# MEASURE™

PRACTICE MANAGEMENT

# User Manual

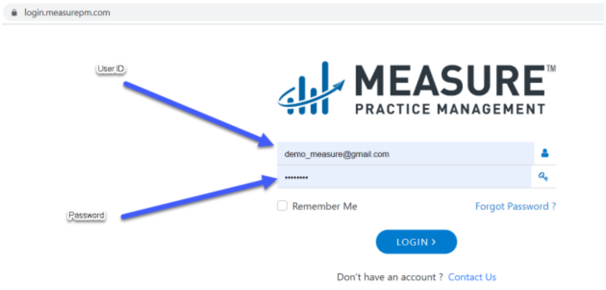
# Contents

# 1. Introduction and Login

Measure is an innovative Applied Behavior Management Software that provides Practice Management, Data Collection, Scheduling, and Revenue Cycle Management in one complete system.

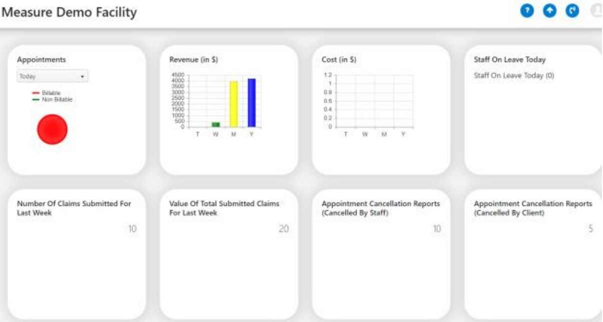
## Login

Please use the username (your email) and password provided to you by your facility administrator. Facility administrators will receive login credentials provided by the MeasurePM implementation team. Upon logging in for the first time, the system will prompt users to change their password.




## 2. Dashboard

User dashboards will display a collection of widgets configured for your group by your facility administrator. Administrators will be able to define which widgets will be visible to user groups by going into the Admin page.



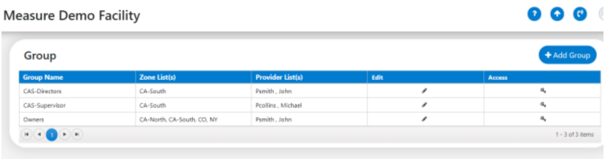

## Available Widgets and Explanation

- Appointments by Category - Displays total appointments and breakdown of billable versus Nonbillable
- Revenue – Displays revenue in dollars by day, week, month and year in real-time
- Cost – Today's cost in dollars (Payroll rates must be defined in order to generate amount)
- Staff on Leave – Displays how many of staff are on leave each day
- Number of Claims Submitted last week
- Value of Submitted Claims last week
- Appointment Cancellations by Staff

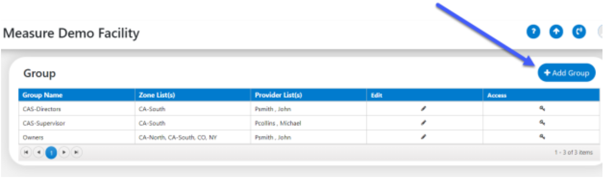
- Appointment Cancellations by Client

## 3. Admin

Under this tab administrators may create and manage group members as well as define page permission/authorization for specific users.




To add a group, click the ‘Add Group’




Add Title of the group, select zones for which this group has access to and add providers.

Zones can be defined to group providers by specific geographic areas for scheduling purposes. Providers will only be able to access client's within assigned zones.

By clicking on 'Zone List', predefined zones will appear in the drop-down menu allowing users to choose applicable zones. Users will be able to add providers to the group created as seen below:

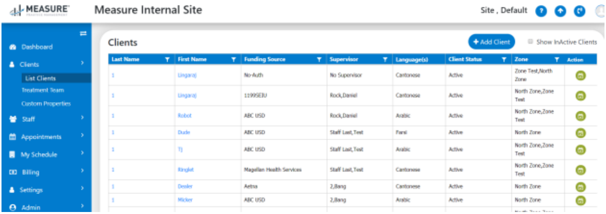

Click 'Save'. You should get a message saying 'Admin group saved successfully.' You may now click on 'Close.'

# 4. Client

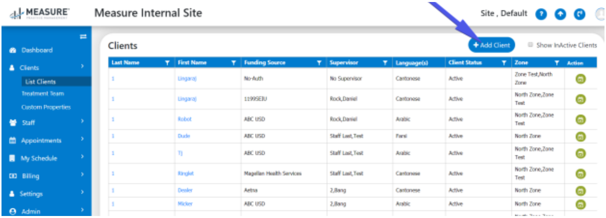
Under the 'Client' tab, authorized users are able to add/edit active client information, client access and create/edit custom properties. The 'Client' submenu has 3 subfields: options:

## 4.1. List Clients

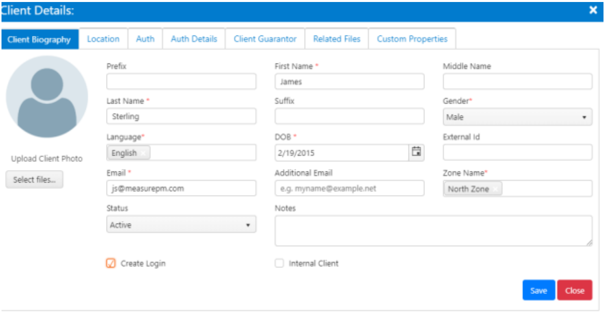
In this section, users will be able to view and access active client information. Facility Administrators have the option to create zones in order to group clients geographically (as well as by other desirable categories) by clicking on 'creating/configuring.' You may also access inactive client information by clicking on the 'Show Inactive Clients' box."



The 'Client' screen allows you to add and manage client information. To add a client, click on 'Client' from the menu on the left side of your screen, choose 'List Clients' from the dropdown menu, and then click on 'Add Client' as seen below:




A dialogue box will then appear as displayed below:



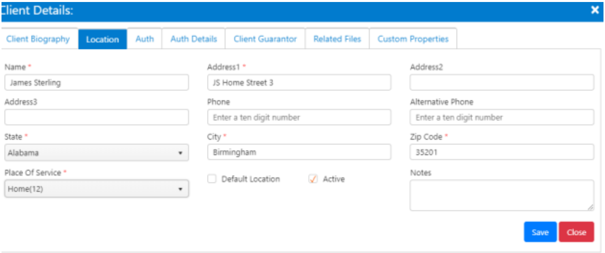
The fields in the above dialog box are defined below:

| Field | Value | Definition |
|---|---|---|
| First Name | Enter Client's *First Name* | The first name indicates the client's first name |
| Last Name | Enter Client's *Last Name* | The last name indicates clients last name |
| Gender | Specify *gender* from drop-down | Gender (Male, Female or Transgender) |
| Language | Enter the Client's *language* | Defines the language Client speaks |
| DOB | Enter Client's *date of birth* | Describes the Client's age as per his/her birth date |
| Email | Enter Client's *Mail Id* | Guarantor Email |

| | | |
|---|---|---|
| Additional Email | Enter Client's *additional Email * (If any) | Alternate email |
| Zone Name | Enter *Zone* from drop-down | Defines the specific geographic area |
| Status | Enter client *Status* from drop-down | Status defines the current status of the client; Approved, Inactive, etc. |

Once all mandatory fields (marked with a *) in the Client Biography section have been completed, click on Save.

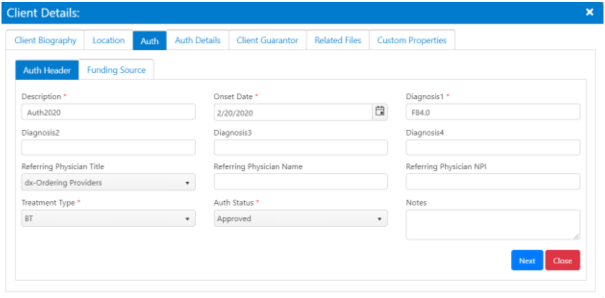
We now move on to the 'Location' tab to add a location where the appointment will take place:




Once you have completed all mandatory fields, click on 'Save.'

Next, select 'Auth' to input/edit all service authorization information.

Upon clicking on 'Auth', a dialogue box with two subfields titled 'Auth Header' and 'Funding Source' will appear. Select 'Auth Header' to begin inputting your client's service authorization information, as seen below.




Please refer to the table below for definition of fields related to 'Auth Header:'

| Field | Value | Definition |
|---|---|---|
| Description | Enter Auth name or short description | Authorization is approval of medical services by an insurance company, usually prior to services being rendered |
| Onset Date | Enter *date* in the format MM/DD/YYYY | Diagnosis date |

| | | |
|---|---|---|
| Diagnosis | Enter the First Diagnosis, the user can enter multiple diagnoses | Diagnosis is the identification of illness done by examination |
| Referring to Physician Title | Enter the title of physician from the drop-down | Defines the type of provider required |
| Referring to Physician Name | Enter Physician name | Defines the provider's name |
| Referring Physician NPI | Enter the NPI number | NPI is a Health Insurance Portability and Accountability Act (HIPAA) Administrative Simplification Standard. The NPI is a unique identification |

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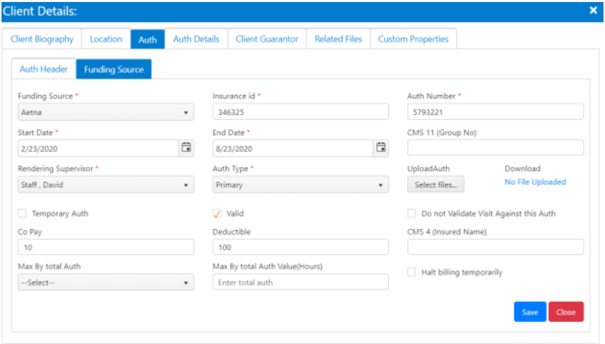
| | | number for covered health care providers. |
| Treatment Type | Enter the treatment from drop-down | Treatment type is the specific treatment the client requires from our defined treatments |
| Auth Status | Enter status of Auth from drop-down | Auth status allows user to select the current status of Auth |
| Notes | Enter Notes if any | You may add any relevant additional information that is not covered in provided fields |

Next, click on ‘Funding Source.’ This will enable users to input information detailing the service authorization including the funding source, insurance identification, Auth number and other related information. Please refer to the dialog box below:




