



# User Manual



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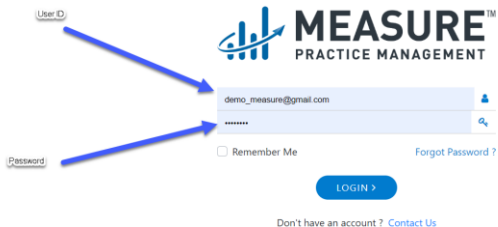
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## **1. Introduction and Login**

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

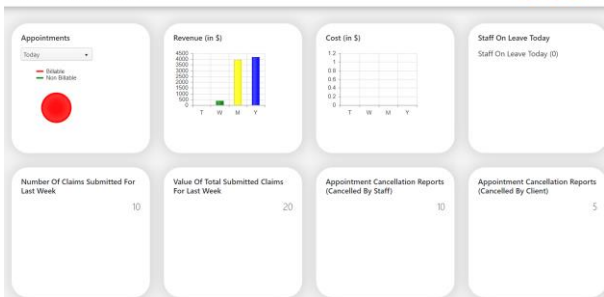
### **Login**

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.



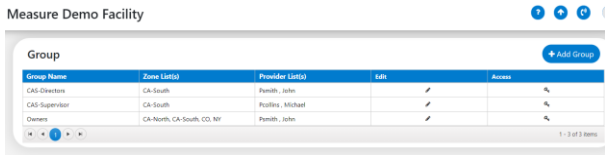
## Available Widgets and Explanation

- 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

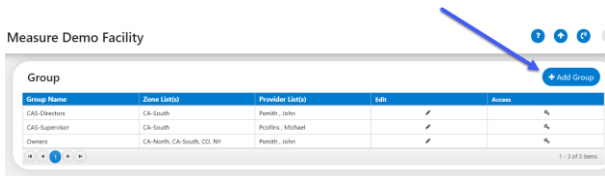
- Appointment Cancellations by Client

### 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:



The screenshot shows a 'Group' form with the following fields and annotations:

- Title \***: A text input field with a blue arrow pointing to it and the annotation '(Name of the group)'.
- Zone List**: A dropdown menu with a blue arrow pointing to it.
- Provider List \***: A text input field with a blue arrow pointing to it and the annotation 'Add providers by clicking names'.
- ☐ **Save Team Member**: A checkbox with a blue arrow pointing to it.
- What zones this group has access to**: A text input field with a blue arrow pointing to it.
- Save** and **Close** buttons: Located at the bottom right of the form.

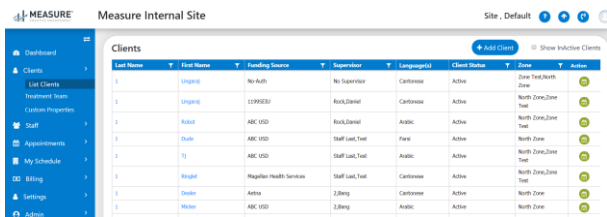
Click 'Save'. You should get a message saying 'Admin group saved successfully.' You may now click on 'Close.'

## 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

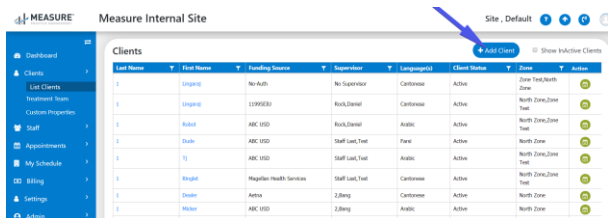
In this section, users will be able to view and access active client information. Facility Administrators have the option to create zones in order to group clients geographically (as well as by other desirable categories) by clicking on 'creating/configuring.' You may also access inactive client information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



The screenshot shows the 'Measure Internal Site' interface. On the left is a navigation menu with options: Dashboard, Clients, List Clients, Treatment Team, Custom Properties, Staff, Appointments, My Schedule, Billing, Settings, and Admin. The 'Clients' section is active, displaying a table of client information. The table has columns for Last Name, First Name, Funding Source, Supervisor, Language(s), Client Status, Zone, and Action. There are 8 rows of data. Above the table, there are buttons for '+ Add Client' and 'Show Inactive Clients'.

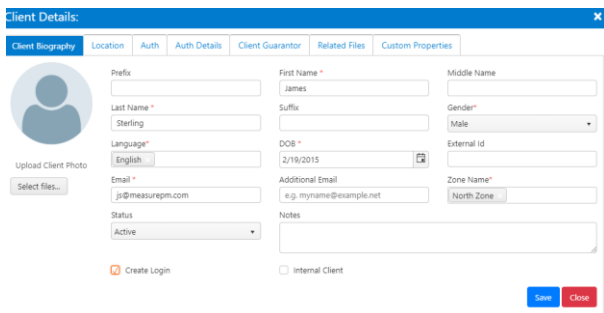
Last Name	First Name	Funding Source	Supervisor	Language(s)	Client Status	Zone	Action
1	Ungari	No Auth	No Supervisor	Canonese	Active	Zone Test, North Zone	[icon]
2	Ungari	11995232	Rick, Daniel	Canonese	Active	North Zone, Zone Test	[icon]
3	Rubio	ABC USD	Rick, Daniel	Arabic	Active	North Zone, Zone Test	[icon]
4	Duke	ABC USD	Staff Last, Test	Para	Active	North Zone	[icon]
5	Tj	ABC USD	Staff Last, Test	Arabic	Active	North Zone, Zone Test	[icon]
6	Engel	Magellan Health Services	Staff Last, Test	Canonese	Active	North Zone, Zone Test	[icon]
7	Decker	Aetna	J. Jiang	Canonese	Active	North Zone	[icon]
8	Melzer	ABC USD	J. Jiang	Arabic	Active	North Zone	[icon]

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:



The screenshot shows the 'MEASURE' software interface. On the left is a navigation menu with options like Dashboard, Clients, Treatment Team, Custom Properties, Staff, Appointments, My Schedule, Billing, Settings, and Admin. The 'Clients' section is selected, showing a 'List Clients' dropdown. The main area displays a table of clients with columns: Last Name, First Name, Funding Source, Supervisor, Language(s), Client Status, Zone, and Action. A blue arrow points to the '+ Add Client' button located above the table. The table contains several client entries, including 'Lingang', 'Kock, Daniel', 'Kubel', 'Duke', 'Tj', 'Engel', 'Decker', and 'Meyer'.

A dialogue box will then appear as displayed below:



The 'Client Details' dialog box is shown with the 'Client Biography' tab selected. It includes a profile picture placeholder with an 'Upload Client Photo' button and a 'Select Files...' button. The form fields are as follows:

- Prefix: [Text Field]
- Last Name: Sterling
- First Name: James
- Middle Name: [Text Field]
- Suffix: [Text Field]
- Gender: Male (dropdown)
- Language: English (dropdown)
- DOB: 2/19/2015
- External ID: [Text Field]
- Email: js@measurepm.com
- Additional Email: e.g. myname@example.net
- Zone Name: North Zone (dropdown)
- Status: Active (dropdown)
- Notes: [Text Area]

At the bottom, there are checkboxes for 'Create Login' (checked) and 'Internal Client' (unchecked). 'Save' and 'Close' buttons are in the bottom right corner.

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:

The screenshot shows a web application window titled 'Client Details:'. It has a blue header bar with a close button (X) on the right. Below the header is a tabbed interface with the following tabs: 'Client Biography', 'Location' (which is selected and highlighted in blue), 'Auth', 'Auth Details', 'Client Guarantor', 'Related Files', and 'Custom Properties'. The 'Location' tab contains several input fields and checkboxes. On the left side, there are fields for 'Name \*' (containing 'James Sterling'), 'Address3', 'State \*' (a dropdown menu showing 'Alabama'), and 'Place Of Service \*' (a dropdown menu showing 'Home(12)'). On the right side, there are fields for 'Address1 \*' (containing 'JS Home Street 3'), 'Phone' (with a placeholder 'Enter a ten digit number'), 'City \*' (containing 'Birmingham'), 'Address2', 'Alternative Phone' (with a placeholder 'Enter a ten digit number'), 'Zip Code \*' (containing '35201'), and 'Notes'. Below the 'City' field, there are two checkboxes: 'Default Location' (unchecked) and 'Active' (checked). At the bottom right of the form, there are two buttons: a blue 'Save' button and a red 'Close' button.

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.

Client Details: ✕

[Client Biography](#)
[Location](#)
[Auth](#)
[Auth Details](#)
[Client Guarantor](#)
[Related Files](#)
[Custom Properties](#)

[Auth Header](#)
[Funding Source](#)

Description \*

Auth2020

Onset Date \*

2/20/2020

Diagnosis1 \*

F84.0

Diagnosis2

Diagnosis3

Diagnosis4

Referring Physician Title

dx-Ordering Providers

Referring Physician Name

Referring Physician NPI

Treatment Type \*

BT

Auth Status \*

Approved

Notes

Next

Close

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



		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:

Client Details: ✕

Client Biography
Location
Auth
Auth Details
Client Guarantor
Related Files
Custom Properties

Auth Header
Funding Source

Funding Source \*  
Aetna

Insurance Id \*  
346325

Auth Number \*  
5793221

Start Date \*  
2/23/2020

End Date \*  
8/23/2020

CMS 11 (Group No)

Rendering Supervisor \*  
Staff - David

Auth Type \*  
Primary

UploadAuth  
Select files...

