that can be customized to reflect the choices available at your facility.



**Resident Profile**

Resident Gender:  Date of Birth:

Inquiry For:  Individual  Couple Living Situation:

Marital Status:  Time Frame:

Amenities:  Resident Parking  Mini Kitchen  Pets Allowed  Walk-in Shower  Community Outings  Smoking  Full Kitchen

Apartment Preference:  Cottage/Villa  2 Bedroom  Studio  Companion  1 Bedroom

Hot Buttons:

Enter detailed data into the Hot Button memo field. This information is important to finding community solutions that will make the resident comfortable in choosing your facility.

### Editing the Financial Information Section

This section provides a brief outline of financial matters pertaining to the resident's ability and desire to enter the facility. Make selections based on information obtained from the prospective resident.



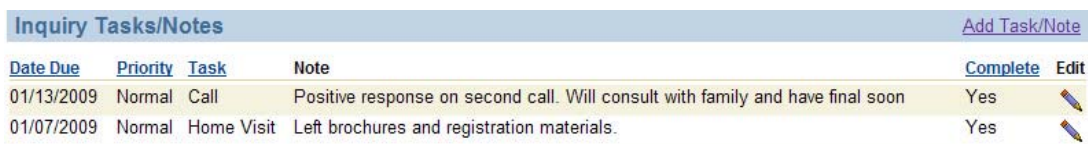
**Financial Information**

Funding Type:  Min. Budget:

Housing Ownership:  Own  Rent Max. Budget:

### Adding Inquiry Tasks/Notes

Every task can be organized and tracked using the Inquiry Tasks/Notes section. Each contact with the potential resident and the results can be recorded as a Note.



<b>Inquiry Tasks/Notes</b> <a href="#">Add Task/Note</a>					
Date Due	Priority	Task	Note	Complete	Edit
01/13/2009	Normal	Call	Positive response on second call. Will consult with family and have final soon	Yes	
01/07/2009	Normal	Home Visit	Left brochures and registration materials.	Yes	

Click the [Add Task/Note](#) link at the right of the header bar. The resulting screen will allow users to select a task, add notes, prioritize and add a deadline, as shown below.

**Tasks/Notes**

\* Required

Select Task \* Home Visit

Specify Task  
If "Other"

Note  
Left brochures and registration materials.  
Do follow-up call next week. Seems positive about the  
facility and location.

Priority  
 High  Normal  Low

Date Due \* 01/07/2009

Completed  
 Jane Wallen, 04/03/2004 2:51:40PM

Date Created 04/03/2004  
Created By Jane Wallen


Add as many tasks and notes as are needed and the report displayed on the Inquiry Information summary will list each in order. Click the Save button when completed and the screen will return to the Inquiry Information summary. When all known data has been entered into Inquiry Information, click Save so that the entries are stored in the potential resident's record.

### Updating an Existing Lead

From the Lead Search screen, edit or update an existing lead by clicking the [Select](#) link associated with the individual. Make any changes to fields on the Inquiry Information summary screen, including adding additional notes and/or tasks. Click the Save button when completed.

### Moving an Inquiry to Pending/Resident

When a contract has been signed, the Inquiry can be changed to Pending status or Resident status if the individual has moved into the facility.

Click the [Select](#) associated with the individual. In the Navigation Menu, click open the Resident Wizards folder using the expand icon .

If there is a lapse of time between signing the contract and moving into the facility, click the **Move Inquiry to Pending** link. The screen will repeat with the Resident Info form. Enter the known information and click Save at the bottom of the screen. This automatically places the individual into the Pending record category, preserving the data, but not adding him or her to the nursing and administrative reports.

If the individual is moving into the facility immediately, click the **Move Pending to Resident** link. The Resident Info form and Individual Worksheet will be presented, one after another. Fill out the data for Resident Info. Click Next at the bottom of the screen. Complete the Individual Worksheet and click Save at the bottom of the screen. This places the individual into the Resident record category and add him/her to the nursing and administrative reports.

**Russon, Margerie**

**Information**

- Summary
- Name and E-mail
- Contact Information
- General Resident
  - Resident Info
  - Responsible Party
  - Resident Wizards
    - Move Inquiry to Pending**
    - Move Pending to Resident
- Inquiry
  - Deferred/Lost Inquiry
- Lead
  - Tasks/Notes

**Work with this Record**

- Document Library
- Relationships
- Schedule
- Change Record Category
- Change Unit
- Delete Record

## Using the Move-in Financial Calculator

The Individual Worksheet contains a section that calculates the move-in fees for a resident and automatically produces a printable, signable Resident Initial Fee Agreement. The Fee Agreement may be customized by the Organization Administrator with your facility's verbiage and letterhead.


To produce this agreement, start by filling in the fields in the Move-in Financial Calculator section of the Individual Worksheet.

### Move-in Financial Calculator

*To see rate and fee totals, enter amounts below, scroll to the bottom and click Save, then reopen the form. Totals will be automatically calculated and displayed.*

*To print a signable version of this section, change the View Layout (In upper right) to "Resident Fee Agreement".*

Daily Fee	*	<input type="text" value="\$0.00"/>
Number of occupancy days	*	<input type="text" value="0"/>
<i>In move-in month</i>		
Next month's service fee		<input type="text"/>
<i>If after 21st</i>		
Community fee		<input type="text"/>
Extra Services - Meals		<input type="text"/>
- Storage		<input type="text"/>
- Parking		<input type="text"/>
- Cable TV		<input type="text"/>
- Telephone		<input type="text"/>
Other fees		<input type="text"/>
Describe extra services		<input type="text"/>
Amount previously paid		<input type="text" value="\$0.00"/>

Payment check copied or scanned  
*No file selected.*  [Document Library](#)

**Check link**

Enter the Daily Fee and Number of Occupancy Days (in move-in month). Charges for next month's service fee and a one-time community fee are optional. The extra services fields should be completed with the charge *per month* for the service.

Any other services beyond meals, storage, parking, cable TV and telephone can be grouped in the Other Fees field and described in the Extra Services memo field. If one of the default extra services is not offered or is included in the basic charges, it should be left blank. If a down payment has been made, enter the amount of the check. Review the numbers for accuracy, then click the Save button at the bottom of the screen.

When the summary screen returns, open the Individual Worksheet again and scroll to the Financial Calculator section. New calculated fields showing the multiplied daily rate, the total rent due, the pro-rated total of extra services and a final total due at move-in will be displayed.

## Accessing the Printable Resident Initial Fee Agreement

To access the Resident Initial Fee Agreement containing the entered and calculated amounts, activate the View Layout at the upper right and select 'Resident Initial Fee Agreement'. A print icon will also appear at the upper right. When printed, this form allows for resident and a facility representative to sign and date the agreement. When a check for the agreement amount is received, it may be scanned into the system using the Check Link field on the Individual Worksheet.

\* The display columns seen on this page were selected at the time HQ™ was configured for your organization. They may be changed by someone in your organization with a Relate™ license or by BlueStep™, upon request.

### Lead Sources



The Lead Sources link provides a way to track those businesses and individuals who refer prospective clients to your organization. This includes those who are professionals in your field or a related field and those who are private individuals, as well as sources such as published write-ups or Internet sites, etc. Additionally, records are categorized by current activity (currently referring/will refer) or inactive (no longer referring/have not referred).

### Viewing and Editing Professional Lead Sources (Active)

This screen, seen below, lists all active referring professionals. To edit any source record or view record details, click the [Select](#) link associated with the record.

[Add Professional Source](#)   • [Inactive Professional Sources](#)   • [Non-Professional Sources](#)

● Next task is scheduled  
▼ Next task is NOT scheduled  
✘ Task is PAST DUE

 [Export](#)    [Print](#)

**Professional Lead Sources (Active)**

Search By: Company   Starts With:    Search For:   

Search within current results

Select	Active Contact	Company	Work Phone	Category
<a href="#">Select</a> <span style="color: green;">●</span>	<a href="#">Boines, Carlin</a> Dunford, ME	Destiny Educational Services	(555) 444-3333	Rehabilitation Center
<a href="#">Select</a> <span style="color: green;">●</span>	<a href="#">Erras, Mark</a> SLC, UT	Quaified Services Inc	(333) 444-5555	Referral Agency
<a href="#">Select</a> <span style="color: green;">●</span>	<a href="#">Smith, Dalton</a> Calfax, NM	Sponsored Home Care	(888) 777-6666	Home Health

To add a source or access the other source categories, click on one of the six (6) links displayed on the Professional Lead Sources (Active) screen and other screens, • [Add Professional Source](#), • [Add Non-Professional Source](#), • [Inactive Professional Sources](#), • [Inactive Non-Professional Sources](#), • [Professional Sources](#), • [Non-Professional Sources](#)

### Adding a Professional Source

To add a source, click the • [Add Professional Source](#) link and provide the first and last name of the source individual. Click Save at the bottom of the screen and the record will be displayed, as shown below, allowing for further details to be entered. Notes may be added to this screen using the [Add Task/Note](#) link on the right end on the Tasks/Notes header bar. When all edits are complete, click Save.

## Lead Source Info (P)

View Layout: Professional Lead Source Contact

\* Required

### Professional Lead Source Contact

Name:	Dalton *	Smith *	Job Title:	Trainer
Company:	Sponsored Home Care			
Address:	321 Spencez		Work Phone:	(888) 777-6666
City:	Caffax	Home Phone:	(888) 666-5555	
State:	NM	Zip:	Mobile Phone:	(888) 555-4444
Category:	Home Health	Fax Number:	(888) 777-2222	
Status:	Active	E-mail:	ds@nomail.com	

### Tasks/Notes

[Add Task/Note](#)

Date Due	Priority	Task	Note	Complete
05/21/2009	Normal	Call	Check for questions about our service	No

## Adding a Non-Professional Source

Follow the same process for adding a non-professional source as for a professional source. The record screen will contain fewer fields and does not include separate notes, but a description field for all pertinent data, as seen below.

### Non-Professional Lead Source

Category:	Public relations *
Name/Title:	Magazine Write-Up
Start Date:	03/02/2009
End Date:	04/02/2009
Cost:	\$0.00
Status:	Active
Description:	Provider Magazine

## Viewing Sources

Active Non-Professional Sources, Inactive Professional Sources, Inactive Non-Professional Sources are accessed through links at the top of any lead source screen and report a list of the names and organizations in the specified category. Any listed person/company may be accessed by clicking the [Select](#) associated with that record.

## Reports – Closed Leads

The Reports link provides a submenu of any lead/marketing reports designed for your organization. The default report is 'Closed Leads' and lists all of those leads that were marked as 'Closed – Lost Lead' in the Sales Phase field of the record. If a lead has been marked closed in error, it may be returned to active tracking by setting the Sales Phase field to any other setting besides 'Closed – Lost Lead'.

## Tasks

Tasks are created for individuals in the Inquiry Tasks/Notes section of the Inquiry Information screen (accessed through selecting an individual on the Lead Search (Open) screen). These tasks are organized by date in four (4) ways – Today's Incomplete, All Tasks, Task Calendar–This Month, Task Calendar-Next Month.

### Task Manager – Today's Incomplete

The 'Today's Incomplete' screen (see below) displays all tasks that have been for completion by today's date and have not been marked as complete.

[View All Tasks](#) • [Task Calendar - This Month](#) • [Task Calendar - Next Month](#)

#### Task Manager - Today's Incomplete

 [Export](#)  [Print](#)

Select	Date Due	Priority	Task	Note	Contact	Complete
<a href="#">Select</a>	05/21/2009	High	Tour	Still has questions about facility convenience/rooms	<a href="#">Busby, Ronald</a> Lead	No
<a href="#">Select</a>	05/21/2009	Normal	Home Visit	Left brochures and registration materials. Do follow-up... <a href="#">More</a>	<a href="#">Russon, Margerie</a> Lead	No

### Reading and Accessing Tasks

To read further notes about the task, add further notes or mark it as complete, click the [Select](#) associated with the task. Make any appropriate changes on the screen and click Save; see below. If the task has been signed as 'Complete', it will disappear from the Today's Incomplete list.

#### Tasks/Notes

\* Required

Select Task \*   
Specify Task  
If "Other"

Note

Priority  High  Normal  Low

Date Due \*  

Completed  Signature

Date Created 03/02/2009  
Created By Jeremiah (Super) Johnson

To access the other dating formats, click on one of the three (3) links displayed on the All Tasks screen, • [View All Tasks](#), • [Task Calendar – This Month](#), • [Task Calendar – Next Month](#)



### Task Manager – All Tasks

The 'All Tasks' screen displays in the same way as the 'Today's Incomplete' screen, but includes the completed items, plus any that were scheduled for the past and are scheduled for the future.

### Task Manager – This Month

As named, this screen displays tasks that are due at any time during the current month and have not been completed.

### Task Manager – Next Month

Also as named, this screen displays tasks that are due at any time during the next month and have not been completed.




## Step-by-Step in Marketing/Leads

### Adding a New Lead

- Click the Add Lead button at the upper right of the Lead Search screen
- Enter as much information on the 'Name and E-mail' form as you know
- Select the Save button

### Editing the Inquiry Information Screen

- Manually type or select the appropriate date from the calendar icon 
- Make selections from the option lists in the Inquiry Method, Lead Source, Decision Status, Assigned To, Lead Status and Sales Phase fields
- Click the Expand icon to open the Primary Contact
- Complete the known information for each field
- Open the Resident Contact section by clicking the expand icon
- Complete the known information for each field. When the form is saved, the closed section will display the Resident Contact header bar, including the name entered for the resident
- Enter detailed data into the Hot Button memo field and remaining fields
- Make selections based on information obtained from the prospective resident
- Click the [Add Task/Note](#) link at the right of the header bar
- Select a task, add notes, prioritize and add a deadline
- Add as many tasks and notes as are needed
- Click the Save button when completed

### Updating an Existing Lead

- On the Lead Search screen, click the [Select](#) link associated with the individual
- Make any changes to fields on the Inquiry Information summary screen
- Adding any notes and/or tasks
- Click the Save button when completed

### Moving an Inquiry to Pending/Resident

- Click the [Select](#) associated with the individual
- In the Navigation Menu, click open the Resident Wizards folder using the expand icon
- If the resident is NOT moving into the facility immediately, click [Move Inquiry to Pending](#) link
- Enter the known information into the Resident Information screen.
- Click Save at the bottom of the screen
- If the individual is moving into the facility immediately, click the [Move Pending to Resident](#) link
- Enter the appropriate information into the Resident Info and Individual Worksheet forms
- Click Save at the bottom of the screen

### Using the Move-in Financial Calculator

- Fill out the fields in the Move-in Financial Calculator section of the Individual Worksheet
- Charges for next month's service fee and a one-time community fee are optional
- The extra services fields should be completed with the charge *per month* for the service
- Group services beyond meals, storage, parking, cable TV and telephone in the Other Fees field and describe in the Extra Services memo field
- If one of the default extra services is not offered or is included in the basic charges, it should be left blank
- If a down payment has been made, enter the amount of the check
- Review the numbers for accuracy, then click the Save button at the bottom of the screen
- Reopen the form
- Activate the View Layout at the upper right and select 'Resident Initial Fee Agreement'
- A print icon will appear at the upper right
- Resident and a facility representative should sign and date the agreement
- Scan any check received into the Check Link field

### Adding a Professional or Non-Professional Lead Source

- Click the • [Add Professional Source](#) or • [Add Non-Professional Source](#) link
- Enter the requested data
- Click Save at the bottom of the screen and the record will be displayed, as shown below, allowing for further details to be entered
- Notes may be added to this screen using the [Add Task/Note](#)
- Click Save



# Resident

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The Resident module provides an efficient record keeping and retrieval system for information on your organization's residents. Through the resident module, all data on each resident is stored in easy-to-use forms, highlighted and accessible through Record Summary screens. All forms and summaries are HIPAA compliant, with complete security and permissions control available for each page, form and field. Staff relationships with the resident, as well as with other residents, responsible parties, care partners and non-care partners are created, documented and editable. In conjunction with Service Manager records, Resident Manager paints a complete, accurate and fully-functional portrait of each individual, which can be accessed anytime needed, day or night.

## **Adding a New Resident**

The 'Add New Resident' link takes you to a series of three (3) screens in which information is entered, saved and stored in a resident's summary record. The screens ask for a basic level of data - general information, home and work contact information and personal information. When saved, the data becomes available in a Record Summary, titled with the resident's name. From the Navigation Menu, any forms, reports or wizards may be accessed to add any additional information or edit existing data. Memo fields are available to track the notes of actions, decisions, activities, any additional information or conversations, with the client, staff, family, consultants and other providers.

The illustration on the following page displays the 'Face Sheet' style of Record Summary. If another summary configuration is desired, contact your BlueStep Implementer and he/she will be glad to assist you.

Newman, Nikki

**Information**

- Summary
- Name and E-mail
- Contact Information
  - General Resident
  - Medications
  - Daily Nursing Forms
  - Medical
  - New Mexico State Forms
  - Family Connect

**Work with this Record**

- Document Library
- Relationships
- Schedule
- Change Record Category
- Change Unit
- Delete Record

## Record Summary

Nikki Newman



### Resident Identification

Current Date: 06/09/2009

Date of Birth: 11/30/1900  
 Age: 108  
 Social Security #: 000-00-0000  
 Medicare #: 111223333A  
 VA Benefits: No  
 Additional Insurance: Deseret Mutual  
 Policy #: 565652658  
 Group #: 5626  
 Rx Insurance: Deseret Mutual  
 Policy #: 565652658  
 Group #: 5626

Room #: 101A  
 Location #: W Wing - Alzheimer's  
 Phone #: (211) 333-5555  
 Admission Date: 05/05/2007  
 Final Discharge Date: [Move/Trans Date](#)  
 No Records Found  
 Move/Transfer Info: [Type Move/Trans](#)  
 No Records Found  
 Forwarding Address: [Forward mail to:](#)  
 No Records Found

### Medical Data for Nikki Newman

**Code Status: Resuscitate**  
 Do Not Resuscitate Order: [Document Library doc](#)  
 Adv Health Care Directive: [Document Library doc](#)  
 End of Life Directive: [Document Library doc](#)  
 Document Type: *[no data]*  
 Past/Current Medical Conditions: **Hallucinations, Chronic cough, Fainting/dizziness, Hallucinations**  
 Other Health Concerns: *[no data]*  
 Surgeries: *[no data]*  
 Diagnosis on current prescriptions: **Diabetes, Sleeplessness, Irregular heartbeat**  
 Medical Devices: *[no data]*  
 Allergies: **Sulfa, PCN Shellfish**  
 Dietary Needs: **small portions requested**

**Medication Contraindications: Aspirin**  
 Primary Care Physician: Dr. Cory  
 Phone: (211) 232-6565  
 Other Provider: Dr. Dennison  
 Service/Specialty: *[no data]*  
 Phone: (211) 232-6565  
 Dentist: Dr. Tavoian  
 Phone: (435) 586-0123  
 Optometrist: *[no data]*  
 Phone: (435) 586-0123  
 Audiologist: Dr. Sully  
 Phone: (435) 586-0123  
 Physical Therapist: Dr. Hall  
 Phone: (211) 232-6565  
 Pharmacy: 4Care Pharmacy  
 Phone: (801) 336-3690  
 Fax: (801) 336-3001

### Contact Persons for Nikki Newman

Full Name	Relationship to Resident	Type of Contact	Home Phone	Cell Phone	Work Phone
Connie Newman	Daughter	Emergency contact	(211) 333-5566		
Dennis Newman	Son	Emergency contact	(211) 666-7777	(211) 666-8888	
Joye Newman	Daughter	Emergency contact, Financially responsible party, Main family notification	(211) 999-1111	(211) 211-2222	
Marva Newman	Daughter	Emergency contact	(211) 222-3333	(211) 333-4444	

### Preferences for Nikki Newman

Religious Preference: **Christian**  
 Clergy: *[no data]*  
 Phone: *[no data]*  
 Other Friend/Leader: *[no data]*  
 Relationship: *[no data]*  
 Phone: *[no data]*

Home Care/Hospice: **Roswell Hospice**  
 Phone: (211) 333-4444  
 Hospital: **Roswell General**  
 Phone: (211) 333-4444  
 Mortuary: **Rest In Pieces**  
 Phone: (211) 333-4444

### Medications Administered Today to Nikki Newman

Medication	Dosage	Date/Time Administered
Creation Date: 08/01/2008		
Colace (Docusate Sodium)	100 mg	08/01/2008 9:34AM
Bisacodyl	5 mg	08/01/2008 9:34AM
Lortab (C2)	20 mg	08/01/2008 9:34AM
Prozac	20mg	08/01/2008 9:34AM

### Current Medications for Nikki Newman

Medication	Dosage	Administration Instructions	Rt of Admin	Administration Type	Sched Admin Time
Acetaminophen	325mg	Take 2 tabs every 4 hours as needed for pain	01 Oral (PO)	Regularly administered	
Bisacodyl	5 mg	Take 1 tablet if not had a bowel movement in 2 days	01 Oral (PO)	PRN (as needed)	<b>12:00pm</b>
Colace (Docusate Sodium)	100 mg	Give with plenty of water	01 Oral (PO)	PRN (as needed)	<b>5:00pm</b>
Lortab (C2)	20 mg	Give with plenty of water, twice daily	01 Oral (PO)	Regularly administered	<b>8:00am, 8:00pm</b>
Lunesta	3mg	Take one tablet at bedtime	01 Oral (PO)	Regularly administered	<b>7:00pm</b>
Prozac	20mg	BID	01 Oral (PO)	Regularly administered	<b>8:00pm</b>

### Current ADL Assistance/Level of Care for Nikki Newman

Medication: Semi-Independent/Limited Assist \*  
 Bath: Semi-Independent/Limited Assist \*  
 Oral: Semi-Independent/Limited Assist \*  
 Incontinence: Semi-Independent/Limited Assist \*

Eating: Semi-Independent/Limited Assist \*  
 Dress: Semi-Independent/Limited Assist \*  
 Diet: Significant/Total Assist  
 Vitals: Semi-Independent/Limited Assist \*

### Vital Signs/Last 60 Days for Nikki Newman

Time	Blood Pressure	Heart Rate	Respiratory Rate	Temperature	Weight	Glucose	O2 Sats	O2 /min	Observations
Date: 06/23/2008									
3:39PM	115/95	66.0	25	97.7	110.0				
Date: 03/14/2008									
8:04AM	115/94	67.0	25	98.7	110.0				
Date: 03/03/2008									
3:00PM	119/94	63.0	32	98.4	110.3				
Date: 02/27/2008									
8:47AM	123	63.6	20	100.0					
1:23PM	123	63.6	20	100.0					
8:46PM	123	63.0	25	100.0					

End of data for Nikki Newman

## Selecting a Resident

The 'View/Select Resident' link under the Resident module provides access to the All Residents query screen, which lists every individual within your organization who has been designated a "Resident" (a member of the Resident record category). The page gives you a snapshot of the records of each individual, with a [Select](#) link to open each record summary.