Please refer to the table below for definition of fields related to 'Funding Source:'

| Field | Value | Definition |
|---|---|---|
| Funding Source | Enter the source name from the drop-down | The organization that will be responsible for funding services |
| Insurance ID | Enter the insurance ID received | It is the same Id as seen in 'Auth' for insurance |
| Auth Number | Enter a valid 'Auth' number found in the | This number is issued by the funding source |

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|---|---|---|
| | 'Auth' document | and can be found in the authorization document |
| Start Date | Enter the date when service/insurance is set to start | Defines the start date of service/insurance authorization |
| End Date | Enter the date when service/insurance is expected to end | Defines the end date of service/insurance authorization |
| CMS 11 Group Number | Enter the CMS 11 group or policy number | |
| Rendering Supervisor | Enter the name of the Supervisor. | Rendering supervisor approves sessions that are rendered. |
| Auth Type | Enter from the drop-down the Auth type | It defines the type of 'Auth' |

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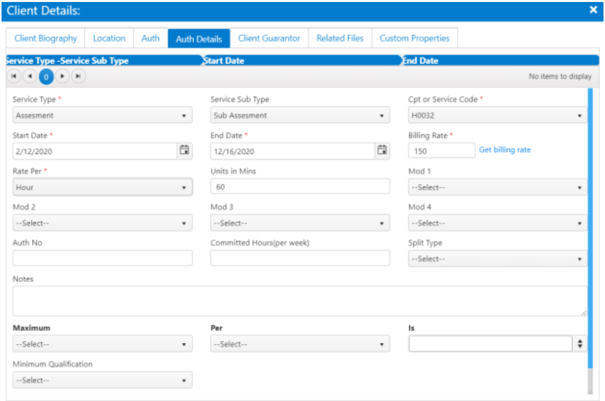
|---|---|---|
| Upload Auth | Clicking on this will allow you to attach an auth document and upload it to the system. | Auth document is the document for approval of medical services issued by an insurance company. |
| Co-Pay | Enter the Co-pay amount | A co-pay is a fixed out-of-pocket amount paid by an insured individual for covered services. |
| Deductible | Enter the deductible amount | The amount a client guarantor is responsible for paying for covered health care services before the insurance plan is in effect |
| CMS 4 (Insured Name) | Enter the name as per CMS 4 | CMS 4 defines Insured's name (Last name, First |

| | | |
|---|---|---|
| | | name and Middle Initial) |
| Max by total Auth | Enter the feature to the max by total auth | Defines the max as per ‘Auth’ |
| Max by the total value | Enter the value to the max by total value | Defines the max as per the value |
| Halt billing | Checking the box allows you to halt billing | Users can halt billing temporarily. |

Upon completing all mandatory fields in the ‘Auth’ tab, click on ‘Auth Details’ to complete additional service authorization information including service type and authorization dates.

Here you will be able to complete the service type information as displayed below:




Please refer to the table below for definition of fields related to 'Auth Details:'

| Field | Value | Definition |
|---|---|---|
| Service Type | Enter the service type available in the system | Service type as defined by your facility |
| Service Sub Type | Enter the sub-service type already | Sub service type as defined by your facility |

| | | |
|---|---|---|
| | defined | |
| Cpt or Service Code | Enter the service code provided. | CPT Code or Service Code as defined in Auth |
| Start Date | Enter the date when service is set to start | Defines the start of service. |
| End Date | Enter the date when service is expected to end | Defines the end of service. |
| Billing Rate | Press on the link alongside the field to get the automatic billing rate for particular service and time | Billing rate as per your company rate table |
| Rate per | Enter a suitable field | Rate per any of the time span |

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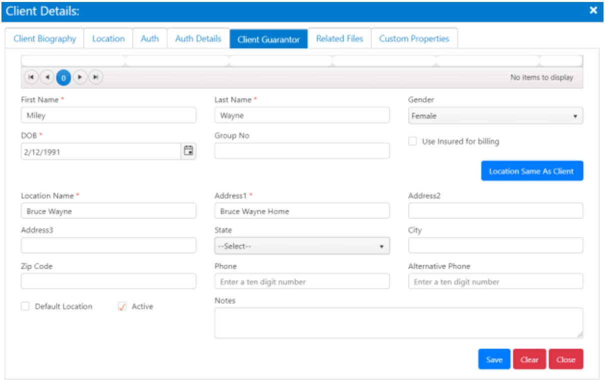
| | for the rate to be calculated | |
| Units in Mins | Enter units in mins per the above-mentioned rate per. | Defined in mins |
| Mod | Select mod from drop-down | Modifier as defined in your contract with Insurance |
| Auth No | Enter Auth Number as provided | If you have a different auth number for each service type |
| Committed Hours per week | Enter as per the client's availability | Committed hours per week is the time client is available to receive the services |

| | | |
|---|---|---|
| Split Type | Enter the split type from options | Split time can be defined as how a service would be split; by day, week or month. |
| Notes | Take notes if necessary | Option to add additional relevant information that is not available in the software. |
| Maximum | Define max value | Maximum by hours |
| Per | Enter per what feature. | Per what feature maximum is defined. |
| is | Enter the required time | This whole thing creates a prerequisite as to how many hours per day, week, month or |

| | | |
|---|---|---|
| | | total auth needs to be set as maximum. |
| Minimum Qualification | Enter the minimum qualification required | You can choose minimum qualification for service type or subtype if dictated by 'Auth' |

Once users have completed all mandatory fields in the 'Auth Details' tab, please proceed by selecting 'Client Guarantor,' which will allow users to add the details of the Guarantor including Name, DOB, Contact and address. Once this has been completed, click on the 'Save" icon.




Please refer to the table below for definition of fields related to 'Client Guarantor:'

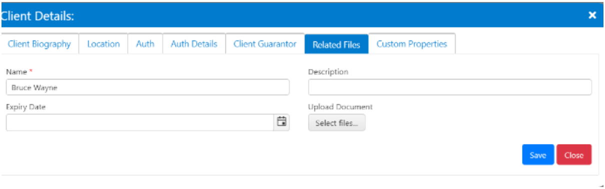
| Field | Value | Definition |
|---|---|---|
| First Name | Enter your *First Name* | Guarantor's First Name |
| Last Name | Enter your *Last Name* | Guarantor's Last Name |
| Gender | Enter from Drop-down | Gender (Male, Female or Transgender) |

| | | |
|---|---|---|
| DOB | Enter guarantor birth date | Defines guarantor's birth date |
| Group No | Enter group number as per the document | Group Number as listed on insurance card |
| Location Name | Enter the name of Location | Header or name for Guarantor's location e.g. home |
| Address | Enter the address of the Guarantor | Enter the Street and house number |
| State | Enter State Name | State |
| City | Enter City Name | City |
| Zip Code | Enter the area zip code | Zip Code |

| | | |
|---|---|---|
| Phone | Enter 10-digit valid phone number | Phone Number |
| Alternate Phone | Enter 10-digit valid alternate phone number | Alternate number if any |
| Notes | Take notes if any | Notes |

**Note**: In the event the guarantor's address is the same as the client, please select Same Location as Client. This will automatically populate the guarantor's location information using the client's previously entered information.

Upon saving Guarantor's details, you may also attach any relevant client files under 'Related Files' as seen below:



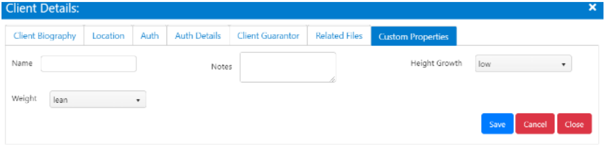

Please refer to the table below for definition of fields related to 'Related Files:'

| Field | Value | Definition |
|---|---|---|
| Name | Enter the file name | Defines the file name |
| Description | Enter a short description of the file | Define the features or what is the document or file about |
| Expiry Date | Enter the Expiry date of the document in the date format MM/DD/YYYY | Defines the validity of the attached file or document |
| Upload Document | Click here to browse, | Option to upload the |

| | | |
|---|---|---|
| | choose and select the file. | document from the user's system |

**Note**: The related files may include, but are not limited to Insurance Cards, Treatment Plans, Client Intake forms, Insurance Denial Letters, IEP documents, Diagnostic Reports, etc.

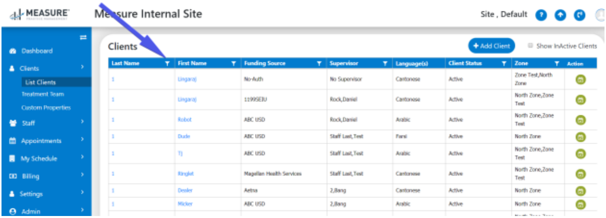
The last step in adding a new client is 'Custom Properties,' a field that allows you to create additional desired fields.



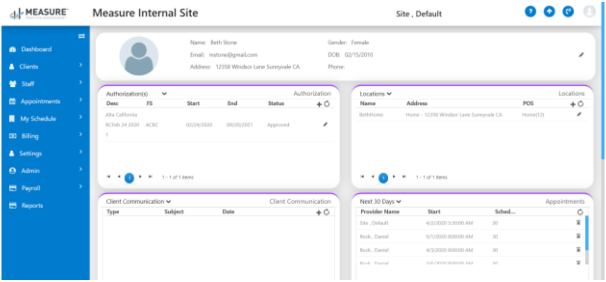

Choose the 'Label' and set the control and hit ''Save''.

This concludes the process of adding a new client.

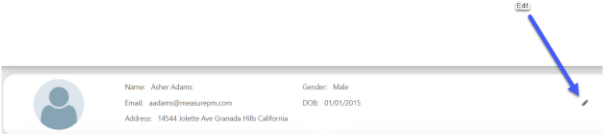
Once all clients have been entered into your organization’s Measure database, users may then search for a client by first name, last name, funding source, supervisor, language, status or Zone, using the filter option as shown by the arrow.




To view client information, click on the client’s first or last name. Users will be able to view the client’s homepage, including any information that the user has been authorized to access.  Some users will have ‘read-only’ access while others may be able to view and edit client information. If you wish to adjust your access authorization, contact your facility administrator.



