AlayaCare Integrated AcuteNet Assessments User Guide

Version: 1.0.0
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Table of Contents

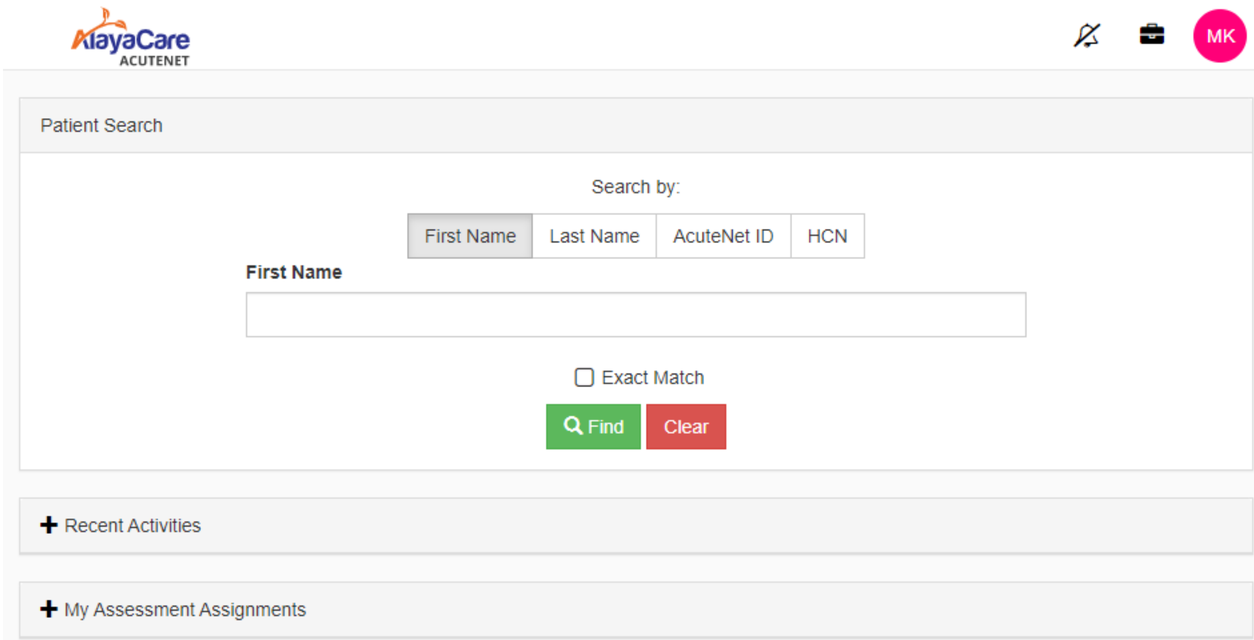
Disclaimer

Information in this user guide provides a general overview of the software's functionality. It does not provide any details specific to any individual agency, and not all agencies will make use of all features.

Chapter 1 – Accessing the Assessments & the Dashboard

Assessments are an integrated part of your AlayaCare experience. Regular users (assessors) will likely access this through **Client Record | Care Management** in AlayaCare. Supervisor and Manager Roles can also access it directly from the Dashboard.

Once you have clicked the option to access it, new window will launch. There, you will see the AcuteNet Assessments Framework's dashboard page. Please see thedashboard elements below:

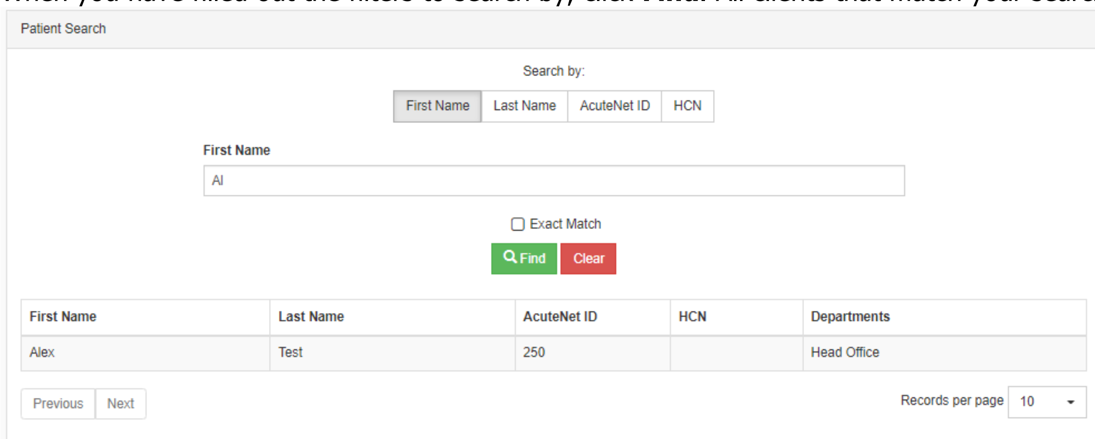


Notifications Center - View notifications received from the application.
Recent Assessments - Provides quick access to the last 10 assessment pages or individual assessments you visited. This option disappears after you clear your browser cache.
Admin - View applicable application sections. The sections available to you depend on the permissions you've been granted. See: **Admin Section**.
Account Menu - Contains the initial letters of your first and last name. Provides access to **My Files**, **User Guide** (this document), and **Log Out**.
Search By: At least one search filter is required, but you can select up to four (First Name, Last Name, AcuteNet ID, and HCN [Health Card Number]). Each option selected adds an additional text field to enter filter terms into. See **Search for a Client** for more details. At least 2 characters must be entered to search on.
Exact Match: Only return clients with information that exactly match your Search Criteria. If not selected, it will match on partial results.
Find: Search for the client.
Clear: Remove all information in the Search By filters.
Recent Activities: Expand to view assignments you have recently accessed. See **Recent Activities** for more details.
My Assessment Assignments: Expand to view assessments that have been assigned to you. See **My Assessment Assignments** for more details.

From anywhere except the dashboard itself, the top bar also shows the dashboard icon, , which you can click to return to this Dashboard page.

Searching for Clients

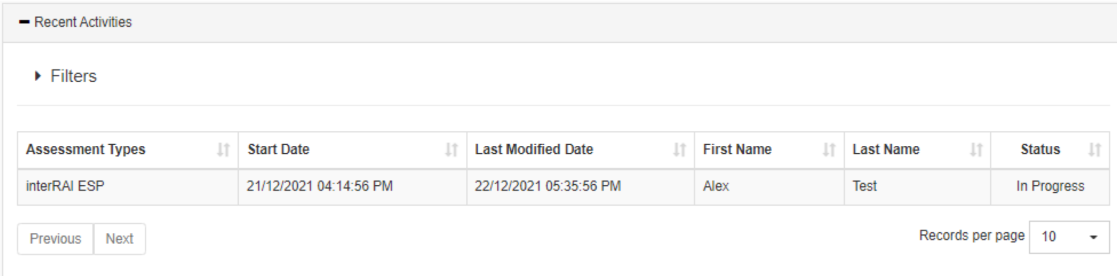
1. To search for an existing client, go to the Patient Search section of the **Dashboard**.
2. Select the search filters you wish to search by. Deselect any you do not wish to search on. At least one search filter must be selected.
   First Name - Client's first name.
   Last Name - Client's last name.
   AcuteNet ID - Client's ID in the AcuteNet Assessment Framework.
   HCN - Client's health card number.
3. If you want to search only on an exact match to the text you entered, click **Exact Match**. For example, use Exact Match if you have entered the client's complete last name or first name. If you want to instead find partial matches, enter the partial text you wish to search on (for example, if you know a client goes by Al, but don't know if they're Alex or Albert, you can enter 'Al' and it will return all clients with 'Al' in their name). You cannot search on fewer than 2 characters.
4. When you have filled out the filters to search by, click **Find**. All clients that match your search filters will be displayed.



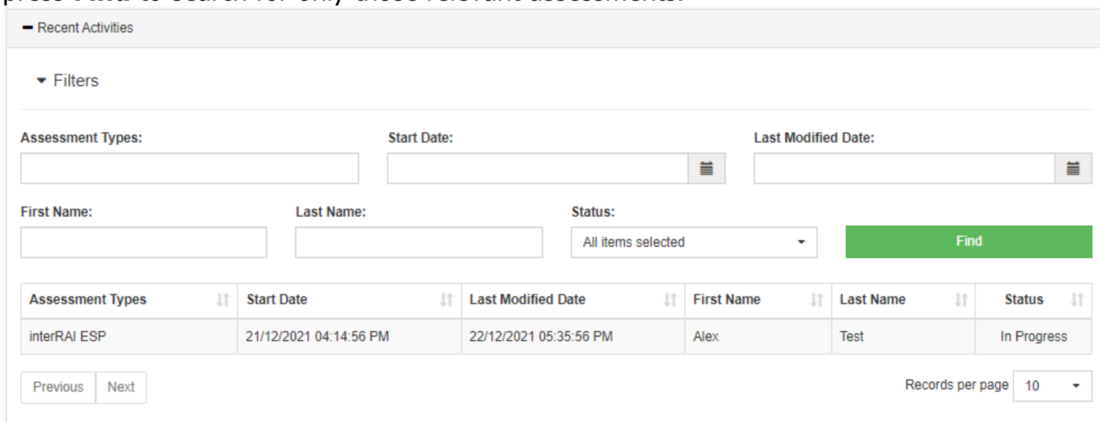
5. Click the relevant client line to go directly to that client's [Assessment Page](#).
6. If more results are shown than the amount set in the dropdown **Records per page** field, you can use **Previous/Next** to display the next section of search results.
7. You can also click **Clear** to remove all information from search fields.

