

CaresAccess



Software Integrity

2007 User Guide

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Opening CaresAccess

CaresAccess is a web application and can be opened by entering the following URL in your web browser.

<http://www.caresaccess.com>

All browsers can be used, but some reporting functions only work with Internet Explorer 5.5 or higher.

Login

Each user has a User ID and Password. If you have any questions regarding your login information please contact your CaresAccess Site Administrator or the CaresAccess System Administrator at **info@softwareintegrity.net**. Once you have logged into the system you can change your User Id and Password by clicking on your name which is displayed in the upper right hand corner of the window.



The screenshot shows a login form with the following elements: a 'User Name:' label above a text input field; a 'Password:' label above another text input field; a 'Remember Login' checkbox; a blue 'Login' button; and a blue link for 'Forgot Password?' below the button.

Patient Module: Search

You can easily search for a patient using their Social Security Number, CARES ID Number (a unique number generated for each patient when they are entered into the system), Date of Birth, or Last Name. The Last Name field will allow you to search for partial entries. For example typing "sm" will give you all the patients that have "sm" in their last name, like Smith or Smithers. Click the Search button and list of patients who meet your search criteria will appear.



The screenshot shows a 'Patient Search' form with the following elements: five input fields labeled 'SSN', 'CARES ID', 'Last Name', and 'DOB'; a 'Status' dropdown menu currently set to 'All'; and a blue 'Search' button at the bottom.

TIP

Use the Status field to narrow your patient search. If you want to see all the Active Patients, choose Active or to see Pending Patients, choose Pending.

The Status default is set to All Patients.

Once you have located your patient, simply click the patient name to pull up their complete record.

Patient Module: Demographics

The Patient Demographics screen contains basic patient information and is the first screen that appears after selecting a patient from the search menu.

Patient Demographics

Patient: Oz, Dorothy A SSN: 122393918 CARESID: 120020834

Last Name:	Oz	Street Address 1:	123 Yellow Brick Rd.
First Name:	Dorothy MI: A	Street Address 2:	
SSN:	122393918 Gen SSN	City:	Springfield
Birth Date:	01/15/1963 Age: 44	State:	NC
Gender:	<input checked="" type="radio"/> Female <input type="radio"/> Male	Zip:	12345
Household Income:	10976 per year	Home Phone:	(125) 456-7890
Fed Poverty Level:	108 %	Work Phone:	
Status:	Active	Mobile Phone:	
Effective Dates:	02/09/2007 to 05/09/2007	Email:	
		Care Coordinator:	

Update Disenroll Change Name Delete

To commit your updates, click the **Update** button.

The **Disenroll** button will take you to a selection of disenrollment reasons.

The Name fields are static until you select the **Change Name** button.

If you find a duplicate patient or need to delete a patient for any reason, select the Delete button.

Each field on this screen can be edited with the exception of Household Income and Percent of Federal Poverty Level. These fields report on data entered on the Additional Information Screen.

A patient's Effective Dates and Care Coordinator are also summary fields from data entered on the Enrollment Screen.

Disenrollment Date & Reason: 06/06/2007 Moved out of County

Update Disenroll Change Name Delete

If a patient has been disenrolled, the Disenrollment Date and Reason will be displayed.

Patient Module: New Patient

TIP

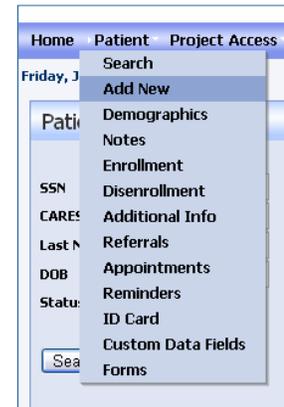
To prevent duplicate patients, always search for a patient using multiple fields before entering them as a new patient.

Entering a new patient into CaresAccess is simple. The system will automatically advance to each screen until the complete patient record is formed.

To enter a new patient choose Add New from the Patient menu.

You will first be prompted to enter the patient's demographic and contact information. A patient's

date of birth is should be entered in the format mm/dd/yyyy. The SSN is a required field, however you can use the Generate SSN button to have CaresAccess generate a number. Every field on this screen can be edited at a later time. When you press Save, you will be taken to the Enrollment screen.



Patient Module: Enrollment

The Enrollment screen allows you to enter various types of data pertaining to a patient's enrollment in your program. The items found under each dropdown menu are generated from entries on in the Project Access Module.

The Auto Disenroll feature allows you to have a patient's status change from Active to Inactive on the last day of their enrollment. You can also set the reason for their disenrollment.

If you do not know any of this information at the time of enrollment, you can always add or change it at a later time.

Once you choose Save you will be automatically taken to the Additional Information Screen.

Enrollment Site:	FQHC #1
Enrollment Length:	3 Months
Enrollment Date:	6/15/2007 Calendar
Expiration Date:	9/15/2007 Calendar
Application Date:	6/15/2007 Calendar
Date to Care Coord:	Calendar
Date ID Card Mailed:	Calendar
Primary Care Physician:	Fricke, Roland A
Primary Physician Write In:	
Referring Physician:	Fricke, Roland A
Referring Physician Write In:	
Referral Source:	Clinic
Reason for Referral:	
Diagnosis:	123.4
Care Coordinator:	Sheila, Rizzo
Enrollment Status:	New Enrollment
Enrollment Plan:	Not Answered
Auto Disenroll:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Auto Disenroll Reason:	Not Answered
Disenrollment Date & Reason:	
Urgency Level:	1 - Most Urgent
Cover Pre-Existing Only Conditions Only:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Patient Module: Enrollment (continued)

If you are re-enrolling a patient, CaresAccess will create an enrollment history so you can view all the previous enrollment periods. Just select New\Re-enroll to create a new enrollment period.

When you re-enroll a patient you will have the option of either keeping an existing pledge and not decrementing that physician's current pledge or re-referring the patient and decrementing the physician's available commitments.

Referral/Pledge Options:

- Maintain current referrals and do not decrement pledge amount for new enrollment.