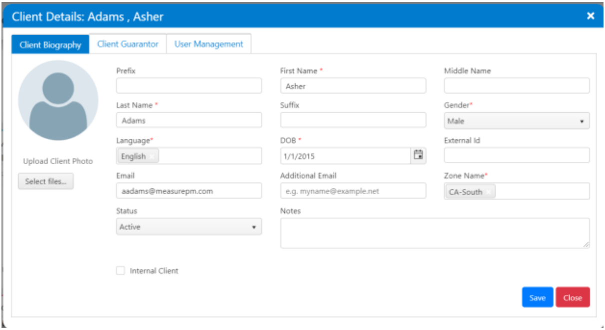

‘Client Biography’ provides access to biographic information of the client. To edit/view more information, click the edit button.




Depending on your access type, you may be able to view and edit client biographic information here. Mandatory fields are marked with *.

When editing client details, the client information is broken into three different sections: ‘Client

Biography', 'Client Guarantor' and 'User Management'.



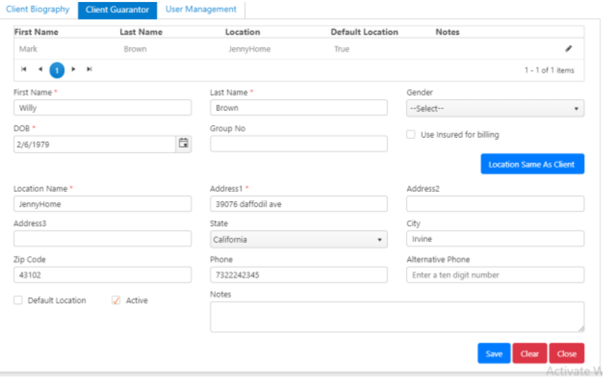

As seen above, there are multiple fields under 'Biography' which can be edited as necessary.

Press 'Save' after you complete the desired edits. Pressing 'Close' will close this screen.

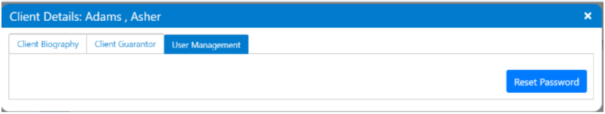
Upon filling out/editing 'Client Biography' you may move on to 'Client Guarantor' which will allow users to edit the guarantor information. Once again, the fields marked with * are mandatory to fill out.

You may input a different location for the guarantor if it is different from the client's address.

A Guarantor is someone who is responsible for the client and acts as a guarantee. A guarantor acts as co-signer because they pledge their own assets or services in case the original debtor cannot perform their obligations.



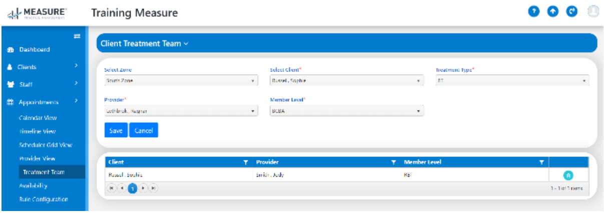

Upon completing the 'Client Guarantor' tab, you may move on to 'User Management," which is used to reset/manage the password for the Guarantor’s account.




Closing this section will take you back to the overview of the client’s information.

## 4.2. Treatment Team

This option allows users to create a treatment team based on Zone, Client, Treatment type, Provider and Member level as seen below:



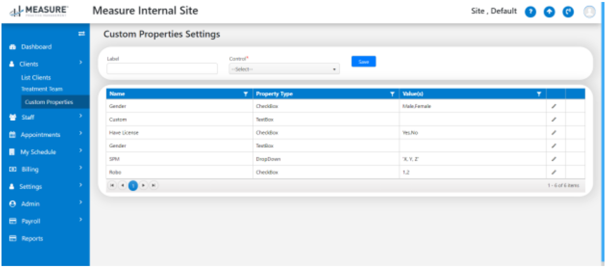

Clicking on ‘Save’ will add Sophie Russel to another treatment team as seen above.

**Note**: In the image above, Sophie Russel is already in a treatment team. If she is added to another team... (her information is given though users can add the same client in another team as well).

## 4.3. Custom Properties

Please note: Custom properties are subject to access and only those who have the appropriate permissions will be able to create custom properties.

To create a Client custom property, click on Clients and then ‘Custom Properties.’ This will enable select users to create custom properties that will be available for all clients of your organization.



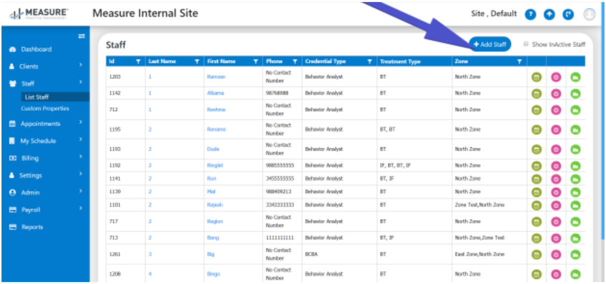

Choose the desired ‘Label,” select desired ‘control’ and then click on ‘Save.’

## 5. Staff

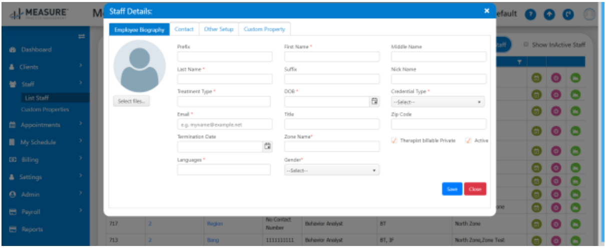
Select Staff from the toolbar to the left of the Dashboard. Clicking on ‘Staff’ takes you directly to the list of the staff added to our system. In order to view or edit any of the staff members you can click on the first or the last name, as done under ‘Client,’ but to add new staff click on ‘Add Staff’ as shown in the following image below (please see 5.1).

## 5.1. List Staff

Clicking on ‘List Staff’ opens a complete list of staff. On the top right-hand corner, there is the option to add any staff member by clicking on ‘Add Staff.’




Next, complete fields ensuring that all mandatory fields (marked with a *) are completed. Please refer to the image below:



Please refer to the table below for the definition of fields related to 'Employee Biography:'

| Field | Value | Definition |
|---|---|---|
| First Name | Enter *First Name* | Staff's first name |
| Last Name | Enter *Last Name* | Staff's last name |
| Treatment Type | Select treatment from drop-down | Defines type of treatment staff are authorized to provide |
| DOB | Enter Date of birth | Defines the age of the staff |
| Credential Type | Select the credential of Staff | Credential defines highest staff credential |

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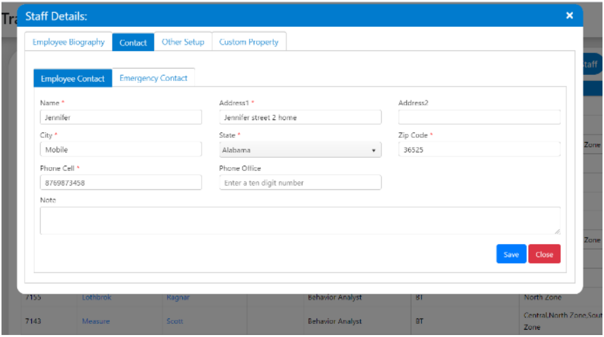
|---|---|---|
| | | (e.g. RBT, BCaBA, BCBA, ect.) |
| Email | Enter the email | Staff's email address for communicatio n |
| Zip Code | Enter Zip Code | Zip code of the staff's home or mailing address |
| Termination Date | Select the termination date | Final date of employment, if applicable. |
| Zone Name | Enter *Zone Name* | A zone is a geographic area that this staff member belongs or has permission to render services |
| Languages | Select all the languages a staff can speak | Languages that staff knows and can speak |

| | | |
|---|---|---|
| Gender | Specify Gender | Gender |

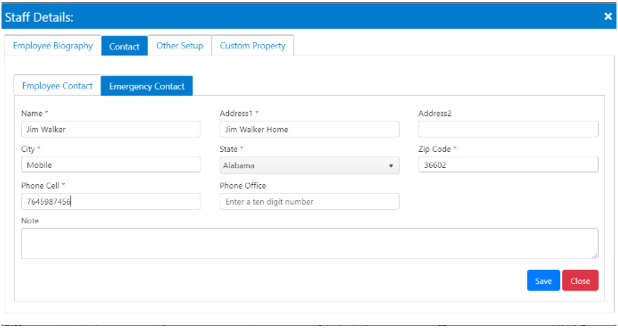
Upon completing ‘Employee Biography,’ select the next tab “Contact,” under which there are two subfields: ‘Employee Contact’ and ‘Emergency Contact’ as seen below:



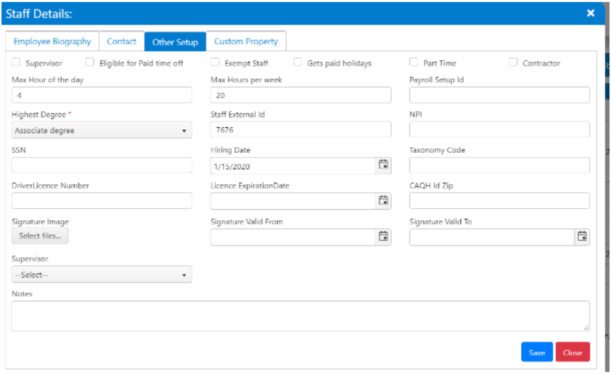

Please refer to the table below for definition of fields related to ‘Employee Contact:’

| Field | Value | Definition |
|---|---|---|
| Name | Enter *Full Name* | Name of the employee |
| Address | Enter *Full Address* | Address of the employee |
| City | Enter City | City of residence |
| State | Select State | State of residence |
| Phone Cell | Enter 10-digit valid number | Phone number |
| Notes | Notes | Notes include any staffing or personnel information |

Click 'Save' after inputting all relevant information and proceed to 'Emergency Contact.' Fill out all the mandatory emergency contact information.




Click ‘Save’ when done filling out this section and proceed to ‘Other Setup,” which allows you to add additional details pertaining to ‘Staff.’