Recent Activities

1. In the **Recent Activities** section of the Dashboard, click the + to expand the table and display all Assessments you've recently accessed.



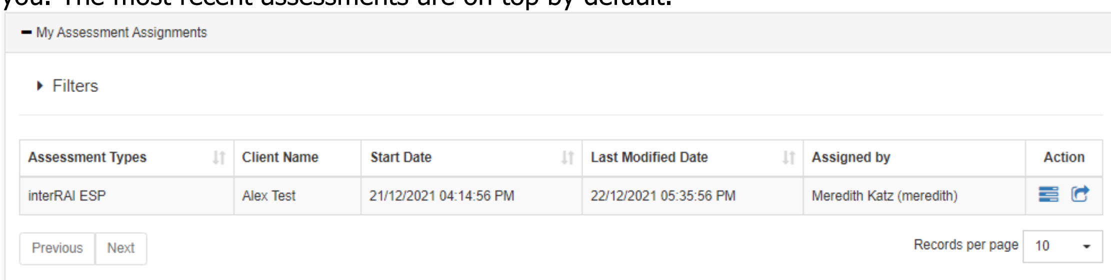
2. Click ►**Filters** to view filters that you can use to help narrow down the list of assessments. Enter the relevant information into the filter fields and then press **Find** to search for only those relevant assessments.



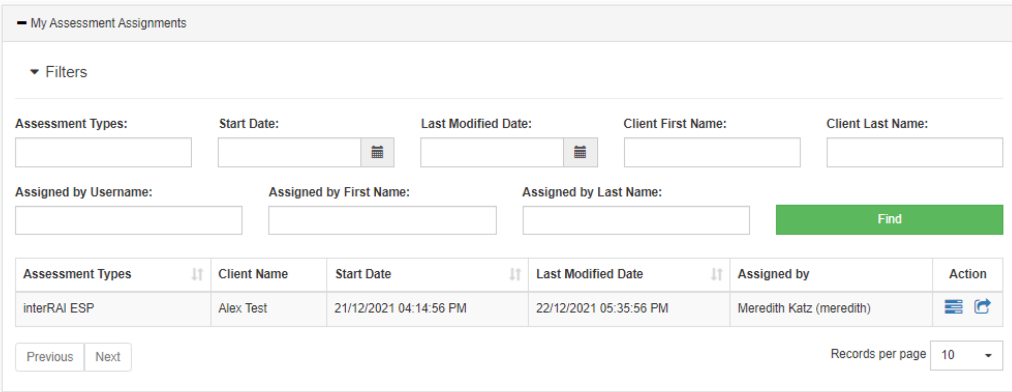
3. Click the assessment line on the table to move to the relevant assessment.

My Assessment Assignments

1. In the **My Assessment Assignments** section of the dashboard, click the + to expand the table and view all assessments that have been assigned to you. The most recent assessments are on top by default.



2. Click ►**Filters** to view filters that you can use to help narrow down the list of assessments. Enter the relevant information into the filter fields and then press **Find** to search for only those relevant assessments.