Or

- Re-refer only the following selected physicians, decrementing their available commitments. Deactivate the referrals of physicians not selected.

Atkinson, Phillis - 06/16/2007

Hit the 'Ctrl' key to select multiple entries.

Patient Module: Additional Information

TIP

Use the Income Notes field to document information like a patient's hourly wage or the number of hours they work in a week.

The Additional Information screen allows you to track additional demographic information about the patient including their income, ethnicity, marital status, family size and interpreter language. Community specific data fields are also found on the Additional Information screen. If there are specific types of data your community needs, they will typically be found here.

The household income and Federal Poverty Level (FPL) percentage is calculated from the Patient Income, Spouse\Other Income and Family Size fields on the Additional Information Screen. These calculated values are found on the Demographics screen for easy access.

If you are entering a new patient, once you choose Save at the bottom of the screen you will be automatically taken to the Referrals module.

Patient Module: Referrals

On the Referrals screen you link a patient with a physician who has available pledge commitments. Each time you refer a patient to an available physician, you are decrementing that physician's available commitments for the year/month/quarter.

When entering a new patient:

1. Choose a specialty. A list of available physicians will appear. If a physician has just accepted a referral, their name will appear at the bottom of the list. This helps to distribute patient referrals to all your volunteer physicians. You also have the option of sorting the physicians by their last name.
2. Select a physician. When you select a physician you will see information about the physician including the number of referrals they have already accepted that year and the practice's contact information.

TIP

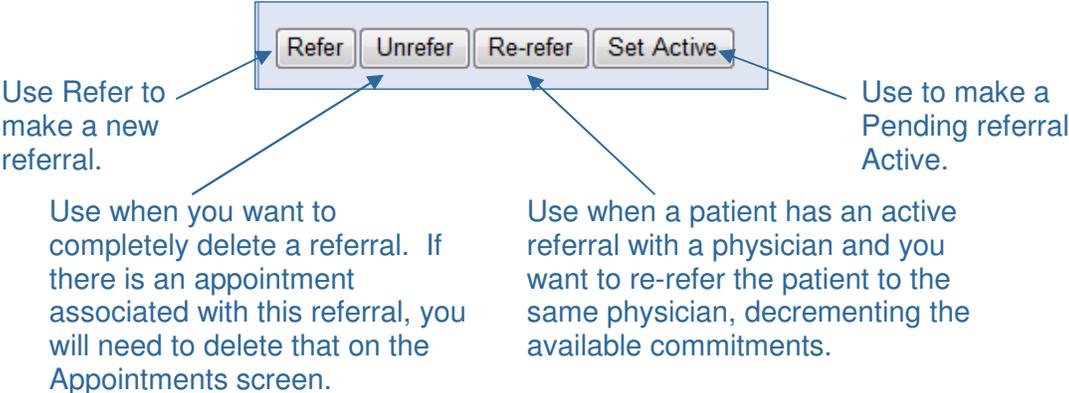
The Referral Date is automatically the current date.

If you would like the referral listed as a different date, simply enter your preferred date in the textbox.

Pledge Year:	2007	Pledge Interval:	Yearly
Commitment:	20		
Taken:	1		
Remaining:	19		

3. Select the Referral Status. Referrals can either be set in an Active Status or a Pending Status. If you choose Pending, the referral will not decrement the physician's available commitments. Once the patient is accepted into the program you can set this referral to an Active Status.
4. Choose Refer.

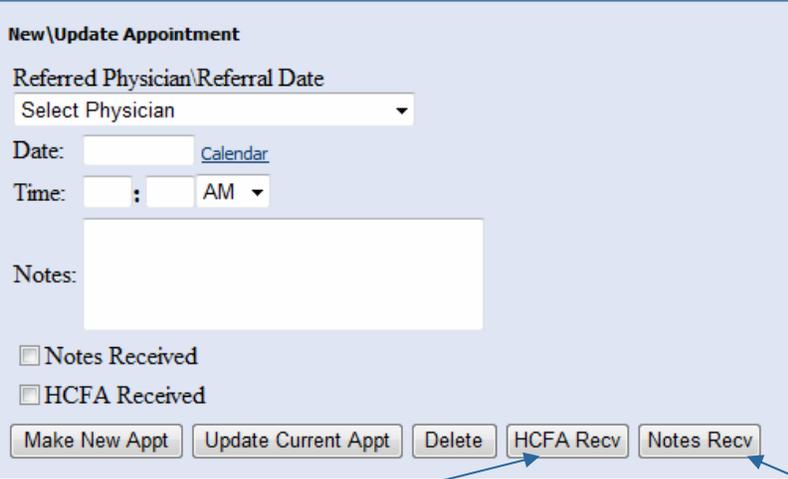
If you are re-enrolling a patient or referring an enrolled patient to a new physician when you come to the Referrals screen you will see a history of all the patient's referrals.



Patient Module: Appointments

After you have linked a patient with a physician on the Referrals screen, you can enter appointment information on the Appointments screen. Choose Appointments from the Patient menu. You can also use this screen to see a history of all a patient's appointments made through your program.

- 1. Select the physician. Only the referred physicians will be visible on this screen.



- 2. Enter the appointment date and time.
- 3. The Notes field can serve many purposes either for documenting instructions for the patient or notes from a physician about the appointment.

Click here to document that you have received a Claim Form for this appointment.

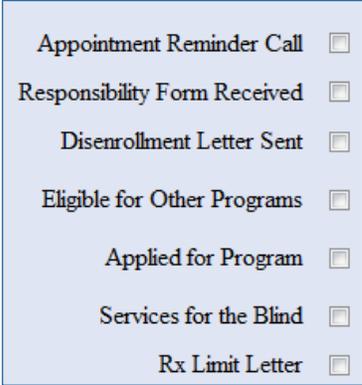
Click here to document that you have received notes about this appointment.

Patient Module: Notes

The Patient Notes module can be an extremely useful tool for documenting various information. You have the option of entering an unlimited number of notes on a patient. When you save your note the date, time and your name will be added to the note. If you need to print all of the notes for a patient, select Print View.