### All Residents


 [Print](#)

Search By: Last Name | Starts With | Search For:

Search within current results

Select	Preferred Full Name	Move-In Date	Birth Date	Room/Bed #
<a href="#">Select</a>	Armstrong, Isabelle	05/07/2007	09/22/1930	
<a href="#">Select</a>	Benson, Annie	12/15/2003	08/23/1923	101B
<a href="#">Select</a>	Fukugawa, Nona	10/18/2007	04/10/1909	
<a href="#">Select</a>	Madsen, Wanda	06/26/2009	06/26/1909	
<a href="#">Select</a>	Newman, Nikki	05/05/2007	11/30/1900	101A
<a href="#">Select</a>	Stokes, Carl	08/18/2005	01/09/1930	129


The All Residents screen is set to alphabetize by last name as a default. You may click on any underlined column title to reorder the records. In the above example, Home City and Home Phone columns are available to reorder.

 The display columns seen on this page were selected at the time HQ™ was configured for your organization. They may be changed by someone in your organization with a Relate™ license or by BlueStep™, upon request.

## Using a Search

If you have a long list of residents, the Search function will be a useful timesaver in locating the record needed.

The Search By field contains a drop-down list of the fields on which you may conduct the search. In the example above, you would click on the down arrow, then on First Name, Last Name or Social Security Number.

 All Residents


Search By: Name, First | Starts With | Search For:

- Name, First
- Name, Last
- Social Security Number

- Starts With
- Contains
- Ends With
- Sounds Like
- Equals
- Not Equals
- Greater Than
- Less Than
- Greater Than or Equals
- Less Than or Equals

The next field (Starts With is the first selection) contains a much longer list of possible search operators. Select one of these options, then proceed to the Search For field.

Type an identifier (the name, partial name or number, in this case) for which you are searching and click the Search button . The page will repaint with the records that most closely match your search criteria. Click the [Select](#) and proceed to work with the selected record as desired.


 The fields available for search under Search By were selected at the time HQ™ was configured for your organization. As above, they may be changed by an individual with a Relate™ license or by BlueStep™, upon request.

## Discharging a Resident

Under many circumstances, residents will eventually become discharged residents. You will need to change their records from the Resident category to the Discharged Resident category. This can be done through in the record Navigation Menu on the record summary page for each individual.

Administrators may effect a resident discharge in two ways: using the 'Discharge This Resident' wizard or the 'Change Record Category' link. The wizard allows for recording of move-out or transfer information, including the date of discharge. This is the preferred method of discharging a resident, as it communicates data to other portions of the system and discontinues resident processes. Changing the record category shuts off those items that are category-dependent only. Relate™ training is recommended if you desire to use the change category method.

## Discharging through Discharge Wizard

Begin by selecting the correct record from the 'Select/View Residents' screen. On the Navigation Menu, click the Expand icon  next to the 'Resident Wizard' folder, if it is not already open. Click the 'Discharge This Resident' link.

The resulting page, example at right, has fields to cover many types of move-outs or transfers. It is, therefore, rather long with multiple sections. Enter the information appropriate for the resident's current situation; do not be concerned about those fields that are not applicable to the move-out/transfer.

Several fields contain decision-making data that you will want to consider. The date entered in the 'Move/Trans Date' field will be the discontinuance date listed on many reports and controlling several operations. It defaults to the current date and can be edited to the actual date, if necessary.

Clicking 'Yes' on the 'Discontinue Medications' field will automatically convert all active medications for this resident to discontinued meds and remove them from the MAR. Once a medication is discontinued, it cannot be returned to 'active' status; it must be manually reentered into the system. If there is a possibility of the resident returning to the facility, select 'No' in this field. In that case, the MARs will continue to be created for this resident each day and the nursing staff will need to mark the MAR exceptions field as 'Absent'. When the resident returns, however, all medication records will still be in place and will **not** need to be reentered into the system.

## Discharge This Resident

**MOVE-OUT/TRANSFER**

\* Required

Move/Trans Date \* 07/02/2009

Type of Move/Transfer Medical Transfer

Family notified  Notified of move-out or transfer

Specify family member notified Carlson Cane

Discontinue Medications? \*  No  Yes

Reasons for move/transfer Arrhythmia

List destination and address Robson Memorial Hospital  
1717 Jenkins Ave  
Sylvester, Robson

Forward mail to: Hold for return

New phone

Method of transfer Ambulance

Relocation assistance provided

Written notice of move/transfer  Given to resident/responsible party

Personal property Describe disposition of property at move/transfer. Unchanged

List refund(s) owed to resident None

Post-Residence Survey link  
Respite only

**Emergency Medical Transfer Only**

M.D. Issuing Orders Dr. Portland

Orders to Nursing Staff  Transfer orders received

Administrative Staff  Notified of orders

Specify Admin Staff Notified Adrienne Jensen

**Physician Arranged Admission to Medical Facility**

Transfer Checklist  Physician arranges admission to medical facility  
 Family completes admission with hospital  
 Hospital Admissions notifies us of bed availability  
 Nursing staff arranges for transfer  
 Transfer completed

**Send Documentation to Hospital**

Documentation Checklist Mark each when sent

<input checked="" type="checkbox"/> Current Labs	<input checked="" type="checkbox"/> Resident Info Form
<input checked="" type="checkbox"/> Current Medications	<input checked="" type="checkbox"/> Nursing Assessment
<input checked="" type="checkbox"/> Medication History	<input type="checkbox"/> Psychosocial Assessment
<input checked="" type="checkbox"/> Medical Information	<input type="checkbox"/> Neurological Screening
<input checked="" type="checkbox"/> Medical History	<input checked="" type="checkbox"/> Next of Kin Form
<input checked="" type="checkbox"/> Treatment Plan	<input checked="" type="checkbox"/> Transfer Form

**Status at Time of Transfer**

Resident Chief Complaint Chest pain

History of Event Oneec evening 12/2/07

Current Precautions

**Follow-Up Notifications by Nursing Staff**

Physician  Notified transfer is complete. date, time of transfer

Specify Physician(s) Notified

Administrative Staff  Notified transfer is complete. date, time of transfer

Specify Admin Staff Notified

Business Office Staff  Notified transfer is complete. date, time of transfer

Specify Office Member Notified

Hold This Room Will this Resident will be returning  No Do NOT hold this room  Yes HOLD This Room

The 'Documentation Checklist' is built from the 'Transfer Documentation' option list and may be configured to list only those items your facility records for its residents. (See 'Modifying Option Lists' in the Step-by-Step section of **Community Setup** for instructions.)

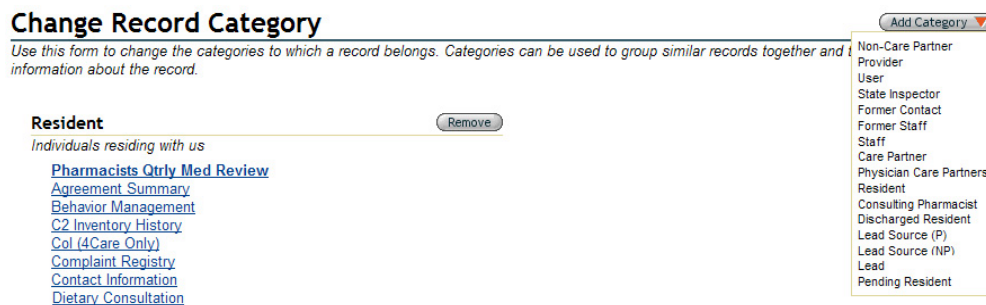
The resident's Record Summary (Face Sheet) contains a summary of the most-oft requested data that hospitals require. It can be printed from the Print link at the top right and sent with the resident, if needed. If there is additional information required by your facility, a BlueStep Implementer or Client Care Technician can make the additions on the Record Summary for you. Other forms can also be printed, if necessary, and sent to the hospital.

At the bottom of the form is an important field, called 'Hold This Room'. If 'Do NOT hold room' is selected, the room number and listing will be returned to unoccupied status and the system will allow it to be selected for another resident. If another individual is assigned to a room that should have been held, both resident's records will need to be edited in the correct order for the room to be released and reassigned.

When the appropriate fields have been completed, review the data and click the Save button at the bottom of the screen. Any medication discontinuance will be reflected in tomorrow's MAR; all other processes will take effect immediately, including an automatic change in record category.

### Discharging through Category Change

Begin by selecting the correct record from the 'Select/View Residents' screen. Click 'Change Record Category' on the Navigation Menu. On the resulting screen, partial example below, mouse over the Add Category button.



All available categories that you could choose for this record are seen on the drop-down. Click on the Discharged Residents selection. If there are fields of required information for the selected category (which have not been filled out for this individual), the forms containing those fields will be presented for you to complete. If there are additional forms, but none of the fields are required to meet the category provisions, the record summary will appear.

## Creating Temporary Warnings

Temporary Warnings are a valuable tool to communicate transient resident events or conditions that must not be overlooked by the staff. When completed, these warnings appear as a red-bordered box, either to the left or right of the resident photo, at the top of the most oft-used resident screens. See the example below.



Start creating a Temporary Warning by selecting the record of the resident for whom you wish to create the warning and click on the 'Temporary Warnings' link in the Navigation Menu. On the resulting page, example seen below, you may select from Standard Messages, Custom Warnings or a combination.

### Temporary Warnings

<b>Standard Messages</b>	<input type="checkbox"/> Suicide watch	<input type="checkbox"/> Aggression risk	<input type="checkbox"/> Extreme anxiety
	<input type="checkbox"/> Substance abuse risk	<input type="checkbox"/> Currently infectious	<input type="checkbox"/> Severe depression
	<input checked="" type="checkbox"/> Wandering risk	<input checked="" type="checkbox"/> Dementia/Alzheimer's	<input type="checkbox"/> Hallucinations/Delusions
<b>Custom Warning</b>	<input checked="" type="checkbox"/> Select		
Enter text	<input type="text" value="Recovering from pneumonia"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text" value="Broken rib from fall on 3/9/06"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text"/>		
<b>Custom Warning</b>	<input type="checkbox"/> Select		
Enter text	<input type="text"/>		
<b>Warning by</b>	Jane Wallace		


There are nine (9) Standard Messages at the top of the screen. Any of them can be activated by clicking the checkbox associated with the desired message. This activation places the prompt in a red-bordered box at the top of the resident's face sheet and a large number of basic resident forms. To deactivate (no longer display on the screens), uncheck the associated Select box.



## Custom Warnings

Additional to the Standard Message are spaces for five (5) Custom Warnings, if the Standard Messages do not cover the resident's situation. Type in the appropriate information into the 'Enter text' box and activate the warning by clicking the Select checkbox. When this warning is no longer needed, uncheck the Select box.

## Applying Temporary Warnings

When all data has been entered as needed for the resident, click the Save button  at the bottom of the screen. The system will automatically record the name of the individual who entered the data. On subsequent changes to the warnings, the most recent name will be listed at the bottom of the screen.



## Step-by-Step in Resident

### Adding a New Resident

- Click Add New Resident link under the Resident module or on the secondary navigation bar
- Enter required and optional data on data entry screens, clicking the Next button after each
- Click the Save button

### Searching for Resident Records

- Click Select Resident link under the Resident module or on the secondary navigation bar
- Choose a Search By criterion from the first drop-down
- Select a criterion from the second drop-down
- In Search For, enter a name, partial name or number (depending on Search By choice)
- Click the Search button

### Editing Resident Records

- Perform a Search, as described above
- Click the Select link opposite the desired record
- Locate the section that contains the information you desire to edit and click the section title or the form title on the record navigation menu
- Scroll to the correct field and type in any changes
- Click the Save button
- Select any other sections and fields to edit, saving each time

### Changing a Lead into a Resident

- Perform a Search as described above
- Click the Select link opposite the desired record
- Click the Change Record Category link on the record navigation menu
- Click the All Category button and select the Resident category
- Click the Change Record Category link again
- Click the Remove button opposite the Lead category

### Creating a Temporary Warning

- Select the record of the resident for whom you wish to create a warning

- Click on the 'Temporary Warnings' link in the left-side Navigation Menu
- Select from Standard Messages, Custom Warnings or a combination
- Activate by clicking the checkbox associated with the desired message
- Type in the appropriate information into the 'Enter text' box of any Custom Warning
- Activate the warning by clicking the Select checkbox
- When a warning is not longer needed, uncheck the Select box
- When done, click the Save button at the bottom of the screen



# Medication

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The Medication module provides a single area where nurses, CNAs, physicians and administrators can record, store, manage, administer and report on multiple medications and medication-associated tasks. Custom MARs and Scheduled MARs are two methods of achieving the same goal, each tailored to address different nursing requirements or preferences. Data from, to or by 4Care Pharmacy can be seen in the 4Care Reports section. All general medication reports, such as New Medication Review, Yesterday's Missed Medications, PRN Effectiveness, C2 Medication Inventory and many others are located on the Medication Reports submenu. Foremost among these reports is the Backup 31-Day MAR system, designed to provide critical medication information if your computers or network are unavailable for a period of time.

## Entering a New Medication\*

On the navigation menu of a resident record, open the Medications folder and click the 'Medication-Prescribed' form link. Select the 'New Entry' button. See the example on the following page. Fill in **all** the fields marked with an asterisk \*. Additionally, enter choices for the following fields:

- a. Medication Classification, if known
- b. Diagnosis
- c. Refills Allowed
- d. Pharmacy Dispensing
- e. Administration End Date - **only** if a limited script, such as a 10-day antibiotic, etc.
- f. Scheduled Admin Time – **do not** select time if medication is a PRN (given as needed)
- g. Periodic Administration – only if **not** administered each day
- h. DEA Number
- i. Order fill/refill
- j. Any additional fields for which you desire to enter information

Be sure to verify correctness and completion of information, then scroll to the bottom of the screen and click the 'Save' button.

\* Medications entered into the 'Medication-Prescribed' form should be one of the following:

- A prescription medication
- An OTC medication that has been prescribed
- A regularly scheduled medication, whether prescription or OTC
- A medication for which the need should be assessed before administration or on a regular basis

## Medication - Prescribed

### Medication Information

Medication	* Broxmed (C2)
Dosage	* 20 mg
Drug Dosage Type	* Tablet
Medication Classification	<input checked="" type="radio"/> C2 <input type="radio"/> C3 or C4 <input type="radio"/> C5 <input type="radio"/> Standard
Diagnosis	
Reason for this medication	
Route of Administration	* 01 Oral (PO)
Administration Type	* <input checked="" type="radio"/> Regularly administered <input type="radio"/> PRN (as needed)
Administration Instructions	* Twice daily
Appears on the MARs	
Refills Allowed	
Pharmacy Dispensing	<input checked="" type="radio"/> Substitution permitted <input type="radio"/> Dispense as written
Assistance needed	* <input checked="" type="checkbox"/> Self-Administer <input type="checkbox"/> Reminder to take <input type="checkbox"/> Open container <input type="checkbox"/> Significant (Total)

### MAR Scheduling

Administration Start Date	* 12/16/2007
Number of Admin Days -OR-	200
Administration End Date	07/02/2008
Scheduled Admin Time	<input checked="" type="checkbox"/> AM <input type="checkbox"/> 7:30am <input type="checkbox"/> 10:30am <input type="checkbox"/> 1:30pm <input type="checkbox"/> 4:30pm <input type="checkbox"/> 7:30pm <input type="checkbox"/> 10:30pm <input checked="" type="checkbox"/> PM <input type="checkbox"/> 8:00am <input type="checkbox"/> 11:00am <input type="checkbox"/> 2:00pm <input type="checkbox"/> 5:00pm <input type="checkbox"/> 8:00pm <input type="checkbox"/> 11:00pm <input type="checkbox"/> Bedtime <input type="checkbox"/> 8:30am <input type="checkbox"/> 11:30am <input type="checkbox"/> 2:30pm <input type="checkbox"/> 5:30pm <input type="checkbox"/> 8:30pm <input type="checkbox"/> 11:30pm <input type="checkbox"/> 6:00am <input type="checkbox"/> 9:00am <input type="checkbox"/> 12:00pm <input type="checkbox"/> 3:00pm <input type="checkbox"/> 6:00pm <input type="checkbox"/> 9:00pm <input type="checkbox"/> 12:00am <input type="checkbox"/> 6:30am <input type="checkbox"/> 9:30am <input type="checkbox"/> 12:30pm <input type="checkbox"/> 3:30pm <input type="checkbox"/> 6:30pm <input type="checkbox"/> 9:30pm <input type="checkbox"/> 2:00am <input type="checkbox"/> 7:00am <input type="checkbox"/> 10:00am <input type="checkbox"/> 1:00pm <input type="checkbox"/> 4:00pm <input type="checkbox"/> 7:00pm <input type="checkbox"/> 10:00pm <input type="checkbox"/> 4:00am

For periodic (non-daily) administration use either day-of-week field OR interval field - not both.

Periodic Administration Days -OR-  Su  M  Tu  W  Th  F  Sa

By administration interval  
Enter a between-administration interval number.

### Authorizations

Prescribed by	* Ryan K. Forsberg
Must be entered as a full name	
DEA Number	920162697
Data entered by	* <input checked="" type="checkbox"/> Ryan K. Forsberg, 12/19/2007 4:08:50PM
Does not place an order	
DC this medication	<input type="checkbox"/> Staff signature
Discontinue	


### 4Care Prescription Ordering Information

First time 4Care ordering must include a faxed copy of the original script or complete transfer information.

Fills Remaining	1
Including this fill	
Order fill/refill	<input checked="" type="checkbox"/> Ryan K. Forsberg, 12/19/2007 4:08:50PM
Memo to Pharmacy	
Memo from Pharmacy	[no data]

## Discontinuing a Medication\*

**\* Important to note: Do not delete any medications! This will delete the resident's entire administration history of the drug. Use the discontinue (DC) process instead.**

On the navigation menu of the resident record, open the Medications folder and click the 'Medication-Prescribed' form link. Select the edit icon  associated with the name of the medication to be discontinued, then look for the Authorizations section and click the 'DC this medication' checkbox.



## Step-by-Step in Medication

### Preparing the 31-Day MAR

- On the last day of every month, open the 31-Day MAR report
- Using the print icon in the upper right corner, print the entire report
- Close the 31-Day MAR report
- Open the 31-Day MAR – Reverse
- Remove the printed documents, turn them over and reinsert in the printer
- Using the print icon, print the medication notes grid on the reverse side of the MAR
- Close the 31-Day MAR – Reverse report
- Store in a labeled binder or folder for emergency use

### Using the 31-Day MAR

- In the event power or computer access is suspended, fill out by hand the paper records and return them to the binder
- As soon as possible after computer operation has been restored, open the 31Day Backup Medication Entry report
- Locate the paper record for the first individual on the report
- On the screen, find the first date on which hand-reporting was done
- Choose any medication for that date and click the [Select](#) link
- By referencing the paper documents, fill out the information for all medications for that date and any subsequent emergency days
- It is critical that you **NOT** leave the date field blank, but enter the correct date/time the medication was administered and click the Staff Signature checkbox
- When done, click the Save button
- Repeat the recording process for as many individuals for whom you have paper records

### Adding a New Prescription

- On the navigation menu of a resident record, open the Medications folder
- Click the 'Medication-Prescribed' form link
- Click the 'New Entry' button. See example of 'Medication-Prescribed' form below
- Fill in **all** the fields marked with an asterisk \*.
- Additionally, enter choices for the following fields: Medication Classification, Diagnosis, Refills Allowed, Pharmacy Dispensing, Administration End Date (only if a time-limited script), Scheduled Admin Time, Periodic Administration, DEA Number, Order fill/refill or any additional fields for which you desire to enter information
- Verify correctness and completion of information
- Scroll to the bottom of the screen and click the 'Save' button

### Discontinuing a Medication

- On the navigation menu of the resident record, open the Medications folder
- Click the 'Medication-Prescribed' form link
- Click the edit icon associated with the name of the medication to be discontinued
- Scroll to the Authorizations section and click the 'DC this medication' checkbox
- You may also edit the following fields, if desired: Assistance Needed, Administration End Date or Memo to Pharmacy
- Scroll to the bottom of the screen and click the 'Save' button

### Authorizing a Prescription Refill

- On the navigation menu of the resident record, open the Medications folder
- Click the 'Physicians Refill Authorization' form link
- Note the medications needing refill authorization
- Click the 'Medication-Prescribed' link
- Click the 'New Entry' button and create a new prescription for each of the needed medications

#### Alternately...

- Click the print link on the 'Refill Authorization' screen
- For each medication that should be refilled, sign and date the form, quantity in fill, DEA number
- Enter contact information for at least one of the medications in this batch
- Make any other changes as needed
- Submit these by fax to 4Care Pharmacy at (801) 336-3001

### Conducting a Quarterly Medication Review

- From the HQ Home page, click the Medication Reports link
- Click the 'Physicians Quarterly Medication Review' link
- Review the medications for each resident
- If there are no changes to any medications, no action is required
- If there **are** changes to any medications listed, note these and click the 'Medication-Prescribed' form link
- Go to the medication needing a change and click the 'DC this medication' checkbox
- Click the 'New Entry' button and create a new prescription for each of the medications needing a change

#### Alternately...

- If there **are** changes to any medications listed, print the Review using the print icon at the top-right of the page
- Make corrections on the page as needed, then sign, date and add DEA number
- Submit these by fax to 4Care Pharmacy at (801) 336-3001

### Using Custom MARs

- Click the 'MARs (Custom)' link in the Medication Module
- On the Med Pass screen, select as many medication administration times as you would like to have displayed
- Click Save at the bottom of the screen
- Review the Daily Meds Report (Custom) for any medications to be administered at the selected times

### Recording a Medication Administration

- On the 'Daily Meds Report (Custom)' page, select the appropriate individual for whom to record a medication administration
- Read any 'Medication Prompts' that appear in the blue box at the top of the screen
- Administer the appropriate medication(s)
- Click the 'Staff signature' checkbox for each medication administered
- Click the 'Save' button at the bottom when complete

### Recording a Medication After Administration Time

- In the resident's record, choose the Medication-MAR form
- Using the edit pencil icon, select the medication for which administration information needs to be recorded
- Click the 'Staff signature' checkbox
- Click the calendar icon and select today's date
- Edit the field information to display the correct time of administration

- Enter any other appropriate notes, dosages or exceptions
- Click the 'Save' button

### **Recording Administration Exceptions**

- Attempt to administer the appropriate medication(s) for the time
- Click the 'Staff signature' checkbox
- Click the down-arrow on the 'Exception' field and select the appropriate exception reason
- Click the 'Save' button.