Download  
No File Uploaded

☐ Temporary Auth

☒ Valid

☐ Do not Validate Visit Against this Auth

Co Pay  
10

Deductible  
100

CMS 4 (Insured Name)

Max By total Auth  
--Select--

Max By total Auth Value(Hours)  
Enter total auth

☐ Halt billing temporarily

Save
Close

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

	'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'

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:

Client Details: ✕

Client Biography

Location

Auth

Auth Details

Client Guarantor

Related Files

Custom Properties

Service Type -Service Sub Type

Start Date

End Date

No items to display

Service Type \*

Assessment

Service Sub Type

Sub Assessment

Cpt or Service Code \*

H0032

Start Date \*

2/12/2020

End Date \*

12/16/2020

Billing Rate \*

150

Get billing rate

Rate Per \*

Hour

Units in Mins

60

Mod 1

--Select--

Mod 2

--Select--

Mod 3

--Select--

Mod 4

--Select--

Auth No

Committed Hours(per week)

Split Type

--Select--

Notes

Maximum

--Select--

Per

--Select--

Is

Minimum Qualification

--Select--

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

	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.

Client Details: ✕

Client Biography

Location

Auth

Auth Details

Client Guarantor

Related Files

Custom Properties

◀

◻

▶

No items to display

First Name \*

Miley

Last Name \*

Wayne

Gender

Female

DOB \*

2/12/1991

Group No

☐ Use Insured for billing

Location Same As Client

Location Name \*

Bruce Wayne

Address1 \*

Bruce Wayne Home

Address2

Address3

State

--Select--

City

Zip Code

Phone

Enter a ten digit number

Alternative Phone

Enter a ten digit number

☐ Default Location

☒ Active

Notes

Save

Clear

Close

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:

Client Details: ✕

[Client Biography](#)
[Location](#)
[Auth](#)
[Auth Details](#)
[Client Guarantor](#)
[Related Files](#)
[Custom Properties](#)

Name \*

Bruce Wayne

Description

Expiry Date

Upload Document

Select files...

Save

Close

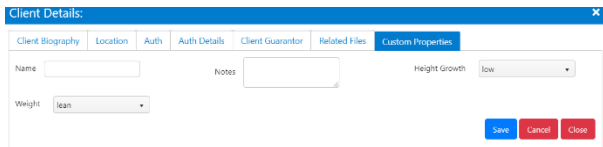
Please refer to the table below for definition of fields related to 'Related Files:'

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.

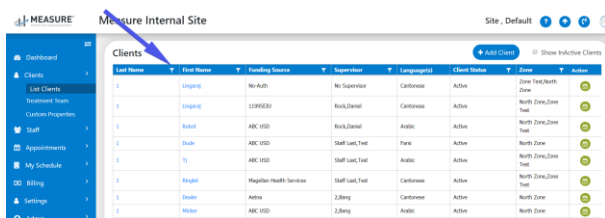
The last step in adding a new client is 'Custom Properties,' a field that allows you to create additional desired fields.



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.



The screenshot shows the 'Measure Internal Site' interface. On the left is a navigation menu with options like Dashboard, Clients, List Clients, Treatment Team, Custom Properties, Staff, Appointments, My Schedule, Billing, Settings, and Admin. The main area is titled 'Clients' and contains a table with the following columns: Last Name, First Name, Funding Source, Supervisor, Language, Client Status, Zone, and Action. A blue arrow points to the 'Clients' header. The table contains 10 rows of client data.

Last Name	First Name	Funding Source	Supervisor	Language	Client Status	Zone	Action
1	Ungang	No Auth	No Supervisor	Cantonese	Active	Zone Test, North Zone	
2	Ungang	1199SERI	Rick, Daniel	Cantonese	Active	North Zone, Zone Test	
3	Abditi	ABC USD	Rick, Daniel	Arabic	Active	North Zone, Zone Test	
4	Osaka	ABC USD	Staff Last, Test	Parsi	Active	North Zone	
5	Tj	ABC USD	Staff Last, Test	Arabic	Active	North Zone, Zone Test	
6	Magellan	Magellan Health Services	Staff Last, Test	Cantonese	Active	North Zone, Zone Test	
7	Decker	Aetna	Z.Bang	Cantonese	Active	North Zone	
8	Mikol	ABC USD	Z.Bang	Arabic	Active	North Zone	

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.



**MEASURE** Measure Internal Site Site, Default

**Client Information:**

- Name: Beth Stone
- Gender: Female
- Email: mstone@gmail.com
- DOB: 02/15/2010
- Address: 12354 Windsor Lane Sunnyvale CA
- Phone:

**Authorizations:**

Doc	PS	Start	End	Status
Alto, California	ACRC	02/16/2020	09/30/2021	Approved

**Locations:**

Name	Address	POS
Bedrooms	Home - 12354 Windsor Lane Sunnyvale CA	Home(12)

**Client Communication:**

Type	Subject	Date
------	---------	------

**Next 30 Days:**

Provider Name	Start	Sched.
Site - Default	4/10/2020 9:00:00 AM	30
Rock, David	5/1/2020 9:00:00 AM	30
Rock, David	4/10/2020 9:00:00 AM	30
Rock, David	5/1/2020 9:00:00 AM	30

**Appointments:**

Provider Name	Start	Sched.
Site - Default	4/10/2020 9:00:00 AM	30
Rock, David	5/1/2020 9:00:00 AM	30
Rock, David	4/10/2020 9:00:00 AM	30
Rock, David	5/1/2020 9:00:00 AM	30

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

**Client Biography:**

- Name: Asher Adams
- Gender: Male
- Email: aadams@measurepm.com
- DOB: 01/01/2015
- Address: 14544 Joliet Ave Granada Hills California

[Edit](#)

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'.

The screenshot shows a web application window titled 'Client Details: Adams, Asher'. It has three tabs: 'Client Biography' (selected), 'Client Guarantor', and 'User Management'. On the left, there is a circular profile icon and an 'Upload Client Photo' section with a 'Select files...' button. The main form area contains several fields: 'Prefix' (empty), 'Last Name' (Adams), 'Language' (English), 'Email' (aadams@measurepm.com), 'Status' (Active), 'First Name' (Asher), 'Suffix' (empty), 'DOB' (1/1/2015), 'Additional Email' (e.g. myname@example.net), 'Middle Name' (empty), 'Gender' (Male), 'External Id' (empty), and 'Zone Name' (CA-South). There is also a 'Notes' text area. At the bottom left, there is a checkbox for 'Internal Client'. At the bottom right, there are 'Save' and 'Close' buttons.

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.

Client Biography Client Guarantor User Management

First Name	Last Name	Location	Default Location	Notes
Mark	Brown	JennyHome	True	

1 - 1 of 1 items

First Name \*  
Willy

Last Name \*  
Brown

Gender  
--Select--

DOB \*  
2/6/1979

Group No

☐ Use Insured for billing

Location Name \*  
JennyHome

Address1 \*  
39076 daffodil ave

Address2

Address3

State  
California

City  
Irvine

Zip Code  
43102

Phone  
7322242345

Alternative Phone  
Enter a ten digit number

☐ Default Location ☒ Active

Notes

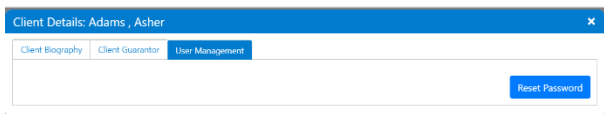
Location Same As Client

Save Clear Close

Activate W

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.



Client Details: Adams, Asher

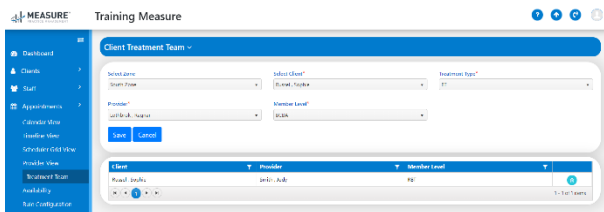
Client Biography Client Guarantor User Management

Reset Password

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:



MEASURE Training Measure

Client Treatment Team

Select zone: [Select Zone] Select Client: [Select Client] Treatment type: [Treatment type]

Provider: [Select Provider] Member Level: [Member Level]

Save Cancel

Client	Provider	Member Level
Russel, Sophie	Dr. J. J. J.	RP

1-10 Teams

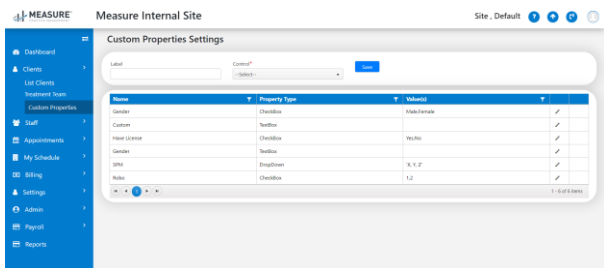
Clicking on 'Save' will add Sophie Russel to another treatment team as seen above.