Patient Module: Reminders

Track all your patient reminders through the Reminders screen.



Patient Module: Custom Data Fields

Through CaresAccess you can set-up your own custom field data to be linked with each patient. The set-up of these fields is found under the Project Access menu. Once set-up you can access these fields under the Patient menu. Communities have found this useful in creating application tracking as well as survey data.

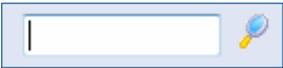
Patient Module: ID Cards

Project Access type programs typically issue a Patient ID card and a Pharmacy card. You can easily generate these cards by choosing ID Cards under the Patient Menu. Select Create ID Card. This function will create a pop-up window. If your browser is set to not allow pop-ups, simply hold the CTRL key while you select Create ID Card. The patient's information will auto populate these fields. A Microsoft Word document containing the cards will be created and is ready for you to customize and print.

Patient Name:
ID Number:
Enrollment Site:
Site Phone #:
Income:
Effective Dates:

Name:
ID Number:
Plan:
Group No:
Co-Pay:
Effective:
Helpline:

Patient Module: Quick Search



From any of the patient screens, you have the ability to search for another patient and load that patient's data into that screen. At the top of each patient screen you will see the patient's Name, SSN, and CARES ID and the Quick Search textbox. Simply type the patient's last name, partial or whole, and click the magnifying glass. A list of patients will be generated where you can select the patient whose information you would like to load in the current screen.

Patient Module: Referral Reasons

To help you prioritize patient referrals you can utilize the Referral Reasons module to track the needed specialty referrals and the urgency level. If a patient re-enrolls in the program you can select Remove All and enter new specialties and urgency levels.

	Specialty	Urgency Level
1.	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>
<input type="button" value="Save"/>		<input type="button" value="Reset"/>
<input type="button" value="Remove All"/>		

Project Access Module

Virtually all data elements of the CaresAccess application are configurable by the Community Administrator through the Project Access menu.

TIP

Visit the "Getting Started Using CaresAccess" section to plan the best way to configure your community's data.



Project Access Module: Physicians

A screenshot of a web form for adding or editing a physician. The form contains the following fields: Last Name (Atkinson), First Name (Phillis), Middle Name (empty), Title (DO), Signature (empty), Email (empty), Status (Active), Assoc. Group (Southern Surgical Specialists), Specialty (General Surgery), Date Of Entry (6/16/2007), Member/ Volunteer checkboxes, Pledge Year (2007), Interval (Yearly), Commitment (20), Taken (1), and Remaining (19). At the bottom are buttons for "New Physician", "New Pledge", "Update", "Delete", and "Notes".

The Physicians module gives you the ability to search for physicians based on their status, specialty and name. This screen makes it easy for the users to enter and edit physician information.

Each of these drop down menus are populated with data entered in other screens in the Project Access menu.

You can select intervals of Yearly, Quarterly, or Monthly which allows you to meet the needs of your volunteer physicians.

Project Access Module: Physician Notes

Like the Patients Notes field, you can enter unlimited notes for a physician. You can access the Physician Notes from the Physicians screen or from the Project Access screen and then searching for the physician. When you save the note the date, time and your name will be added to the note.

Project Access Module: Physician Clinic Pledges

Some Project Access communities recruit and coordinate volunteer physicians for area free clinics. This module allows you to enter physician pledges and track the nights physicians volunteered at the clinic. Each time you enter a date the physician's clinic pledge is decremented.

The screenshot shows a web form for managing physician clinic pledges. It includes the following fields and controls:

- Last Name:
- First Name:
- Middle Name:
- Status: (dropdown menu)
- Assoc. Group: (dropdown menu)
- Specialty: (dropdown menu)
- Clinic Pledge Year: (dropdown menu)
- # Pledge Visits:
- Taken:
- Remain:
- Buttons: New, Update, Save
- Text Area: (with a red 'x' icon on the right)
- Visit Date:
- Button: Add Visit

Project Access Module: Physician Disenrollment Reasons

TIP

Use your retired physicians list to recruit volunteers for a local free clinic or to recruit new physicians into your program.

If you change a physician's status to Inactive on the Physicians screen, CaresAccess will prompt you to enter a disenrollment reason. Your community sets these disenrollment reasons so that you can best track physician's participation in the program. Common disenrollment reasons include: Moved, Retired, or Completed Residency.

Project Access Module: Physician Status Codes

Both Physicians and Patients can have a designated Status in your program. Active and Inactive status are build into the CaresAccess system. You have the ability to add as many additional status codes to meet the needs of your community.

TIP

Use the Physician Status Code to track your physician recruitment efforts by adding a status like Recruitment Letter Sent.

Project Access Module: Physician Specialties

When referring a patient to a physician knowing that physician's specialty is key to making that referral as efficient as possible. Throughout CaresAccess you have the ability of searching for a physician by specialty. For a comprehensive list of Physician Specialties visit: http://en.wikipedia.org/wiki/Physician_Specialty_Codes.

Project Access Module: Physician Disenrollment

There are two places you can disenroll a physician from participating in your program. From the Physicians screen if you change a physician's status to Inactive, you will be prompted a enter a disenrollment reason. You can also select Physician Disenrollment from the Project Access menu. Select your Disenrollment Reason and confirm the disenrollment.

Project Access Module: Groups

For most communities a Group constitutes a physician practice. In the Groups module you enter the contact information for that practice. You can also easily view all the physicians associated with that practice.

Project Access Module: Groups (continued)

Groups

Group List, Count = 8

- Carolina Mind works
- County Community Health
- Franklin Cardiology Group
- Southern Surgical Specialists**
- Test Group One
- Test Group Two
- West Side Pediatrics
- Woods Orthopedics

Physician List, Count = 1

- Atkinson, Phillis

Name: Southern Surgical Specialists

Street 1: 78 N. Riverside Dr.