Please refer to the table below for definition of fields related to 'Other Setup:'

| Field | Value | Definition |
|---|---|---|
| Max Hours of the day | Enter the max hours per day | Max number of hours of service for a single day |
| Max hours per week | Enter the max hours per week | Maximum number of hours of service for a single week |
| Payroll Setup ID | Enter Payroll setup Id | Payroll ID as per the employer |
| Highest Degree | Enter the highest degree | The highest degree of employee |
| Staff external ID | Enter the external Id | Record or ID outside the company |
| NPI | Enter the employees | A National Provider Identifier |

| | | |
|---|---|---|
| | 10-digit NPI number | (NPI) is a unique 10-digit identification number issued to health care providers in the United States by the Centers for Medicare and Medicaid Services (CMS). |
| SSN | Enter your SSN number if any | Social Security Numbers (SSNs) are required for employees enrolling in group health coverage |

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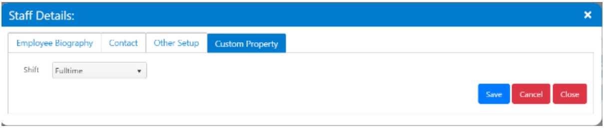
| | | through their company. |
| Hiring Date | Enter the date in the format MM/DD/YYYY | Start date of employment |
| Taxonomy Code | Enter the taxonomy code given. | Taxonomy codes are administrative codes set for identifying the provider type and area of specialization for health care providers |
| Driver license number | Enter the driving license number | Driving license unique number |
| License Expiration date | Enter the expiry date of license | The expiration date for the |

| | | |
|---|---|---|
| | | employee's driver's license. |
| CAQH Id Zip | Enter CAQH Id zip | CAQH stands for "Council for Affordable Quality Healthcare". It is essentially an online database that stores provider information. Providers grant access to their information to insurance companies |
| Signature Valid from | Enter date from* | Signature validity date from |

| | | |
|---|---|---|
| Signature Valid to | Enter date to* | Signature validity date to |
| Supervisor | Enter the supervisor name | A supervisor is a person reporting to |

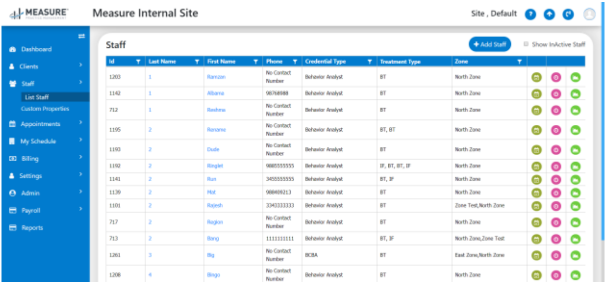
Click ‘Save’ after inputting all the information and proceed to the final tab ‘Custom Properties,” where the user can define the ‘Shift’ for that particular employee - please see the image below. This concludes the process of adding new employees to the portal.




**Note:** Please click on ‘Save’ after completing each section before moving on to the next tab.

This concludes the process of creating new ‘Staff.’

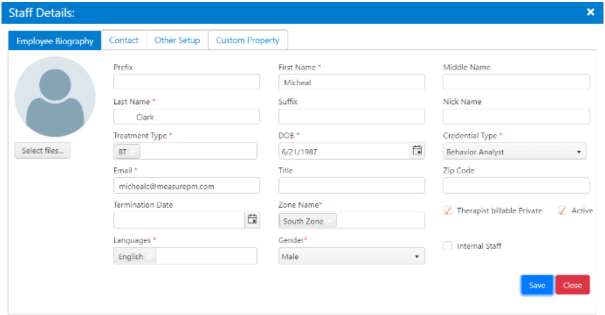
Users may search for a particular staff member by their first or last name, zone, etc.




To access staff information, click on a Staff name.

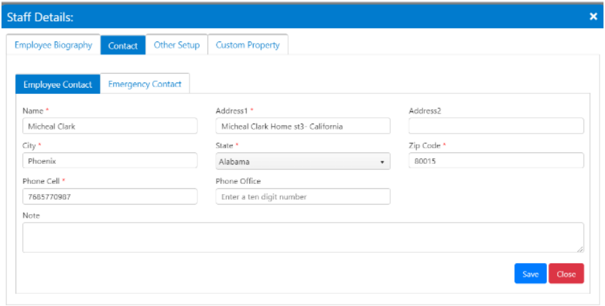
Click on the edit button (pencil icon on the right-hand corner as seen below) to edit or view complete staff information.


Once you have clicked on the edit button, a dialogue box, as seen below, will appear:

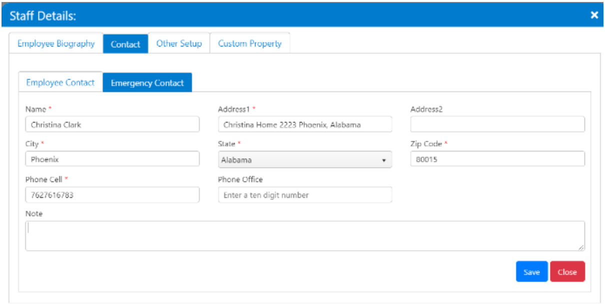



Input all mandatory information including First Name, Last Name, and Authorized Treatment Type that you wish to edit. Once completed, click on 'Save.' Users may edit any of the information available in the four tabs displayed under 'Staff' details.

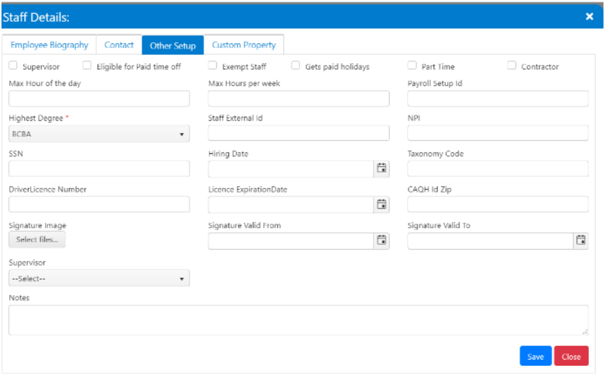
The Contact option allows users to edit the 'Employee Contact' and 'Emergency Contact' as seen below:



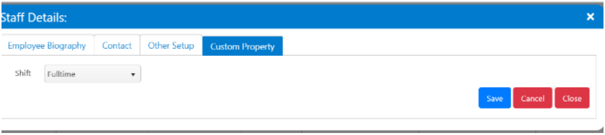

And 'Emergency Contact' as seen below:




The 'Other Setup' tab allows you to edit the details related to a staff member's highest degree, hire date, and payroll settings.

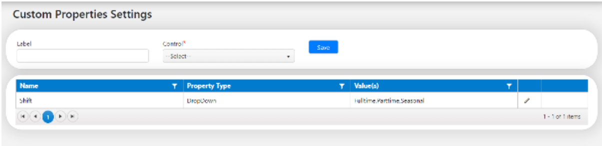



The ‘Custom Property’ tab functions similarly to the ‘Custom Property’ tab found in the ‘Client’ section; however, labels in this section will only apply to staff.



## 5.2. Custom Properties

Access to 'Custom Properties' is subject to permissions. Users who have been granted the appropriate permissions, will be able to create custom properties.




Create the desired 'label,' set the 'control' option and click on 'Save.'

# 6. Appointments

This module helps you view, add or edit appointments and availability of client and provider (if established). You will see next how to navigate this section of the software.

To view, edit, or schedule appointments, click on the 'Appointment' tab on the left-hand toolbar. A dropdown menu will appear that allows users to select from a variety of views, configure scheduling rules, and view availability.

## 6.1. Calendar View

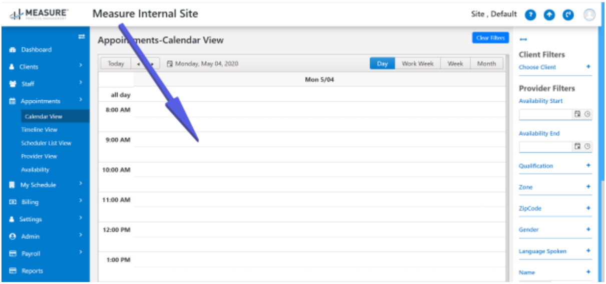
This option allows you to view client and provider schedules as well as create an appointment as indicated below by the arrow.

To view a client schedule, first locate the Client Filters menu on the right-side of your browser window.  Select the appropriate client by clicking on ‘Select Client’ and selecting the appropriate client’s name.  Users may limit the number of possible clients by selecting a zone, which will only allow clients assigned to this zone to populate in the dropdown menu.  In addition, users may view the client schedule by day, work week, calendar week and month by using the tabs near the top of the screen.

To add an appointment, double-click anywhere on the calendar to open a Add/Edit Appointment dialog box.  This will allow users to enter in all appointment information manually.

When scheduling an appointment, users are encouraged to use Measure's Client Filters feature, which can be used to help identify appropriate providers based on criteria including availability, qualifications, and zone.

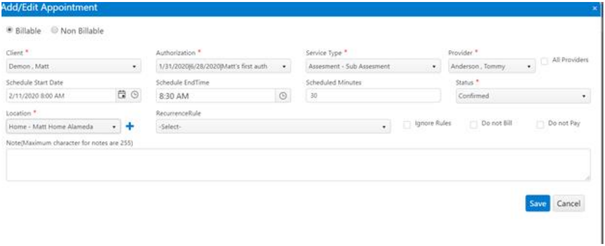
To do so, first select the client under 'Choose Client' found on the Client Filters menu. This will open an existing schedule for the client, which will allow you to create or edit a session by clicking on the desired time.




Next, enter in all necessary criteria such as availability, qualification, zone, zip code or gender that can be entered into the appropriate fields in the Client Filters menu.  This will produce a filtered list of available providers that meet specified requirements.  View provider schedules by clicking on a particular provider under 'Name'. The system will indicate the percentage availability of the provider next to their name.

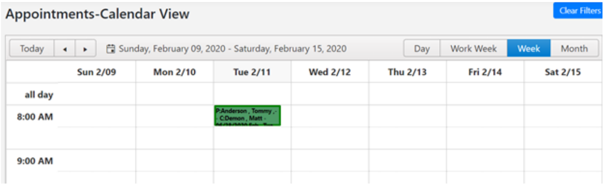
Next, double-click anywhere on the calendar to open the Add/Edit Appointment dialogue box and enter in all required appointment information. Finally, click on Save.

**Note:** Users may create recurring appointments by selecting the appropriate rate of recurrence from the Recurrence Rule dropdown menu.