**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.'

The screenshot displays the 'List Staff' page in the Measure Practice Management system. The page title is 'Measure Internal Site'. On the top right, there is a 'Site, Default' dropdown and a '+ Add Staff' button, which is highlighted by a blue arrow. The left sidebar contains a navigation menu with options: Dashboard, Clients, Staff (selected), Appointments, My Schedule, Billing, Settings, Admin, Payout, and Reports. The main content area shows a table of staff members with the following columns: ID, Last Name, First Name, Phone, Credential Type, Treatment Type, and Zone. The table lists 15 staff members, each with a unique ID, last name, first name, phone number, credential type, treatment type, and zone. At the bottom of the table, there are three status icons: a green checkmark, a yellow warning icon, and a red error icon.

ID	Last Name	First Name	Phone	Credential Type	Treatment Type	Zone
1203	1	Ramson	No Contact Number	Behavior Analyst	BT	North Zone
1142	1	Alfama	987654321	Behavior Analyst	BT	North Zone
712	1	Andres	No Contact Number	Behavior Analyst	BT	North Zone
1195	2	Ramson	No Contact Number	Behavior Analyst	BT, BT	North Zone
1103	2	Duke	No Contact Number	Behavior Analyst	BT	North Zone
1102	2	Alinget	988555555	Behavior Analyst	BT, BT, BT, BT	North Zone
1141	2	Rui	345555555	Behavior Analyst	BT, BT	North Zone
1139	2	Hui	988456789	Behavior Analyst	BT	North Zone
1101	2	Ramson	123456789	Behavior Analyst	BT	Zone Test, North Zone
717	2	Ramson	No Contact Number	Behavior Analyst	BT	North Zone
713	2	Ramson	111111111	Behavior Analyst	BT, BT	North Zone, Zone Test
1201	3	Rui	No Contact Number	BTSA	BT	East Zone, North Zone
1206	4	Rui	No Contact Number	Behavior Analyst	BT	North Zone

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



		(e.g. RBT, BCaBA, BCBA, ect.)
Email	Enter the email	Staff's email address for communication
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:

The screenshot shows a 'Staff Details' window with a blue header and a close button. Below the header are four tabs: 'Employee Biography', 'Contact', 'Other Setup', and 'Custom Property'. The 'Contact' tab is active, showing two sub-tabs: 'Employee Contact' and 'Emergency Contact'. The 'Employee Contact' sub-tab is selected, displaying the following fields:

- Name \***: Text box containing 'Jennifer'
- Address1 \***: Text box containing 'Jennifer street 2 home'
- Address2**: Empty text box
- City \***: Text box containing 'Mobile'
- State \***: Dropdown menu showing 'Alabama'
- Zip Code \***: Text box containing '36525'
- Phone Cell \***: Text box containing '8769873458'
- Phone Office**: Text box containing 'Enter a ten digit number'
- Note**: Large text area for additional information

At the bottom right of the form are 'Save' and 'Close' buttons. Below the form, a table lists staff members:

7155	Lobbick	Ragnar	Behavior Analyst	BT	North Zone
7143	Measure	Scott	Behavior Analyst	BT	Central/North Zone/Source

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.

Staff Details:

Employee Biography

Contact

Other Setup

Custom Property

Employee Contact

Emergency Contact

Name \*

Jim Walker

Address1 \*

Jim Walker Home

Address2

City \*

Mobile

State \*

Alabama

Zip Code \*

36602

Phone Cell \*

7645987456

Phone Office

Enter a ten digit number

Note

Save

Close

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

Staff Details:

Employee Biography

Contact

Other Setup

Custom Property

☐ Supervisor
 ☐ Eligible for Paid time off
 ☐ Exempt Staff
 ☐ Gets paid holidays
 ☐ Part Time
 ☐ Contractor

Max Hour of the day

4

Max Hours per week

20

Payroll Setup Id

Highest Degree \*

Associate degree

Staff External Id

7676

NPI

SSN

Hiring Date

1/15/2020

Taxonomy Code

Driver/Licence Number

Licence ExpirationDate

CAQH Id Zip

Signature Image

Select files...

Signature Valid From

Signature Valid To

Supervisor

--Select--

Notes

Save

Close

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

		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

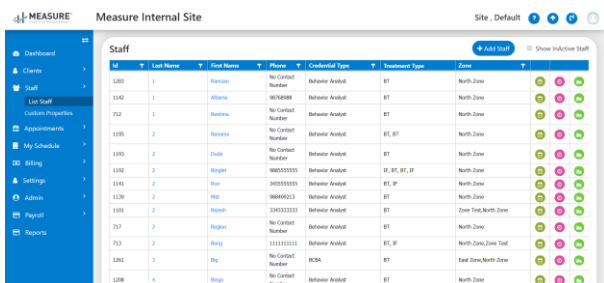
Click 'Save' after inputting all the information and proceed to the final tab 'Custom Properties,' where the user can define the 'Shift' for that particular employee - please see the image below. This concludes the process of adding new employees to the portal.

The screenshot shows a window titled 'Staff Details:'. It has four tabs: 'Employee Biography', 'Contact', 'Other Setup', and 'Custom Property'. The 'Custom Property' tab is active. Inside this tab, there is a 'Shift' dropdown menu currently set to 'Fulltime'. At the bottom right of the window, there are three buttons: 'Save' (blue), 'Cancel' (red), and 'Close' (red).

**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.



The screenshot shows the 'Measure Internal Site' interface with a 'Staff' list. The left sidebar contains navigation options: Dashboard, Clients, Staff, Custom Properties, Appointments, My Schedule, Billing, Settings, Admin, Payroll, and Reports. The 'Staff' list table has columns: Id, Last Name, First Name, Phone, Credential Type, Treatment Type, and Zone. Each row represents a staff member with associated details and status icons.

Id	Last Name	First Name	Phone	Credential Type	Treatment Type	Zone
1203	1	Ramona	No Contact Number	Behavior Analyst	BT	North Zone
1342	1	Alliance	96748988	Behavior Analyst	BT	North Zone
712	1	Andrew	No Contact Number	Behavior Analyst	BT	North Zone
1395	2	Ramona	No Contact Number	Behavior Analyst	BT, BT	North Zone
1393	2	Daria	No Contact Number	Behavior Analyst	BT	North Zone
1392	2	Angela	9885555555	Behavior Analyst	BT, BT, BT, BT	North Zone
1341	2	Ron	3455555555	Behavior Analyst	BT, BT	North Zone
1139	2	Hat	988498213	Behavior Analyst	BT	North Zone
1391	2	Ramona	3343333333	Behavior Analyst	BT	Zone Test, North Zone
717	2	Angela	No Contact Number	Behavior Analyst	BT	North Zone
713	2	Ramona	1111111111	Behavior Analyst	BT, BT	North Zone, Zone Test
1201	3	Big	No Contact Number	BCBA	BT	East Zone, North Zone
1206	4	Big	No Contact Number	Behavior Analyst	BT	North Zone

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.



The screenshot shows the staff profile edit form for 'rosy thal 2'. The form includes fields for Name, Email, Address, Gender, and DOB. A blue arrow points to the pencil icon in the top right corner, which is used to edit the staff member's information.

Name: rosy thal 2	Gender: Female
Email: rosy2@gmail.com	DOB: 03/11/2020
Address: california china	

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


Staff Details:

Employee Biography

Contact

Other Setup

Custom Property



Select files...

Prefix

Last Name \*

Clark

Treatment Type \*

BT

Email \*

michealcl@measurepm.com

Termination Date

Languages \*

English

First Name \*

Michael

Suffix

DOB \*

6/21/1987

Title

Zone Name \*

South Zone

Gender \*

Male

Middle Name

Nick Name

Credential Type \*

Behavior Analyst

Zip Code

☒ Therapist billable Private
 ☒ Active

☐ Internal Staff

Save

Close

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:

**Staff Details:** [X]

Employee Biography **Contact** Other Setup Custom Property

**Employee Contact** Emergency Contact

Name \* Micheal Clark Address1 \* Micheal Clark Home st3- California Address2

City \* Phoenix State \* Alabama Zip Code \* 80015

Phone Cell \* 7555770907 Phone Office Enter a ten digit number

Note

[Save] [Close]

And 'Emergency Contact' as seen below:

**Staff Details:** [X]

Employee Biography **Contact** Other Setup Custom Property

Employee Contact **Emergency Contact**

Name \* Christina Clark Address1 \* Christina Home 2223 Phoenix, Alabama Address2

City \* Phoenix State \* Alabama Zip Code \* 80015

Phone Cell \* 7627616783 Phone Office Enter a ten digit number

Note

[Save] [Close]

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

Staff Details:

Employee Biography

Contact

Other Setup

Custom Property

☐ Supervisor
☐ Eligible for Paid time off

☐ Exempt Staff
☐ Gets paid holidays

☐ Part Time
☐ Contractor

Max Hour of the day

Max Hours per week

Payroll Setup Id

Highest Degree \*  
BCBA

Staff External Id

NPI

SSN

Hiring Date

Taxonomy Code

DriverLicence Number

Licence ExpirationDate

CAGH Id Zip

Signature Image  
Select files...