### **Changes in Administered Dosage**

- Administer the appropriate medication(s) for the time
- Click the 'Staff signature' checkbox
- Change the number/amount displayed in the 'Dosage' field
- Click the 'Save' button

### **Using Scheduled MARs**

- Click the 'Scheduled MARs' link in the Medication Module
- Find the scheduled administration time on which you are working
- Click the appropriate resident's name
- Use the resulting 'Daily MAR Edit Report' in the same way as 'Daily MAR Edit (Custom)', described above

### **Creating Medication Prompts**

- Select the record of the resident for whom you wish to create a prompt
- Click on the 'Medication Prompts' link in the left-side Navigation Menu
- Select from Standard Prompts, Medication Contraindications, Custom Prompts or any combination
- Click the checkbox associated with the desired standard prompt
- Enter text for Medication Contraindications, as needed, and check the Select box
- Type in the appropriate information into any 'Enter text' box of Custom Prompts
- Activate the prompt by clicking the associated Select checkbox
- When the screen is completed as desired, click the Save button
- When a specific prompt is no longer needed, deactivate by unchecking the Select box
- Click the Save button when done



# Community

The Community module is designed to monitor several critical areas relating to community-, unit-, or facility-wide functions. Forms and reports divided among sub-menus provide the options to build your own physical facilities preventive maintenance program, follow its progress and interface with maintenance personnel. The Community Census Monitor offers a profile of room occupancy, while the Community Records Monitor tracks the status of resident and staff records. Additionally, records of providers, outside services, suppliers and consultants are stored in this area, as well as the facility-wide consulting pharmacist reports that are mandated by most states.

**Community**

Select/View Communities | Community Census Monitor |  
Community Records Monitor | Community Maintenance Monitor |  
Providers | Pharmacist Reports

## Accessing Communities

Click the 'Select/View Communities' link in the Community module. The resulting query displays each 'Community', 'Facility' or 'Unit' in your organization, depending upon the preferred terminology.

To access a specific community, click the [Select](#) link associated with the community name. From the community record, all facility-wide community reports and most setup functions can be selected from the Navigation Menu, as seen at right.

Harvest Home Care Center

Information

- ▶ Summary
  - Setup: Community Information
  - ▢ Rooms/ Beds
    - Setup: Rooms/ Beds
  - ▢ Staff Scheduling
    - Setup: Staff Scheduling
  - ▢ Records Reviews
    - Staff Records Review
    - Resident Records Review
    - Setup: Certifications
    - Setup: Records Reviews
  - ▢ Preventive Maintenance
    - Maintenance Checklist
    - Edit Maintenance Tasks
    - Setup: Maintenance
  - ▢ Emergency Med Kit
    - Admin from Emergency Kit
    - Restocking Emergency Kit
    - Emergency Med Kit Contents
    - Emergency Med Kit History
    - Printable Med Kit Contents
  - ▢ Medications
    - Consulting Pharmacist Review

Work with this Record

- Change Record Category
- Change Unit
- Delete Record





# Community – Setup

## Configuring a Community Record\*

\* Your BlueStep implementer is trained to assist you in the process of configuring the initial setup for each of the communities in your organization. Since the success of certain internal automated processes depends upon the accurate and complete configuration of the community functions, please contact your implementer before beginning this multi-step process.

## Critical Setups

Eight (8) setup processes must be complete before your system will operate as designed and provide all the tracking features available. These setups are: 1) Community Information, 2) Rooms/Beds, 3) Staff Scheduling, 4) Certifications, 5) Records Reviews, 6) Maintenance, 7) Emergency Med Kit Contents and 8) OTC PRN Medications.

As displayed in the Navigation Menu for the community record are links for basic setup functions such as:

- Number and type of rooms or beds in your building(s)
- Managing workdays, shifts and staff scheduling
- Completeness of staff and resident records
- Stocking any state-mandated first aid kits
- Tracking routine preventive maintenance tasks
- Reporting by visiting consulting pharmacists

The setup of some of these items may be delegated to senior staff members or managers; others may be completed by the community administrator. The decision as to who is responsible for the setups is specific to the community management and the community mode of operation.

## 1. Setup: Community Information

Since each individual community is the basic reference for all records it contains, such as resident, staff, maintenance, etc., the Community Information form should be completed first. From the Navigation Menu, click the Community Information link. As in the illustration at right, enter the appropriate data into each field on the form. Take particular care to provide the correct time zone and number of room hold days. Both of these fields work internally to support functions and calculations essential to proper operation of your system.

## Community Information

Community Name	<input type="text" value="Harvest Home Care Center"/>
Community Time Zone	<input type="text" value="(GMT-07:00) Phoenix Time"/>
Address	<input type="text" value="1212 Auburn St"/>
City	<input type="text" value="Verda"/>
State	<input type="text" value="AZ"/>
Zip Code	<input type="text" value="44444"/>
Phone	<input type="text" value="(333) 444-5555"/>
Administrator	<input type="text" value="Claudia Dawkins"/>
Number of Room Hold Days	<input type="text" value="10"/>

## 2. Setup: Rooms/Beds

The BlueStep Rooms/Beds function interacts with resident records to provide lists of available rooms during move-ins/move-outs, when costs and billings are being determined, as well as providing the foundation for community census/occupancy reports. Prior to adding facility rooms to the system, proper classification and descriptions of room types, location and access are necessary.

### Modifying Room Types, Access and Location Lists

Types, access and location lists exist in Relate Option Lists, but contain default data, as in the 'Room Access' example below.

**Edit Option List**

\* Required

Name \*

Description

Folder Location \*

**List Items** Reorder Add Add Multiple

Label	Edit	Delete
Ground Floor		
Ground Floor w/ steps		
2nd Floor at street level		
2nd Floor w/ elevator		
3rd Floor w/ elevator		

From the Tools button drop-down, select the Relate link. Mouse over the Admin tab and select 'Option Lists'. Click the Edit Pencil icon associated with the Room Access list. The current options on the list will be displayed, as seen above.

For any of the displayed options that do not match the actual composition of your building and location, click the associated Edit Pencil icon. A small pop-up screen will appear, as seen at right. Highlight and delete the existing data in the Label field. Type in the appropriate information. Do not enter an export value, as this is reserved for functions not used in room calculations. Be sure to click the Save *at the bottom of the pop-up*.

### Edit Option Item

\* Required

Label \*

Export Value


If more option items are needed, click the Add button Add for one more item, or click the Add Multiple button Add Multiple for a larger field that allows several more items to be entered at one time, example right. If using the multiple function, push the Enter key after each line entry. Be sure to click the Save button *at the bottom of the pop-up*. The Edit Option List screen will repaint with the added items displayed at the bottom.

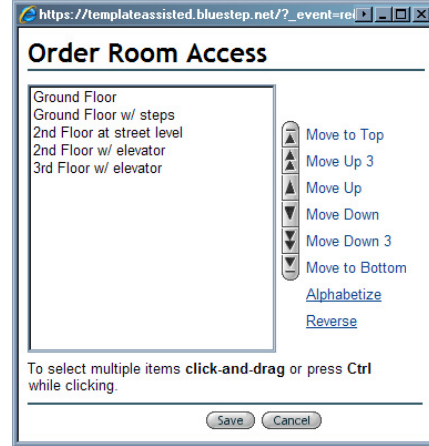
### Add Multiple Option Items

\* Required

Labels   
Type one new item per line

### Changing the Order of Option Items (Reordering)

If you would like to change the order in which the option items display on the list, click the Reorder link  [Reorder](#). When the pop-up appears, example at right, click on an option item and use the right-side keys to move to the appropriate spot on the list. When done, be sure to click *Save at the bottom of the pop-up* when done.



Follow the same procedure as above to modify the Room Location and Room Types lists. When all three lists accurately describe the composition of your rooms and building(s), proceed to adding specific rooms and/or beds to the community record.

### Adding Rooms/Beds

In order to accurately track maintenance, census and room availability, all rooms (excluding bathrooms, storage rooms or additional spaces inside of rooms or suites), hallways, common areas, offices and service areas should be entered into the system.

From the Navigation Menu, click the Setup: Rooms/Beds link. Using the New Entry button, access a blank Rooms/Beds form. Any rooms that have already been entered into the system will appear in the upper section of the screen, as in the example below. Enter the room name or number in the appropriate field. In the case of a room with two or more beds, create separate records for each bed and indicate them with the room number followed by A, B, C, etc. or some other unique identifier of your own choosing. For rooms such as hallways, craft rooms, furnace room and kitchens, DO NOT click the 'Billable, rentable room' checkbox.

### Setup: Rooms/Beds

[New Entry](#)

Room/Bed Number/Name	Room Type	Location	Resident
<a href="#">100</a>	Single	East Wing	Sandra Shaffer
<a href="#">101</a>	Single	East Wing	Nicki Newman
<a href="#">102A</a>	Double	Central	Annie Benson
<a href="#">102B</a>	Double	Central	George Sampson
<a href="#">103A</a>	Mini-suite	North Wing	Doug Ferrante
<a href="#">103B</a>	Mini-suite	North Wing	Marianne Ferrante

**\* Required**

Room/Bed Number/Name \*

Is this a billable, rentable room/unit?  Yes

Room Type

Room Access

Location

Base Price per month


Room Notes

Occupancy Date

Vacancy Date

Select the Room Type, Room Access and Location by activating the drop-down arrows on the fields. As noted above, types, location and access are selected from default drop-down lists.

These lists must be modified to accurately reflect the composition of your rooms and building(s), as they affect the proper functioning of resident records, billing processes and census records.

Enter the base price (if the 'Billable, rentable room' checkbox has been checked) and room notes. Occupancy and Vacancy Dates should be entered to reflect the current census as accurately as possible. Click the Save button  at the bottom of the screen.





### 3. Setup: Staff Scheduling










The Staff Scheduling system is a widely-integrated process that interacts with staff records at multiple points and provides at-a-glance schedule pages when complete. The setup process is a one-time-only function, but shifts may be edited and rearranged as needed at any time.

Activate the scheduling functions by selecting a community. In the Navigation Menu, select 'Setup: Staff Scheduling' and click the Enable checkbox. 'Last Schedule Generation' may be blank or contain the date your system was implemented.



#### Staff Module Screens

Click the Staff Scheduling sub-menu in the HR/Staff module. Select 'Staff Schedule Setup'. The resulting screen, example below, will contain default sample shifts.

**Staff Schedule Setup**  By Staff  By Shift   Print

Shift	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<a href="#">Weekend Day Nurse</a>	<a href="#">Cara C.</a> <small></small>						<a href="#">Cara C.</a> <small></small>
<a href="#">Weekend Night Nurse</a>							
<a href="#">Weekend Swing Nurse</a>							
<a href="#">Weekly Day Nurse</a>		<a href="#">Anita A.</a> <a href="#">Darla D.</a> <a href="#">Nanette N.</a> <small></small>	<a href="#">Darla D.</a> <a href="#">Nanette N.</a> <small></small>	<a href="#">Anita A.</a> <a href="#">Darla D.</a> <a href="#">Nanette N.</a> <a href="#">Sylvia P.</a> <small></small>	<a href="#">Anita A.</a> <a href="#">Nanette N.</a> <small></small>	<a href="#">Anita A.</a> <a href="#">Darla D.</a> <a href="#">Nanette N.</a> <small></small>	
<a href="#">Weekly Day Nurse</a>							
<a href="#">Weekly Night CNA</a>							
<a href="#">Weekly Swing CNA</a>				<a href="#">Nanette N.</a> <small></small>		<a href="#">Anita A.</a> <small></small>	

If you are viewing in the 'By Shift' mode (as above), only the 'By Staff' link at the top of the grid will be active. Note that the left column lists all shifts that have been created in alphabetical order. Clicking the 'By Staff' link presents the staff view, seen below. Note that the left column contains all staff members who have been added to any shift. The 'By Staff' link is inactive, while the 'By Shift' link has returned to active.

**Staff Schedule Setup**  By Staff  By Shift

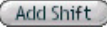
Staff	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Hours
<a href="#">Aaronson, Anita</a>		<a href="#">Weekly Day Nurse</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a> <a href="#">Weekly Swing CNA</a>		44.0
<a href="#">Crane, Cara</a>	<a href="#">Weekend Day Nurse</a>						<a href="#">Weekend Day Nurse</a>	17.1
<a href="#">Davis, Darla</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>		<a href="#">Weekly Day Nurse</a>		36.0
<a href="#">Nourse, Nanette</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a> <a href="#">Weekly Swing CNA</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>		53.0
<a href="#">Plath, Sylvia</a>				<a href="#">Weekly Day Nurse</a>				9.0

#### Setting up Shifts

Plan out a shift naming pattern that you will use for all shifts (see suggested names in the grids above) and a consistent abbreviation pattern of no more than three (3) characters per shift. In

designing the naming pattern, consider if nurses, CNAs, office staff, administration, etc. work the same hours or different hours. All shifts will be listed in alphabetical order, so if a particular shift order is required, name them appropriately or begin the shift names with A., B., etc. or 1., 2., etc.

Create a separate shift entry for each group that works hours different from any other group. In the example above, CNAs work a different hourly schedule from nurses even though the shifts are named similarly.

From the 'By Shift' view, click the Add Shift  button at the top right of the screen. On the resulting screen example right, all fields are required.

Enter the selected shift name and abbreviation, plus the start and end times. Consider if your staff members work weeks/weekends, 4 days & 3 days, or any other combination and assign the appropriate days for this shift. The 'Hours' field will calculate automatically after the shift has been saved.

### Add New Shift

#### SHIFT INFORMATION

\* Required

Shift Name \*

Abbreviation \*   
1-3 character abbreviation used on monthly schedule

Start Time \*

End Time \*

Days \*  Su  M  Tu  W  Th  F  Sa

Hours [no data]

Shift Differential \*

Some shifts will have a pay differential other than the default 1.0. If this shift pays time-and-a-half, for instance, enter 1.5 into the 'Differential' field. Make the appropriate entry for this shift, then check the completed form.

Once the form is saved, it is locked to prevent editing the shift and you will not be able to revise the name, abbreviation, times, days or differential. Locking is critical to preserving the integrity of your records, as editing after a shift has been worked would destroy the accuracy of the staff's work history and compromise the veracity of staff payroll records. For the same reasons, shifts cannot be deleted, only discontinued.

### Discontinuing a Shift

If a shift should be changed, such as when new hours are adopted, names changed, etc., discontinue it. Start by creating a new shift, as described above, reviewing and saving it. Remove the unneeded shift by clicking the underlined name from the Staff Schedule Setup screen and entering a DC date: the date on which this shift will no longer appear on the work schedule. Likewise, any unused or inappropriate default shifts that appear on your shift schedule should be discontinued in the same manner.

### Configuring Staff Shifts

Once the shifts are entered and correctly reflect the hours worked at your facility, populate them with staff members. This may be done two ways: by assigning the shift on the Staff Schedule Setup or by setting routine schedules for individual staff members.

### Setting up Staff per Shift

It is easiest to populate the shifts from the Staff Schedule Setup screen. Click one of the tan boxes in the appropriate shift. The resulting page, example at right, displays the name and times of the shift. Choose a staff member from the drop-down field, Staff to Fill Shift, by activating the field down arrow.

### Shift Information

Shift Name Weekend Swing Nurse


Start Time 3:00PM

End Time 11:00PM

Staff to Fill Shift

Days Staff Will Work  Su  M  Tu  W  Th  F  Sa

Choose all days of the shift that the selected individual will work by clicking the appropriate checkboxes. Days that do not apply to the shift are grayed out (uncheckable). Review the screen for accuracy, then save.

Once at least one staff member has been added to a day, that grid box is no longer tan, but white or ivory and the Add Staff icon  [Add Staff](#) appears below the staff member's name. Clicking this icon also leads to the above Shift Information screen.

### Setting up Routine Staff Schedules\*

The second method begins by selecting a staff member from the 'Select Staff' query in the HR/Staff module.

\* If you are performing this operation from the top or management level of your organization, be sure to select a staff member whose record is in the unit where you are attempting to create the schedule. If you are unsure where a specific individual works, you may check the 'Change Unit' link on the Navigation Menu in his/her record.

Click the 'Routine Schedule' link in the Navigation Menu, then the New Entry button. Select the appropriate shift from the drop-down and check the days represented by this shift. For instance, in the above example, the Weekend Swing shift for nurses occurs on Sunday and Saturday. Set Effective Start and End dates and click the Save button at the bottom of the screen. If the staff member works additional shifts, select the New Entry button again and setup the next shift.

#### Routine Schedule


**\* Required**


Shift \* Weekend Swing Nurse Go

Hours [no data]

Day(s) \*  Su  M  Tu  W  Th  F  Sa

Total Hours [no data]

Effective Start Date 06/01/2009 

Effective End Date 06/01/2010 

To change a schedule, click the Edit icon and make the appropriate changes in the days worked, the start date or end date. If the Day(s) field is changed, be sure to enter the current date as the Effective Start Date.

To change the shift worked, delete the existing routine schedule, using the delete icon associated with it. Create a new entry for the staff member for the new shift to be worked.

If you return to the Staff Schedule Setup screen, the display shows the selected staff member added to the chosen shifts and days. As future schedules are generated, this automatic assignment to the shifts and days will continue until the effective end date is reached.

### Viewing Scheduled Shifts

When the setup is complete and for any week thereafter, the past week's, current week's and following week's schedule can be viewed and printed from the Scheduled Shifts screen, example below. This example is a 'By Staff' view; a 'By Shift' view is also available.

 [Print](#)

By Staff By Shift Day Week Month

Staff	Sunday 6/21	Monday 6/22	Tuesday 6/23	Wednesday 6/24	Thursday 6/25	Friday 6/26	Saturday 6/27
<a href="#">Aaronson, Anita</a>		<a href="#">Weekly Day Nurse</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a> <a href="#">Weekly Swing CNA</a>	
<a href="#">Crane, Cara</a>	<a href="#">Weekend Day Nurse</a>						<a href="#">Weekend Day Nurse</a>
<a href="#">Davis, Darla</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>		<a href="#">Weekly Day Nurse</a>	
<a href="#">Nourse, Nanette</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a> <a href="#">Weekly Swing CNA</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	
<a href="#">Plath, Sylvia</a>				<a href="#">Weekly Day Nurse</a>			

#### 4. Setup: Certifications

Most states require that healthcare or treatment organizations track the licensing and certifications of their care providers and staff members. To initialize tracking certifications, two (2) Option Lists must be updated to conform to the staff positions at your facility and the certifications required by your state. Please verify licensure requirements in your state before editing the lists.

#### Modifying Job Position and Staff Certification/Training Lists\*

The Job Position and Staff Certification/Training lists already exist in Relate Option Lists, but contain default data, as in the 'Job Positions' example below.

**Edit Option List**

\* Required

Name \*

Description

Folder Location \*

**List Items** Reorder Add Add Multiple

Label	Edit	Delete
Business Office Manager		
Charge Nurse		
CNA		
Chef/Cook		
Director of Nursing		
Executive Director		
Food Services Director		
Housekeeper		
Housekeeping Supervisor		
Maintenance Staff		
Maintenance Director		
Marketing Staff		
Marketing Director		
Nursing Staff		
Program Director		
Waitstaff		
Wellness Director		

From the Tools button drop-down, select the Relate link. Mouse over the Admin tab and select 'Option Lists'. Click the Edit Pencil icon associated with the Job Positions list. The current options on the list will be displayed, as seen above.

This option list is pre-configured to contain most of the positions used in any facility. If there are any positions that do not exist at your facility, they may be deleted with the delete icon . Before any options are deleted, however, remember that this list is also used on the Employment form to record hiring data. Even if a position does not require certification, if it exists at your organization, leave it on the list.

To change wording on any option, click the associated Edit Pencil icon. A small pop-up screen will appear, as seen at right. Highlight and delete the existing data in the Label field. Type in the appropriate information. Do not enter an export value, as this is reserved for functions not used in certification calculations. Be sure to click the Save *at the bottom of the pop-up.*

#### Edit Option Item


\* Required

Label \*

Export Value

If more option items are needed, click the Add button Add for one more item, or click the Add Multiple button Add Multiple for a larger field that allows several more items to be entered at one

time. If using the multiple function, push the Enter key after each line entry. Be sure to click the Save button *at the bottom of the pop-up* when done.