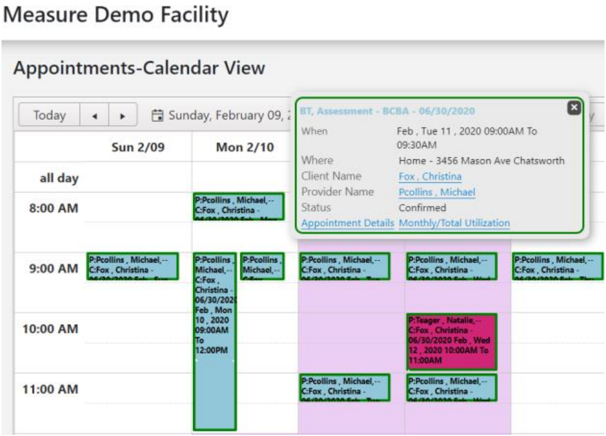



If a treatment team has been created, only team members will be shown under the provider list. To see all providers, click the 'all provider' checkbox.

This is how an appointment will be displayed on your calendar upon successfully creating it:

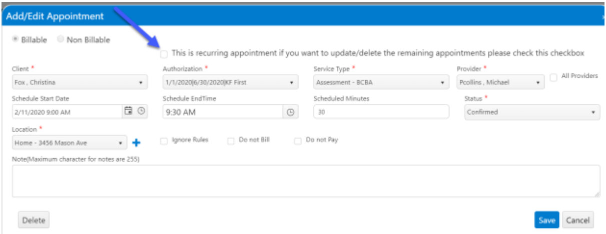


To see the details of an existing session, click once on the appointment.



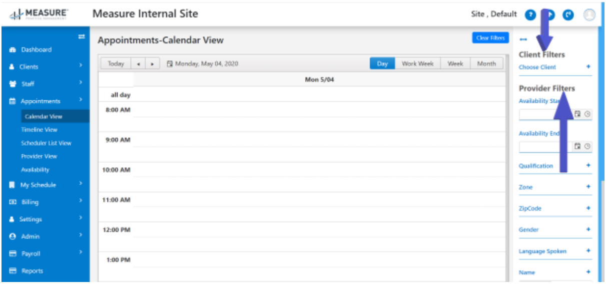

To edit a session, double-click on the appointment and edit any necessary information. Remember to click ‘Save’ before closing the appointment.

If the session is part of a recurring session, you will need to click the checkbox, as seen below, before editing an appointment.



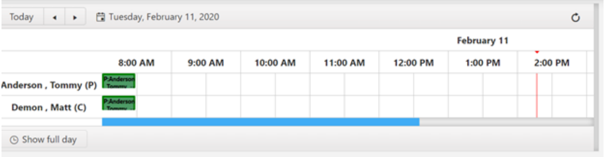

Please note that any changes made to repeated sessions will not affect the sessions that have already been rendered.

On the right-hand side of the page, we have 'Client Filter' and 'Provider Filter' options which allow users to search the availability of the former and latter simultaneously by inputting relevant details, as seen below:




## 6.2. Timeline View

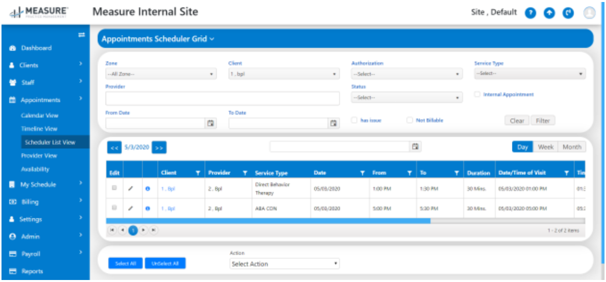
Under the ‘Appointments’ section, you will also find the ‘Timeline View’ tab which allows users to view the combined availability of the client and provider side-by-side. Please refer to the dialog box below:



## 6.3. Scheduler Grid View

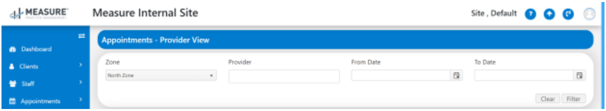
'Scheduler Grid View' allows users to view a client's schedule as well as appointment details in a convenient list view. In addition, users will also be able to make changes including changing session status, location, and provider to existing sessions by clicking on "Action" and selecting an appropriate action from the dropdown menu. After selecting the appropriate action, select the appropriate selection from the secondary menu.

Please refer to the image below:

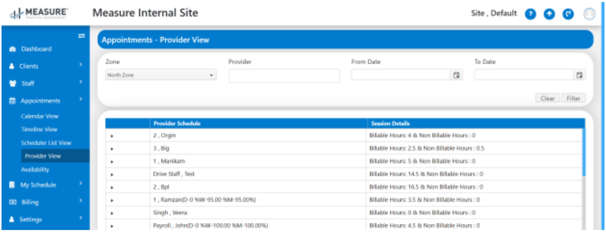


## 6.4. Provider View

'Provider View' allows users to search for appointments by selecting 'Zone,' 'Provider,' and 'start'/'end' dates the user wishes to filter out. Please refer to the image below.



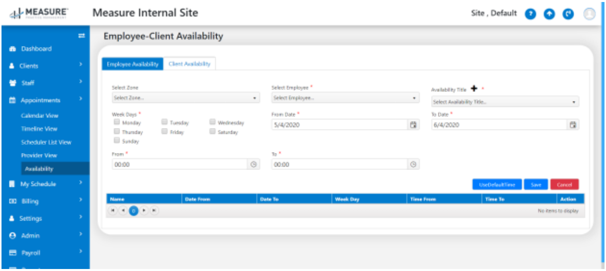

Upon filling out the required fields, click on 'Filter.' All provider-specific appointments within the given timeframe will be displayed as seen below:



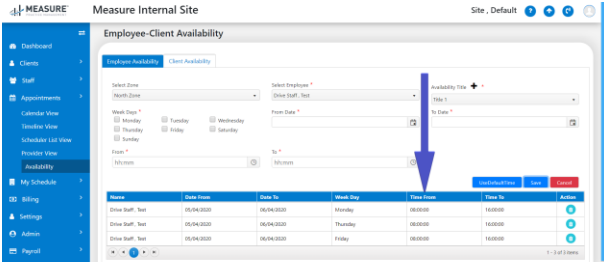
## 6.5. Availability

This option allows users to set the availability of an 'Employee' and 'Client,' as seen below in the two subfields: 'Employee Availability' and Client Availability.

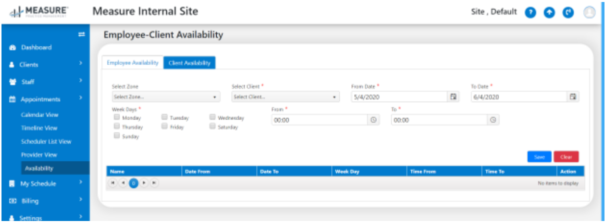
Under 'Employee Availability,' users can set availability in the fields seen below:



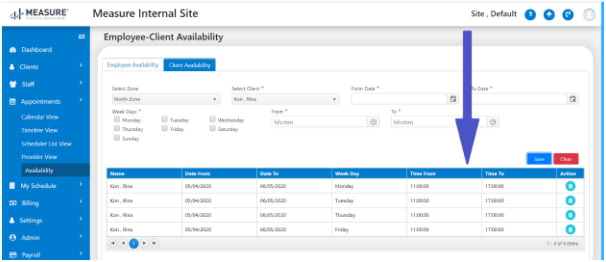

Click on "Save" to add the Provider's availability to the system as seen below, as indicated by the arrow.




Under ‘Client Availability,’ users can set the availability of the selected Client as seen below.




Click on ‘Save’ to add the Client’s availability to the system, as indicated by the arrow in the image below.



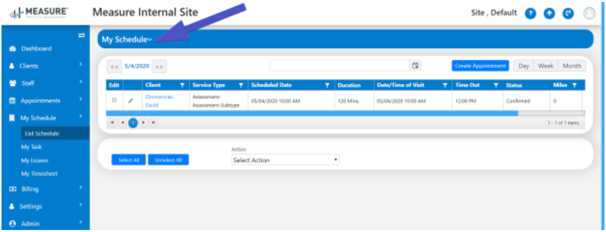
This concludes the ‘Appointments’ section.

# 7. My Schedule

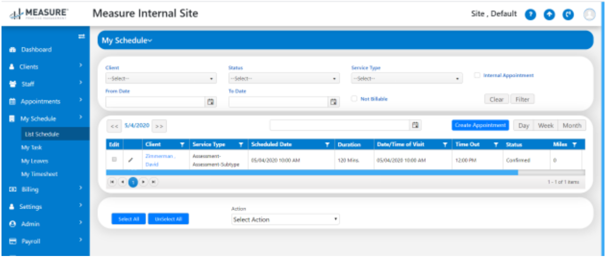
This option allows authorized users to render sessions, view schedules, add tasks, leaves and timesheets.

## 7.1. List Schedule

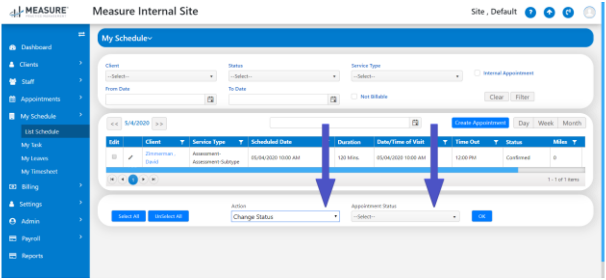
The List Schedule option allows providers to view their schedule by day, week, or month by clicking on the “List Schedule” option in the My Schedule dropdown menu on the left side of your browser. Providers may filter through their appointments by clicking on the ‘My Schedule’ dropdown near the top of your screen as indicated by the arrow:




A series of menu options including Client, Service type, and date range will appear, which users can use to provide a filtered list of sessions as shown below:



Users will also be able to update the status of a given session by clicking on edit and then selecting the appropriate selections from the Action and Appointment Status dropdown menus. This is indicated by the arrows in the image below.  Once appropriate selections have been made, please press “OK.”

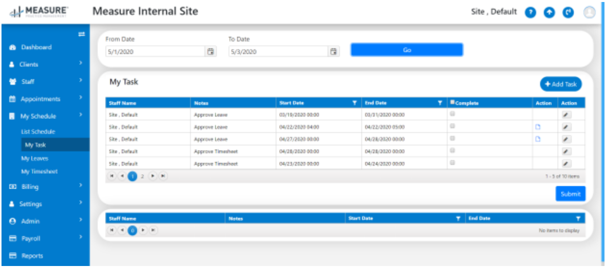



## 7.2. **My Tasks**

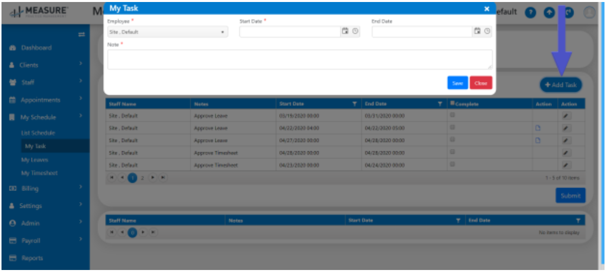
This option allows the user/provider/supervisor to add and view tasks using the date filter.