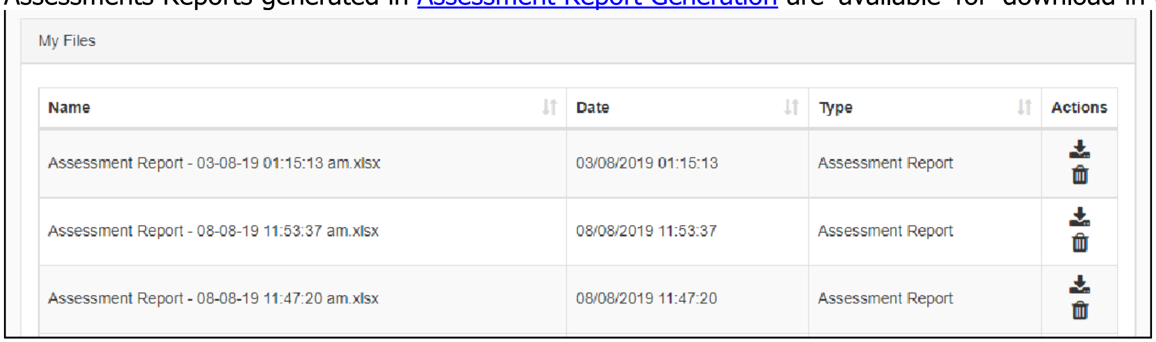


3. In the action pane, there can be up to 3 possible actions:
    a. **Go To Assessment:** Click to go directly to the assessment.
    b. **Show Note**: Click to view the note left for you by the assigner.
    c. **Assignee(s):** View and/or change the list of assignees for the assignment.

Account Menu

My Files

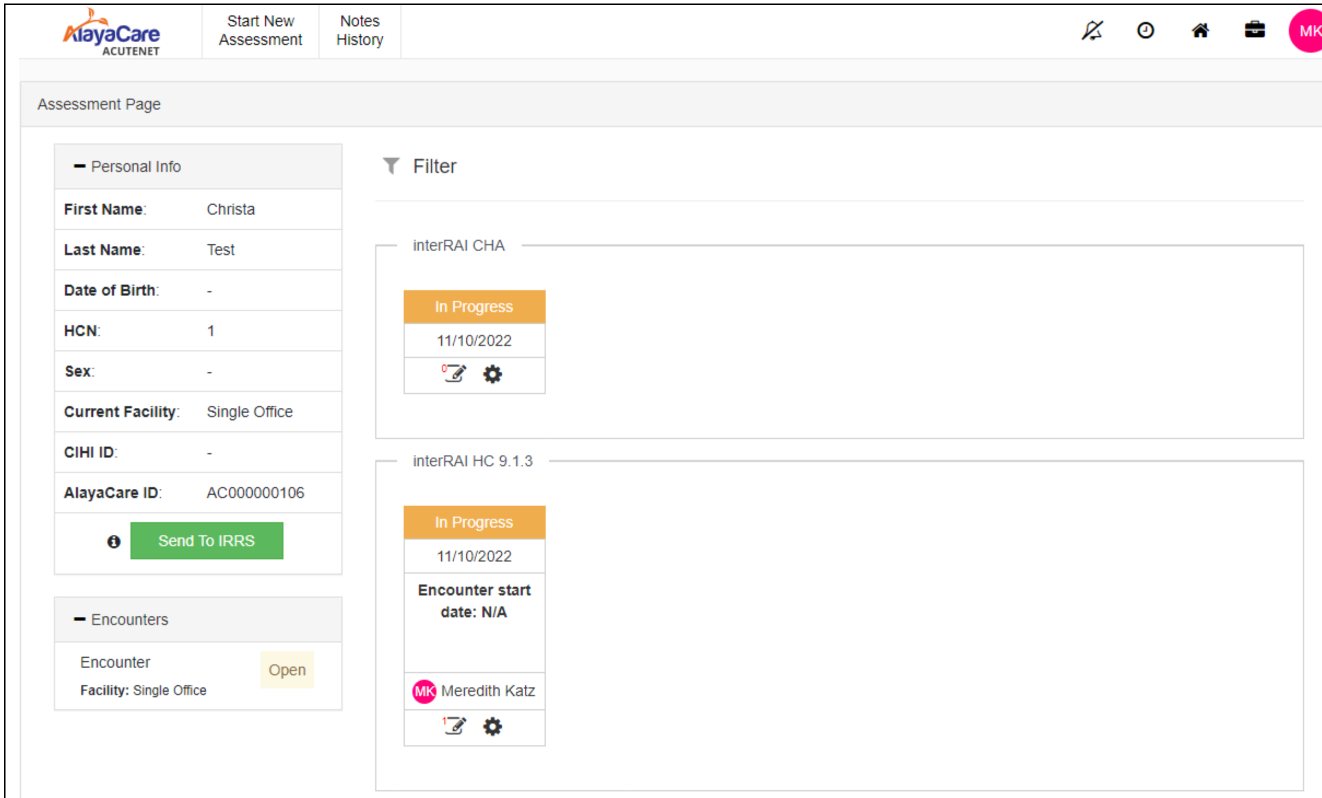
Assessments Reports generated in Assessment Report Generation are available for download in the My Files page.