Signature Valid From

Signature Valid To

Supervisor  
--Select--

Notes

Save

Close

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.

Staff Details:

Employee Biography

Contact

Other Setup

Custom Property

Shift  
Fulltime

Save

Cancel

Close

## 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.

Custom Properties Settings

Label:  Control:

Name	Property Type	Value(s)
Shift	DropDown	fulltime parttime seasonal

1 - 1 of 1 items

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.

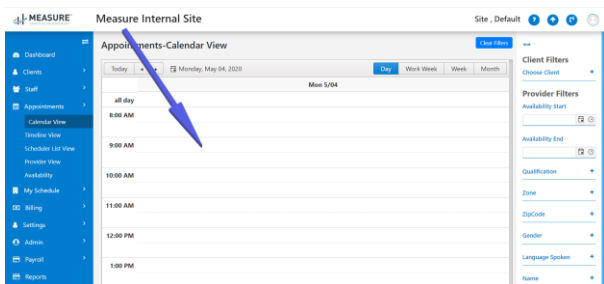
To view a client schedule, first locate the Client Filters menu on the right-side of your browser window. Select the appropriate client by clicking on 'Select Client' and selecting the appropriate client's name. Users may limit the number of possible clients by selecting a zone, which will only allow 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.

**Add/Edit Appointment**

☒ Billable ☐ Non Billable

Client \*  
Demon, Matt

Authorization \*  
1/31/2020(6/28/2020)Matt's first auth

Service Type \*  
Assessment - Sub Assessment

Provider \*  
Anderson, Tommy

☐ All Providers

Schedule Start Date  
2/11/2020 8:00 AM

Schedule End Time  
8:30 AM

Scheduled Minutes  
30

Status \*  
Confirmed

Location \*  
Home - Matt Home Alameda

Recurrence Rule  
-Select-

☐ Ignore Rules ☐ Do not Bill ☐ Do not Pay

Note(Maximum character for notes are 255)

**Save** **Cancel**

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:

**Appointments-Calendar View** Clear Filters

Today ◀ ▶ Sunday, February 09, 2020 - Saturday, February 15, 2020 Day Work Week **Week** Month

Sun 2/09	Mon 2/10	Tue 2/11	Wed 2/12	Thu 2/13	Fri 2/14	Sat 2/15
all day						
8:00 AM		P-Anderson, Tommy C-Demon, Matt				
9:00 AM						

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

## Measure Demo Facility

**Appointments-Calendar View**

Today ◀ ▶ 📅 Sunday, February 09, 2020

Sun 2/09	Mon 2/10
all day	
8:00 AM	P-Pcollins, Michael,-- C-Fox, Christina
9:00 AM	P-Pcollins, Michael,-- C-Fox, Christina
10:00 AM	P-Pcollins, Michael,-- C-Fox, Christina
11:00 AM	P-Pcollins, Michael,-- C-Fox, Christina

**IST, Assessment - BCBA - 06/30/2020**

When: Feb , Tue 11 , 2020 09:00AM To 09:30AM

Where: Home - 3456 Mason Ave Chatsworth

Client Name: [Fox, Christina](#)

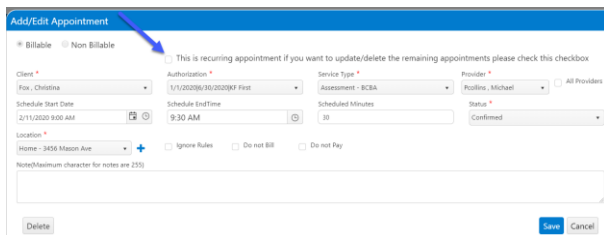
Provider Name: [Pcollins, Michael](#)

Status: Confirmed

[Appointment Details](#) [Monthly/Total Utilization](#)

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

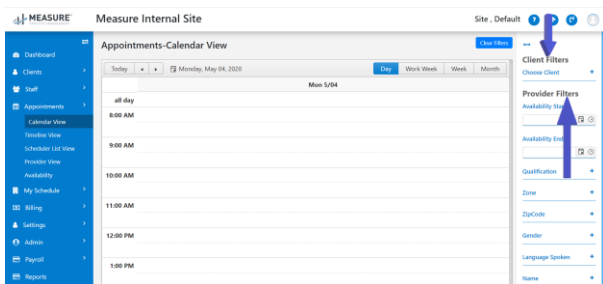
If the session is part of a recurring session, you will need to click the checkbox, as seen below, before editing an appointment.



The screenshot shows the 'Add/Edit Appointment' form. At the top, there is a blue header bar with the title 'Add/Edit Appointment'. Below the header, there are two radio buttons: 'Billable' (selected) and 'Non Billable'. To the right of these is a checkbox labeled 'This is recurring appointment if you want to update/delete the remaining appointments please check this checkbox'. A blue arrow points to this checkbox. Below the radio buttons and checkbox, there are several dropdown menus and input fields: 'Client' (Fox, Christina), 'Authorization' (1/1/2020/6/30/2020KF First), 'Service Type' (Assessment - BCBA), 'Provider' (Pcollins, Michael), 'Schedule Start Date' (2/11/2020 9:00 AM), 'Schedule EndTime' (9:30 AM), 'Scheduled Minutes' (30), and 'Status' (Confirmed). There is also a 'Location' dropdown (Home - 3456 Mason Ave) and three checkboxes: 'Ignore Rules', 'Do not Bill', and 'Do not Pay'. At the bottom, there is a text area for 'Notes' (Maximum character for notes are 255) and two buttons: 'Delete' and 'Save'.

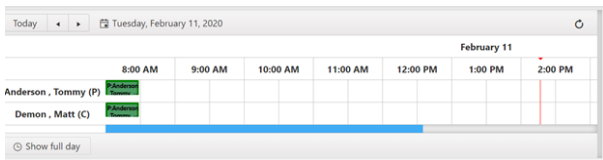
Please note that any changes made to repeated sessions will not affect the sessions that have already been rendered.

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.

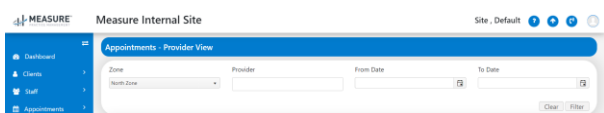
Please refer to the image below:

The screenshot displays the 'Appointments Scheduler Grid' interface within the MEASURE Internal Site. The left sidebar contains navigation links: Dashboard, Clients, Staff, Appointments (with sub-links for Calendar View, Timeline View, Scheduler List View, and Provider View), Availability, My Schedule, Billing, Settings, Admin, Payroll, and Reports. The main content area features a header with filters for Zone, Client, Authorization, and Service Type, along with a Status dropdown and an 'Internal Appointment' checkbox. Below these filters is a date range selector (From Date to Date) and buttons for 'Has Issue' and 'Not Billable'. The central grid shows a list of appointments with columns for Edit, Client, Provider, Service Type, Date, From, To, Duration, Date/Time of Visit, and Title. Two appointments are visible for 5/3/2020: one for 'Direct Behavior Therapy' (1:00 PM to 1:30 PM) and another for 'ABA CON' (5:00 PM to 5:30 PM). At the bottom, there is an 'Action' dropdown menu with 'Select Action' as the current selection.

Edit	Client	Provider	Service Type	Date	From	To	Duration	Date/Time of Visit	Title
	1. Jpl	2. Jpl	Direct Behavior Therapy	05/03/2020	1:00 PM	1:30 PM	30 Mins	05/03/2020 01:00 PM	012
	1. Jpl	2. Jpl	ABA CON	05/03/2020	5:00 PM	5:30 PM	30 Mins	05/03/2020 05:00 PM	051

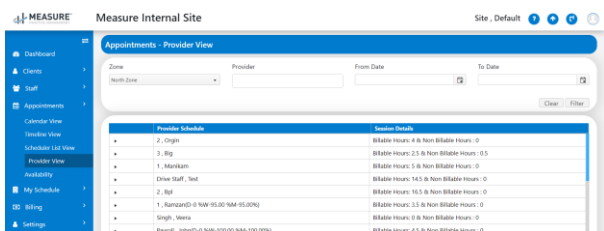
## 6.4. Provider View

‘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.