Clicking on ‘My Task’ allows users to input ‘From’ and ‘To’ dates to view associated tasks with the selected dates. Under the same dialog box, users may complete a task by checking that checkbox.

This will be reflected at the bottom of the dialog box as seen below:



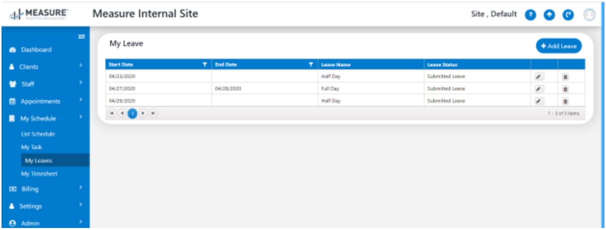

To add a task click on 'Add Task' as indicated by the arrow in the image below: Select 'Employee' >> 'Start Date' >> 'End Date' >> 'Notes' (If Any) and click on 'Save,' which will create a new task.



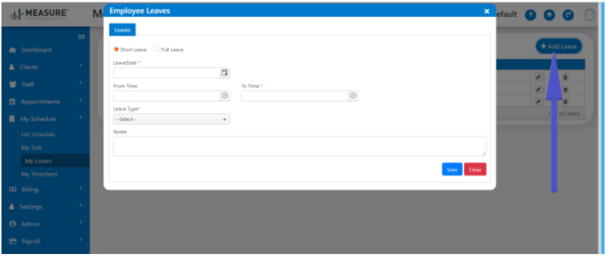

## 7.3. My Leave

This feature allows users to ‘Add’, ‘View’ or ‘Edit’ their leave requests.

Click on ‘My Leaves’ to view all current and past leave requests.

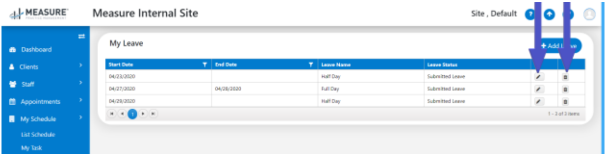


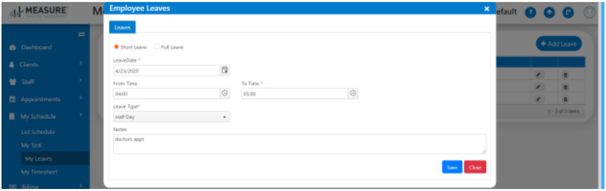
To make a leave request, click on the 'Add Leave' and a dialog box will appear. Select 'Short Leave' to make a partial day leave request or 'Full Leave' to request at least a whole day leave request. Then select 'Leave Date,' 'From Time,' 'To Time,' and 'Leave Type.'  Users may also add any relevant notes in the Notes section.  Finally, click 'Save,' which will add the new leave to the system.




To edit or delete a leave request, click on the 'Edit' icon, as indicated by the arrow, which will open a dialog box.  Once the dialogue box opens, users may make modifications to their leave request by modifying the 'Leave Date,' 'From

Time,’ ‘To Time,’ and ‘Leave Type’ as necessary. Users may also add notes (if any). Once all necessary modifications have been made, click ‘Save’, which automatically updates the leave already placed. In order to remove a leave request, simply click on the ‘Delete’ icon, which is represented by the trash can icon.

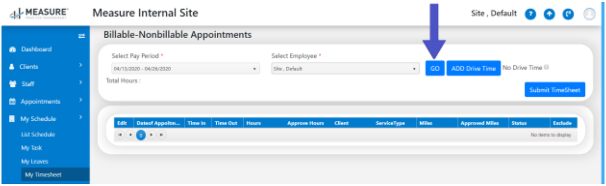



## 7.4. My Timesheet

This option allows users to view, edit, and submit their timesheets during a given Pay Period. In addition, select users/administrators may also be granted permissions to edit or submit timesheets on the behalf of employees.

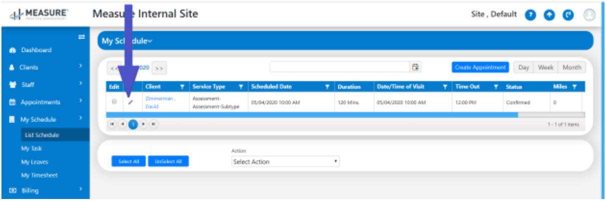
To view user timesheets, click on ‘Select Pay Period’ and choose the appropriate pay period from the drop-down menu.  Select ‘Employee’ and click ‘GO.’ This allows users to view all timesheets for the selected pay period as seen in the image below:

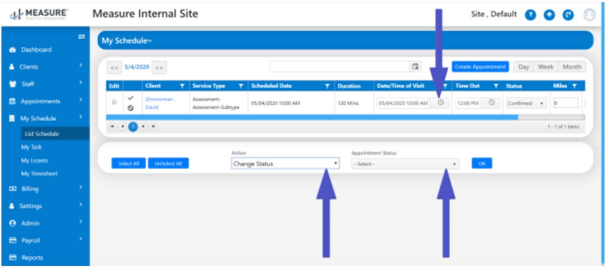



Users will then have the option select ‘Add Drive Time’ or ‘No Drive Time” by clicking on the appropriate selection.

To edit individual appointment information, click on the ‘Edit’ icon, which will allow users to change the ‘Time In,’ ‘Time Out’ and ‘Miles.’ To save any changes, click on the check mark icon in the edit field.  Users may also may cancel changes, but clicking on the cancellation icon.

Once all timesheets have been reviewed and any necessary modifications have been made, timesheets may be submitted by clicking on ‘Submit Time Sheet’ as indicated below.



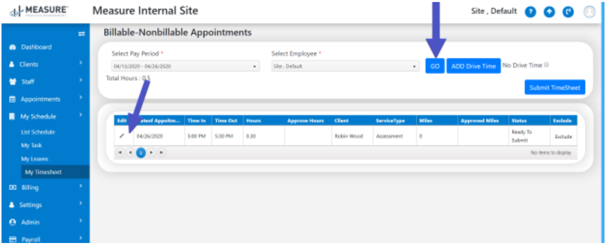



# 8. Payroll

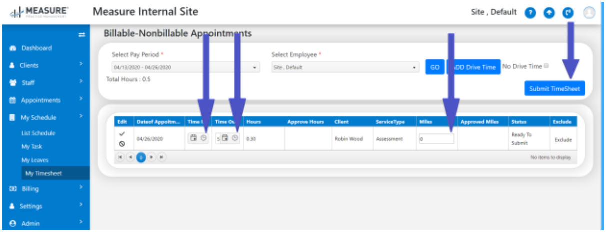
Payroll allows users to submit, view and/or update timesheets.

## 8.1. Timesheet

Clicking on 'Timesheet' allows users to submit a timesheet by selecting 'Pay Period' >> 'Employee' >> 'Submit Timesheet,' as indicated in the image below:




To edit, update or view the timesheet, select the 'Pay Period' >> Employee >> 'GO' icon. This will display the appointment sessions of the selected employee. As indicated by the arrows below, users may also edit information by clicking on the 'Edit' icon. Input 'Time In' and 'Time out' and click on the 'tick' mark.

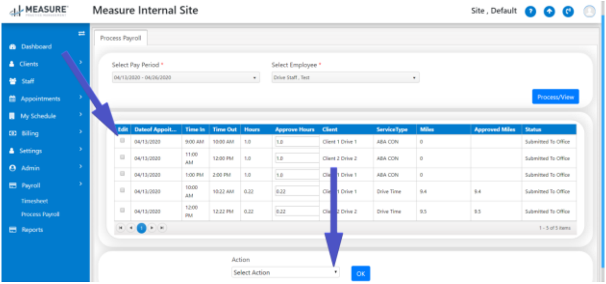



Note: There is an option to either 'Add drive time' or simply select 'No Drive Time'.

## 8.2. Process Payroll

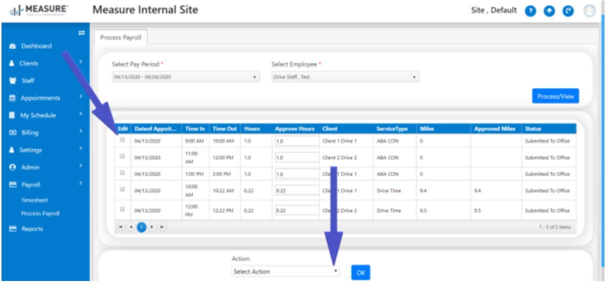
This option allows users to process or view payroll information of an employee.

To begin, click on ‘Process Payroll’ and then select the appropriate ‘Pay Period’ from the dropdown menu.  Next, select the appropriate ‘Employee’ and click on the ‘Process/View’ button as indicated by the arrow:




In order to make changes to an existing entry, select the checkbox under the ‘Edit’ column, choose ‘Action’ from the dropdown menu at the bottom of the screen, and click ‘OK’ which will save all changes.

Please refer to the image below which reflects said instructions:



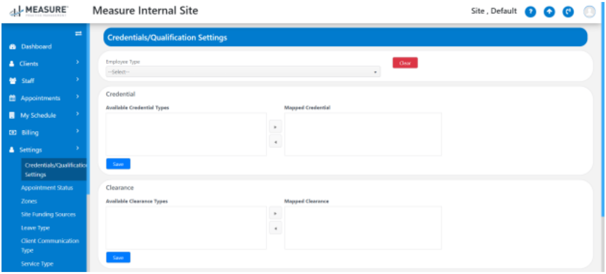

## 9. Settings

'Settings' allows users to make changes that will be reflected throughout the entire system by editing or creating new options/fields altogether.

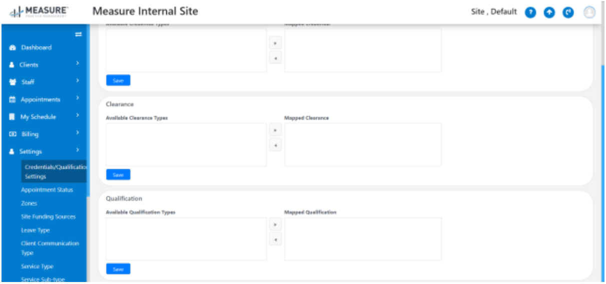
### 9.1. Credentials/Qualification Settings

Credential/Qualification settings will allow organizations to map the required credentials, clearance levels, and qualifications required for all employees by type.