Chapter 2 – Assessment Page

Assessment Page

Once you have loaded a client profile, you are automatically brought to the Assessment Page.



Start New Assessment: Start a new assessment; see Starting a New Assessment.
Notes History: View notes added to all assessments for the client; see Notes History.
Personal Info: Shows the client's identifying Personal Information from the Client Profile.
Send to IRRS: Submit client personal info to CIHI. Once this is submitted successfully, the CIHI ID is added to the form, and the Send to IRRS button disappears. Best practice is to submit this before you do the assessment. You can then make any changes to the form and refresh it (if fed from the demographics) and it will automatically update, up until the point the assessment is marked as complete.
Encounters: Displays information of Client Encounters.
Filter: Set Filters to determine which assessments will display. By default, it only shows the filter option, not the specific filters themselves. Click to expand it and receive options for **Statuses**, **Assessment Types**, and whether they are **Assigned to Me**. On selecting anything in these fields, the assessments are modified. These filters are remembered on subsequent visits until you clear your browser cache. The number of applied filters is shown next to the Filter icon.

Displayed assessments: Each type of Assessment gets its own table when they are added. Each assessment displays the **Assessment Status** in the header (for example, In Progress, Completed, Cancelled), the **Date** type assigned to the assessment (either Creation Date, Last Modified Date, or Original Completion Date, depending on the type of assessment and what was selected during form setup), the **Assigned User(s)** for the assignment (if none, it displays as Unassigned), and two icons, below. Click an assessment to view the assessment details. See Working with Existing Assessments for more details.
Notes: View the notes previously left for the assessment or add a new note. The notes added while assigning the assessment to the user will also be shown in the Notes popup.
Actions: View the actions that can be done on the assessment, based on your role permissions.

About Assessment Submissions:

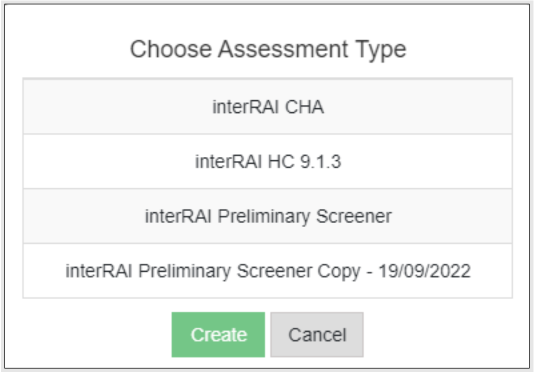
There are differences in how assessments are submitted depending on what endpoint it is going to (in other words, who is seeing it).

IAR Submissions are sent automatically when an assessment is successfully marked as complete. At this time, they are added to the IAR Submission Report in Pending status. Every 3 minutes, the system will look for new pending assessments. If the submission fails (because the end point is having an outage or an issue with credentials), the system will try again every 24 hours for 30 days.

IRRS submissions are similar but not identical. After adding a client, but before creating your first assessment that should be submitted to IRRS, you should click the **Send to IRRS** button on this page. If there is any mandatory information that is missing for the client, you will receive an error message; otherwise, it will inform you that the client information was submitted to IRRS. After that, whenever you complete an assessment for that client, it is submitted automatically to IRRS. When you attempt to complete an assessment, if there are any errors, a pop-up will occur that will inform you of anything that needs to be fixed before it can be completed and thus submitted.