Street 2:

City: Springfield

State: PQ **Zip:** 12345

Tax ID:

Business #:

Contact Name: Suzie Q. Manager

Email:

Fax: (123) 456-7890

Status: Active Inactive

Referral Procedure: Follow procedure for insured patients, but fax Project Access card with referral.

Date of Entry:

If your practices have specific instructions for referring patients from your program into their practice you can easily list them here.

Project Access Module: Facilities

Facilities are usually community clinics like Federally Qualified Health Centers that refer patients to your program. This list of Facilities will populate the Enrollment Site dropdown menu on the Patient Enrollment screen.

Populates the patient's Pharmacy ID Card →

Populates the patient's ID Card →

Name:

Street 1:

Street 2:

City:

State:

Zip:

Pharmacy Group:

Copay:

Primary Contact:

Telephone:

Associated Group: County Community Health

Project Access Module: Patient Disenrollment Reasons

When patients are disenrolled either on the Demographics screen, the Disenrollment module or the Auto-disenroll feature on the Enrollment screen, you will be prompted to enter a disenrollment reason. These reasons are completely customizable. Common reasons include: Enrollment Period Ended, Medicaid Enrollment, Private Insurance, Non-Compliance, Moved, and Over-income.

Project Access Module: Patient Status Codes

Active and Inactive statuses are built into the CaresAccess system, however you can add additional reasons to meet your community’s enrollment needs. A patient’s status will be visible and editable when entering a new patient and on the Demographics screen.

TIP

Use the Patient Status Code to track where a patient is in their enrollment process by using codes like Pending, Canceled, or Denied.

Project Access Module: Care Coordinators

The Care Coordinator Module allows you to integrate Case Managers or Care navigator type position into your system. On the Enrollment screen for patients you will see a dropdown menu of Care Coordinators. This Care Coordinator is visible from the Demographics screen for easy access to this information. Through the Project Access Module you can enter the Care Coordinators you want visible on the Enrollment screen.

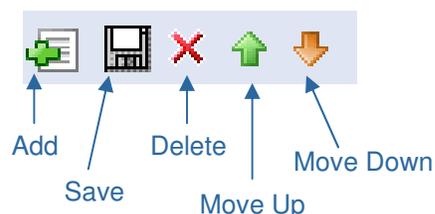


A screenshot of a web form for adding a Care Coordinator. It features two text input fields: 'Last Name:' and 'First Name:'. Below the fields are two buttons: 'Save' and 'Cancel'.

Project Access Module: List Maintenance

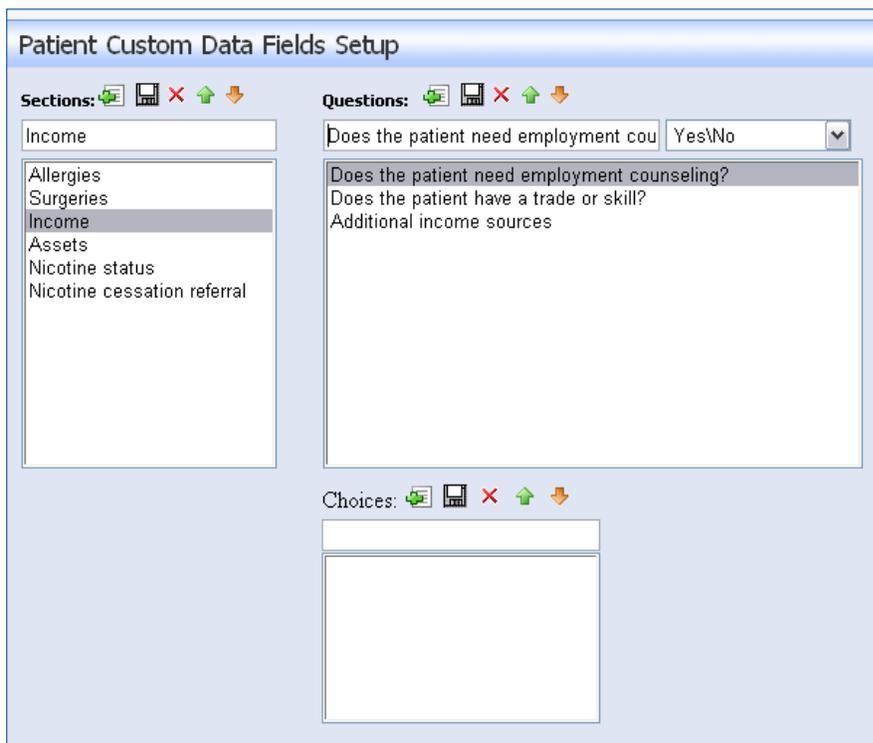
To further enhance making CaresAccess individualized to your community, the List Maintenance module gives you the freedom to set the options for various lists. List Types include: Service Code, Enrollment Plan, Interpreter Languages, Employer Insurance, Employment Status, and Referral Source.

Project Access Module: Patient Custom Data Fields Setup



The Patient Custom Data Fields is a great place to track any data not already part of the CaresAccess system. Communities are using this module to transition to a “paperless” enrollment and tracking system. The Patient Custom Data Fields are not integrated into any reporting functions. These fields are designed to give you additional information that is linked to a patient, however queries can not be run on this data.

1. Create a Section by choosing Add. Enter the Section Title and choose save.
2. To create questions and choices for a section, make sure the Section is highlighted the Add Questions with the Add, and Save Buttons.
3. Once you have added a question, make sure it is highlighted and you can choices. If you do not add specific choices, then a textbox will appear next to the question on the Custom Data Fields Screen.



Reports Module:

Reporting on your data is simple and user friendly with CaresAccess. Reports are divided into several subcategories: Appointment, Patient, Enrollment, Physician, and Referral. Don't see a report you need? The staff at Software Integrity knows the importance of being able to effectively use your data to meets the needs of your community and we are happy to design new reports to meet your needs. Reports can be downloaded in to several formats: Excel, Acrobat (pdf) format, CSV (comma delimited), TIFF file, HTML, Web archive, and XML file with report data. When you select a specific report, the reporting system will open a separate window. The CaresAccess reporting function must be run in Internet Explorer.