The screenshot shows the 'Measure Internal Site' interface. On the left is a navigation menu with options: Dashboard, Clients, Staff, and Appointments. The 'Appointments' section is expanded, showing sub-options: Calendar View, Timeline View, Scheduler List View, and Provider View (which is selected). The main content area is titled 'Appointments - Provider View'. It contains a search form with the following fields: 'Zone' (a dropdown menu currently showing 'North Zone'), 'Provider' (a text input field), 'From Date' (a date picker), and 'To Date' (a date picker). There are 'Clear' and 'Filter' buttons at the bottom right of the form.

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



The screenshot shows the 'Measure Internal Site' interface with the 'Appointments - Provider View' form filled out. The 'Filter' button has been clicked, and a table of appointments is displayed. The table has two columns: 'Provider Schedule' and 'Session Details'. The table contains the following data:

Provider Schedule	Session Details
2, Origin	Bilable Hours: 4 & Non Bilable Hours: 0
3, Big	Bilable Hours: 2.5 & Non Bilable Hours: 0.5
1, Markham	Bilable Hours: 5 & Non Bilable Hours: 0
Drive Staff, Test	Bilable Hours: 14.5 & Non Bilable Hours: 0
2, Big	Bilable Hours: 16.5 & Non Bilable Hours: 0
1, Ramzan(0-0 NAW-05:00 NAW-05:00N)	Bilable Hours: 3.5 & Non Bilable Hours: 0
Singh, Vienna	Bilable Hours: 0 & Non Bilable Hours: 0
Payroll, Johns(0-0 NAW-100:00 NAW-100:00N)	Bilable Hours: 4.5 & Non Bilable Hours: 0

## 6.5. Availability

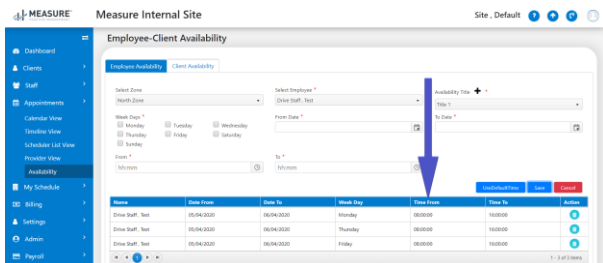
This option allows users to set the availability of an ‘Employee’ and ‘Client,’ as seen below in the two subfields: ‘Employee Availability’ and Client Availability.

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

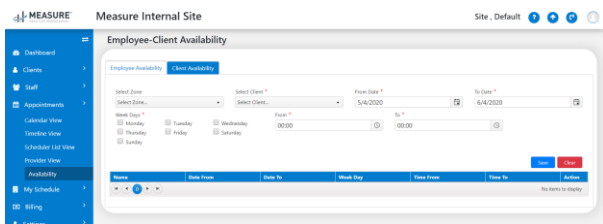
The screenshot displays the 'MEASURE' Internal Site interface. On the left is a blue sidebar with navigation links: Dashboard, Clients, Staff, Appointments, Calendar View, Timeline View, Scheduler List View, Provider View, Availability, My Schedule, Billing, Settings, Admin, and Payroll. The main content area is titled 'Measure Internal Site' and 'Site, Default'. Below this is a sub-header 'Employee-Client Availability' with two tabs: 'Employee Availability' (active) and 'Client Availability'. The 'Employee Availability' form includes fields for 'Select Zone', 'Select Employee', and 'Availability Title'. It also features a 'Work Days' section with checkboxes for Monday through Sunday. Below this are 'From Date' and 'To Date' fields, both set to 5/4/2020. At the bottom, there are 'From' and 'To' time fields, both set to 00:00. A table at the bottom shows columns for Name, Date From, Date To, Week Day, Time From, Time To, and Action. The table is currently empty, with a message 'No items to display' at the bottom right. Buttons for 'Update/Save', 'Save', and 'Cancel' are located at the bottom right of the form.

Click on “Save” to add the Provider’s availability to the system as seen below, as indicated by the arrow.

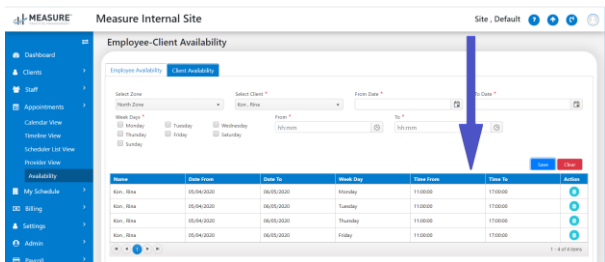




Under 'Client Availability,' users can set the availability of the selected Client as seen below.



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.

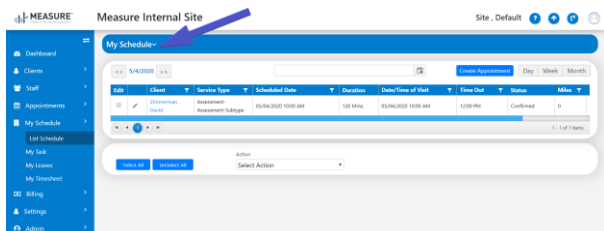
## 7. My Schedule

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

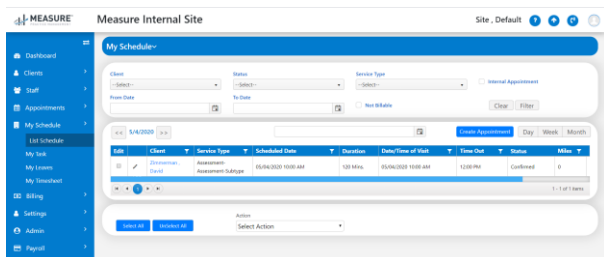
### 7.1. List Schedule

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

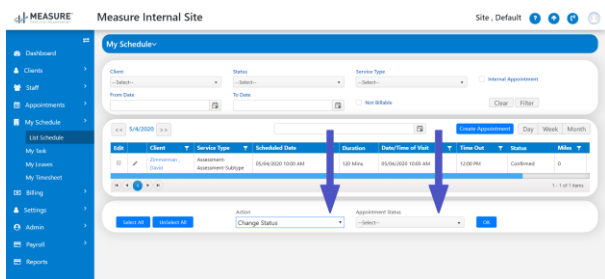
dropdown menu on the left side of your browser. Providers may filter through their appointments by clicking on the 'My Schedule' dropdown near the top of your screen as indicated by the arrow:



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:

MEASURE Measure Internal Site Site, Default

From Date: 5/1/2020 To Date: 5/1/2020 Go

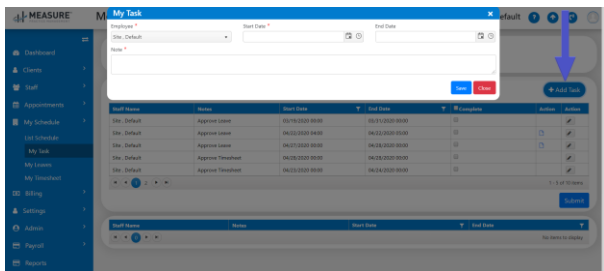
**My Task** + Add Task

Staff Name	Notes	Start Date	End Date	Complete	Action	Action
Site - Default	Apprentice Lesson	03/15/2020 00:00	03/15/2020 00:00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Site - Default	Apprentice Lesson	04/02/2020 04:00	04/02/2020 05:00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Site - Default	Apprentice Lesson	04/07/2020 00:00	04/08/2020 00:00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Site - Default	Apprentice Timesheet	04/08/2020 00:00	04/08/2020 00:00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Site - Default	Apprentice Timesheet	04/02/2020 00:00	04/04/2020 00:00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 5 of 10 items Submit

Staff Name Notes Start Date End Date No items to display

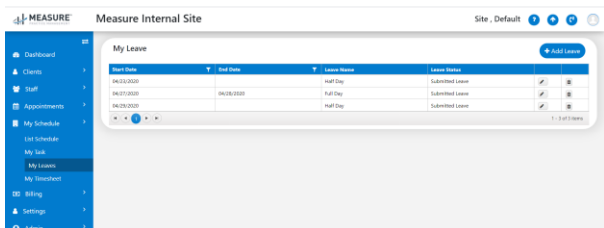
To add a task click on 'Add Task' as indicated by the arrow in the image below: Select 'Employee' >> 'Start Date' >> 'End Date' >> 'Notes' (If Any) and click on 'Save,' which will create a new task.