The Edit Option List screen will repaint with the added items displayed at the bottom. If you would like to change the order in which the option items are displayed on the list, click the Reorder link . When the pop-up appears, use the right-side keys to organize the list items. Be sure to click Save *at the bottom of the pop-up* when done. When the options on the list accurately reflect all job types/titles at your facility and in the desired order, click the Save button at the bottom of the screen.

Follow the same procedure to modify the Staff Certification/Training list. When both lists accurately describe the positions at your facility and the certifications required by your state, proceed to setting up the Certifications monitor.








\* Because the certifications will be displayed in a grid layout, keep the certification names as concise as possible and use abbreviations wherever they will not cause confusion.


### Setting up Certification Groups

Click the Select Community link in the Community module. Select the appropriate community and click 'Setup: Certifications' on the Navigation Menu. Some default certifications will be in place, as seen in the example below.

**Setup: Certifications**  [Print](#)

This multi-entry form can be used for setting up the necessary certifications for each job position. Add a new entry for each job position. [New Entry](#)

Position	Select Necessary Certifications	Edit
Charge Nurse	Alzheimer/dementia care, CPR, Med admin procedures, Elder accident prev, Medical licensure, First aid, Health assess/illness recog	
Chef/Cook	Fire safety, Nutrition/menus/food prep/storage, Food handlers permit	
CNA	Alzheimer/dementia care, Med admin procedures, CPR, Med delegation, Indiv care/social interaction, First aid, Health assess/illness recog, Elder accident prev, Communication skills, Medical licensure	
Director of Nursing	Alzheimer/dementia care, Indiv care/social interaction, CPR, Med admin procedures, Elder accident prev, First aid, Res rights/redress, Health assess/illness recog	
Housekeeping Supervisor	Fire safety, Elder accident prev, Housekeeping/sanitation	
Nursing Staff	Alzheimer/dementia care, Indiv care/social interaction, CPR, Med admin procedures, Elder accident prev, Medical licensure, First aid, Health assess/illness recog	
Waitstaff	CPR, First aid, Food handlers permit	

If any of the entries for any of the positions are incorrect, click the Edit Pencil icon  associated with that item. On the resulting screen, example seen below, check and uncheck the boxes until the appropriate certifications and/or training are listed for the position shown. Click the Staff Signature checkbox and the Save button. The setup screen will repaint with the changes displayed.

**Setup: Certifications**

\* Required

Position \*

Select Certifications Necessary \* for this Position

<input checked="" type="checkbox"/> Alzheimer/dementia care	<input type="checkbox"/> Housekeeping/sanitation
<input type="checkbox"/> Communication skills	<input checked="" type="checkbox"/> Indiv care/social interaction
<input checked="" type="checkbox"/> CPR	<input checked="" type="checkbox"/> Med admin procedures
<input type="checkbox"/> DEA license	<input type="checkbox"/> Med delegation
<input type="checkbox"/> Elder accident prev	<input checked="" type="checkbox"/> Medical licensure
<input type="checkbox"/> Fire safety	<input type="checkbox"/> Nutrition/menus/food prep/storage
<input checked="" type="checkbox"/> First aid	<input type="checkbox"/> Res rights/redress
<input type="checkbox"/> Food handlers permit	<input type="checkbox"/> Other
<input checked="" type="checkbox"/> Health assess/illness recog	


If other, please insert title

Selections by \*  Staff signature



For job positions that are not listed on the default setup screen, but that require certification tracking, click the New Entry button at the top right. A blank certification screen will appear. Click the down arrow on the 'Position' field and select the desired job position. Check the necessary certifications/training, click the Staff Signature and the Save button. The new position selections will be added to the setup screen in alphabetic order.

## 5. Setup: Records Reviews

BlueStep offers a record review function that allows management a concise summary of the status of selected critical data for all residents and all staff. To initialize this function, select the community and click 'Setup: Records Reviews' on the Navigation Menu. On the resulting page, seen below, several options are available for the types of records administrators might want to see on the record review. Click the checkbox associated with desired data for both residents and staff. Click the Save button  at the bottom of the screen.

### Setup: Records Reviews

---

**Records Reviews Setup**  
**Resident Records Review Options**  
 DOB       Pre-Admit       Serv Plan       Diet Type  
 Date Admitted       Six-Month       MAR       Diet Consult  
 Admit Agree       Signif Chang       Advance Directive  
  
**Staff Records Review Options**  
 Date of Birth       TB       Certs/Licenses (General)       Food Handler's Permit  
 Date Hired       Immunizations       CPR       Medication Delegation  
 Health Exam       Job Description       First Aid

## 6. Setup: Maintenance

The Preventive Maintenance system in BlueStep allows administrators to select those maintenance issues that must be addressed on a recurring basis and also provides an interface for maintenance staff to record completion of such tasks. A summary screen is available for reviewing the current status of preventive maintenance projects.

Before configuring the maintenance tasks, there are five (5) Option Lists that should be modified to meet the specific needs of your facility. They are for Annual-Summer, Annual-Winter, Monthly, Quarterly and Semi-Annual tasks.

### Modifying Maintenance Task Lists

Preventive Maintenance Task lists exist in Relate Option Lists, but contain default data, as in the 'Preventive Maintenance Tasks-Annual-Summer' example on the next page. From the Tools button drop-down, select the Relate link. Mouse over the Admin tab and select 'Option Lists'.

## Edit Option List

\* Required

Name \* Preventive Maintenance Tasks - Ann

Description

Folder Location \* Option Lists

**List Items** [Reorder](#) [Add](#) [Add Multiple](#)

Label	Export Value	Edit	Delete
Life Safety - Fire Alarm	Fire Alarm		
Life Safety - Kitchen Hood	Kitchen Hood		
Life Safety - Fire Extinguishers	Fire Extinguishers		
Life Safety - Fire Sprinklers	Fire Sprinklers		
Life Safety - Back Flow Preventor	Back Flow Preventor		
Main Kitchen - Range Hood	Range Hood		
Main Kitchen - Gas	Gas		
Building Ext. - Wash Exterior	Wash Exterior		
Generator - Antifreeze	Antifreeze		
Generator - Tune-up	Tune-up		

Click the Edit Pencil icon associated with the Preventive Maintenance Tasks – Annual-Summer list. The current options on the list will be displayed, as seen above.

For any of the displayed options that do not match the tasks needed annually in the summer, click the associated Edit Pencil icon. A small pop-up screen will appear, as seen at right. Highlight and delete the existing data in the Label field. Type in appropriate information. Enter an export value similar to the label, but unique to that option item. See the illustration above for examples. Be sure to click the Save button *at the bottom of the pop-up*.

## Edit Option Item

\* Required

Label \* Life Safety - Fire Alarm

Export Value Fire Alarm

If more option items are needed, click the Add button [Add](#) for one more item, or click the Add Multiple button [Add Multiple](#) for a larger field that allows several more items to be entered at one time. If using the multiple function, push the Enter key after each line entry. Be sure to click the Save button *at the bottom of the pop-up*.

The Edit Option List screen will repaint with the added items displayed at the bottom. If you would like to change the order in which the option items display on the list, click the Reorder link . When the pop-up appears, use the right-side keys to organize the list items. Be sure to click Save *at the bottom of the pop-up* when done.

Follow the same procedure to modify the remaining four lists: Preventive Maintenance Tasks – Annual-Winter, Preventive Maintenance Tasks – Monthly, Preventive Maintenance Tasks – Quarterly and Preventive Maintenance Tasks – Semi-Annual lists. When all five lists accurately describe the required tasks at your facility, proceed to setting up the maintenance schedule.

## Maintenance Selection

Click the Select Community link in the Community module. Select the appropriate community and click 'Setup: Maintenance' on the Navigation Menu. The maintenance items entered on the Option Lists will be displayed. Make appropriate selections, as seen in the example below.

**Preventive Maintenance Setup**

**Select Monthly Tasks**

Life Safety - Check Fire Doors     Main Kitchen - Dishwasher     Equipment - Vacuum/Extractor     Building Int. - Floor Drains  
 Life Safety - Check Exit Alarms     Main Kitchen - Fridge/Freezers     Equipment - Workspace     Generator - Coolant Level  
 Life Safety - Check MSDS     Mechanical - Air Filters     Building Ext. - Front Entry     Generator - Fuel Supply  
 Life Safety - Fire Extinguisher Inspection     Mechanical - Blower Motor     Building Ext. - Dumpster     Generator - Hoses  
 Life Safety - Drain Condensation     Mechanical - Outside coils     Landscaping - Sprinklers     Generator - Heater  
 Life Safety - Test Flashlights     Mechanical - Water Softener     Roof & Attic - Attic Heaters     Generator - Leaks  
 Life Safety - Update ER Book     Mechanical - Elevator     Building Int. - Appliances     Generator - Exhaust Line  
 Life Safety - Check Emergency Med Kits     Equipment - Wheelchairs     Building Int. - Whirlpool Bather     Generator - Battery Charger

**Select Quarterly Tasks**

Main Kitchen - Range/Ovens     Mechanical - Mixing Valves     Mechanical - HVAC  
 Main Kitchen - Grease Trap     Mechanical - Sewer Lift Stations     Equipment - Carpet Machine  
 Main Kitchen - Vinyl Floor     Mechanical - Central Exhaust     Life Safety - Consulting Pharmacist Facility Review

Please select the month in which to start quarterly tasks:

**Select Semi Annual Tasks**

Building Ext. - Windows     Building Ext. - Window Leaks     Landscaping - Siding     Building Int. - Carpet  
 Building Ext. - Main Sign     Landscaping - Sprinkler     Landscaping - Fertilize     Building Int. - Back-Flow

Please select the month in which to begin semi-annual tasks:

**Select Annual Summer Tasks**

Life Safety - Fire Alarm     Life Safety - Fire Sprinklers     Main Kitchen - Gas     Generator - Tune-ups  
 Life Safety - Kitchen Hood     Life Safety - Back Flow Preventor     Building Ext. - Wash Exterior  
 Life Safety - Fire Extinguishers     Main Kitchen - Range Hood     Generator - Antifreeze

Please select the month for summer tasks:

**Select Annual Winter Tasks**

Winterization - Gutters     Winterization - Fire Sprinkler     Winterization - Train Staff  
 Winterization - Vacant Units     Winterization - Vents

Please select the month for winter tasks:

The months in which quarterly, semi-annual, summer and winter tasks are to begin are set from the drop-down lists below each task-selection section. When complete, click the Save at the bottom of the screen.

### Editing Maintenance Tasks

Once the initial maintenance tasks have been setup, additional tasks or task modification is done through the 'Edit Maintenance Tasks' link. From the Community module, click the Select/View Communities and choose the appropriate facility. In the Navigation Menu, click 'Edit Maintenance Tasks'. As seen in the partial screen below, all the current maintenance tasks are listed.

**Edit Maintenance Tasks**

<u>Task Type</u>	<u>Task</u>	<u>Month Cycle Starts</u>	<u>Edit Delete</u>
<b>Period: Annual - Once a Year</b>			
Life Safety	Fire Alarm	June	
Life Safety	Fire Extinguishers	June	
Life Safety	Kitchen Hood	June	
Winterization	Fire Sprinkler	November	
Winterization	Vents	November	
<b>Period: Monthly</b>			
Life Safety	Check Emergency Med Kits	January	
Life Safety	Check Exit Alarms	January	
Life Safety	Check Fire Doors	January	
Life Safety	Check MSDS	January	
Life Safety	Drain Condensation	January	
Life Safety	Fire Extinguisher Inspection	January	
Life Safety	Test Flashlights	January	
Life Safety	Update ER Book	January	

To create a new task, select the New Entry button  at the upper right. Select a Task Type from the drop-down.\* Enter the specific action into the Task field, as in the example below. Select how often and, if appropriate, in what month the task should be completed. Click the Save button when finished.

## 📁 Edit Maintenance Tasks

Print

**\* Required**

**Task Type** \*

**Task** \*

**How often?** \*
  Monthly
   
 Quarterly - Every 3 Months
   
 Semi-Annual - Every 6 Months
   
 Annual - Once a Year

**Start in:**

*For quarterly, semi-annual and annual tasks*

To change how often or in what month a task should be done, select the Edit icon . The Edit Task screen will appear, as above, on which you can make the desired changes. It is advisable to delete tasks for which the Task Type and Task fields must be changed or those default tasks that have no application at your facility. To delete such a task from the schedule, click the Delete icon associated with that item.

\* In the rare instance that a new Task Type is required, add the type to the Preventive Maintenance Types option list.

### Tracking Maintenance Tasks

To report the completion of any scheduled task, select the Community Maintenance Monitor in the Community module and the Maintenance Checklist on the subsequent page. Any maintenance personnel or others with recurring tasks (consulting pharmacist, head nurse, kitchen staff, dietitian, etc.) should have access to this checklist.

## Maintenance Checklist

Print

### Maintenance Items for Current Month

Task	Due Date	Period	Maintenance Completed	Maintenance Notes
<b>Type: Life Safety</b>				
Fire Sprinklers	06/30/2009	Annual - Once a Year	<input checked="" type="checkbox"/> Janet Holder, 03/19/2009 3:30:51PM	Sprinkler in west hallway replaced.
Fire Alarm	06/30/2009	Annual - Once a Year	<input type="checkbox"/> Check here if completed	<input type="text"/>
Check Fire Doors	06/30/2009	Monthly	<input checked="" type="checkbox"/> Check here if completed	<input type="text"/>
Check Exit Alarms	06/30/2009	Monthly	<input checked="" type="checkbox"/> Check here if completed	Made volume adjustment.
<b>Type: Mechanical Systems</b>				
Outside coils	06/30/2009	Monthly	<input type="checkbox"/> Check here if completed	<input type="text"/>
Blower Motor	06/30/2009	Monthly	<input type="checkbox"/> Check here if completed	<input type="text"/>

### Previous Unsigned Maintenance Items

Type	Task	Maintenance Completed	Maintenance Notes
No Records Found			


The checklist, as seen above, will list all tasks by type and display the due date. Any tasks that were previously completed will show the name of the individual, date and time the data was

entered. To mark a task as completed, check the associated checkbox and enter any appropriate notes. Click the Save button when done. Once the end of the current month has passed, these maintenance tasks will no longer appear on the list and it will not be possible to check them as completed.

The bottom section of the checklist is a report of any maintenance items that remained uncompleted after the due date. Ideally, this list should remain empty, as this would indicate that all tasks were completed on time.

### Preventive Maintenance Review

The maintenance status can be reviewed at any time by selecting the Community Maintenance Monitor in the Community module, then the Preventive Maintenance Review. This report shows all maintenance items for the past six months and for one month into the future, a portion of which can be seen in the example on the next page.

 **Preventive Maintenance Review - Last 6 + 1 months** 1 - 68 of 68

Select	Task	Period	Completed	Notes
<b>Community: Harvest Home Care Center</b>				
<b>Due Date: 03/31/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Check Fire Doors	Monthly	Chaz Jones, 03/19/2009 4:34:35PM	
<a href="#">Select</a>	Update ER Book	Monthly	Jane Wallace, 03/19/2009 2:23:30PM	
<a href="#">Select</a>	Fire Extinguishers	Annual - Once a Year	Chaz Jones, 03/19/2009 3:34:53PM	
<a href="#">Select</a>	Drain Condensation	Monthly		
<a href="#">Select</a>	Check MSDS	Monthly	Anita Aaronson, 03/19/2009 2:34:35PM	
<a href="#">Select</a>	Fire Alarm	Annual - Once a Year	Jane Wallace, 03/19/2009 2:23:30PM	
<a href="#">Select</a>	Test Flashlights	Monthly		
<a href="#">Select</a>	Fire Extinguisher Inspection	Monthly	Chaz Jones, 03/19/2009 4:34:53PM	
<a href="#">Select</a>	Check Exit Alarms	Monthly	Chaz Jones, 03/19/2009 2:24:55PM	
<a href="#">Select</a>	Fire Alarm	Annual - Once a Year		
<a href="#">Select</a>	Kitchen Hood	Annual - Once a Year	Anita Aaronson, 03/19/2009 4:34:25PM	
<b>Due Date: 02/28/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Check Emergency Med Kits	Monthly	Anita Aaronson, 02/19/2009 1:34:15PM	
<a href="#">Select</a>	Check Fire Doors	Monthly	Chaz Jones, 02/19/2009 4:34:35PM	
<a href="#">Select</a>	Test Flashlights	Monthly	Chaz Jones, 02/19/2009 4:31:51PM	
<a href="#">Select</a>	Fire Extinguisher Inspection	Monthly	Chaz Jones, 02/19/2009 4:34:45PM	
<a href="#">Select</a>	Update ER Book	Monthly	Anita Aaronson, 02/19/2009 4:34:55PM	
<a href="#">Select</a>	Check MSDS	Monthly	Jane Wallace, 02/14/2009 2:23:30PM	
<a href="#">Select</a>	Drain Condensation	Monthly	Chaz Jones, 02/19/2009 1:31:55PM	
<a href="#">Select</a>	Check Exit Alarms	Monthly	Chaz Jones, 02/19/2009 4:34:53PM	
<b>Due Date: 01/31/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Restock the Emergency Med Kit: Tylenol was administered from the Emergency Med Kit on 01/06/2009.		Dan Rasband, 01/06/2009 9:01:54AM	Tylenol restocked on... <a href="#">More</a>

Note that the date/time of completion is listed, along with the name of the person who checked-off the task.

### 7. Setup: Emergency Med Kit


Most states require that an emergency medication tray or first aid kit be in place in the facility and fully stocked by a licensed pharmacist. Administrators may contact a local pharmacist or consulting pharmacist from the source where medications for residents are obtained. This pharmacist should stock the medication kit in coordination with the administrator and/or head nurse. Complete instructions for setup and stocking of the Emergency Med Kit are located in the Provider (Consulting Pharmacist) Guide section of this manual.


The Emergency Med Kit section of the Community record is provided to track the history of usage and restocking of the kit and to monitor the contents for safe storage and theft prevention. State licensing will require that this kit be locked and stored in a secure but readily available area.

Contents of the kit fall into three (3) categories: 1) prescription drugs to meet the emergency needs of specific individuals (such as, EpiPens, digitalis tablets, etc.), 2) non-prescription drugs (both taken internally and applied externally), and 3) non-drug supplies (such as, dressings, stethoscopes, scissors, latex gloves, hot/cold packs, etc.).

If your facility stores resident's medications in a med cart or an area with fast and easy access, you may choose to store the emergency prescription drugs with the resident's other medications in an emergency drug section. In that case, the emergency kit would contain only non-prescription drugs and supplies.

### Entering Medications and Supplies

Select the appropriate community from the 'Select/View Communities' query in the Community monitor. Click the 'Setup: Emergency Med Kit' link in the Navigation Menu. If any default medications appear on the list, use the Delete icon  to remove them.

Click the New Entry button at the upper right on the screen. On the resulting setup screen, example seen at right, the date will prefill with the current date and the expiration will prefill with one year from the current date. Either of these may be edited using the mini-calendar icon  or by typing in the appropriate date.

The Expiration Date entered should be the expiration date printed on the drug packaging. Type in the name and dosage of the medication and the quantity that will be in the kit. Select the dosage type from the drop-down. If the drug is prescribed for a specific individual, enter the name of the resident and the prescriber of that drug.

When completed, click the Save button. Click the New Entry button for each medication or supply item carried in the kit and complete the form as above. If the setup is being created by an administrator or nurse, a licensed pharmacist also should login to sign each entry. The current quantity for the kit will not display on any report or track correctly in the system until each form has been signed.


### Administering from the Emergency Med Kit

It is important that the head nurse, Director of Nursing or administrator document the usage of medications or supplies each time items are administered from the Emergency Med Kit. To do so, select the appropriate community from the Community module query. On the Navigation Menu, click the 'Administer from Emergency Kit' link. This will open up a screen that displays all items that have been setup in the kit in alphabetical order, as seen in the partial screen below.

#### 📁 Setup: Emergency Med Kit


---

**\* Required**

Date \*  

Medication/Supply \*

Dosage \*   
# of mg, cc, etc.

Expiration Date  

Quantity approved for kit \*   
Amount of medication, product, etc.

Drug Dosage Type \*

Resident's Name

Prescriber's Name

(Re)Stocked by  Pharmacist signature

## Administer from Emergency Kit



\* Required

**Dosage** Med Administering Staff

Medication: Aspirin  
30 mg Date: \* [03/22/2009 1:00pm] Resident Name: [ ] Nature of Emergency: [ ]  
 Staff signature Curr Amt: 20.0 Tablet Amt Admin: [ ] Tablet

Medication: Bandages  
1" x 2" Date: \* [03/29/2009 1:15pm] Resident Name: [Elizabeth Rushton] Nature of Emergency: [Cover EpiPen injection site]  
 Staff signature Curr Amt: 12.0 Unknown Amt Admin: [1.0] Unknown

Medication: EpiPen  
20 CC Date: \* [03/29/2009 1:20pm] Resident Name: [Elizabeth Rushton] Nature of Emergency: [Allergic reaction of walnuts in cookies.]  
 Staff signature Curr Amt: 2.0 Injection Amt Admin: [1.0] Injection

In the example, a medication was administered to the resident for whom it was prescribed (third section) and a bandage was used to cover the injection site (second section). The Resident Name field for the prescribed medication is not editable, indicating that this drug is specifically for that resident only. For any non-prescribed items, enter the resident's name into the name field. The Date field populates with the current date/time and may be edited using the mini-calendar or typing in the appropriate data, if necessary. Lastly, click the Staff Signature field for each item used and the Save button at the bottom.

### Restocking the Emergency Med Kit

Whenever a pharmacist is visiting the facility or if the contents of the kit become depleted, the med kit should be restocked. This should be done by a pharmacist following the instructions in the Provider (Consulting Pharmacist) Guide in this manual.

### Recording the Completed Task

'Check the Emergency Med Kits' and 'Restock the Emergency Med Kit' are both listed, by default, as community maintenance tasks. Select 'Community Maintenance Monitor' from the Community module, then click 'Preventive Maintenance Review'. Look for 'Check the Emergency Med Kits' with the regularly scheduled tasks. Because restocking medications can be on an unscheduled basis, restocking will appear as a task, but listed separately. Locate items beginning 'Restock' or for the scheduled med kit check and choose the associated [Select](#). Click the 'Completed' checkbox and the Save button for each med kit item on the screen.