This guide is designed to define various reports and their parameters so you can access the data you need. Step-by-step instructions are listed for some of the frequently used reports.

Reports Module: Appointment

Appointment List – query is defined by a user specified date range and returns:

- | | |
|---------------------------|----------------------|
| Specialty | Patient's Home Phone |
| Facility | SSN |
| Physician Name | Cares ID |
| Appointment date and time | HICF Received |
| Patient Name | |

Appointment List By Facility – query is defined by a user specified date range and facility. This query reports all appointments for patients associated with a certain facility. Fields on the report:

- | | |
|---------------|------------------|
| Patient Name | Appointment Date |
| Date Enrolled | Physician Name |
| Date Expires | Specialty |
| Facility | |

Appointment List By Physician and Date – query is defined by a user specified date range and returns fields:

- | | |
|----------------|--------------|
| Physician Name | Date |
| Specialty | Patient Name |
| Group | |

Appointment List By Specialty – query is defined by a user specified date and a specialty and returns appointments only for that specialty. Fields included on the report are:

- | | |
|----------------|---------------------|
| Physician Name | Date of Appointment |
| Specialty | Patient Name |
| Group | |

TIP

Use the Date of Service Past Enrollment Period report to identify patients who need to be re-enrolled in your program for a future appointment.

Appointment List By Week – query is defined by a user specified date range and returns:

Appointment date and time	Specialty
Patient Name	Care Coordinator
Physician Name	Diagnosis

Date of Service Past Enrollment Period – query is defined by a user specified date range and returns all appointments that are outside of a patient’s enrollment period. Fields include:

Patient Name	Physician Name
Cares ID	Group Name
Date of Service (DOS)	Specialty Name
Expiration Date	

Future Appointments – Reports all appointments which occur past the current date. Fields included are:

Appointment date and time	Physician Name
Patient Name	Office Phone
Patient Status	Notes from the appointment screen

Future Appointments (Expanded) – This expanded version of the Future Appointments report includes the fields:

Patient Name	Patient Phone
SSN	Patient Status
Cares ID	Enrollment Facility
Address	Interpreter Language
City	Physician name
State	Appointment date and time
Zip	Practice Fax
Date Enrolled	Practice Phone

Reports Module: Patient

Employer List – pulls all entries into the Employer field on the additional information screen and defines the query by the user specified patient status. The status dropdown menu is populated with titles entered on the Patient Status Codes under the Project Access menu. This report pulls from a text field and is only as clean as it is entered.

Patient Address List – pulls all patients who meet a user specified patient status. Fields returned are:

Last Name	City
First Name	State
Middle Initial	Zip
Address 1	E-mail
Address 2	

This is a great resource for creating patient address labels.

Patient Address List With Enrollment Date – is the above report with the added field of the patient’s enrollment date

Patient Birthday List – pulls all patient who meet a user specified patient status. Fields included in the report are:

Birth Date	Cares ID
Patient Name	Home Phone
SSN	Work Phone

This report makes it easy to identify individuals who may become eligible for certain programs based on their age.

Patient Demographics – pulls patients who meet a user specified patient status. Fields included in the report:

Last Name	Marital Status	Spouse/Other income
First Name	Family Size	Period
Cares ID	Income Source	FPL %
Gender	Housing	Interpreter Language
DOB	Employer	Homeless
Race	Income	Homeless Risk
Education	Income Period	

Patient Employment and Insurance – queries patients with a user specified status. The report includes the fields:

Last Name	Income Period
First Name	Employment status
Cares ID	Spouse Income
Income	Spouse Income Period

Patient List With Zip Code and First Appointment – queries patients with a user specified enrollment status. The report includes:

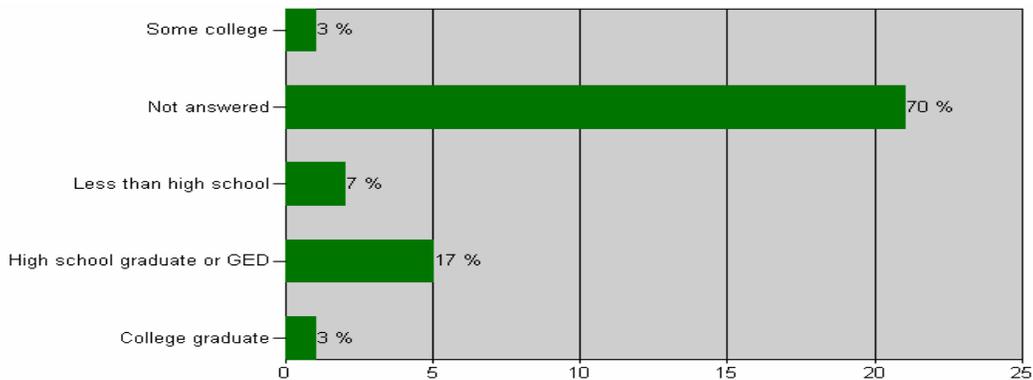
Last Name	Jurisdiction
First Name	Zip
Middle Initial	Date Applied
SSN	Status
Cares ID	First Appointment
City	

Patient Notes – queries patients with a user specified enrollment status. The report includes:

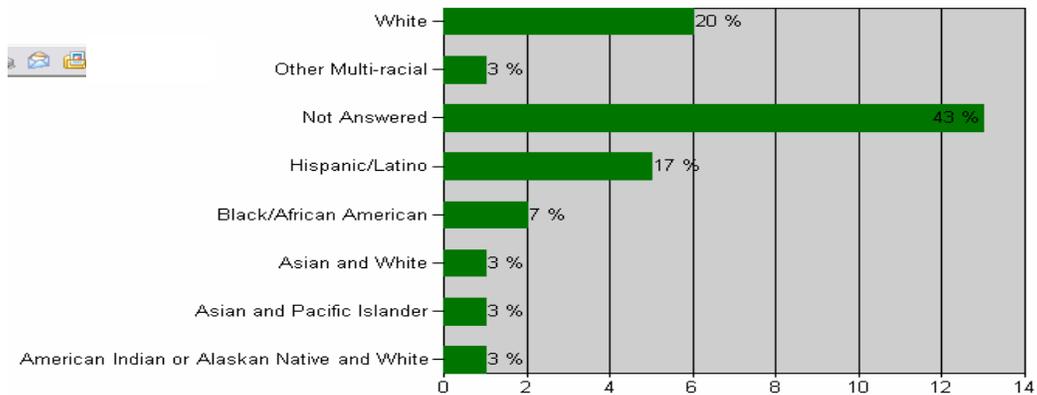
Last Name	Note #
First Name	Note
Cares ID	

If a patient has five notes each note will be listed with their corresponding Note number.