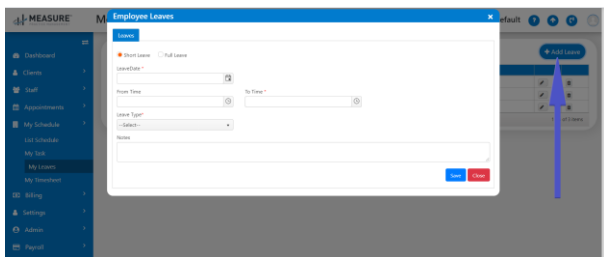
## 7.3. My Leave

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

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

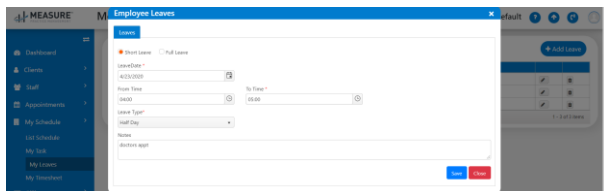
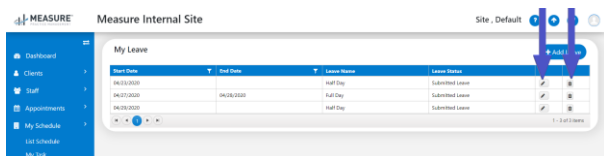


To make a leave request, click on the 'Add Leave' and a dialog box will appear. Select 'Short Leave' to make a partial day leave request or 'Full Leave' to request at least a whole day leave request. Then select 'Leave Date,' 'From Time,' 'To Time,' and 'Leave Type.' Users may also add any relevant notes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



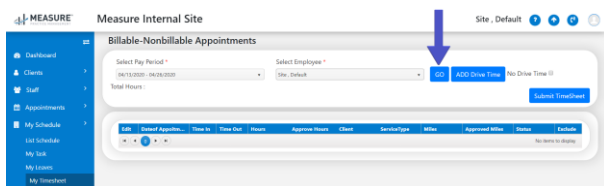
## 7.4. My Timesheet

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:

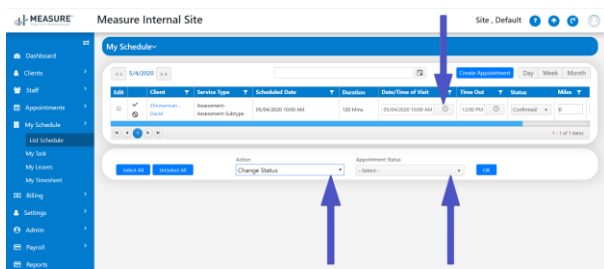
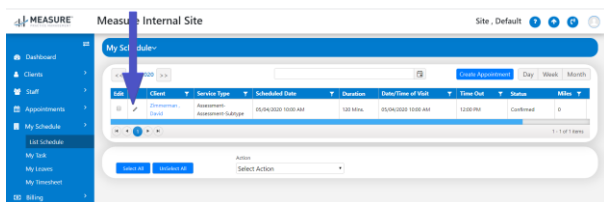


Users will then have the option select 'Add Drive Time' or 'No Drive Time' by clicking on the appropriate selection.

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.

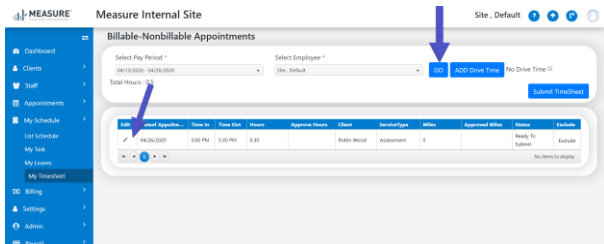


## 8. Payroll

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.

Measure Internal Site

Site, Default

### Billable-Nonbillable Appointments

Select Pay Period \*  
04/13/2020 - 04/24/2020

Select Employee \*  
Site: Default

GO

GO Drive Time

No Drive Time (i)

Total Hours: 0.5

Submit Timesheet

Edit	Dated Appointment	Time In	Time Out	Hours	Approve Hours	Client	Service Type	Miles	Approved Miles	Status	Exclude
<input checked="" type="checkbox"/>	04/20/2020	<input type="text" value="8:30"/>	<input type="text" value=""/>	0.30		Robin Wood	Assessment	<input type="text" value="0"/>		Ready To Submit	Exclude

No items to display

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:

The screenshot shows the 'Process Payroll' interface in the Measure Internal Site. The left sidebar contains a navigation menu with options: Dashboard, Clients, Staff, Appointments, My Schedule, Billing, Settings, Admin, Payroll, TimeSheet, Process Payroll, and Reports. The main content area has a 'Process Payroll' tab. At the top, there are two dropdown menus: 'Select Pay Period' (showing 06/13/2020 - 06/26/2020) and 'Select Employee' (showing Drive Staff, Test). A 'Process/View' button is on the right. Below these is a table with the following columns: Edit, Date/Time Appt., Time In, Time Out, Hours, Appointed Hours, Client, Service Type, Miles, Appointed Miles, and Status. The table contains five rows of data. At the bottom of the table, there is an 'Action' dropdown menu and an 'OK' button. A purple arrow points to the 'Action' dropdown menu.

Edit	Date/Time Appt.	Time In	Time Out	Hours	Appointed Hours	Client	Service Type	Miles	Appointed Miles	Status
<input type="checkbox"/>	06/13/2020 9:00 AM	9:00 AM	10:00 AM	1.0	1.0	Client 1 Drive 1	ABA CON	0		Submitted to Office
<input type="checkbox"/>	06/13/2020 11:00 AM	11:00 AM	12:00 PM	1.0	1.0	Client 2 Drive 2	ABA CON	0		Submitted to Office
<input type="checkbox"/>	06/13/2020 1:00 PM	1:00 PM	2:00 PM	1.0	1.0	Client 1 Drive 1	ABA CON	0		Submitted to Office
<input type="checkbox"/>	06/13/2020 10:00 AM	10:00 AM	10:22 AM	0.22	0.22	Client 1 Drive 1	Drive Time	0.4	0.4	Submitted to Office
<input type="checkbox"/>	06/13/2020 12:00 PM	12:00 PM	12:22 PM	0.22	0.22	Client 2 Drive 2	Drive Time	0.5	0.5	Submitted to Office

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:

MEASURE<sup>™</sup> Measure Internal Site Site , Default

Process Payroll

Select Pay Period <sup>+</sup> 06/13/2020 - 06/26/2020

Select Employee <sup>+</sup> Drive Staff, Test

Process/View

Edit	Dateof Appt...	Time In	Time Out	Hours	Approve Hours	Client	ServiceType	Miles	Approved Miles	Status
<input type="checkbox"/>	06/13/2020	9:00 AM	10:00 AM	1.0	1.0	Client 1 Drive 1	ABA CDM	0		Submitted to Office
<input type="checkbox"/>	06/13/2020	11:00 AM	12:00 PM	1.0	1.0	Client 2 Drive 2	ABA CDM	0		Submitted to Office
<input type="checkbox"/>	06/13/2020	1:00 PM	2:00 PM	1.0	1.0	Client 1 Drive 1	ABA CDM	0		Submitted to Office
<input type="checkbox"/>	06/13/2020	10:00 AM	10:22 AM	0.22	0.22	Client 1 Drive 1	Drive Time	0.4	0.4	Submitted to Office
<input type="checkbox"/>	06/13/2020	12:00 PM	12:22 PM	0.22	0.22	Client 2 Drive 2	Drive Time	0.5	0.5	Submitted to Office

1 - 5 of 5 items

Action Select Action OK

## 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

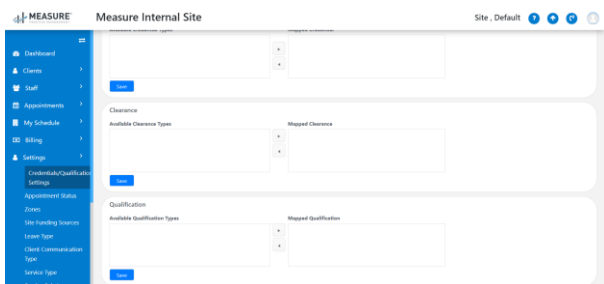
Credential/Qualification settings will allow organizations to map the required credentials,

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.

The screenshot shows the 'Measure Internal Site' interface. The top navigation bar includes the 'MEASURE' logo, the site name 'Measure Internal Site', and a 'Site: Default' dropdown with three icons. A left sidebar contains a menu with items like Dashboard, Claims, Staff, Appointments, My Schedule, Billing, and Settings. The 'Settings' item is expanded, showing sub-options including 'Credentials/Qualification Settings', which is the active page. The main content area is titled 'Credentials/Qualification Settings' and features an 'Employee Type' dropdown menu at the top. Below this, there are two sections: 'Credential' and 'Clearance'. Each section has an 'Available' list on the left and a 'Mapped' list on the right, with directional arrows between them. A 'Save' button is located at the bottom of each section.

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.

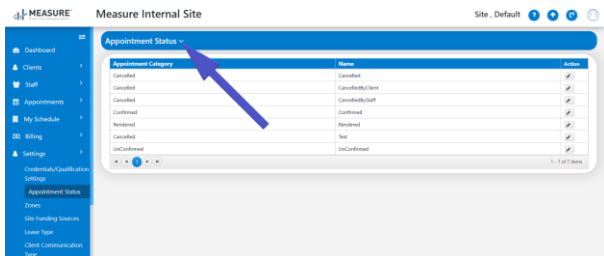


## 9.2. Appointment Status

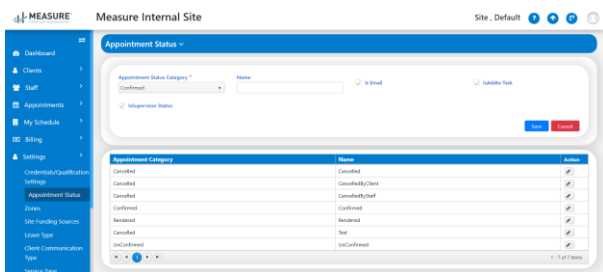
In this section users are able to add an appointment status category as per convenience or requirement.