Pharmacists should record the completed restocking tasks following the instructions in the Provider (Consulting Pharmacist) Guide section in this manual, but administrators may assign recording the routine med kit check to the head nurse, nursing administrator or other administrator as a verification that the pharmacist did, indeed, do the appropriate kit check and restocking, if desired.

### Emergency Med Kit Contents and History

At any time, a listing of the current contents of the Emergency Med Kit can be viewed or printed using the 'Printable Med Kit Contents' link on the Navigation Menu. To view or print the entire history of drug administration, supply usage and kit restocking, click the 'Emergency Med Kit History.' On this report, each med kit transaction is displayed giving date, item, quantity and 'nature of emergency' details.

### Consulting Pharmacist Facility Report \*

Most states have a requirement for quarterly, on-site pharmacist evaluations of general medication management by the facility. This is accessed through the Community module and the Pharmacist Reports link. The current 'Consulting Pharmacist Report' and all past reports will be listed and can be viewed by clicking the Edit icon.

\* The default questions on the Facility Report cover the standard issues requested by most states. If additional information is required by the state in which the facility is located, please contact BlueStep and we will be happy to add the needed items.

### List of Facility Review Questions

- Is the facility licensed posted?
- Is the consulting pharmacist license posted?
- Is a medication reference available?
- Is the Pharmacy Policy and Procedures Manual available?
- Are medications stored in a locked cabinet or room?
- Are refrigerated medications locked?
- Is the drug storage temperature acceptable?
- Is the drug refrigeration temperature between 36° and 46° Fahrenheit or 2° and 8° Celsius?
- Are opened vials labeled with the first-use date?
- Is each resident's medication stored separately?
- Are discontinued, expired and unused medications stored separately for disposal?
- Are medications stored separately from food?
- Is medication storage organized, neat and clean?
- Are prescription medications properly labeled?
- Are prescription labels legible and unaltered?
- Is the expiration date printed on the prescription label?
- Do the medication administration instructions match the physician's orders?
- Are the medication administration times appropriate?
- Are vital signs checked when required to administer specific medications?
- Are tests given when required to administer specific medications?
- Are all received medications checked in to the facility?
- Are medication quantities appropriate?
- Are controlled substances identified and inventoried?
- Is medication destruction recorded and signed?
- Are sample medications on the premises?
- Is prescription floor stock on the premises?
- Has the Pharmacy Policy and Procedure Manual been signed by the consulting pharmacist?
- Are consulting pharmacist reports available for the last three (3) years?
- Are receipt of medication reports available for the last three (3) years?
- Are medication destruction reports available for the last three (3) years?

### 8. Setup: PRN Stock Medications

Most facilities have a limited number of stock medications, such as Tums, aspirin, Tylenol, Pepto-Bismol that can be administered to residents as needed without a prescription. If your facility does not keep or administer **any** stock, over-the-counter, non-prescription drugs, this setup does not need to be performed.

Tracking stock non-prescription drugs is managed on the 'Medications-OTC PRNs' form. This form is populated with default stock medications that must be edited in two ways to reflect the actual stock in the facility. See the default example below.



## Medication - OTC PRNs

These medications are **floor stock** and must be -  
Over-the-counter AND Non-prescribed AND Not regularly scheduled  
For all others, use Medications-Prescribed form

\* Required

### Over-the-Counter PRN Medication Information and Instructions

Do not administer medications without reading instructions below

**Tums 20mg** - 1 tab every 2 to 4 hours as needed  
Do not exceed 12 tabs in 24 hours

**Tylenol 500mg** - 1 tablet every 4 to 6 hours while symptoms persist  
Do not exceed 6 tablets in 24 hours

**Pepto Bismol 2 tablespoons** - 2 tablespoons as needed  
Do not exceed 12 tablespoons in 24 hours

**Benedryl 25mg** - 1 tablet every 12 hours while symptoms persist  
May cause drowsiness. Do not exceed 4 tablets in 24 hours

**Tylenol 250 mg** - 2 tablets every 4 to 6 hours as needed  
Do not take more than 8 tablets in 24 hours

**Advil 150mg** - 1 tablet every 2 to 4 hours as needed  
Do not exceed recommended dosage

**Centrum Silver 250mg** - 1 tablet per day  
Do not exceed recommended dosage

### Medication Administration

\* Select Medication:  Tums 20mg  Pepto Bismol 2 Tablespoons  
 Tylenol 250mg  Centrum Silver 250mg  
 Tylenol 500mg  Benedryl 25mg  
 Advil 150mg  Other

Name/Dosage if 'Other':

Administration time:

Administered by: Don Waller

### OTC Medication Follow-up Assessment

Effectiveness:

Follow-up by:  Don Waller, 1/21/2009 3:53PM

## Modifying the OTC PRN List

The 'Over-the-Counter PRNs' list exists in Relate Option Lists, but contains default data, as seen at right.

From the Tools button drop-down, select the Relate link. Mouse over the Admin tab and select 'Option Lists'. Click the Edit Pencil icon associated with the 'Over-the-Counter PRNs' list. The current options on the list will be displayed.

## Edit Option List

\* Required

Name \*

Description

Folder Location \*

### List Items

Reorder

Label	Fixed Id	Edit	Delete
Tums 20mg			
Tylenol 250mg			
Tylenol 500mg			
Advil 150mg			
Pepto Bismol 2 Tablespoons			
Centrum Silver 250mg			
Benedryl 25mg			
Other	-55112		

For any entries that do not match an actual OTC stock medication at your facility, click the Delete icon . To add items that are not listed, click the Add button  for one more item, or click the Add Multiple button  for a larger field that allows several more items to be entered at one time. If using the multiple function, push the Enter key after each line entry. Be sure to click the Save button *at the bottom of the pop-up*. The Edit Option List screen will repaint with the added items displayed at the bottom.

\* Note that the dosage is listed along with the medication name and that drugs in two different strengths are listed separately, as shown in the Tylenol 250mg and Tylenol 500mg items above. All medication entries should follow this format.

## Changing the Order of Option Items (Reordering)


If you would like to change the order in which the option items display on the list, click the Reorder link Reorder. When the pop-up appears, click on an option item and use the right-

side keys to move to the appropriate spot on the list. When done, be sure to click Save *at the bottom of the pop-up* when done.

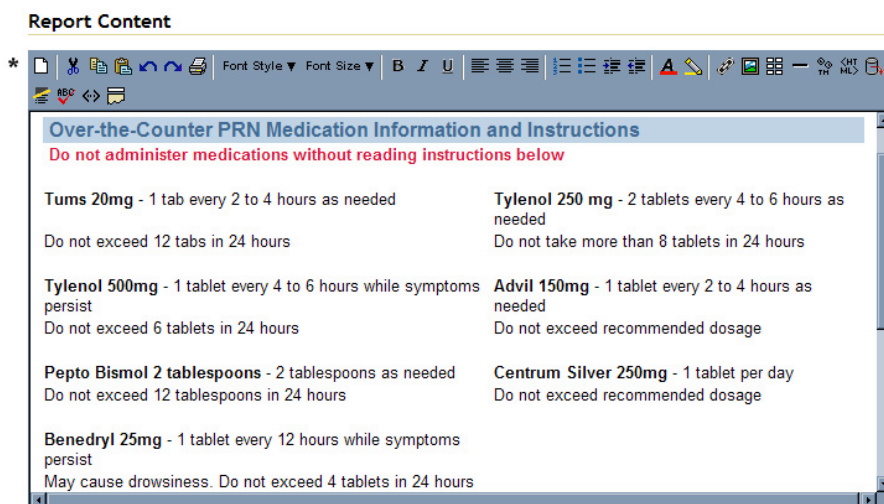
When the 'Over-the-Counter' option list matches those items stocked by your facility, proceed to configuring the form instructions.

### Configuring OTC Medication Instructions \*

Configuring the medication instructions for the Medication–OTC PRNs form requires editing a Merge Report in Relate, a delicate operation. Please follow the instructions carefully and completely.

From the Tools button drop-down, select the Relate link. Mouse over the Admin tab and select 'Merge Reports'. Click the Edit Pencil icon  associated with the 'Medication – OTC PRNs' merge report. Navigate to the fourth page without making any changes.


In the Report Content box is the current instructions for the default OTC PRNs, as seen in the example below.



Edit 1. Carefully place the cursor within the existing bold text and type the name and strength of the first medication. Delete the unneeded bold characters.

Edit 2. Place the cursor in the standard text and type the instructions for that drug. Delete any unneeded characters.

Edit 3. Place the cursor in the 'warning line' text and type in any "Do Nots" that apply to the drug. Delete the unneeded characters.

Repeat this process for all medications that appear on the 'Over-the-Counter PRNs' option list. Use the scroll bar to reach the lower part of the screen. If you need additional space for more medications, click the HTML Source icon . If you have HTML experience, you will be able to add additional table rows. If you are unfamiliar with HTML, contact your BlueStep Implementer and he/she will be glad to assist. When all medications have been entered, click the Save button at the bottom of the screen.

\* It is highly recommended that the instructional information be obtained from the medication packaging and the text entered exactly as it appears on the label.

### Additional Setup: Care Partners

Outside providers and consultants may need access to your community and resident records in order to perform assigned tasks in your community. These individuals are **not** staff members and are referred to as Care Partners within the system. Care Partners may include physicians, consulting pharmacists, hospice staff, psychotherapists, physical therapists and others who will be working directly with your residents or their records.

Physicians requiring access to resident's records in order to care for their patients should follow the instructions outlined in the Provider (Physicians) Guide section of this manual. Likewise, Pharmacists should follow the instructions in the Provider (Consulting Pharmacist) Guide section of this manual.

\* Some of the following items may be already available in your system and only need verification.

### Configuring Relate for Care Partners

Care Partners must be configured in Relate in two ways: a record category and a matching security query. In the Tools drop-down, select Relate and click Record Categories under the Admin tab. Click the New Category button and create the Care Partner record category(ies) (Physician, Therapist, Pharmacist, etc. as needed) with appropriate form names checked. Save the category.

Click the Queries tab on the Navigation Bar. Select the New Query button and create a security query based on each of the Care Partner record category(ies) just created. The third page should have the Physician Info 'Provider Type' marked as [Is None Of] value of empty, as in the example below.

**Edit Query - Security - Physician Care Partner** Step 3 of 5 - ○ ○ ○ ○ ○

Select search criteria.

\* Required

**Search Criteria**

---

Include records where  of the following apply:

Form	Field Name	Operator	Value
<input type="text" value="Physician Info"/>	<input type="text" value="Provider Type"/>	<input type="text" value="Is None Of"/>	<input type="text" value="Set Value"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Set Value"/>

The fourth page should only display the 'Fullname' field from the Name and E-mail form. Save the query.

### Configuring Security in Organization Administration

On the Organization Administration page, accessed from the Tools drop-down, select User Groups. Create a new Dynamic Group for each of the Security Group queries just created, if they do not already exist.

In the Advanced Unit Security section, select the third option, "same unit". Be sure that the Relate Query field is set to the appropriate security group query.

### Permissioning Forms and Merge Reports

Navigate to Relate and click Relate Structure from the Admin drop-down. Click the Permissions Report link [Permissions Report](#) at the top right of the screen.

This screen, partial example below, is a master view of permission settings for Relate items such as forms and merge reports. Note that the Security Groups are in vertical columns and the forms/reports are listed down the left side.

## Relate Permission Report

[Collapse All](#) [Expand All](#)

Name	Edit	4Care Global	All Staff	Consulting Pharmacist	Everyone	Human Resources	Operations	Pharmacists	Physician Care Partners	Registered Users	Relate Licensees	Relate Self	Resident Basic Medical	Resident Basic Non-Medical	Resident Edit Medical	Resident Enter Prescriptions	Resident Marketing/Inquiry	Resident Therapy	Staff Basic Access	State Inspection	Unit Admins
<b>Relate</b>																					
Record Types and Categories																					
Relate Structure																					
Online Profile					N	E				N	E	E						E			N
Contact Information					N	E	E			R	E	E						E			N
Community																					
Rooms/Beds																					
Rooms/Beds					N					N	E	N								R	N
Staff Scheduling																					
Records Reviews																					
Resident Records Review					R	N				N	R										
Staff Records Review					N		R			N	R										
Setup: Certifications					N					N	E	N									E

The blue letters represent the permission level assigned to each specific item, as follows:

**N** = No Access                      **P** = Participant                      **A** = Author  
**R** = Reader                              **E** = Editor                              Gray letters = inherited permission

On this report, click the Edit icon and set 'Editor' permissions on the Record Type form for the security groups just created. Using the Expand icon open the folders as needed and set appropriate levels of permission. Form access and level of permission are facility decisions, but 'Editor' or 'Reader' access to most resident and all medication forms is recommended.

### Configuring HQ for Care Partners

Permission to the HQ pages needs to be configured to match the access settings in Relate. For instance, if a physician is granted access to the MAR form, he/she should have 'Reader' permission to the Resident module and the 'Select/View Resident' query. This will allow him/her to select the appropriate resident's record on which to view the MAR. However, within the Resident module, the physician should not be able to see 'Change Resident Status', 'Resident Monitor' or other non-physician functions. Permissions to these pages should be 'No Access'.

Under the Security tab drop-down, select HQ Structure. Click the Permissions Report link [Permissions Report](#) for a page similar to Relate permissions, see partial example below.

Note that security groups are listed vertically across the top, but HQ modules and pages, including postings for reports and queries, are listed down the left side.

## Permission Report: HQ - Assisted Living

[Collapse All](#) [Expand All](#)

Name	Creator	Edit	4Care Global	Consulting Pharmacist	Family Connect Access	HQ Licensees	Human Resources	Physician Care Partners Operations	Resident Basic Medical	Resident Edit Medical	Resident Basic Non-Medical	Resident Enter Prescriptions	Resident Marketing/Inquiry	Resident Therapy	Staff Basic Access	Unit Admins
HQ - Assisted Living	Jan Walker		R	R	R	A		A	R			A			A	N
HQ Home	Anita Aaronson		R	R	N	A		A	R			A			A	N
My Office	Anita Aaronson		R	N	N	A		N	R			A			A	N
Management	Anita Aaronson		R	N	N	A		A	N	N		N			N	N
Office	Anita Aaronson		R	N	N	A		R	R			N			A	N
Scheduling Calendar	Anita Aaronson		R	N	R	A		N	N			N			A	N
Shared Files	Anita Aaronson		R	N	N	A		N	N			N			A	N
Enter Timecard	Brian Kelley		R	N	N	A		N	N			N			A	N
My Shifts	Brian Kelley		R	N	N	A		R	R			N			A	N
Time Off	Brian Kelley		R	N	N	A		R	R			N			A	N
HR/Staff	Anita Aaronson		R	N	N	A	A	N	N			N			N	N
Marketing/Leads	Anita Aaronson		R	N	N	A		N	N			N	A		N	N

Select the Edit icon to make the permission edit and add 'Reader' permissions for the Care Partner security groups created for this setup. For other modules in HQ where access should not be granted to a Care Partner group, edit the various Care Partner levels to 'No Access'

In the Resident Database, set report folders, wizards and queries to 'No Access' for the Care Partner groups. Leave 'Editor' access for those items with which the Care Partner will need to work. For Care Partners who will have 'Relationships' established with the resident, leave only the 'My Residents' page available. See the discussion of Relationships below.

In the Medication Module, set folders, reports and queries to 'No Access' for the Care Partner groups. Leave only the 'Medication Reports' folder available

### Add Record for Provider

The 'Providers' link, see the Providers submenu at right, in the Community module offers a central location to add, store and retrieve the records of Care Partners and Vendors/Suppliers.

To enter Care Partner data, click the 'Add New Physician/Care Partner' link. This link takes you through a wizard that collects the most vital information, creates the record and allows you to view and edit it, if necessary. As you go through each screen, enter the known information, then click the Next button at the bottom until the Save button is no longer grayed out , but clickable .

### Providers

[Add New Physician/Care Partner](#)

[Select Physician/Care Partner](#)

[Add New Vendor/Supplier](#)

[Select Vendor/Supplier](#)

### Care Partner Information

Once a Care Partner is in the system and set as a 'User', the physician, therapist, etc. needs to be notified about his/her access. Contact the individual directly to issue his/her secure login information. In compliance with HIPAA regulations, logins control access to Protected Health Information and must be treated with the same care. Provide the Care Partner and/or Partner's staff the URL (web address) of the facility's HQ home page and direct them to access the appropriate Provider Guide in this manual.

## Setting the Relationship Feature

The Relationships link in the record navigation menu is used to establish a relationship between the record you are viewing and any other staff member, resident or care partner within the HQ™ system. When viewed in a relationship tree, this allows you to know who is responsible for any issues, who is affected by changes or who to contact concerning the individual shown on the record.

In some instances, you will want to ensure that a Care Partner group has no access to residents other than those who are their direct clients. For others, it does not matter if the names of non-client residents are accessible to the group. Make the determination as to which groups will be restricted from access and then use Relationships to create a link between each partner and each of his/her patients.

On the just-created Care Partner record, select 'Relationships' from the Navigation Menu. Two options are on the screen example below, Primary and Secondary relationships.

- A **Primary Relationship** is defined as an individual or organization over whom the person named on this record has responsibility.
- A **Secondary Relationship** is defined as an individual or organization that has responsibility over the person named on this record.

## Relationships

### Primary Relationships (i.e., Draper, Darla is Care Giver)

[New Primary Relationship](#)

Relationship	Edit	Delete
Draper, Darla is Staff over <a href="#">Marple, Mary</a>		
Draper, Darla is Staff over <a href="#">Foster, Frank</a>		
Draper, Darla is Staff over <a href="#">Hammond, Harry</a>		
Draper, Darla is Staff over <a href="#">James, Jeremy</a>		

### Secondary Relationships (i.e., Draper, Darla is Care Receiver)

[New Secondary Relationship](#)

Relationship	Edit	Delete
<a href="#">Aaronsen, Andrew</a> is Supervisor over Draper, Darla		

For any providers, click the 'New Primary Relationship' button. On the resulting screen, example at right, the blue underlined category links in the Related Person field let you select the individual with whom the relationship will be created.

Once the selection is made, the screen repaints with the chosen individual. From the Relationship Type drop-down, seen expanded at right, that individual's position can be selected.

When saved, the new relationship

## New Relationship

Related Person \* [\[Select one ==>\]](#) [Select a Resident](#) [Select a Staff](#) [Select a Lead](#)  
[Select a Discharged Resident](#) [Select a Care Partner](#)

Relationship Type

- select one --
- Primary Physician
- Nurse
- Referring Physician
- CNA
- Care Partner
- Primary Physician
- Supervisor
- General Staff
- Referring Physician
- Responsible Party
- Therapist
- Resident
- Administrator
- Provider
- Physician

will be added to the Relationships page for this record and the related person. Additionally, it will also be displayed on any relationship tree that includes this record and/or the related person.