Patient Population by Education Level – analyzes your entire patient population (all enrollment statuses) and generates a bar graph like the one below.



Patient Population By Education Level – analyzes your entire patient population (all enrollment statuses) and generates a bar graph like the one below.



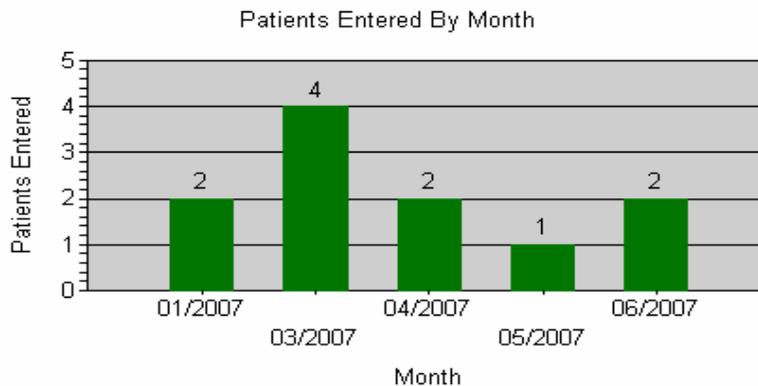
Patient Status Changed – queries all patients who meet a user specified enrollment status change and user specified date. For instance if you want to see all the patients whose status changed to Active on a date simply choose Active and the date. Fields included:

Last Name	State
First Name	Zip
Middle Name	Date of Birth
Date Status Changed	SSN
Address 1	Cares ID
Address 2	Home Phone
City	

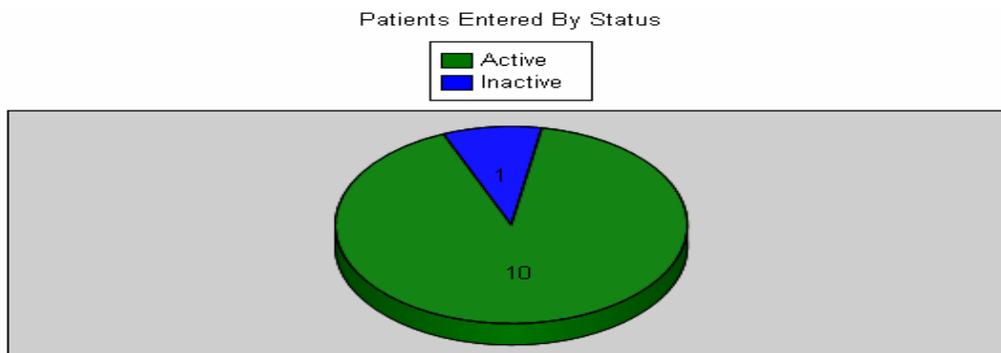
TIP

Use the Patient Status Changed report to generate letters to all your patients who became Active that day. Download the report into Excel and use the Mail Merge feature in Word.

Patients Entered By Month – queries all patients who were entered into the CaresAccess system during a user specified date range. Data reported in a bar graph like the one below.



Patients Entered By Status – queries all patients who were entered into the CaresAccess system during a user specified date range. The pie chart generates represents the current enrollment status of the patients entered during the date range.



Pending Status Report – queries all patients who meet the user specified date range and have the user specified enrollment status. Fields included on the report:

Last Name	Zip
First Name	Date Enrolled
SSN	Facility Name
Cares ID	Interpreter Language
Patient Phone	Referring Physician
Address 1	Physician Phone
Address 2	Physician Fax
City	Notes
State	Appointments

Responsibility Form Not Received – this report is tied to Responsibility Form Received check box on the Reminders screen under the Patients menu. All patients with a user specified enrollment status whose form has not been received will be included in this report. Fields included on the report:

Reports Module: Enrollment

Enrollment Urgency – this report includes the number of days a patient has until their first appointment as well as the level of urgency for enrollment. Fields included on the report:

Last Name	First Appointment Date
First Name	Wait (in days)
Cares ID	Urgency Level
Date Applied	

Inactive Patient Disenrollment Reason – queries patients by a user specified date range and returns the disenrollment reason for inactive patients. Fields included on this report:

Disenrollment Reason	Patient Count
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Number of Patients Reenrolled – queries all patients and returns the number of patients who were reenrolled in the program during the user specified date range.

Number of Patients Served – queries all patients who had a status of Active during the user specified date range.

Patient Demographics by Enrollment Date – queries all patients who were enrolled during a user specified date range. Fields included on this report:

Last Name	Marital Status	Spouse/Other income
First Name	Family Size	Period
Cares ID	Income Source	FPL %
Gender	Housing	Interpreter Language
DOB	Employer	Homeless
Race	Income	Homeless Risk
Education	Income Period	Enrollment Date

Patient Disenrollment Summary By Disenrollment Date – queries all patients who were disenrolled during a user specified date range. Fields included on this report:

Disenrollment Reason	Patient Count
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Patient List By Disenrollment Date – queries all patients disenrolled during a user specified date range. Fields included on this report:

Last Name	Cares ID
First Name	Date Disenroll
Middle Initial	Disenrollment Reason
SSN	Phone Number

Patient List By Date Enrolled – queries all patients enrolled during a user specified date range. Fields included on this report:

Last Name	Date Enrolled
First Name	Date Expired
Middle Initial	Primary Care Provider (PCP)
SSN	Enroll Status
Cares ID	Facility