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

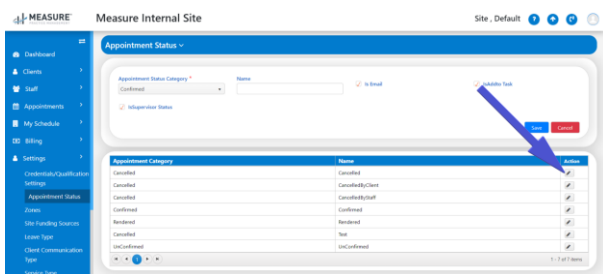




A dialog box, as seen below, will appear. Choose the 'Appointment Status Category' from the drop-down and enter the desired 'Name' i.e. 'By Parent,' 'By Staff. Users may also indicate Once all necessary modifications have been made, click on "Save." This will save the 'Name' under that category and the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

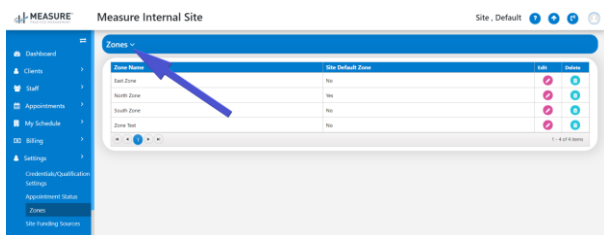


## 9.3. Zones

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

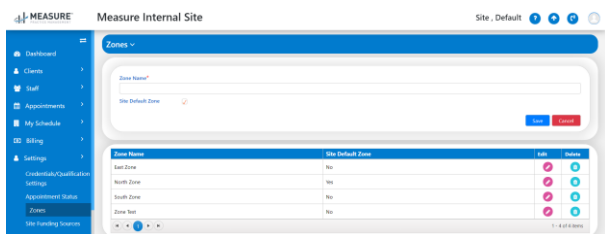
Once established, these zones can be utilized to group staff and clients by geographic locations for scheduling purposes.

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

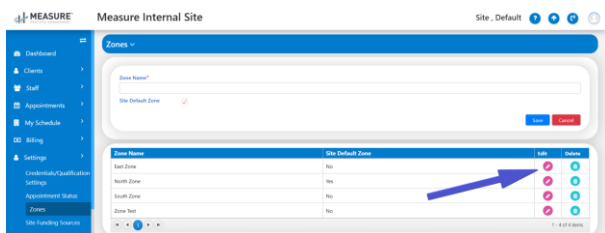


Enter the desired 'Zone Name' and click 'Save.' If the user wishes to define a given Zone as 'Default

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



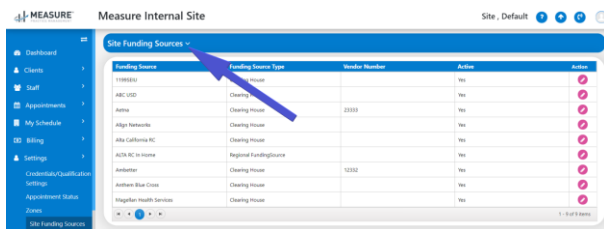
To edit a saved 'Zone' click on the edit icon, make desired changes, and determine whether or not to make selected zone 'Default.'



## 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.'

**Measure Internal Site** Site, Default

**Site Funding Sources**

Funding Source\*  Funding Source Type\*  Funding Source Number  Funding Source Number For Collig

FundingSource Contract File  CMS1000\_30a  CMS1000\_30b  CMS1000\_31

Cms1000\_30a  CMS1000\_30a  Taxid  Taxonomy SSN

CMS1000\_32  CMS1000\_33  Provider NPI  Provider Sig

☒ Active ☐ ClickDay By Provider ☐ Superuser Overlap NonBill

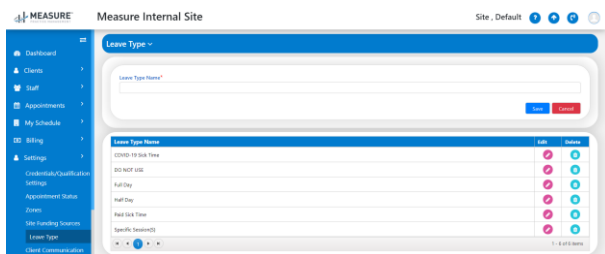
☐ ClickDay By CPT Code ☐ FEBuild?

Funding Source	Funding Source Type	Vendor Number	Active	Action
1000000	Cleaning House		Yes	
ABC USD	Cleaning House		Yes	

## 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.’

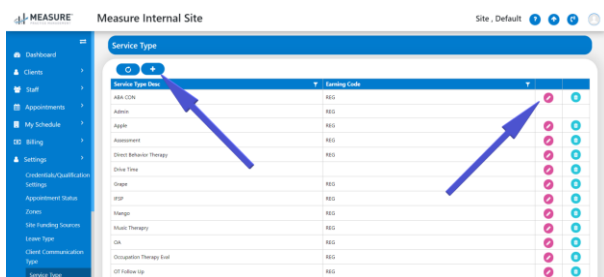
Users can also edit or delete any log type by clicking on edit or delete icon under ‘Action.’ Please refer to the image below:

## 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.

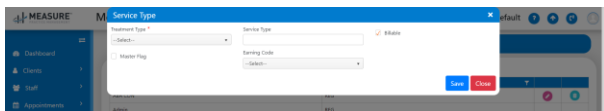


To add a service type, click on the '+' sign as indicated below:



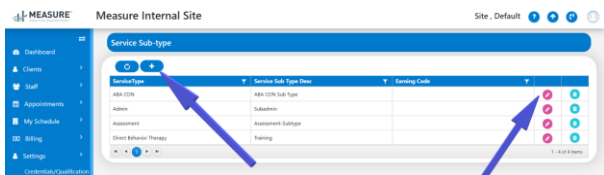
Clicking the '+' sign will open a dialog box. Using the dropdown menu, select the 'Treatment Type' and then enter the 'Service Type,' 'Billing Rate' defined for that particular service and 'Service Code.' Once all fields have been completed, click 'Save.'

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



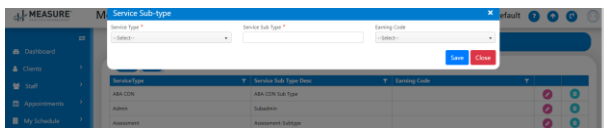
## 9.8. Service Sub-type

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:



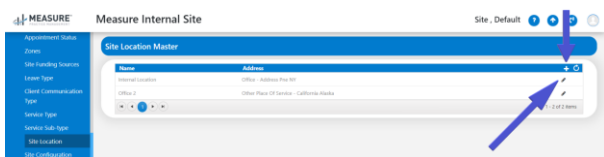
Now Select the 'Service Type' to be associated with the sub-service user is about to input. Input 'Service Sub Type', select the enter 'Earning Code' (If any) and Click 'Save' to add a new 'service sub-type' to the system. Users can always edit or

delete any 'Service Subtype' by clicking on the edit or delete icon under 'Action.'

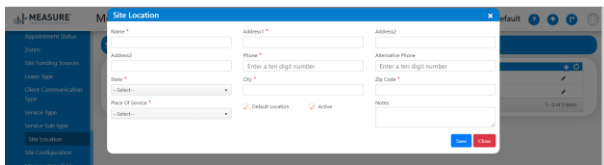


## 9.9. Site Location

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.