## Step-by-Step in Community Setup

### Setup 1: Community Information

- From the Navigation Menu, click the Community Information link
- Enter the appropriate data into each field on the form
- Take particular care to provide the correct time zone and number of room hold days
- Click the Save button

### Setup 2: Rooms/Beds

- From the Tools button drop-down, select the Relate link
- Mouse over the Admin tab and select 'Option Lists'
- Click the Edit icon associated with the Room Access list
- Modify the list to reflect the actual composition of your buildings and location
- Do not enter an export value
- Click the Save at the bottom of the pop-up
- Modify the Room Location and Room Types lists and Save
- From the Community record Navigation Menu, click the Setup: Rooms/Beds link
- Using the New Entry button, access a blank Rooms/Beds form
- Enter the room name or number in the appropriate field
- In the case of a room with two or more beds, create separate records for each bed
- For hallways, craft rooms, kitchens, etc. DO NOT click the 'Billable, rentable room' checkbox
- Select the Room Type, Room Access and Location from the drop-down fields
- Enter the base price, if the 'Billable, rentable room' checkbox has been checked'
- Enter room notes and Occupancy/ Vacancy Dates
- Click the Save button at the bottom of the screen
- Repeat until all rooms, billable or not, have been entered.
- Do not include rooms that are built and/or billed as part of a suite or unit

### Setup 3: Staff Scheduling

- Select a community from the 'Select/View Community' link in the Community module
- In the Navigation Menu, select 'Setup: Staff Scheduling'
- Click the Enable checkbox
- Click the Staff Scheduling sub-menu in the HR/Staff module
- Select 'Staff Schedule Setup'
- Choose a shift naming pattern that you will use for all shifts and a consistent abbreviation pattern of no more than three characters per shift
- Create a separate shift entry for each group that works hours different from any other group
- From the 'By Shift' view, click the Add Shift button at the top right of the screen
- On the resulting screen, enter the data for all fields, except for the 'Hours' field, which will calculate automatically after the shift has been saved
- Enter the appropriate data in the 'Differential' field, if necessary

- Check the completed form for accuracy, then click Save
- Once the form is saved, it is locked to prevent editing no revisions can be made
- If there has been an error or a shift should be changed, discontinue it
- Create a new shift to replace the unneeded one, as described above
- Click on the underlined name of the unneeded shift and enter a DC date
- Select a staff member from the 'Select Staff' query in the HR/Staff module
- Click the 'Routine Schedule' link in the Navigation Menu, then the New Entry button
- Select the appropriate shift from the drop-down and check the days represented by this shift
- Set Effective Start and End dates
- Click the Save button at the bottom of the screen
- For additional shifts, select the New Entry button again and setup the next shift
- Repeat for all staff members
- For shifts that are not covered by routine schedules or for vacation coverage and other limited adjustments, click the appropriate tan box in the grid on the Staff Schedule Setup screen
- On the resulting screen, choose a staff member from the drop-down field, Staff to Fill Shift
- Choose all days of the shift that the selected individual will work by clicking the checkboxes
- Review the screen for accuracy, then save
- If additional non-routine coverage for this shift is needed, click the Add Staff icon to reach the Shift Information screen as described above

#### Setup 4: Certifications

- From the Tools button drop-down, select the Relate link
- Mouse over the Admin tab and select 'Option Lists'
- Click the Edit icon associated with the Job Position list
- Modify the list to reflect the actual positions at your facility
- Do not enter an export value
- Click the Save at the bottom of the pop-up
- Follow the same procedure to modify the Staff Certification/Training list
- Because certifications are displayed in a grid, keep the names as short, using abbreviations where possible
- Select the community from the 'Select/View Communities' link in the Community module
- Click 'Setup: Certifications' on the Navigation Menu
- Review the default setup
- If any certifications need to be edited from the default, click the Edit icon for that item
- Check and uncheck the boxes until the appropriate certifications and/or training are listed
- Click the Staff Signature checkbox
- Click the Save button
- For job positions that are not listed, but that require certification, click the New Entry button
- Click the down arrow on the 'Position' field and select the desired job position
- Check the necessary certifications/training
- Click the Staff Signature checkbox and the Save button

#### Setup 5: Records Review

- Select the community from the 'Select/View Communities' link in the Community module
- Click 'Setup: Records Reviews' on the Navigation Menu
- Click the checkboxes associated with desired review options for both residents and staff
- Click the Save button at the bottom of the screen

#### Setup 6: Preventive Maintenance

- From the Tools button drop-down, select the Relate link
- Mouse over the Admin tab and select 'Option Lists'
- Click the Edit icon associated with the 'Maintenance – Annual-Summer Tasks' list



- Modify the list to reflect the actual summer tasks at your facility
- Enter a short, appropriate export value
- Click the Save at the bottom of the pop-up
- Follow the same procedure to modify the 'Preventive Maintenance Tasks - Annual-Winter', 'Preventive Maintenance Tasks – Monthly', 'Preventive Maintenance Tasks – Quarterly' and 'Preventive Maintenance Tasks - Semi-Annual' lists
- Click the 'View/Select Community' link in the Community module and choose the appropriate community
- Click 'Setup: Maintenance' on the Navigation Menu
- Make appropriate selections in the Monthly, Quarterly, Semi-Annual, Summer and Winter sections
- For all but the Monthly section, select a month for the tasks
- Click Save when done

### Setup 7: Emergency Med Kit

- Select the appropriate community from the 'Select/View Communities' query in the Community monitor
- Click the 'Setup: Emergency Med Kit' link in the Navigation Menu
- Remove any default medications, using the Delete icon
- Click the New Entry button at the upper right on the screen
- Edit the Date and Expiration Date, if necessary
- Type in the name and dosage of the medication
- Enter the quantity that will be stored in the kit
- Select the dosage type from the drop-down
- If the drug is prescribed for an individual, enter the name of the resident and the prescriber
- Click the Save button
- Click the New Entry button for each medication or supply item carried in the kit
- If the setup is being created by an administrator or nurse, a licensed pharmacist must also sign each entry

### Setup 8: OTC PRN Medications

- From the Tools button drop-down, select the Relate link
- Mouse over the Admin tab and select 'Option Lists'
- Click the Edit icon associated with the 'Over-the-Counter PRNs' list
- Modify the list to reflect the stock medications at your facility
- Enter the dosage along with the medication name
- Create separate entries for medications in different strengths
- Do not enter an export value
- Click the Save at the bottom of the pop-up
- From the Tools button drop-down, select the Relate link
- Mouse over the Admin tab and select 'Merge Reports'
- Click the Edit icon associated with the 'Medication – OTC PRNs' merge report
- Navigate to the fourth page without making any changes
- Place the cursor within the existing bold text and type the name and strength of the first medication
- Delete the unneeded bold characters
- Place the cursor in the standard text and type the instructions for that drug
- Delete any unneeded characters
- Place the cursor in the 'warning line' text and type in any "Do Nots" that apply to the drug
- Delete the unneeded characters
- It is highly recommended that the instructional information be obtained from the medication packaging and the text entered exactly as it appears on the label
- Repeat this process for all medications that appear on the 'Over-the-Counter PRNs' option list
- When instructions for all medications have been entered, click Save

### Modifying Option Lists

- From the Tools button drop-down, select the Relate link
- Mouse over the Admin tab and select 'Option Lists'
- Click the Edit icon associated with the list requiring modification
- For any options that do not match the needed data, click the associated Edit icon
- On the resulting pop-up, highlight and delete the existing data in the Label field
- Type in the appropriate information
- Unless expressly directed, do not enter an export value
- Click the Save at the bottom of the pop-up
- If one more option item is needed, click the Add button
- If several more option items are needed, click the Add Multiple button
- If using the multiple function, push the Enter key after each line entry
- Click the Save button at the bottom of the pop-up
- When the Edit Option List screen repaints, check that the list items are in the desired order
- If not in the correct order, click the Reorder link
- When the pop-up appears, click on an option item and use the right-side keys to move it to the appropriate spot on the list
- Repeat until all items are arranged as desired
- Click Save at the bottom of the pop-up
- When the option list is complete and correct, click Save

### Editing Maintenance Tasks

- From the Community module, click 'Select/View Communities'
- Choose the appropriate facility
- In the Navigation Menu, click 'Edit Maintenance Tasks'
- Select the Edit icon for the task needing modification
- Make the desired changes on the Edit Task screen that appears
- For tasks in which the Task Type and Task fields no longer apply or must be changed, delete the task by clicking the Delete icon for that item
- Create a new task with the appropriate Type and Task to replace the deleted task
- If a new Task Type is required, add the type to the Preventive Maintenance Types option list

### Recording Completed Tasks

- Select the Community Maintenance Monitor in the Community module
- Select the Maintenance Checklist
- Mark a task completed by checking the checkbox and entering any appropriate notes
- Click the Save button when done

### Administering from the Emergency Med Kit

- Select the appropriate community from the Community module query
- On the Navigation Menu, click the 'Administer from Emergency Kit' link
- Change the Date/Time of the administration, if necessary
- Enter the name of the resident needing the emergency medication
- Medications for prescribed individuals will have this field prefilled and will not be editable
- Type in the amount administered
- Enter notes in the 'Nature of Emergency' field
- Click the Staff Signature checkbox
- Click Save at the bottom of the screen

## Configuring Care Partners

### In Relate (Once only per Care Partner group)

- Establish a Care Partner record category (Physician, Therapist, Pharmacist, etc. as needed) with appropriate forms checked
- Create a security query based on each of the Care Partner record category(ies) just created

### In Organization Administration (Once only per Care Partner group)

- Create a new dynamic group using the Security Group query(ies) just created
- In Advanced Unit Security, select the third option, "same unit"

### In Relate Permission Report (Once only per group or upon creation of new forms/reports)

- Select the Relate Structure link and the Permissions Report
- Set 'Editor' permissions on the Record Type form for the groups needing access
- For Relate Forms and Merge Reports, set permissions as required

### In HQ (Once only per group)

- Select the HQ Structure link and the Permissions Report
- Add 'Reader' permissions for the Care Partner security groups created for this setup
- In modules where access should be restricted edit the various Care Partner levels to 'No Access'
- In the Resident module, set report folders, wizards and queries to 'No Access' for Care Partners
- Leave 'Editor' access for those items with which the Care Partner will need to work
- For Care Partners with 'Relationships' established with clients, leave only the 'My Residents' page available
- In the Medication Module, set folders, reports and queries to 'No Access' for the Care Partner groups. Leave only the 'Medication Reports' folder available

### In HQ Provider Records - Non-Staff (Each physician, therapist, pharmacist, etc.)

- Click the 'Add Physician/Care Partner' link on the Provider submenu of the Community module
- Complete all forms
- On the just-created record, click the 'Change Record Category' link and add the appropriate 'Care Partner' and 'User' categories
- Fill out any forms required by those categories
- Repeat for each individual needing access to the HQ system

### Care Partner Information (Each Care Partner)

- Contact the physician, therapist, etc. directly to issue his/her secure login information
- Give the Care Partner and/or Partner's staff the URL (web address) of the HQ home page
- Direct the individual to the appropriate Provider Guide in this manual

### Create Relationships (Each Care Partner, each patient)

- On the just-created Care Partner record, select 'Relationships' on the navigation menu
- Click the 'New Primary Relationship' button and click the 'Select a Resident' link
- Click the [Select](#) next to the name of one of the Care Partner's patients
- Select a Relationship Type from the drop-down, then click the Save button
- Repeat for each of the Care Partner's patients





# Community – Reports

## Viewing Communities

All communities that have been setup within your organization will be accessible on the 'All Communities' query. To reach it, click the 'Select/View Communities' link in the Community module. For a specific community, click the [Select](#) link associated with its name.

The community Record Summary will appear with extensive navigation in the left-side Navigation Menu, as seen in the example at right.

Click the name of the needed form, report or wizard within the gold navigation menu at the left side of the record. If the needed folder is closed, as designated by an Expand icon  in front of the folder name, click the icon and the folder will open to display its contents.

To see the contents of all folders, click the Expand All icon  **Expand All** at the top of the menu.

Once any of the folders are open, users may select the name of the form, report or wizard, as needed.



## Viewing or Printing the Community Census

A series of reports are designed to help administrators and others track the flow of residents into and out of the facility. To access these, click the 'Community Census Monitor' in the Community module. The submenu, seen at right, will appear.

The 'All Rooms/Units' query displays a listing of every room that has been entered into the system and reports the type, access, location and occupant of the room. There is a Print link at the upper right, if needed.

The 'Room Census' query is similar, but sorts the rooms by room type then lists the location, occupancy date and vacancy date, if known.

'Room Occupancy' reports numerical data, totaling the number of billable rooms, how many are occupied and how many are vacant.

The 'All Pending Move-ins' and 'All Pending Move-Outs/Transfers' list the resident and room number when any 'pending' action has been given a date within that resident's record. If pending dates are recorded accurately, these two reports will give you a quick glance at the foreseeable future.

## Community Census Monitor

[All Rooms/Units](#)

[Room Census](#)

[Room Occupancy Report](#)

[All Pending Move-Ins](#)

[All Pending Move-Outs/Transfers](#)

### Viewing or Printing the Resident Record Review

A summary of resident records may be checked at any time to ensure completion of critical forms and data. To reach the summary, click the Community Records Monitor link in the Community module. Select 'Resident Records Review' from the sub-menu. The screen displays the selections that were chosen on the Setup screen. The example below shows all available selections for the three displayed individuals. A print link is available at the upper right.

[Print](#)

Resident Records Review (AZ): Harvest Home Care Center											
Name	DOB	Date Admitted	Assessment					Dietary			
			Admit Agree	Pre-Admit	Six Month	Signif Chng	Serv Plan	Meds Entered	Diet Type	Diet Consult	Advance Directive
<a href="#">Annie Benson</a>	✗	05/01/2006	✗	✗	✗	▽	●	MAR	Therapeutic	✗	▽
<a href="#">Isabelle Caley</a>	12/12/1912	12/12/2006	✗	✗	✗	●	✗	MAR	Regular	N/A	▽
<a href="#">Nikki Newman</a>	✗	08/18/2005	✗	✗	✗	●	●	MAR	Therapeutic	✗	▽

The icons indicate various stages of completion for each of the displayed items:

- Complete (form is signed)
- Unfinished (some information has been entered; form is unsigned)
- No data (form contains no information)

For details concerning any resident listed, click the underlined resident name. The screen will repaint with the resident's summary screen, from which you can navigate view data.

### Viewing or Printing the Staff Record Review

Staff records may be checked for accuracy and completeness at any time. To reach the summary, click the Community Records Monitor link in the Community module. Select 'Staff Records Review' from the sub-menu. The screen displays the selections that were chosen on the Setup screen. The example below shows all available selections for the five individuals listed. A print link is available at the upper right.

[Print](#)

Staff Records Review: Harvest Home Care Center													
Name	DOB	Date Hired	Health Exam	TB	Immunizations	Job Disc	Certs Done	Certs Skill Needed	Key Certs/Permits				
									Medical Licensure	CPR	First Aid	Food Handlers	Med Del
<a href="#">Anita Aaronson</a>	05/16/1952	06/16/2002	●	●	✗	●	●	N/A	Not Required	Not Required	Not Required	Not Required	Not Required
<a href="#">Cara Crane</a>	17/19/1957	07/17/2007	●	▽	▽	●	✗	Alzheimer/dementia care, Elder accident prev, health assess/illness recog	●	●	●	Not Required	Not Required
<a href="#">Carla Davis</a>	05/26/1969	02/09/2005	●	●	▽	✗	✗	Fire safety, Food handlers permit, Nutrition/menua/food prep/storage	Not Required	Not Required	Not Required	▽	Not Required
<a href="#">Nanette Hourse</a>	✗	✗	✗	●	●	●	✗	Alzheimer/dementia care, Elder accident prev, health assess/illness recog, Med admin procedures	●	●	●	Not Required	Not Required
<a href="#">Sylvia Plath</a>	✗	✗	✗	✗	▽	✗	●	N/A	Not Required	Not Required	Not Required	Not Required	Not Required

- The icons indicate various stages of completion for each of the displayed items:
- Complete (field in filled in or all required certifications have been obtained)
  - Unfinished (some information entered or some certifications obtained)
  - No data (in the specified field or no certifications obtained)

For details concerning any staff member listed, click the underlined name. The screen will repaint with the staff member's summary screen, from which you can navigate to view data.

### Viewing or Printing the Community Preventive Maintenance Monitor

From the 'Community Maintenance Monitor' in the Community module, users can select the 'Maintenance Checklist'. This form reports all maintenance items scheduled for the current month and provides completion checkboxes for those tasks that have been finished, as in the example below. A Print link is provided, if a paper copy is required.

**Maintenance Checklist** [Print](#)

**Maintenance Items for Current Month**

Task	Due Date	Period	Maintenance Completed	Maintenance Notes
<b>Type: Life Safety</b>				
Fire Sprinklers	06/30/2009	Annual - Once a Year	<input checked="" type="checkbox"/> Janet Holder, 03/19/2009 3:30:51PM	Sprinkler in west hallway replaced.
Fire Alarm	06/30/2009	Annual - Once a Year	<input type="checkbox"/> Check here if completed	
Check Fire Doors	06/30/2009	Monthly	<input checked="" type="checkbox"/> Check here if completed	
Check Exit Alarms	06/30/2009	Monthly	<input checked="" type="checkbox"/> Check here if completed	Made volume adjustment.
<b>Type: Mechanical Systems</b>				
Outside coils	06/30/2009	Monthly	<input type="checkbox"/> Check here if completed	
Blower Motor	06/30/2009	Monthly	<input type="checkbox"/> Check here if completed	

**Previous Unsigned Maintenance Items**

Type	Task	Maintenance Completed	Maintenance Notes
No Records Found			

The Preventive Maintenance Review gives a wider view of the status of maintenance items. This report, accessible from the 'Community Maintenance Monitor' submenu, displays all maintenance items for the past six months and for one month into the future, a portion of which can be seen in the example below.

**Preventive Maintenance Review - Last 6 + 1 months** [Print](#)

1 - 68 of 68




Select	Task	Period	Completed	Notes
<b>Community: Harvest Home Care Center</b>				
<b>Due Date: 03/31/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Check Fire Doors	Monthly	Chaz Jones, 03/19/2009 4:34:35PM	
<a href="#">Select</a>	Update ER Book	Monthly	Jane Wallace, 03/19/2009 2:23:30PM	
<a href="#">Select</a>	Fire Extinguishers	Annual - Once a Year	Chaz Jones, 03/19/2009 3:34:53PM	
<a href="#">Select</a>	Drain Condensation	Monthly		
<a href="#">Select</a>	Check MSDS	Monthly	Anita Aaronson, 03/19/2009 2:34:35PM	
<a href="#">Select</a>	Fire Alarm	Annual - Once a Year	Jane Wallace, 03/19/2009 2:23:30PM	
<a href="#">Select</a>	Test Flashlights	Monthly		
<a href="#">Select</a>	Fire Extinguisher Inspection	Monthly	Chaz Jones, 03/19/2009 4:34:53PM	
<a href="#">Select</a>	Check Exit Alarms	Monthly	Chaz Jones, 03/19/2009 2:24:55PM	
<a href="#">Select</a>	Fire Alarm	Annual - Once a Year		
<a href="#">Select</a>	Kitchen Hood	Annual - Once a Year	Anita Aaronson, 03/19/2009 4:34:25PM	
<b>Due Date: 02/28/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Check Emergency Med Kits	Monthly	Anita Aaronson, 02/19/2009 1:34:15PM	
<a href="#">Select</a>	Check Fire Doors	Monthly	Chaz Jones, 02/19/2009 4:34:35PM	
<a href="#">Select</a>	Test Flashlights	Monthly	Chaz Jones, 02/19/2009 4:31:51PM	
<a href="#">Select</a>	Fire Extinguisher Inspection	Monthly	Chaz Jones, 02/19/2009 4:34:45PM	
<a href="#">Select</a>	Update ER Book	Monthly	Anita Aaronson, 02/19/2009 4:34:55PM	
<a href="#">Select</a>	Check MSDS	Monthly	Jane Wallace, 02/14/2009 2:23:30PM	
<a href="#">Select</a>	Drain Condensation	Monthly	Chaz Jones, 02/19/2009 1:31:55PM	
<a href="#">Select</a>	Check Exit Alarms	Monthly	Chaz Jones, 02/19/2009 4:34:53PM	
<b>Due Date: 01/31/2009</b>				
<b>Type: Life Safety</b>				
<a href="#">Select</a>	Restock the Emergency Med Kit: Tylenol was administered from the Emergency Med Kit on 01/06/2009.		Dan Rasband, 01/06/2009 9:01:54AM	Tylenol restocked on... <a href="#">More</a>

## Viewing or Adding Providers

In most communities, outside providers and consultants need access to community and resident records in order to perform their assigned tasks. These individuals are **not** staff members and are referred to as Care Partners within the system. Care Partners may include physicians, consulting pharmacists, hospice staff, psychotherapists, physical therapists and others who will be working directly with your residents or their records.

Additionally, outside vendors or supplier, who are **not** staff member and who do **not** work with your residents or their records, may also be tracked. These include such individuals or companies as a foodstuffs supplier, the lawn maintenance crew, a roofing company, the linen supplier and others.

The 'Providers' link, see the submenu at right, in the Community module offers a central location to add, store and retrieve the records of Care Partners and Vendors/Suppliers.

To enter Care Partner or Vendor data, click the appropriate 'Add' link. This link takes you through a wizard that collects the most vital information, creates the record and allows you to view and edit it, if necessary. As you go through each screen, enter the known information, then click the Next button  at the bottom until the Save button is no longer grayed out , but clickable .

These records, once entered, can be accessed by clicking the appropriate 'Select' link on the 'Provider' submenu. When the individual or company is located on the query, click the Select link associated with the name. The Record Summary will appear with its left-hand Navigation Menu.

## Providers

---

[Add New Physician/Care Partner](#)

---

[Select Physician/Care Partner](#)

---

[Add New Vendor/Supplier](#)

---

[Select Vendor/Supplier](#)

---

## Viewing Pharmacist Reports

The 'Pharmacist Reports' submenu in the Community module is the location where your staff pharmacist or consulting pharmacist will begin his/her work.

Administrators, as well as pharmacists and pharmacy techs, can access reports that detail the status of the on-site Emergency Med Kit (or First Aid Kit), the pharmacist review of individual resident's medication regimen and the pharmacist review of facility medication policy, procedures and conditions. These reviews are mandated in most states.

## Pharmacist Reports

---

[Emergency Med Kit Contents](#)

---

[Restock Emergency Med Kit](#)

---

[Emergency Med Kit History](#)

---

[Select Resident for Individual Medication Review](#)

---

[Pharmacists Medication Review](#)

---

[Consulting Pharmacist Facility Report](#)

---

## Viewing or Printing Emergency Med Kit Contents and History

At any time, a listing of the current contents of the Emergency Med Kit can be viewed or printed. Access your community from the 'View/Select Communities' link, then click the 'Printable Med Kit Contents' link on the Navigation Menu.

To view or print the entire history of drug administration, supply usage and kit restocking, click the 'Emergency Med Kit History' on the Navigation Menu. On this report, as in the example below, each med kit transaction is displayed giving date, item, quantity and 'nature of emergency' details. More information can be seen by clicking the Edit icon for a specific date.

## Emergency Med Kit History

[New Entry](#)

Date of occurrence	Action	Medication	Dosage	Amt admin/restock	Resident	Nature of emergency	Admin/Restock individual	Edit Delete
04/16/2009 1:17PM	Restocking med kit	EpiPen	20 CC	2.0 Injection	Elizabeth Rushton		Dan Reese	
04/16/2009 1:16PM	Restocking med kit	Bandages	2" x 3"	12.0 Unknown			Dan Reese	
04/15/2009 11:23AM	Restocking med kit	Aspirin	40mg	20.0 Tablet			Dan Reese	
03/22/2009 1:20PM	Administering medication	EpiPen	20 CC	1.0 Injection	Elizabeth Rushton	Allergic reaction of walnuts in cookies	Dan Reese	
03/22/2009 1:15PM	Administering medication	Bandages	2" x 3"	1.0 Unknown	Elizabeth Rushton	Cover EpiPen injection site	Dan Reese	
03/22/2009 10:12AM	Administering medication	Aspirin	30 mg	20.0 Tablet	Bella Allen		Dan Reese	
01/06/2009 9:01PM	Restocking med kit	Tylenol	500mg	2.0 Tablet			Dan Reese	
01/06/2009 9:01PM	Administering medication	Tylenol	500mg	2.0 Tablet	Joe Hatch	Headache	Dan Reese	

## Viewing or Printing a Facility Report

Many facilities are going paperless and use digital storage for all of their records. If, however, you desire a print copy of the Consulting Pharmacist Facility Report (if the pharmacist did not print and sign one) or simply want to review it, the report is available at any time. Click the Pharmacist Reports link in the Community module and select 'Consulting Pharmacist Facility Report'. Open the report by clicking on the Edit icon. The View Layout (upper right) should read 'Printable Facility Report'. If it does not, activate the down arrow and change it. When the screen repaints, it will contain all of the data entered by the pharmacist in an easily-viewable, printable version. See the partial-screen example below. Click the Print icon at the upper right, if desired, and when the pop-up appears, select a printer associated with the computer in use. When done, close the print pop-up.