Start New Assessment

1. Click **Start New Assessment**. The Choose Assessment Type list will appear.

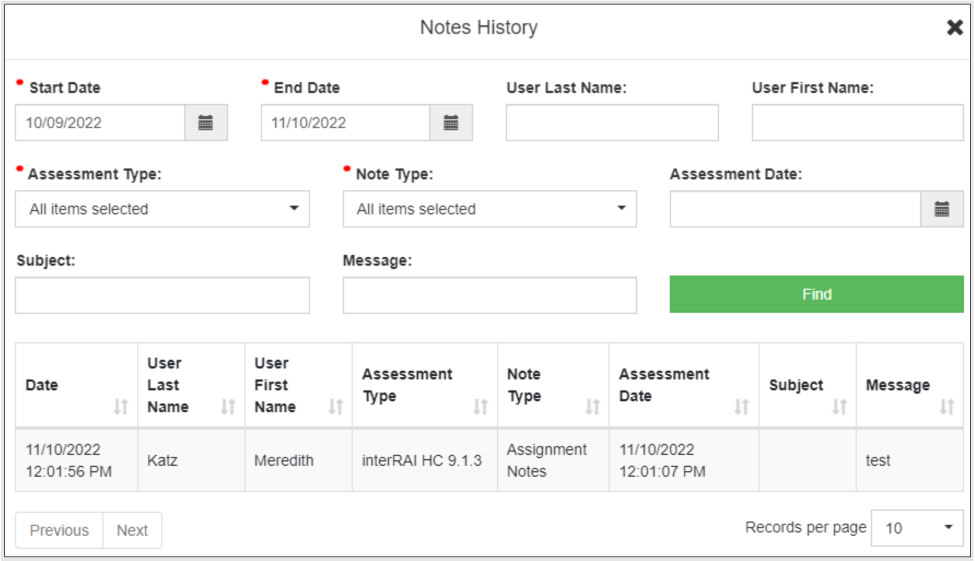


2. Click on the assessment type you wish to add an assessment for. This will highlight it. Then, click **Create.** You will be brought to the Assessment Details for that particular assessment.

Note: If an In Progress assessment of the selected type already exists for the client, you will not be able to create another assessment of the same type unless the previous In Progress assessment is completed.

Notes History

1. Click **Notes History**. A popup opens which displays all types of notes for the client (user notes, correction notes, assignment notes).



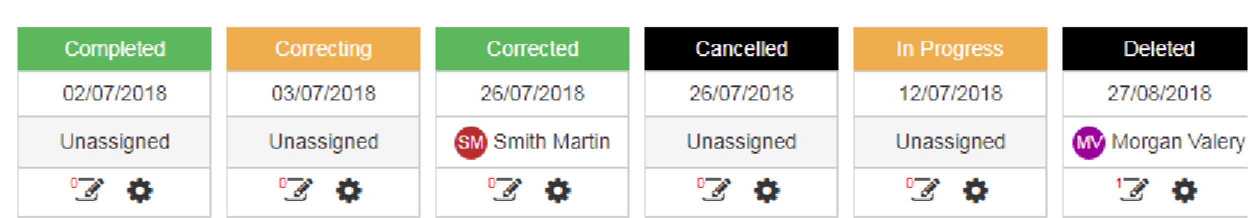
2. As the table of notes in the bottom will display all notes, it may be faster to search for the relevant note than to scroll through it manually. Fill out the required fields (Start Date, End Date, Assessment Type, and Note Type), along with any relevant optional fields (User Last Name, User First Name, Assessment Date, Subject, or Message). Then click **Find**. The table in the bottom section will only include messages with matching information.
3. The table at the bottom displays all notes that have been entered for this assessment (and which fit the note filters in the Find section, as applicable). The full message will always display in the Message Field. A note cannot be deleted after being left. The number of notes that display per page can be set in the **Records per page** dropdown, or one can continue to another page of notes with the Previous/Next buttons.

Working With Existing Assessments

Assessment Statuses

An assessment can have one of the following statuses:

- In Progress
- Cancelled
- Completed
- Correcting
- Corrected
- Deleted

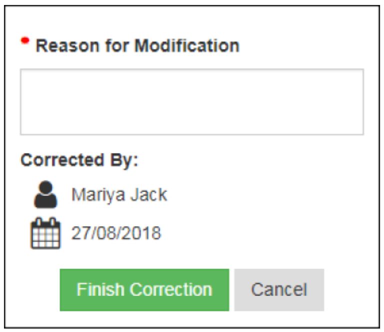


Each status has certain Actions available to them, which can be viewed by users with the correct permissions. These actions can be seen by clicking the Actions menu icon, .