To begin, select the Employee Type from the dropdown menu located at the top of the page.



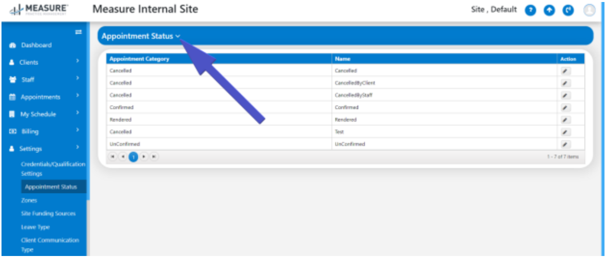

Using the directional arrows, credentials, clearance levels, and qualifications may be added/mapped or removed from the employee type. This will set the criteria for the 'Employee Type' selected.



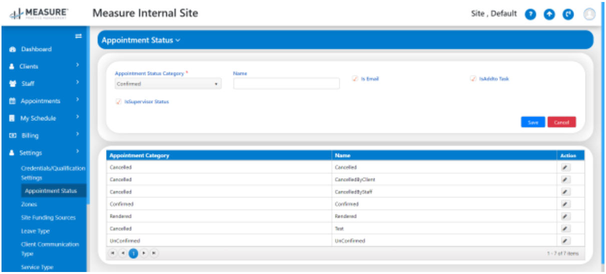

## 9.2. Appointment Status

In this section users are able to add an appointment status category as per convenience or requirement.

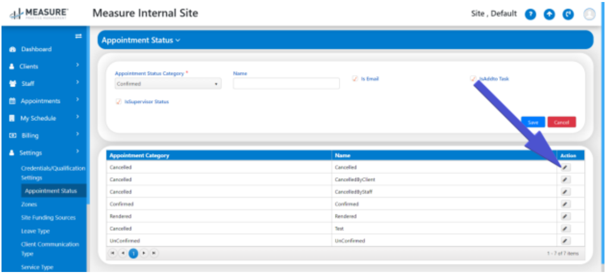
To add a new appointment status, click on Appointment Status drop-down arrow as shown in the figure below:




A dialog box, as seen below, will appear. Choose the ‘Appointment Status Category’ from the drop-down and enter the desired ‘Name’ i.e. ‘By Parent,’ ‘By Staff.  Users may also indicate Once all necessary modifications have been made, click on ‘’Save.’’ This will save the ‘Name’ under that category and the same change will be reflected in the system.




To edit any appointment statuses, click on the edit/pencil icon immediately to the right of the appropriate status. The relevant status information will populate in the appointment status fields at the top of the screen. Proceed to edit any necessary fields and 'Save' once again.

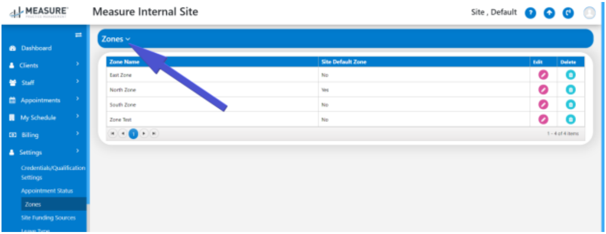


### 9.3. Zones

The ‘Zones’ function will allow users to add, edit or delete a geographic zone as well as setting default zones for the system.

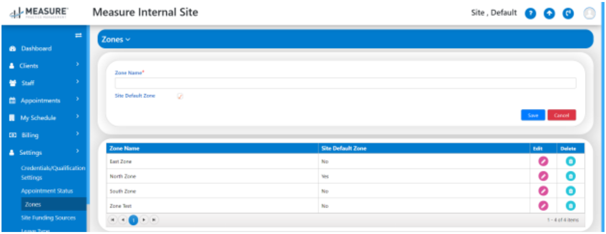
Once established, these zones can be utilized to group staff and clients by geographic locations for scheduling purposes.

To create a Zone, click on the drop-down as indicated by the arrow in the image below:

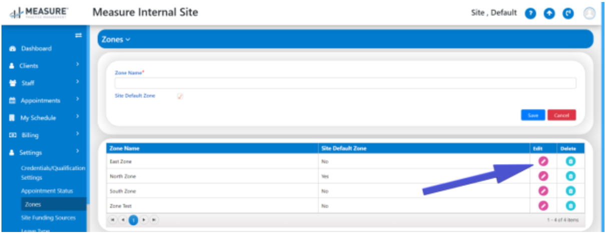



Enter the desired ‘Zone Name’ and click ’Save.’ If the user wishes to define a given Zone as ‘Default

Zone' check the box 'Set Default Zone.' All available zones will be listed below.



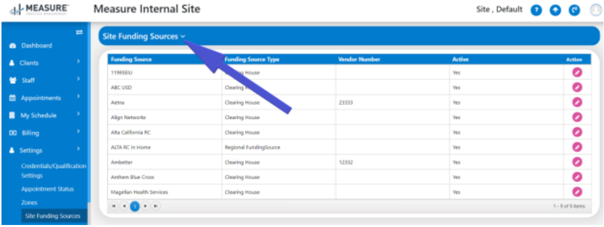

To edit a saved 'Zone' click on the edit icon, make desired changes, and determine whether or not to make selected zone 'Default.'



### 9.4. Site Funding Sources

'Site Payors' allows users to add a 'Funding Source' to the system. Additionally, users are able to add or edit all the information on the selected funding source.

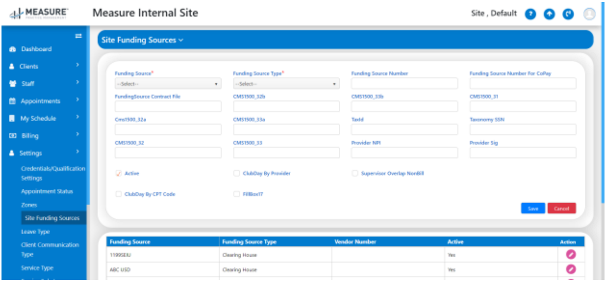
To add a funding source, click on the drop-down as indicated by the arrow:




Multiple fields related to 'Funding Sources' will appear, including 'Funding Source', 'Funding Source Type', 'Vendor Number' etc. Please refer to the image below:

Select the appropriate ‘Funding Source’ from the dropdown menu.  To expedite your search, you may type the name of the funding source once you click on the Funding Source menu.

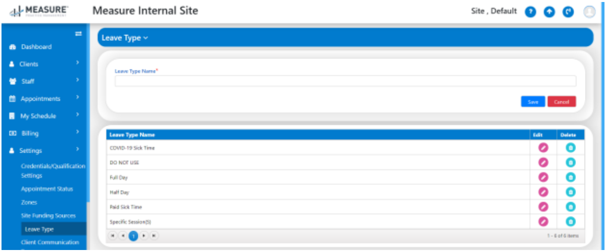
Next, choose ‘Funding Source Type’ and complete the remaining fields per (the funding source) documentation.  Once all fields have been completed, click ‘Save.”



## 9.5. Leave Type

This option allows administrators to establish types of Leaves that will be available for staff use. i.e. ‘Full Day’ or ‘Half Day’ etc.

To create a leave type, click on the ‘Leave Type’ dropdown menu, enter in the desired leave type name and click ‘Save.’



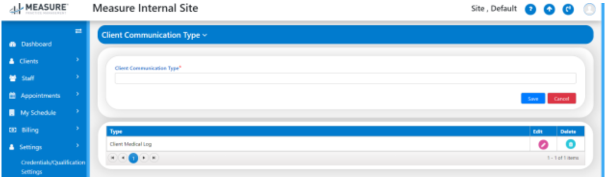

Users can also edit or delete ‘Leave’ types by clicking on edit or delete icon under ‘Action.’

Keep in mind that the changes we make here will be reflected in the entire system.

### 9.6. Client Communication Type

‘Log Type’ is used as a setting to define log types in the system.

Click on the drop-down as indicated by the arrow:



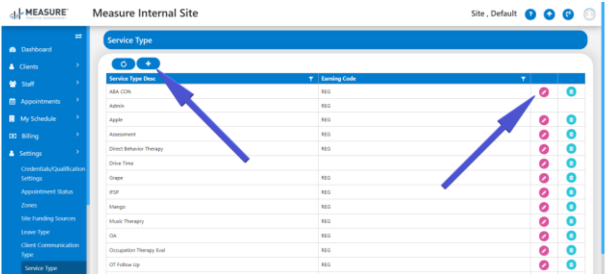

Add the desired ‘Log’ and click on ‘Save.’

Users can also edit or delete any log type by clicking on edit or delete icon under ‘Action.’ Please refer to the image below:

### 9.7. Service Type

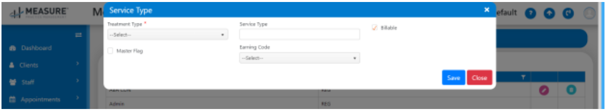
This option in settings allows users to add a service type to the system and define the billing rate associated with the service.

To add a service type, click on the '+' sign as indicated below:



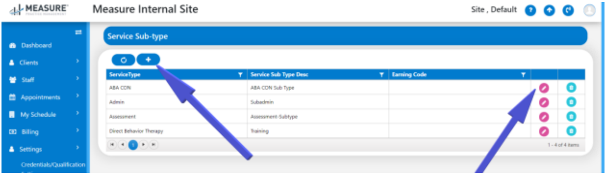

Clicking the '+' sign will open a dialog box. Using the dropdown menu, select the 'Treatment Type' and then enter the 'Service Type,' 'Billing Rate' defined for that particular service and 'Service Code.' Once all fields have been completed, click 'Save.'

To edit or delete any Service type by clicking on edit or delete icon under 'Action.'