MEASURE Measure Internal Site Site , Default

### Site Flag Configuration

Master Flag Code	Master Flag Description	Master Flag Type	Enabled
ADD	Add Site Time	MySchedule	<input type="checkbox"/>
DURS	Disallow Rendering Without Client Signature	MySchedule	<input type="checkbox"/>
DURA	Disallow Rendering Without Client Signature	MySchedule	<input type="checkbox"/>
FRAG	Ignore Rendering Session Notes	MySchedule	<input type="checkbox"/>
DRON	Disallow Rendering Session Notes	MySchedule	<input type="checkbox"/>
HCPN	Hide Client Phone Number in Schedule	MySchedule, Calendar	<input type="checkbox"/>
RNDR	Schedule is Allowed to Render Appointment	MySchedule, MobileApp, Schedule	<input type="checkbox"/>
SAGE	SMS Enabled or Not	MySchedule, MobileApp, Schedule	<input type="checkbox"/>
MROD	Mobile (Pending) Enabled or Not	MySchedule, MobileApp	<input type="checkbox"/>
CLOD	Click In / Click Out Enabled or Not	MySchedule, Dashboard, MobileApp	<input type="checkbox"/>
GSDA	GPS Enabled in App or Not	MobileApp	<input type="checkbox"/>
SPRN	Allowed to Show Provider Phone Number	MySchedule	<input type="checkbox"/>
RGR	Ignore Rules Check Box Should be Visible On Add or Not	AddSchedule	<input type="checkbox"/>
CICA	Allowed to Change Scheduling Code For Appointment	MySchedule	<input type="checkbox"/>
NBRD	Non-Billable Session Needs Rendering or Not	MySchedule	<input type="checkbox"/>

1 - 15 of 15 items

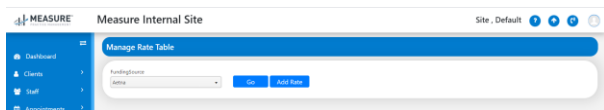
Save Close

## 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:



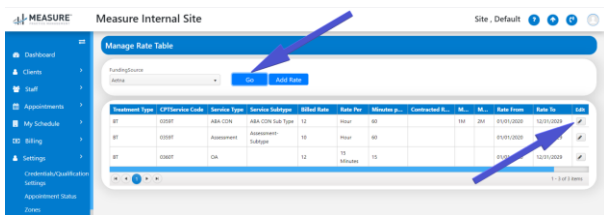
To add a rate for a new funding source or service type, select a funding source from the dropdown menu and click ‘Add Rate.’

The screenshot shows the 'Manage Rate Table' interface in the Measure Internal Site. The form includes the following fields and controls:

- FundingSource:** A dropdown menu with 'Active' selected.
- Buttons:** 'Get' and 'Add Rate' (highlighted with a purple arrow).
- Treatment Type:** A dropdown menu with '--Select--'.
- CPT Service Code:** A dropdown menu with '--Select--'.
- Service Type:** A dropdown menu with '--Select--'.
- Service Subtype:** A dropdown menu with '--Select--'.
- Billed Rate:** A text input field.
- Rate Per:** A dropdown menu with '--Select--'.
- Minutes Per Unit:** A text input field.
- Contracted Rate:** A text input field.
- Mod 1:** A dropdown menu with '--Select--'.
- Mod 2:** A dropdown menu with '--Select--'.
- Mod 3:** A dropdown menu with '--Select--'.
- Mod 4:** A dropdown menu with '--Select--'.
- Standard Degree:** A dropdown menu with '--Select--'.
- Rate From:** A text input field with a calendar icon.
- Rate To:** A text input field with a calendar icon.
- Buttons:** 'Save' and 'Cancel' at the bottom right.

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.

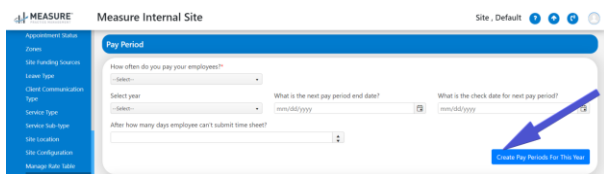
Note: A payor will have multiple 'Service Types' and 'Sub-service Types.' Users can choose rates separately for each service accordingly.

## 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.'



The screenshot shows the 'Measure Internal Site' interface. On the left is a blue sidebar with a menu including 'Appointment Status', 'Zones', 'Site Funding Sources', 'License Type', 'Client Communication Type', 'Service Type', 'Service Sub-Type', 'Site Location', 'Site Configuration', and 'Manage Rate Table'. The main content area is titled 'Pay Period' and contains several form fields: 'How often do you pay your employees?' (a dropdown menu), 'Select year' (a dropdown menu), 'What is the next pay period end date?' (a date input field with a calendar icon), 'What is the check date for next pay period?' (a date input field with a calendar icon), and 'After how many days employee can't submit time sheet?' (a dropdown menu). A blue arrow points to a button at the bottom right labeled '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.

The screenshot shows the 'Measure Internal Site' interface. On the left is a navigation menu with options like 'Appointment Status', 'Zones', 'Site Funding Sources', 'Lease Type', 'Client Communication Type', 'Service Type', 'Service Sub-Type', 'Site Location', 'Site Configuration', 'Manage Rate Table', 'Pay Period' (highlighted), 'Rule Configuration', 'Holiday', 'Manage Site Properties', 'Provider Note Service', and 'Provider Note Status'. The main content area is titled 'Measure Internal Site' and 'Site, Default'. It contains a form with a dropdown 'After how many days employee can't submit time sheet?' and a 'Create Pay Periods For This Year' button. Below this is a table with columns: 'Edit', 'From Date', 'To Date', 'Last Date to Submit Time Sheets', 'Check Date', and 'Delete'. The table lists 12 pay periods for the year 2020. At the bottom, there is an 'Action' dropdown menu with 'Select Action' as the current selection. A blue arrow points from the 'Action' dropdown to the 'Delete' icon in the table's action column.

Edit	From Date	To Date	Last Date to Submit Time Sheets	Check Date	Delete
	05/01/2020	05/09/2020	05/11/2020	05/15/2020	
	05/01/2020	05/14/2020	05/17/2020	05/22/2020	
	05/01/2020	05/15/2020	05/18/2020	05/18/2020	
	05/01/2020	05/14/2020	05/18/2020	05/22/2020	
	05/01/2020	05/15/2020	05/18/2020	05/18/2020	
	05/01/2020	05/14/2020	05/18/2020	05/18/2020	
	05/01/2020	05/15/2020	05/20/2020	05/19/2020	
	05/01/2020	05/15/2020	05/20/2020	05/19/2020	
	04/10/2020	05/09/2020	05/07/2020	05/14/2020	
	04/01/2020	05/10/2020	05/15/2020	05/28/2020	
	04/15/2020	05/01/2020	05/04/2020	05/08/2020	

## 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 Rule option 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.

Rule Name	Rule Description	Run Rule	Prevent Rule
Auth Start Date	Can Appointment Be Before Auth Start Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Auth End Date	Can Appointment Be After Auth End Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Auth Frequency	Appointment Is Out Of Auth Frequency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Therapist On Leave	Create Appointment When Provider Is On Leave	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Therapist Double Booked	Create Duplicate Session For Provider	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Funding Source Block Day	Funding Source Will Not Pay For This Day	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Same Activity Same Day	This Service Has Already Been Scheduled On This Day	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Therapist Non-Availability hrs	Allow Appointment When Therapist Is Not Available	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client Non-Availability hrs	Allow Appointment When Client Is Not Available	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Exceeds Max Days	Appointment Exceeds Maximum Hour For Day In Auth	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Exceeds Max Week	Appointment Exceeds Maximum Hour For Week As Defined In Auth	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Holiday	Can Appointment Be Scheduled On Holiday	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client Double Booked	Can Client Have Duplicate Appointment At This Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.

The screenshot shows the 'Measure Internal Site' interface. On the left is a blue sidebar with a menu including: Appointment Status, Zones, Site Funding Sources, Location Type, Client Communication Type, Service Type, Service Sub-type, Site Location, Site Configuration, Manager Role Table, Pay Period, Rule Configuration, Holiday (selected), Manager Site Properties, and Provider Role Service. The main content area is titled 'Holiday' and features a form with fields for 'Date Of Holiday', 'Description', and 'Active' (a checkbox). Below the form is a table listing existing holidays.

Date Of Holiday	Description	Active	Edit	Delete
04/22/2020	Christmas Day	True		
04/23/2020	Affiliated Rule	False		
05/01/2020	Labor Day	True		

At the bottom right of the table, it says '1 - 3 of 3 items'.

## 9.15. Manage Site Properties

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

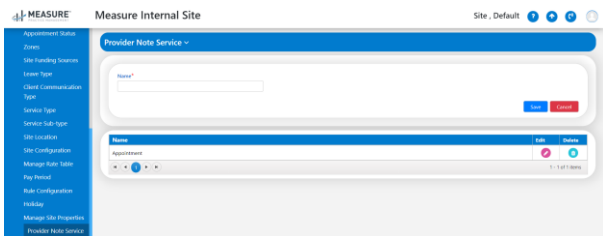
To establish a site, select the appropriate division from the dropdown menu and enter in the name, email, EIN, NPI, Tax code, Active Dates, and password. Next you will enter in the location name, address, phone, and place of service. You

may also select Default and Active to indicate an active, default location.

The image displays two screenshots of the MEASURE software interface, specifically the 'Manage Site Details' form. The top screenshot shows the 'Site' section with the following fields: Division (dropdown menu), Name (text field), Status (dropdown menu), Email (text field), EIN (text field), NPI (text field), Tax Code (text field), Active From (text field), Active To (text field), and Password (text field). The bottom screenshot shows the 'Location' section with the following fields: Name (text field), Address (text field), Address2 (text field), Address3 (text field), Phone (text field), Alternative Phone (text field), State (dropdown menu), City (text field), Zip Code (text field), and a section for 'Place Of Service' with a dropdown menu and checkboxes for 'Default Location' and 'Active'. The interface includes a sidebar with navigation options and a top bar with the MEASURE logo and site information.

## 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.'