Patient List By Enrollment Date And Enrollment Status – queries all patients enrolled during a user specified date range with a choice of Enrollment Status (new or re-enrollment) and Patient Status. Fields included on this report:

Enrollment Date	City
Last Name	State
First Name	Zip
Cares ID	Phone
Address 1	Enrollment Status
Address 2	

Patient Status By Enrollment Plan – queries all patients with a user specified Patient Status and Enrollment Plan type. Fields included on this report:

Last Name	Address 2
First Name	City
Cares ID	State
Enrollment Date	Zip
Expiration Date	Home Phone
Address 1	Care Coordinator

[Patient List By Expiration Date](#) – pulls all patients whose enrollment expired on a user specified date. Fields included on this report:

Last Name	Cares ID
First Name	Date Applied
Middle Name	Date Expires
SSN	Phone

[Patient List By Expiration Date \(Expanded\)](#) – this expanded version of the above report includes the ability to include multiple expiration dates by using a date range. Fields included on this report:

Last Name	State
First Name	Zip
SSN	Date Applied
Cares ID	Date Expires
Facility	Date Disenrolled
Address 1	Primary Care Provider (PCP)
Address 2	Interpreter Language
City	Patient Status

[Patient List By Expiration Date Range](#) – pulls all patients whose expiration date falls within a user specified date range and have a user specified patient status. Fields included on this report:

Last Name	Date Applied
First Name	Date Expires
Middle Name	Phone
SSN	Primary Care Provider (PCP)
Cares ID	

[Patient List By Facility And Date Range](#) – pulls all patients whose enrollment date falls within a user specified date range and was enrolled at a user specified facility. Fields included on this report:

Last Name	Cares ID
First Name	Primary Care Provider (PCP)
Middle Name	Date Enrolled
SSN	Date Expires

[Patient List By Facility And Date Range](#) – pulls all patients whose expiration date falls within a user specified date range and was enrolled at a user specified facility. Fields included on this report:

Last Name	Primary Care Provider (PCP)
First Name	Date Applied
SSN	Date Expires
Cares ID	Date Disenrolled

Patient List With Referring Physician and PCP – pulls all patients with a user specified patient status. The Referring Physician and Primary Care Provider are pulled from entries on the Enrollment Screen on the Patients module. Fields included on this report:

Last Name	Date Enrolled
First Name	Date Expired
Middle Name	Referring Physician
Cares ID	PCP

Patient Pre-Existing Coverage – pulls all patients who have a certain Enrollment Status (ie. Active or Inactive) and returns the data entered in the Pre-existing Coverage field on the Enrollment Screen in the Patients module. Fields included on this report:

Last Name	Cares ID
First Name	PCP
Middle Name	Cover Pre-existing Only

Patient List with Referral Reasons – pulls data from the Referral Reasons screen in the Patients module. The user specifies the Enrollment Status to pull from. Fields included on this report:

Last Name	Enrollment Date
First Name	Specialty of Referral
Cares ID	Urgency Level of Referral

Patients Currently Enrolled – pulls all patients who Enrollment Status is not Inactive (ie. Active or Pending). Fields included on this report:

Last Name	Birth Date
First Name	Date Enrolled
Middle Name	Date Expires
Cares ID	Enrollment Status
SSN	

Reports Module: Physician

Available Physicians By Specialty – pulls all physicians with available commitments. Physicians who have completed their commitment are not included on this report. If a physician has a per month or per quarter pledge, their pledges are totaled and reported as an annual pledge on this report. Fields included on this report:

Specialty	Phone
Physician Name	Status
Group\Practice	Available Commitments

[Available Physicians By Specialty \(Monthly\)](#) – pulls all physicians whose pledge interval was set to Monthly. This report includes physicians who have completed their pledges by indicating that they have 0 remaining. Fields included on this report:

Specialty	Pledge
Physician Name	Remaining Referrals
Phone	

[Available Physicians By Specialty \(Quarterly\)](#) - pulls all physicians whose pledge interval was set to Quarterly. This report includes physicians who have completed their pledges by indicating that they have 0 remaining. Fields included on this report:

Specialty	Pledge
Physician Name	Remaining Referrals
Phone	

[Group\Clinic List](#) – pulls all groups that have been entered into CaresAccess by your community. Reports if the community has an Active status. Fields included on this report:

Group Name	Zip
Address 1	Phone
Address 2	Fax
City	Manager
State	Active?

[Physician Address List](#) – pulls all physicians that have been entered into CaresAccess by your community. Address listed is the physician's practice address. Fields included on this report:

Last Name	Address 2
First Name	City
Middle Initial	State
Title	Zip
Group	E-mail
Address 1	

[Physician Clinic Pledges By Year](#) – the user sets the pledge year. This report pulls from the clinic pledges entered in the Physician Clinic Pledges screen in the Project Access Module. Fields included on this report:

Last Name	Commitment
First Name	Taken
Middle Initial	Remain
Title	Clinic Visit Date
Specialty	

Physician List – pulls all physicians with a user specified status (ie. Active or Inactive). Fields included on this report:

Last Name	Referrals Taken
First Name	Last Referral Date
Middle Initial	E-mail
Title	Volunteer
Commitment	

Physician Pledges By Year – the user sets the pledge year and this reports pulls all physicians who have a pledge set for the year. Fields included on this report:

Last Name	Specialty
First Name	Commitment
Middle Initial	Referrals Taken
Title	

Physicians By Specialty And Group – pulls all physicians who have been entered in to CaresAccess. The report is specifically designed to group specialties and list groups\practices associated with these specialties and then the physicians associated with the group. Fields included on this report:

Specialty	Group Phone Number
Group\Practice	
Physician Name	

Physicians Completed Commitment- pulls all physicians who have pledge in the current year and have met their pledge number. Fields included on their report:

Physician Name	Specialty
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Reports Module: Referral

Referral List – pulls patients and the physicians who accepted the referral. The user specifies a referral date range with pulls from the Referral Date found on the Referrals screen in the Patients module. Fields included on this report:

Group Name	Date Enrolled
Physician Name	Date Expires
Patient Name	Date Disenrolled
SSN	

Referral List By Group – The user specifies a referral date range and also selects a group from a drop down menu populated by all groups entered into CaresAccess. Fields included on this report:

Physician Name	Date Enrolled
Patient Name	Date Expires
Patient SSN	Date Disenroll

Security: HIPAA Compliance

CaresAccess maintains HIPAA compliance on various levels. The first level is by employing strong passwords. These user set passwords must be at least 7 characters, contain both upper and lowercase entries, and must have both alpha and numeric characters.