ACTION	STATUS AVAILABLE TO
Download PDF: Download the Assessment in its current state in PDF format.	In Progress/Completed/Corrected.
Show Scales: View the Scales for this Assessment.	In Progress/Completed/Corrected.
Show CAPs: View the CAPs for this Assessment.	In Progress/Completed/Corrected.
Cancel: Cancel an In Progress Assessment.	In Progress.
Restore: Restore a Cancelled Assessment and return to In Progress.	Cancelled.
Copy: Create an In Progress assessment with values already populated from the Completed or Corrected assessment being copied. (If another In Progress assessment already exists, you will need to confirm that you want to overwrite the existing In Progress assessment with this new copy).	Completed/Corrected.
Correct: Change Assessment Status to Correcting to indicate that changes are being made to a finalized version.	Completed/Corrected.
Cancel Correction: If the status was changed to Correcting in error, you can cancel this correction to return it to its previous status of Completed or Corrected.	Correcting.
Delete: Delete the assessment – this should be done if it was created by mistake. You will need to confirm this action.	Completed/Corrected.
Cancel Deletion: Cancel the deletion – this should be done if it was accidentally deleted. It will return to its previous status of Completed or Corrected.	Deleted.

Reason for Modification When Correcting an Assessment

1. If you need to correct a Completed or Corrected assessment, select the action **Correct**. The status of the assessment will change to Correcting.
2. Click the Assessment to open its Assessment Details page. Make any necessary changes to correct the errors.
3. Mark the Assessment as Complete. A pop-up will appear:

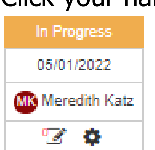


4. Enter the **Reason for Modification** (up to 5000 characters, mandatory). The text entered here will be added to **Notes** section of the affected assessment. Then click **Finish Correction**. The Assessment will be put into the finalized status of Corrected.

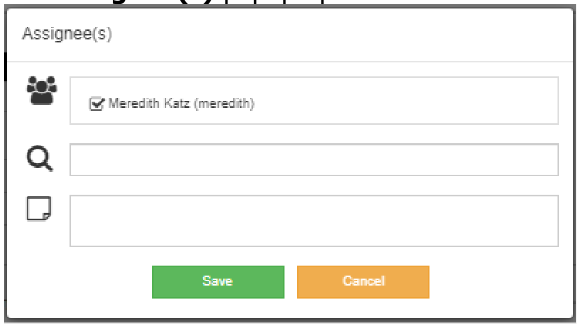
To Assign an Assessment

When you create a new assessment, by default it is assigned to you. To change the assignees to one or more other people:

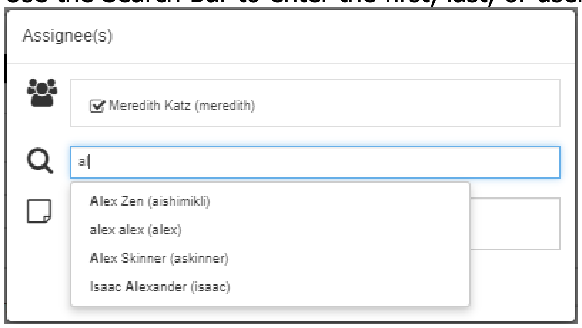
1. Click your name inside the assessment card:



2. The **Assignee(s)** popup opens:



3. Use the Search Bar to enter the first, last, or username of the person you want to add. The search will automatically happen after at least 2 letters.



4. Select the relevant people in the search, and they will move up into the list of assignees.
5. Uncheck anyone in the list of assignees you no longer want the assessment to be assigned to.
6. You can also optionally add a note (up to 5000 characters). This will appear both in the **My Assessment Assignment** section of the people to whom this assessment is assigned, and in the **Notes** section of the Client Assessment Page.
7. Click **Save**.

Notes:

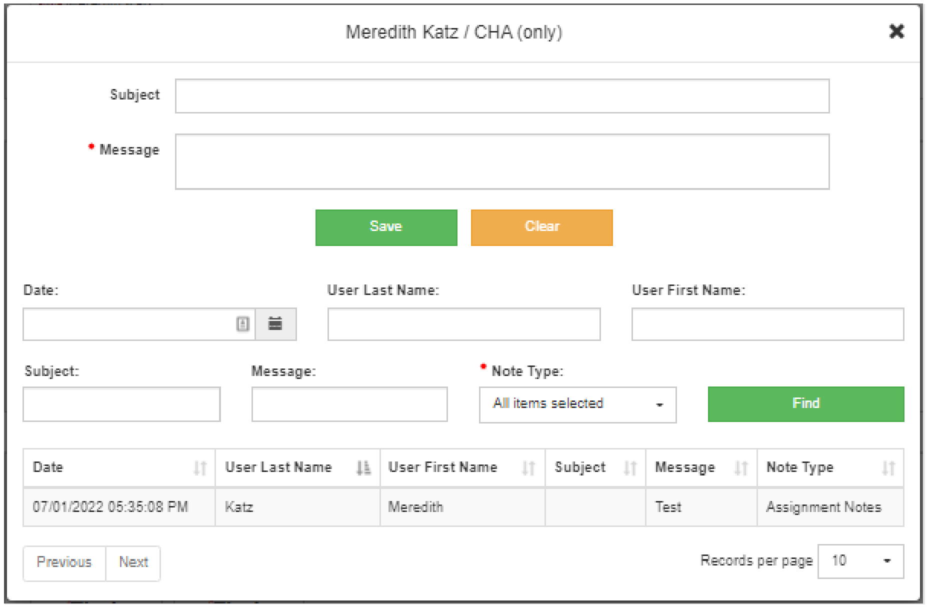
- Assessments without an assignee are listed as **Unassigned** on the assessment card.
- Multiple assignees are shown as initials on the assessment card up to 4 users, with a counter showing those not displayed. E.g.: MV YM JM SM +4. To see their full name, hover over the assignees section of the assessment card.