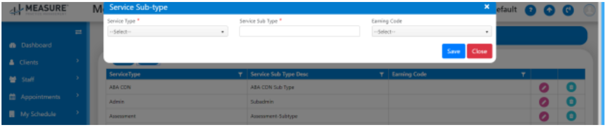



## 9.8. Service Sub-type

This field allows users to create a Service Sub-type, which defines basic service or the service that is finally to be provided. Click on the '+' sign as indicated below:

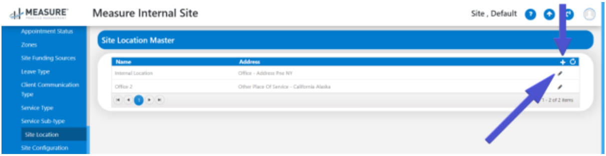



Now Select the 'Service Type' to be associated with the sub-service user is about to input. Input 'Service Sub Type', select the enter 'Earning Code' (If any) and Click 'Save' to add a new 'service sub-type' to the system. Users can always edit or delete any ‘Service Subtype’ by clicking on the edit or delete icon under ‘Action.’

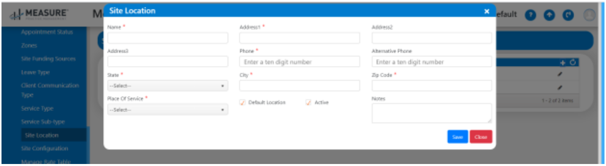



## 9.9. Site Location

This allows the user to add a location of the customer or the actual office Location.




Clicking on the ‘+’  or Edit icon as shown by the arrow in the above picture opens a dialogue box as below:

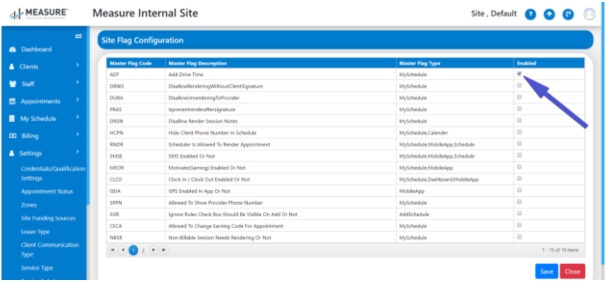


Where users can add a new location to the system and if clicking on edit will allow to edit the fields in the box location, once done click on Save.

### 9.10. Site Configuration

Site configuration allows users to enable or disable rules which are already set in the system.

As seen in the screenshot below, the column named ‘Enabled,’ located on the far right of the page, allows users to check or uncheck the associated box for each predefined rule as shown by the arrow. Click “Save” after the rules are set as per requirement or preferences.

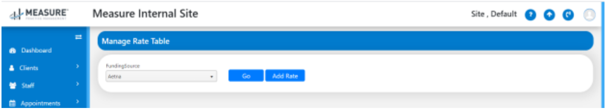


## 9.11. Manage Rate Table

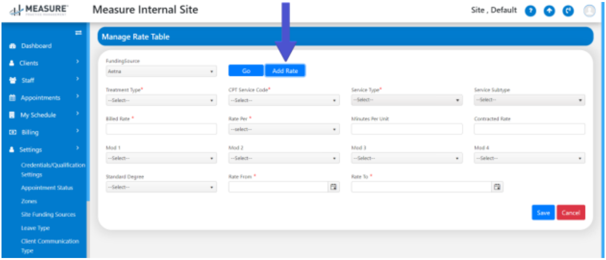
'Manage the Rate Table,' as the name suggests, manages the rate of the type of service of a particular funding source.

Click on 'Funding Source', select the appropriate funding source from the dropdown menu, and click 'Go' if the rate for that funding source has already been established.

Clicking on 'Add Rate' Opens a Dialog Box as seen below:

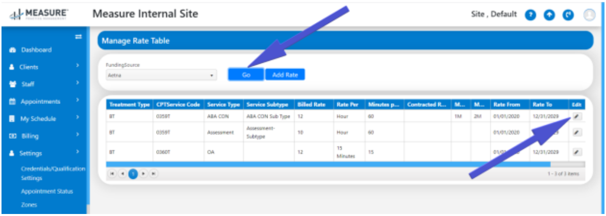



To add a rate for a new funding source or service type, select a funding source from the dropdown menu and click 'Add Rate.'




Select the Treatment Type, CPT Service Code, Service Type, and Sub-service Type from the dropdown menu. Next, enter the Billed Rate, select the service interval from the Rate Per dropdown menu, enter the Units in Minutes, and Contract Rate.  Lastly, select the respective mod defined or already allocated from the Mod dropdown menus, select the standard degree and click Save.

And there you have it! The rate is saved for that particular service type for a particular funding source.




The above picture shows the rates set after clicking on the ‘Go’ as shown by the arrow. After which the user can also edit the rate by clicking on the edit Icon as shown by the arrow.

Users can also edit or delete an existing rate by simply clicking on the ‘Edit’ or ‘Delete’ icon under ‘Action,’ as seen below.

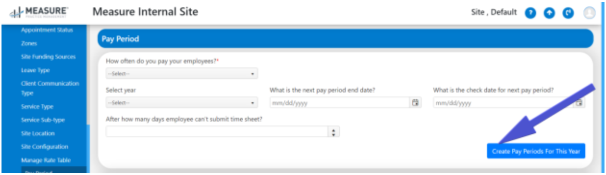
Note: A payor will have multiple ‘Service Types’ and ‘Sub-service Types.’ Users can choose rates separately for each service accordingly.

### 9.12. Pay Periods

‘Pay Period’ allows users to set the duration of each pay period along with the ‘Last Date to

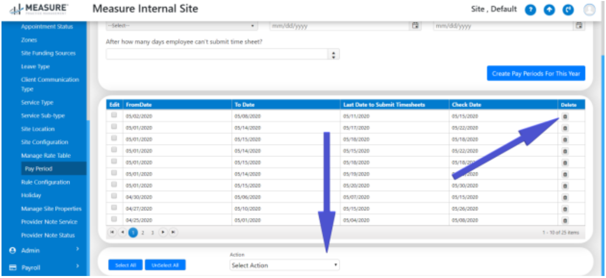
Submit Timesheets and ‘Check Date’ of the next pay period. Users can also set the specific days an employee can submit their timesheet.

As seen below: Select your organization’s pay frequency by selecting the appropriate interval from the ‘How often do you pay your employees?’ drop down menu.  Next, select the year, end date for the next pay period, ‘Check Date’ for the next pay period and the maximum number of days an employee will have to submit their timesheet. Finally, click on ‘Create Pay Periods For This Year.’




Users can also delete any established ‘Pay Period’ by checking the ‘Pay Period’ box on the far-left side of the table and selecting ‘Delete’ from the

‘Action’ dropdown menu. Users can also delete ‘Pay Periods’ in bulk by choosing multiple pay periods and selecting ‘Delete’ from the Action dropdown menu.

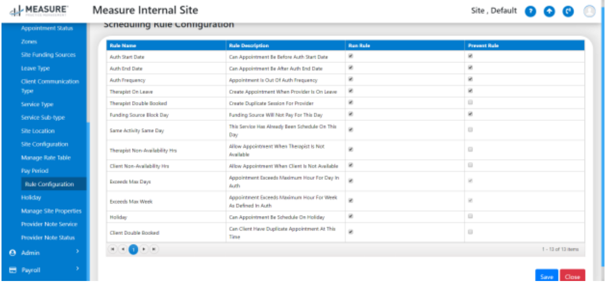



## 9.13. Rule Configuration

Rule Configuration is subject to access and only those with the required permissions will be able to utilize this feature.  System-wide rules may be Run or Prevented based on authorized user selections.

To establish rule, click on the Run Ruleoption to the immediate right of the appropriate rule.  To prevent a rule from being utilized, click on Prevent Rule.

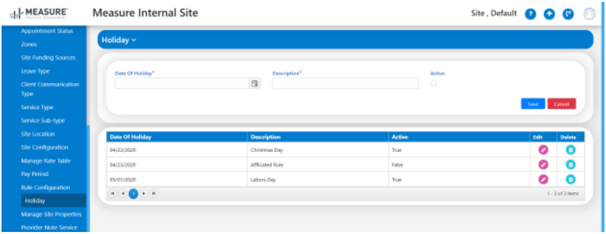
Please refer to the image below where some examples of rules are exhibited for this particular user.




## 9.14. Holidays

This feature allows users to add a holiday to the system along with its description.

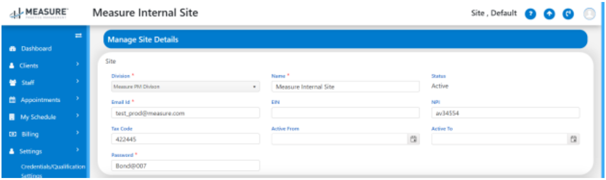
Firstly, click on the drop-down next to ‘Holiday.” Next, choose the date of holiday, and enter the description. Lastly, to make it an active or observed holiday then click ‘Active,’ and ‘Save.’ This saves your ‘Holiday’ to the system.

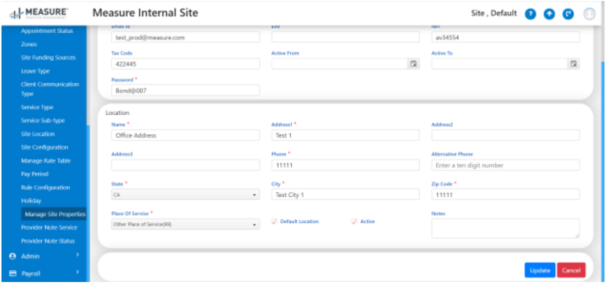



## 9.15. Manage Site Properties

In ‘Manage Site Properties,’ users can create a default or main Site/Facility

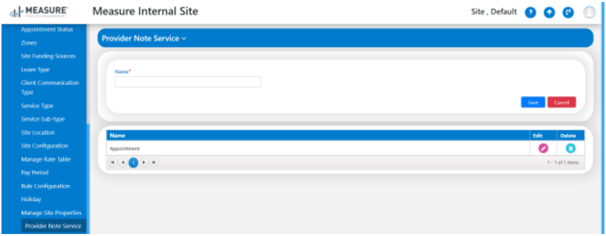
To establish a site, select the appropriate division from the dropdown menu and enter in the name, email, EIN, NPI, Tax code, Active Dates, and password. Next you will enter in the location name, address, phone, and place of service. You may also select Default and Active to indicate an active, default location.




## 9.16. Provider Note Service

This option allows users to enter any notes that will be reflected in the system under ‘Notes.’




## 9.17. Provider Note Status

This option allows users to create a desired 'Note Status' to be reflected throughout the system.

To create a note type, click on 'Provider Note Service' and enter the name and click 'Save.'