## Consulting Pharmacist Facility Report

View Layout: [Printable Facility Report](#)   
Last Modified: Jun 23, 2009 4:55:44PM

### Consulting Pharmacist Facility Report with Signature

#### Licensing

Facility licensed posted: Yes  
License notes: [no data]

Consulting pharmacist license posted: Yes

#### Reference Materials

Medication reference available: Yes  
Abbreviations/conversions available: Yes  
Reference material notes: Put second copy of Pharmacy Manual in west wing.

Policy/Procedure Manual available: Yes

#### Medication Storage

Medication storage locked: Yes  
Storage temperatures optimal: Yes  
Open vials marked w/ first-use date: No  
External/Internal stored separately: No  
Food not stored w/ medications: Yes  
Medication storage notes: [no data]

Refrigerated medications locked: Yes  
Refrigeration temperature 36° to 46°F: Yes  
Resident's medications stored separately: Yes  
To-be-destroyed medications stored separately: Yes  
Storage organized/neat/clean: Yes

## Viewing or Printing a Single Medication Review

If you desire a print copy of any resident's quarterly Medication Review (if the pharmacist did not print and sign one) or simply want to review it, the report is available at any time.

To do this, select a resident and navigate to his/her record and click on the 'Pharmacists Qtrly Med Review' link. Select the Edit pencil icon for the review date you would like to see. The View Layout (upper right) should read 'Pharmacists Printable Review'. This screen contains all of the data entered by the pharmacist in an easily-viewable, printable format. See the example below. Click the Print icon at the upper right and select a printer from the pop-up. When done, close the print pop-up.



Full Name: Armstrong, Isabelle  
 Birth Date: 09/22/1930

Select 

### Medication Review for Isabelle Jane Armstrong

Facility: Harvest Home Care Center Date: 02/11/2009

Medications Reviewed: All current medications Regimen: Within acceptable usage

Medication	Strength	Diagnosis	Med Class	Rt of Admin	Administration Instructions	Assistance Needed
Broxmed	20 mg		Standard	01 Oral (PO)	Twice daily	Self-Administer
Corapamil	1mg		C3 or C4	01 Oral (PO)	Give with plenty of water	Self-Administer
Furosemide	20mg	Edema	Standard	01 Oral (PO)	Take 1 tab by mouth daily	Self-Directed
Lunesta	3 mg	Sleeplessness	Standard	01 Oral (PO)	Take one tablet at bedtime	Self-Administer
Senioplax	30 mg		Standard	By mouth (PO)	bid	Reminder to take, Family/Designated Person

Code Status: Do NOT Resuscitate (DNR) Drug Allergies: NKDA Substance Allergies: No food allergies

[Broxmed](#) May be discontinued when symptoms subside  
[Corapamil](#) Dosage may be reduced with permission of physician  
[Furosemide](#) [no data]  
[Lunesta](#) [no data]  
[Senioplax](#) Can be changed to PRN unless symptoms increase.

Pharmacist Signature: \_\_\_\_\_ License #: \_\_\_\_\_  
 Don Preston, 09/23/2006 2:46:12PM 1234567

### Viewing or Printing All Medication Reviews

Alternately, all medication reviews for your community may be viewed or printed from one screen. Click the Pharmacist Reports in the Community module, then the 'Pharmacists Medication Review' on the submenu.

It may take a moment for all the records in the facility to load and compile the report, as this feature presents the same individual display for each resident as seen above, but collects every resident in the facility and presents it in one long, scrollable screen.

When the screen repaints, click the Print icon in the upper right and select a printer. This printing may take some time, as the same detail is printed as in the individual review and each resident's review prints on a separate page. When done, close the print pop-up.



### Viewing or Printing Scheduled Shifts

Working views of the Scheduled Shifts are available as soon as the setup is complete. The views display the schedule for the past week, current week and following week. These are viewed and can be printed from the Scheduled Shifts screen in the HR/Staff module, example below. This example is a 'By Staff' view; a 'By Shift' view is accessed through the 'By Shift' link.

Print

**Scheduled Shifts** By Staff By Shift Day Week Month

◀ June 21-27, 2009 ▶							
Staff	Sunday 6/21	Monday 6/22	Tuesday 6/23	Wednesday 6/24	Thursday 6/25	Friday 6/26	Saturday 6/27
<a href="#">Aaronson, Anita</a>		<a href="#">Weekly Day Nurse</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a> <a href="#">Weekly Swing CNA</a>	
<a href="#">Crane, Cara</a>	<a href="#">Weekend Day Nurse</a>						<a href="#">Weekend Day Nurse</a>
<a href="#">Davis, Darla</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>		<a href="#">Weekly Day Nurse</a>	
<a href="#">Nourse, Nanette</a>		<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a> <a href="#">Weekly Swing CNA</a>	<a href="#">Weekly Day Nurse</a>	<a href="#">Weekly Day Nurse</a>	
<a href="#">Plath, Sylvia</a>				<a href="#">Weekly Day Nurse</a>			

The current week is named in the gray header bar. To navigate to the past week, click the left arrow . To view the week following the current week, select the right arrow . Any of these views may be printed using the print icon in the upper right. On the Days-of-the-Week row, each day and date is displayed (Sunday 6/21, etc.) with the current day shown on a white background.



## Step-by-Step in Community Reports

### Viewing Communities

- Click the 'Select/View Communities' link in the Community module
- For the specific community, click the [Select](#) link associated with its name
- Click the name of the needed form, report or wizard within the Navigation Menu
- If the needed folder is closed, click the Expand Plus icon
- To see the contents of all folders, click the Expand All icon

### Viewing the Community Census

- Click the 'Community Census Monitor' in the Community module
- Select the 'All Rooms/Units', 'Room Census', 'Room Occupancy', 'All Pending Move-ins' or 'All Pending Move-Outs/Transfers' query
- A print link is at the upper right, if needed.

### Viewing the Resident Record Review

- Click the Community Records Monitor link in the Community module
- Select 'Resident Records Review' from the sub-menu
- Access details by clicking the underlined resident name
- A print link is available at the upper right

### Viewing the Staff Record Review

- To reach the summary, click the Community Records Monitor link in the Community module
- Select 'Staff Records Review' from the sub-menu
- Access details by clicking the underlined staff member name
- A print link is available at the upper right

### Viewing the Community Preventive Maintenance Monitor

- Click the 'Community Maintenance Monitor' in the Community module
- Select the 'Maintenance Checklist' or 'Preventive Maintenance Review'
- A print link is provided, if required

### Viewing Providers

- Select the Providers link in the Community module
- Click 'View/Select Care Partners' or 'View/Select Vendors'
- Click the [Select](#) link associated with the name
- Navigate the record from the left-hand Navigation Menu

### Viewing Pharmacist Reports

- Select 'Pharmacist Reports' in the Community module
- For Emergency Med Kit reports, click 'Contents' or 'History'
- More information can be seen by clicking the Edit icon for a specific date
- For a single pharmacist review of a resident's medication regimen, click 'Select Resident for Individual Medication Review'

- Choose the [Select](#) link associated with the appropriate resident
- Click the 'Pharmacists Qtrly Med Review' link in the Navigation Menu
- Click the Edit icon for the desired date
- Change the View Layout to 'Pharmacists Printable Review'
- A Print link is available at the upper right
- For all current reviews for every resident's medication regimen, click 'Pharmacist Medication Review'
- For the community-wide medication report, select 'Consulting Pharmacist Facility Report'
- Click the Edit icon for any desired date
- The View Layout (upper right) should read 'Printable Facility Report'
- A Print icon is available, if needed

### **Viewing Staff Scheduling**

- Select 'Staff Scheduling' from the HR/Staff module
- Click the 'Scheduled Shifts' link
- Change to 'By Shift' or 'By Staff' as desired
- View for Day, Week or Month
- Navigate forward or back in time (by week) using the right and left arrows
- A Print link is available, if needed
- For current approved requests for time off, click the 'Time Off Requests' link
- A Print link is at upper right

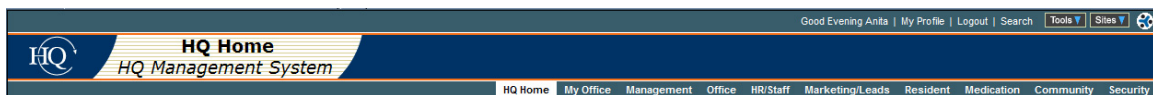


# Security

The Security module contains functions that are not visible to every user, but play a crucial role in customizing and securing your HQ™ application. The person who appears as your administrator was designated this position during configuration of your HQ™. Through HQ Administrators, you may share this critical access or reassign it entirely by entrusting administrator privileges to others within your organization. Through Media Library, you may select images, audio and video clips to store on your library for use throughout HQ™. Through Styles, you may set titles, logos and icons.

## Styles

The Styles page controls items that appear in the space between the dashboard and the main navigation bar and to the right of the HQ Management logo and title.



After clicking on Styles, you have the option of selecting the inherited title/logo, which is only different from the default, as seen above, if your organization has logos or titles in use on other HQ™ products in your unit. The HQ logo and HQ Home titles on the left are unaffected by Styles, but you may add graphics and text to the dark blue area to the right using the editor box.

While the editor has functions similar to Microsoft Word™ or Corel WordPerfect™, in this instance you will probably want to limit its use to font styles, sizes, colors and alignment or pictures, links, HTML and the like. See **The Editor Box** in **Administrative Options**, below.

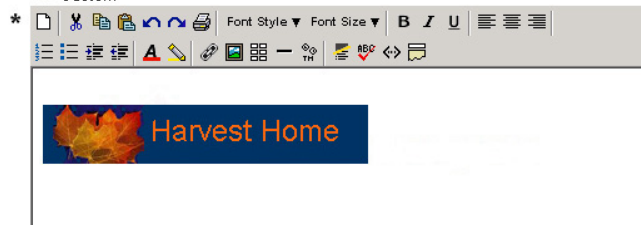
## Styles

\* Required

### Appearance

#### Title/Logo Area


- Inherited  
 Custom



Logo  [Media Library](#)

HQ Icon

The dark blue title/logo space is 47 pixels high. While you may add logos and text that are higher than that, doing so will create unattractive edge distortions in the beige block containing the HQ Home title.




Using the editor box allows flexibility in placement of a logo, however you may also insert a logo using the Logo field, which anchors the logo to the right end of the title/logo space. Any graphic images that are entered in the Media Library will be available on the Logo field drop-down. By clicking the media library link  [Media Library](#) you can open the library directly and upload the images that you need, but that may not already be in the library. See **Media Library**, below.

The HQ Icon field applies to the HQ Home page, which displays the nine virtual managers. In cases where the default icon for each virtual manager has been individually set to Inherited and you would like them all to be an identical icon, this field provides icon selection from a drop-down. See **Edit Page – Styles in Administrative Options**, below.

### HQ Administrators

The original person shown as the administrator for your HQ™ was designated at the time HQ™ was created for your organization. Additional people can be added and/or the original administrator removed using the HQ Administrators page.


**HQ Administrators** Add User

Primary Admin	Name	Email	Remove
<input checked="" type="radio"/>	Andrew Aaronson	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	
<input type="radio"/>	Betty Bronson	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	
<input type="radio"/>	Chris Cook	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	
<input type="radio"/>	Darla Draper	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	

Save Cancel

To add a person to the list of administrators, click the Add User button Add User. A list of all users will appear in a pop-up window. Scroll to the individual you wish to add and click on the select link [Select](#). The HQ Administrators screen will reappear with the selected individual added to the list. You may do this as often as needed, just be sure to click Save when done.

If you want to change the Primary Admin, click on the radio button opposite the name of the new person you wish to designate as the primary. To remove an individual, click on the delete icon associated with their name. The Primary Admin does not have a delete icon. If you need to delete the current Primary Admin, select another Primary Admin, click the radio button and then click save Save. The HQ Administration screen will appear. Click the Administrators Manage button Manage, which will re-list the administrators, this time with a delete icon available for the original Primary Admin. Click it and click Save once more.

 At virtually every level of Connect™, Relate™, Team™ and HQ™, the administrator has the option of restricting or allowing use of data or any functions/features at multiple points. Please heed the warnings concerning edit and deletion powers granted to administrators, and the serious consequences they can have to your HQ™ and its data when in the hands of unknowledgeable individuals.

## Media Library

The Media Library is designed specifically for graphical images, audio and video files. It is an efficient space for this type of file and makes the images easily available in all the places on the site where you may want to use them.

Nearly any graphic, audio or video file will be supported in the Media Library, depending upon the current support inherent in the version of Internet Explorer™ (or other browser) that you or your organization are using. Presently gif, jpeg, png, pdf, Flash, avi, mpeg, midi, wave, mp3, zip, exe (for downloads) and others are storable and supported on the pages. To add one of these types of files to the Media Library, click on the Media Library title under Security manager or on the link [Media Library](#) wherever it is displayed throughout HQ™. The current contents of the library will display in a pop-up window.






Click the Add Files button on the upper right for a file upload screen. On the resulting file upload screen click the Browse button. This will open a pop-up window displaying files, folders, drives and networks on your computer, allowing you to navigate to the file you wish to upload.



General Information		Permissions	
<b>New File</b>			
File To Upload	C:\Documents and Settings\jwalker\	Browse...	(Max upload is 20 MB)
Rename To	Perspective Hills small.jpg		
File Description	Main Logo		
<input type="checkbox"/> Enable Version Control			

The Media Library has a 20 megabyte upload limit. If the file does not exceed that limit (or if the total of all files to be added with the Add Multiple Files function does not exceed 20 MB), click on the file name, which will place that name in the File to Upload field. The Rename To field will be automatically filled, but you may change the name entry, if desired. Click the Upload button and be patient. File upload may take several minutes. When done, the Media Library screen will reappear.



*Please click the Upload button only once.* Clicking it more than once may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

To view a slideshow presentation of all the Media Library files, click one of the slideshow icons  (see **Slideshow** in **Office Manager** for full details). To edit the title or description of the file, click the edit icon . To delete the file, click on the delete icon .

Once content is uploaded to the Media Library, it is available for use any place that you see a media library link  [Media Library](#) or from the insert picture icon  contained in the header of the editor box (see **The Editor Box** in **Administrative Options**, below).



## Step-by-Step in Security

### Adding Titles and Logos

- Click Styles on the drop-down
- Click the Custom radio button
- Paste chosen logo into the editor box or click the picture icon to select from the Media Library
- Type any title text
- Using the editor box header, make font and text changes as needed
- Alternately, you may add a graphic with the Logo field
- Click the Save button

### Adding/Deleting HQ Administrators

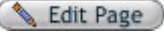
- Click HQ Administrators on drop-down
- Click the Add User button
- Click Select next to the name you wish to add
- Add as many administrators as desired
- Click the delete icon opposite any name(s) you wish to remove
- Click the Save button

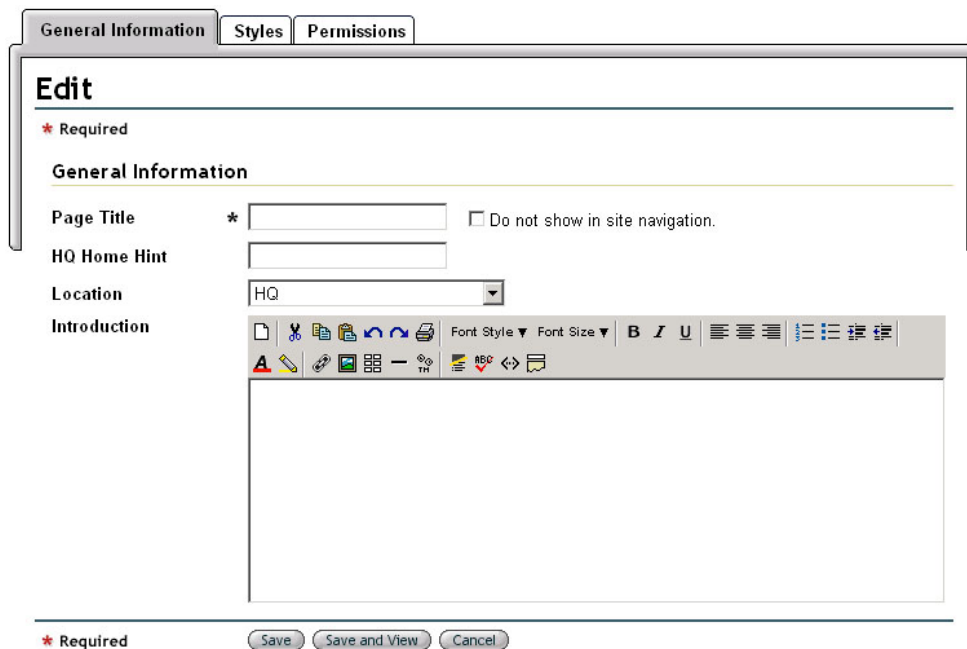
### Uploading Images to the Media Library

- Click Media Library on the drop-down
- Click the Add Files button
- Click the Browse button and navigate to the file you wish to upload
- If the file is under 20MB, click on the file name
- Click the Upload button and be patient if it is a large file



# Administrative Options

There are several options and operations that are available to HQ™ administrators. If you have the correct permissions and licenses, these options and operations are accessible through an Edit Page button  that will appear to you at the upper right of various screens throughout the system. When you click the Edit Page button on a specific screen, a pop-up window appears containing General Information, Styles and Permissions tabs. Any work that you do on these screens will apply to the page on which you accessed the Edit Page button and to no others.



The screenshot shows a pop-up window titled "Edit" with three tabs: "General Information", "Styles", and "Permissions". The "General Information" tab is selected. The window contains the following fields and controls:

- Page Title**: A text input field with an asterisk (\*) and a checkbox labeled "Do not show in site navigation".
- HQ Home Hint**: A text input field.
- Location**: A dropdown menu currently showing "HQ".
- Introduction**: A rich text editor with a toolbar containing icons for font style, font size, bold, italic, underline, list, and link. Below the toolbar is a large text area.

At the bottom of the window, there are three buttons: "Save", "Save and View", and "Cancel". A red asterisk (\*) is visible in the bottom left corner, indicating a required field.

## Edit Page - General Information

If you have been designated an HQ Administrator, you will see an Edit Page button on various screens throughout the system. You may click it on any screen where it appears. Using the resulting screen, you may re-title the page and add an italicized hint to the Manager link on the home page. You may decide to hide this page from navigation by clicking the 'Do not show' box. From the Location field, you can open a drop-down, which allows you to move the page location within the list of managers, which changes the order as seen on the home page.

The Introduction section contains a BlueStep™ Editor box. Using the Editor gives you the ability to add text, links, graphics, fonts and tables, etc. to the page in much the same way that Microsoft Word™ or Corel WordPerfect™ programs are used. See **The Editor Box**, below.

As with all data entry screens, remember to click the Save or Save and View buttons to post your work.




























## The Editor Box

The BlueStep™ editor box was created to allow users exceptional flexibility in adding text, tables, graphics and hyperlinks to your sites and pages. Each editor has a header displaying tool icons, providing access to functions similar to those offered by traditional word processing programs.



Additionally, you may cut-and-paste from standard word processing programs (such as Microsoft Word™, Corel WordPerfect™, etc.) and web pages. Pasting copied content into the editor preserves the formatting from the original source, as allowed by your page layout.

-  Clears the entire contents of the editor box
-  Cuts the highlighted/selected text
-  Copies the highlighted/selected text
-  Pastes the cut or copied text into the place indicated by cursor position
-  Left arrow undoes the previous edit, right arrow redoes the previous edit
-  Sends text to printer
- Font Style ▼ Changes font style from selected default. Available fonts: Arial, Courier, Helvetica, Tahoma, Times New Roman, Trebuchet, Verdana, Windings
- Font Size ▼ Adjusts the font sizes from size 1 to size 7
- B** *I* U Bolds, italicizes or underlines the highlighted/selected text
-    Aligns text to left margin edge, center or right margin edge
-  Creates a numbered list or a bulleted list
-  Increases or decreases the indent in text
-  Colors the selected font using any of 54 web-safe colors or a hexadecimal code
-  Highlights the selected text using 54 web-safe colors or a hexadecimal code
-  Links highlighted text to a URL. To link: Highlight a chosen page, document or URL. Right click and copy shortcut. Highlight text in editor. Click hyperlink icon. Paste URL into address window. Click OK. If no text is highlighted, the specified link is inserted in the text in the selected position
-  Inserts a picture from the Media Library
-  Inserts a horizontal bar
-  Inserts symbols not found on standard keyboard, such as ™ ¢ £ § © ® ° ¶ ¼ ½ % ª œ and others, including Latin alphabet letters formatted for foreign languages
-  Inserts raw HTML code into the editor box, allowing the use of shopping cart buttons and other formatting
-  Inserts information from the fields in single- and multi-entry forms
-  Strips all formatting from the editor text or from highlighted text only
-  Performs a spell check
-  Reveals the HTML code
-  Opens a larger editor window

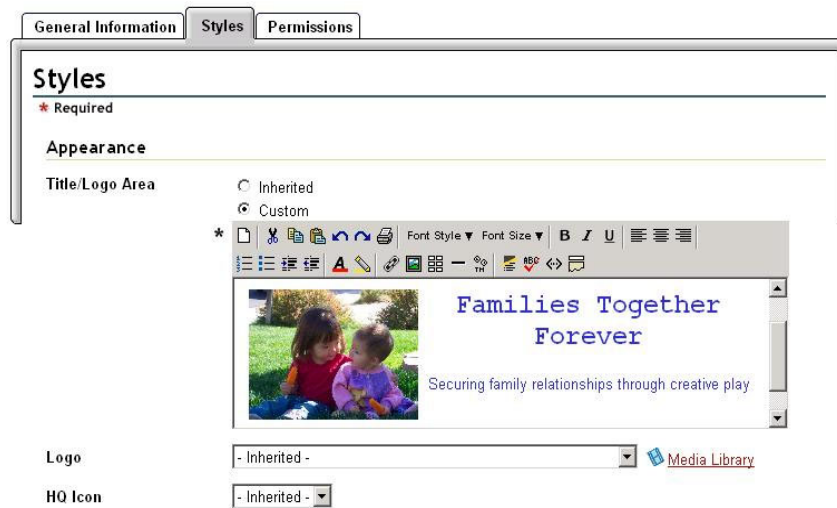
## Edit Page - Styles

If you have been designated an HQ Administrator, you will see an Edit Page button on various screens throughout the system. You may click it on any screen where it appears, then on the Styles tab. The Styles screen controls items that appear in the space between the dashboard and the main navigation bar to the right of the HQ Management logo and title. Since all BlueStep™ products operate in a hierarchical fashion, the styles selections placed here will not be seen other places in the system. Any work that you do on these screens will apply to the page on which you accessed the Edit Page button and to no others.