Security: Security Levels

CaresAccess has five user levels so you can control the amount of data specific users can view and edit. For information on how to set users with different security reasons see the User Management section.

Patient Enrollment Read Only – has access to patient search, demographics, and enrollment screens only. Cannot add new patients or update patient data.

Patient Administrator – has access to all options under the Patient Menu, can add new patients and update patient data.

Project Access Administrator – can access all options under the Patient Menu and the Project Access Menu, and can change\update data in either area.

Entire Site Read Only – can access all pages on the site, but cannot change any data.

User Administrator – can create new users, and can assign a user to a given security level.

User Management

A user may maintain their own user profile (password, email address, etc.), and can change it at any time.

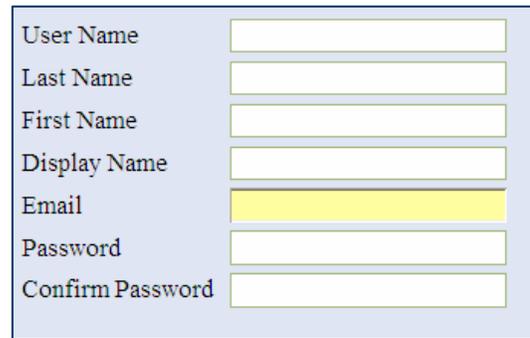
1. Login
2. Click your name in the upper right hand corner of the screen

You will be taken to the User Profile screen where you can make changes to your information.

Community Administrators can manage all users for their community. You can add or delete users, set their permission/security level, update name and e-mail information and reset passwords from the System module.

To add a new user:

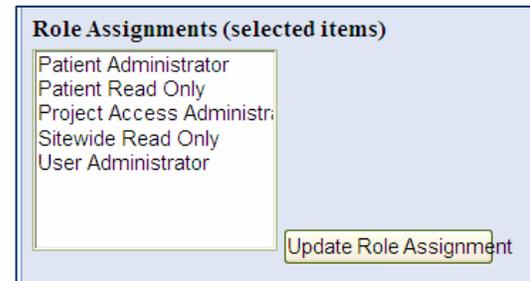
1. Go to the User Maintenance option under the System menu.
2. Select Add New.
3. Enter the user's information:
 - User Name is specific to the login process
 - Display Name is the name that prints with the date when a user saves a note.
 - Passwords should be 8-10 characters in length and contain at least one letter and one number.



A screenshot of a user creation form. It contains seven input fields: User Name, Last Name, First Name, Display Name, Email, Password, and Confirm Password. The Email field is highlighted in yellow.

And Save.

4. Set the users security level. Before a user can access any feature in CaresAccess they must have a defined security level. See the Security Levels section to make the best choice of security levels for your users. Choose Update Role Assignment when your selection is complete. If a user needs more than one role, hold the Ctrl key to make multiple selections.



A screenshot of a dialog box titled "Role Assignments (selected items)". It contains a list of roles: Patient Administrator, Patient Read Only, Project Access Administrator, Sitewide Read Only, and User Administrator. There is an "Update Role Assignment" button at the bottom right.

User names can not be changed. If you need to update a user name, create a new user with the correct user name and new password then disable the previous user account.

Getting Started Using CaresAccess

Where do we start? All the CaresAccess user entered data can be updated or modified at any point during the process. Remember that communities use the CaresAccess application differently to meet their individual needs. Here are our suggestions on where to start entering your data:

1. Enter Group\Practice Data (Project Access Module)
2. Enter Physician Specialties (Project Access Module)
3. Add Physician Status Codes (Project Access Module) – The Status Codes “Active” and “Inactive” are build into CaresAccess.
4. Enter Physicians (Project Access Module) with their Pledge. Some communities enter all physicians and list some as “Inactive” for recruitment purposes.

5. Enter Facilities (Project Access Module)
6. Add Patient Status Codes (Project Access Module) - The Status Codes “Active”, “Inactive” and “Pending” are build into CaresAccess.
7. Enter Patient Disenrollment Reasons (Project Access Module)
8. Adjust entries under List Maintenance (Project Access Module)
9. Set-up and Patient Custom Data Fields (Project Access Module)
10. Enter Care Coordinators
11. Set-up Users and their Security Level
12. Distribute Logins and start entering patients!

Technical Information: Data Backups

The data for a CaresAccess community is backed up nightly, and backup archives are kept for two months. As a CaresAccess customer, you own your data and can request a copy of your data files at any time, which can be sent to you electronically or on a CD. The format for the data is Microsoft SQL Server 2000.

Technical Information: Server Locations

The primary CaresAccess server is located at a data center in Fayetteville, NC. The secondary (backup) server is located in Arizona.

Technical Information: Application and Database Platform

CaresAccess has been constructed using the Microsoft .NET 2.0 application platform, and the DotNetNuke web portal framework. The database for CaresAccess is Microsoft SQL Server 2000, and the Reporting system is based on Microsoft SQL Server 200 Reporting Services.

Support & Training:

Software is committed to providing you with the support needed to make your community successful in using CaresAccess. Please contact us at support@softwareintegrity.net with your needs.

Show us the problem! With your permission Software Integrity can log onto your computer where you can show us the problem.

Software Integrity offers a variety of training packages from on site initial training to experienced user training for individuals looking to add efficiencies to the way they use CaresAccess to manage their program. Please contact us to find a training solution that works for your community.