After clicking on Styles, you have the option of selecting the inherited title/logo, which is only different from the default, as seen above, if your organization has logos or titles in use on other HQ™ products in your unit. The HQ logo and HQ Home titles on the left are unaffected by Styles, but you may add graphics and text to the dark blue area to the right using the editor box.

While the editor has a range of functionality similar to Microsoft Word™ or Corel WordPerfect™, in this instance you will probably want to limit its use to font styles, sizes, colors and alignment or pictures, links and HTML. See **The Editor Box** in **Administrative Options**, above.



The dark blue title/logo space is 47 pixels high. While you may add logos and text that are higher than that, doing so will create unattractive edge distortions in the beige block containing the HQ Home title.

Using the editor box allows flexibility in placement of a logo, however you may also insert a logo using the Logo field, which anchors the logo to the right end of the title/logo space. Any graphic images that are entered in the Media Library will be available on the Logo field drop-down. By clicking the media library link [Media Library](#) you can open the library directly and upload graphical images that you need, but that may not already be in the library. See **Media Library**, above.

The HQ Icon field applies to the HQ Home page, which displays the nine virtual managers. In cases where the default icon for each virtual manager has been individually set to Inherited and you would like them all to be an identical icon, this field provides icon selection from a drop-down.


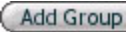
## Edit Page - Permissions

The HQ Administrator has the option of restricting or allowing use of data or any functions/features at multiple points. Anything from a single field to the entire system may be included or excluded for entire groups or individual users through the various Permissions screens.

If you have been designated an HQ Administrator, you will see an Edit Page button on various screens throughout the system. You may click it on any screen where it appears. By selecting the Permissions tab from a specific page, your Permissions settings affect that page only. Any choices that you make on the resulting screens will apply to the page on which you accessed the Edit Page button and to no others. You may set permissions on the main screens of My Office, Total Operations Management, Quality Control Manager, Service Manager and Office Manager and many subsequent screens throughout the system.

The Permissions levels are defined as:



- **No Access** – no admission of any sort to the item
- **Reader** – permission to view contents only
- **Participant** – permission to respond to content
- **Author** – permission to create and add content
- **Editor** – full permission to create, add, edit and delete content in any way











To activate any of these levels for a selected individual or group, click the radio button in the appropriate column. Individual users may be added by clicking the Add Users button . A list of all users presently in the system will appear, allowing you to search, then click [Select](#) to add the needed individual. To add a group of users, click the Add Group button . A list of the security groups that have been configured for your HQ™ will appear. User groups can be added at the Org Admin level (see note below) or in Departments, see **Departments in Management**. Click on the required group to add them to the permissions page. Once the users and groups have been added, you may adjust their permissions in any way desired.

General Information
Permissions


### Permissions


*Use this page to control the level of access to content and functionality. Think in terms of publishing an article in a newspaper. "Readers" can view content, "Participants" can respond to the content, "Authors" can create new content, and "Editors" can modify or remove all the content in the newspaper.*






	No Access	Reader	Participant	Author	Editor	Remove
 All Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
 Everyone	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 HQ Licensees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
 Registered Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 Unit Admins	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	


**Legend**


 Default Permission



 New Permission


 Overridden Permission

 Reset to Default

 Remove







 Cannot Remove

 The security groups that have been configured for your HQ™ can be changed outside of the HQ™ program by an Organization Administrator using the Organization Admin screen. Both dynamic groups (names retrieved by a selected query) and static groups (names selected from a list) can be created for security purposes.

Since permissions in all BlueStep™ products function hierarchically, the permissions granted at the top level of the organization will flow down the organization until they are overridden by selections made on a subsequent Permissions screen.

The icons to the left of each row identifies whether a Default, Overridden or New Permission is in effect. To the far right, in the Remove column, the Reset to Default or Remove icons are available. When you are finished selecting permissions, remember to click the Save button to post your changes.

-  Permissions are at default, as set in the unit above this page in the hierarchy
-  Permissions from the unit (default) have been overridden
-  Permissions are new, not set anywhere in the unit above this page in the hierarchy
  
-  Resets the permissions to selection made in the unit above this page in the hierarchy
-  Removes the user or group
-  Signifies that the user or group cannot be removed



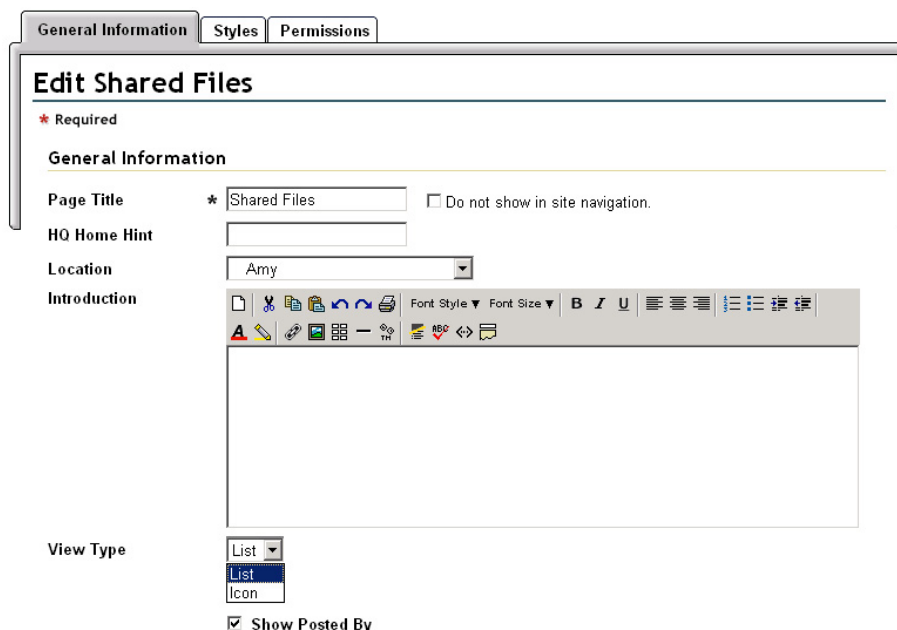
Please heed the warnings concerning edit and deletion powers granted by permission, and the serious consequences they can have to the database in the hands of unknowledgeable individuals.

### Edit Page – Shared Files

The HQ Administrator has the option of configuring the Shared Files page to display in a graphic (Icon) format rather than the default (List) format. However, all of the functionality remains the same, the page is simply displayed in a different layout. The illustrations seen in the **Shared Files** section under Office Manager are from the standard Shared Files (List) format.

### Turning on the Icon Format

If you have been designated an HQ Administrator, the Edit Page button will be visible to you on the upper right of the Shared Files screen. When clicked, the General Information screen will appear just as it does in the above discussion (see **Edit Page – General Information**), with the addition of two (2) options available only on Shared Files.



General Information Styles Permissions

### Edit Shared Files

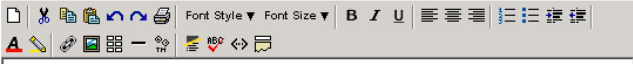
\* Required

**General Information**

Page Title \* Shared Files  Do not show in site navigation.

HQ Home Hint

Location Amy

Introduction 

View Type   
List  
Icon

Show Posted By

## Posted By

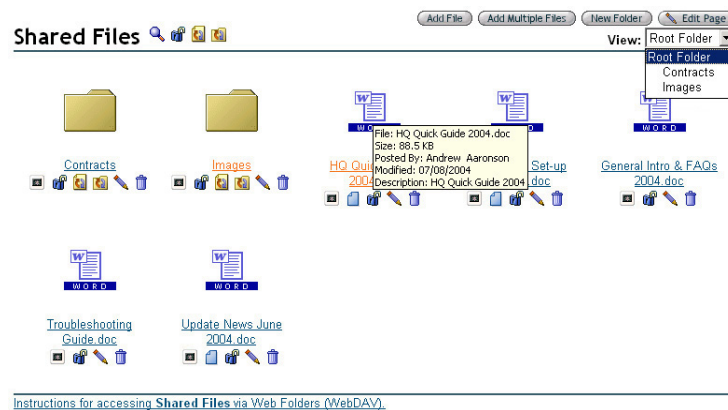
You may choose to have the names of the persons who have posted documents displayed or hidden by using the checkbox. An unchecked Show Posted By box eliminates the Posted By column on the List view and the Posted By line in the Icon view.

## View Type

You also have the option of selecting the List view or the Icon view from the View Type drop-down, which alters the layout of the main Shared Files page.

The Icon view defaults to display each folder in the root folder as a graphic, with the function icons (slideshow, lock, reorder, edit and delete) seen below. Any files that exist in the root folder have the slideshow, version, lock, edit and delete function icons shown below. To view the contents of a different folder, click the View drop-down. In the example below, Contracts and Images are also available to view.

If you mouse over any document within any folder, the information shown on the Shared Files List view (file name, file size, name of the posting individual, last date the file was modified and file description) becomes available, as shown in the small yellow box below.



The Icon view is particularly valuable if you have many images stored in a Shared Files folder. Nearly any graphic, audio or video file will be supported in Shared Files, depending upon the current support inherent in the version of Internet Explorer™ (or other browser) that you or your organization are using. Presently gif, jpeg, png, pdf, Flash, avi, mpeg, midi, wave, mp3, zip, exe (for downloads) and others are storable and supported on the pages. These will appear as thumbnail images, rather than icons, when the folder in which they are contained is opened, and include the function icons, slideshow, lock, edit and delete.





## Step-by-Step in the Administrative Options

### Editing a Page - General Information

- Click the Edit Page button
- Make any needed changes to the page title
- If you wish to hide the page, check the “Do not show in site navigation” box
- Change page location, if desired
- Type in any text you wish to have appear at the top of the page
- Click the Save button when done

### Editing a Page - Styles

- Click the Edit Page button
- Select the Styles tab
- Select the default setting (Inherited) or customize the page (Custom)
- Type in any text you wish to have appear at the top of the page
- If a logo is desired and it is not in the editor box, select one from the Media Library
- Click the Save button when done

### Editing a Page - Permissions

- Click the Edit Page button
- Select the Permissions tab
- Select any of the permissions levels for the groups/individuals listed
- Click the Save button when done

### Adding Permissions Groups

- Click the Add Group button
- Select a group from the security groups listed
- Select any of the permissions levels for the newly added group
- Click Save when done

### Adding Permissions Users

- Click the Add User button
- Select an individual from the All Users screen
- Select any of the permissions levels for the newly added user
- Click Save when done

### Editing a Page – Shared Files Views

- Click the Edit Page button
- Select List or Icon from the View Type drop-down
- Check or uncheck Show Posted By
- Click Save when done



# Frequently Asked Questions

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**Q** I have a username and password, but I can't log in. What do I do?

**A** Check that you have remembered the correct username and password, then check the upper- and lower-cases that are used in each word. Usernames and passwords are case-sensitive; that is, they must be typed into the correct fields **exactly** as entered in your user record, with the same capitalization, punctuation, spelling and spacing. Occasionally, absent-minded entries while creating a login cause a user to be locked out, so please be careful, aware and exact as you create, then use, your username and password.

If, at any point, you have problems on the login screen, click one of the links available at the bottom of the screen. These are each designed to take you to a specific place in the system that will resolve your problem and/or give you the information needed. Please read them carefully and select the link that most closely describes the problem you are experiencing.

#### Need Help?

*If you can't remember your username or password, we can look it up for you.*

- ▶ [Can't remember your Username or Password?](#)
- ▶ [Locked out or unable to find information from a Site or Team?](#)
- ▶ [Need to change your Username, Password or Email?](#)
- ▶ [Why do I need to Login?](#)
- ▶ [Need technical help from BlueStep customer care?](#)

**Q** How do I get a login username and password?

**A** Your organization will have set a process by which they assign or have created usernames and passwords for their users or staff.

The organization may opt to **sign up for you** and issue the username and password to you. If that is the case, you would enter the username and password given you in the appropriate fields on the login screen to obtain access.

If you continue to have difficulties, select one of the **Need Help?** links on the login page. These links provide a variety of ways to resolve any login issues you may encounter.

#### I'm already a user


*Usernames and passwords are case-sensitive.*


Username \*

Password \*

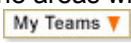
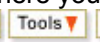

Remember Me

**Q** I have tried to enter the site, but am receiving the message “You have exceeded the maximum number of allowable login attempts.” What should I do?

**A** The error icon  and this message appears if you have made more than three unsuccessful attempts to login. This is a security measure, which prevents automated hacking into your account. Completely close your browser (Internet Explorer™, etc.). Reopen the browser and navigate to the site again; you will have three more tries to enter.

**Q** I am able to login okay, but get the icon and message, “ You are currently logged in but you are not authorized to view this site. Please contact the site administrator for access.” Why is this? Where do I go from here?

**A** The message is explaining that you do have a valid user account, but the particular page where you are attempting to login is secured by permissions that you have not been granted.


However, the page will display button links to the areas where you **do** have permission to enter. Look for the My Teams, Tools or Sites buttons    to appear at the top of the screen. You may see one, two or three of these, depending upon the products your organization has purchased and upon your own permissions level. Clicking any of these will take you to pages where you may work and navigate as needed. It will probably be more convenient if you set ‘Favorites’ (on your browser) to be one of the pages where you have unrestricted direct access.

If you believe you should have access to certain pages where you are locked out, the information in the red message is your best route to resolving the problem. Part of BlueStep’s commitment to our residents is that we do not intrude into their security measures and permissions authorization. They have full control over whom they wish to include or exclude from files, pages, sites or products. That being the case, the site administrator from the organization who owns the site or Team has the authority to grant proper permissions for your entry.

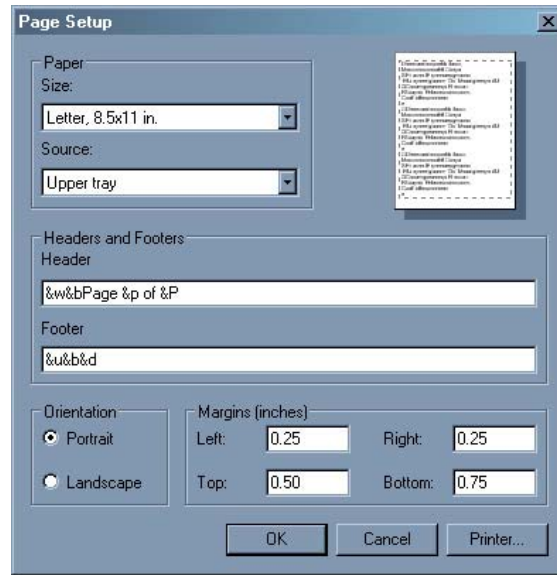
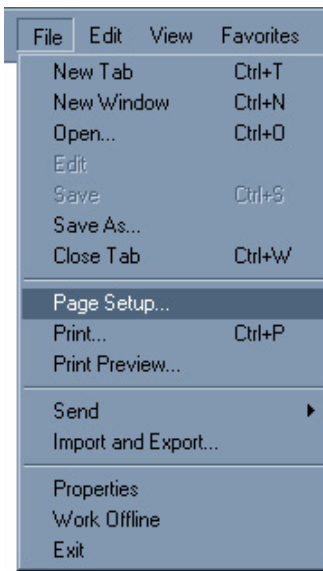
**Q** I want to print a report, but it does not print. What do I do?

**A** There are a few things to check before you go any further: the printer is turned on, the power cable is plugged into both the back of the printer and the wall or power strip, the data cable is plugged into the back of the printer and the back of the computer case. If everything is connected, call your organization’s computer technician, as this would appear to be a hardware problem to be handled locally.

**Q** My reports print, but they are not printing correctly on the page. What do I do?

**A** Check that there is a print link  [Print](#) on the desired report and that you are using it rather than the print icon on the browser. Then, check the margin settings for your printer. To do this, click the File link at the left side of the browser heading, as seen below, left. Select Page Setup.





On the Page Setup dialog box, as seen above, right, adjust the margins (bottom right section) as needed. Most BlueStep pages print best with the settings as shown above: Left: 0.25, Right: 0.25, Top: 0.50 and bottom: 0.75. Be sure to click the OK button when done.

If the margins are set correctly, but there are large gaps on the printed page, it is usually that a user has entered a string of erroneous characters or blanks into a field contained on the form or report. This can happen when a form is open and the user leans against or lays an object on the keyboard. Finding the mistaken entry and clearing it will solve the problem.

**Q** I need to update my username, password and e-mail address. Where can I do that?

**A** You will see a My Profile link in several locations depending upon the product you are using. All applications will have a My Profile link [My Profile](#) on the dashboard at the top of the screen. In HQ™, [★ My Profile](#) appears on the left of the main screen and [My Profile](#) is the bottom link on the My Office secondary menu. Clicking any of these will produce a screen where you may change username, password and/or e-mail address. Depending on the product and its configuration, you may also be able to review and edit password hint, e-mail subscription preferences, home and work contact information and persons you have listed as contacts, as well as other pertinent data. As with all data entry screens, if you make changes, you must click the Save button [Save](#) for the changes to be posted.

**Q** I find that my changes don't always record on the screen. What is happening?

**A** Because you are working 'live' within a database, on any screen where the Save button is active, you **must** click it in order for your work to be posted to the database and saved in the system. On any screen with an inactive Save button (grayed out), you **must** click Next until the Save becomes active and available to click. Unfortunately, until you are in the habit of looking for the buttons at the bottom of each screen, it is easy to navigate elsewhere without posting the

work. Scroll down and check for buttons at the bottom of each data entry screen after you have made any changes. Using them every time will ensure that your work sessions go smoothly.

**Q** Every so often I get a message saying that my site is unavailable. What's wrong?

**A** There are several possible answers to this question. The most common reason is a mistyped URL (website address entered into the address bar of your browser). That is why we often recommend that you use the 'Favorites' listing on your browser (Internet Explorer™). It is a quick and easy way to reach the site and always records the URL accurately.

The second possibility is that your Internet service is down. Check to see if you can reach *any* websites. If you can't, then call your Internet Service Provider (ISP). They should be able to restore your connection or give you further advice.

The third reason has to do with the volume of traffic through the Internet and the route your connection takes to reach its destination. Your ISP routes all its traffic through many connection points (called nodes) to reach the requested URL. If an ISP uses an excessive number of connections, your browser can 'time out' before reaching the destination. The same is true if there is simply more Internet traffic than can be effectively handled, even with just a reasonable number of connections. The majority of the time, the problem clears itself and retrying the site in a few minutes resolves the issue. However, if this is a frequent and continuing problem, switching to a better ISP is probably your best solution. Please note that one of the favorite tactics of cyber-terrorists is to direct so much bogus traffic at a target site that no legitimate connections can be made. This is not the fault of either your ISP or the owners of the site.

Lastly, in a *very* few instances our servers are down. We make every effort to ensure that your access is continuous and uninterrupted, however, the unexpected and unavoidable does occasionally happen. To address this, the servers are monitored 24/7 by on-call engineers. If a problem develops, they are notified by pager and immediately go to work resolving the trouble. In general, it takes just a few minutes to handle any server issues. Please be patient and allow a little time before retrying the site.

**Q** Sometimes the site seems slow and pages don't return quickly. Why is this happening?

**A** Page load time is affected by a number of factors, some of which are controlled by you, some by BlueStep™ and some by the Internet Service Providers between our servers and yours.

Page complexity is one factor. Most sites on the web are static pages - simple, unchanging displays of data and graphics. BlueStep™ pages are dynamic; that is, they have active functionality that directly interacts with the database. If a specific page is large and complex it will take longer to load than a static page. It is, however, a difference of seconds over milliseconds, in most cases.

The second factor is the speed and efficiency of your computer. If you have an older computer or are running a large number of programs concurrently (including background processes), the time taken by your computer to send a request for the page, process and display the results can be significant, perhaps from one to ten seconds. Exceptionally large pages may take up to thirty

seconds. On a newer, faster computer, even relatively complex pages seldom take over a second to load.

The third factor is the upload speed, the download speed and the latency of the Internet service you are using. Latency is the time it takes for messages to be passed from computer to computer through the Internet. It is extremely variable and can be difficult to control. A good latency is around 0.5 seconds both to and from the destination. A high volume of user traffic can slow connections through even very high speed/low latency Internet Service Providers. Upload and download speed, as well as latency, are important factors to know and consider when choosing an ISP.

Page load time at BlueStep™ is controlled by the speed of our network, the speed of our data storage/retrieval systems and the efficiency of our application software and servers. We monitor these systems constantly and make improvements regularly. Presently, approximately 74% of our pages process in under a quarter of a second, though it is possible for a user to hit complex pages that may take slightly longer or to run into an occasional period of high user traffic.

We continue to enhance the performance of our hardware and software in an ongoing effort to serve our residents better. If page load times are an issue for you, upgrading your computer or your Internet Service Provider will likely produce a noticeable improvement in speed.