Assessment Notes

An assessment with notes enabled has the corresponding icon in the assessment tile (with counter of added notes), 4. You can add notes to the selected assessment in three ways: 1) By clicking on the Notes icon on the assessment card (described below); 2) by adding a comment while assigning that assessment to the user(s); 3) by completing the assessment when in *Correcting* status and filling out the **Reason for Modification** field.

To work with notes for a specific assessment,

1. click the 4 icon on the relevant assessment card. The Notes popup opens.



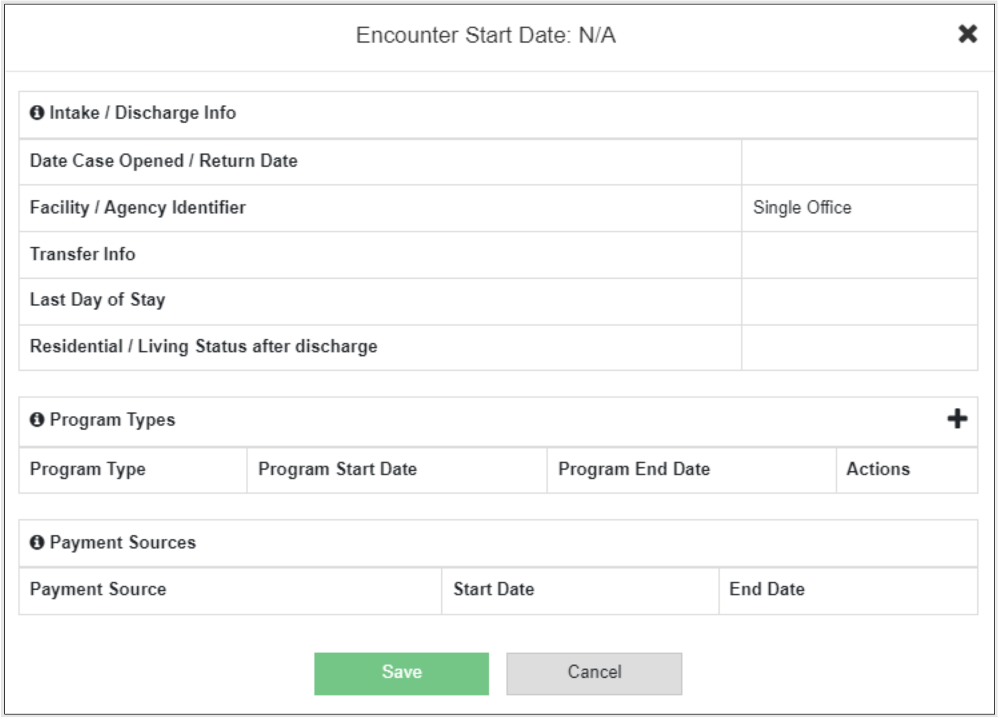
2. To add a note to this assessment, in the top section, enter an optional **Subject** for the note and, in the **Message** field, enter the note you want to add. Click **Save**, and the note will be added to the table of notes in the bottom section.
3. As the table of notes in the bottom will display all notes, it may be faster to search for the relevant note than to scroll through it manually. Enter, at minimum, the Note Type, along with any of the other options to help narrow it down (Date, User Last Name, User First Name, Subject, or Message). Then click **Find**. The table in the bottom section will only include messages with matching information.
4. The table at the bottom displays all notes that have been entered for this assessment (and which fit the note filters in the Find section, as applicable). The full message will always display in the Message Field. A note cannot be deleted after being left. The number of notes that display per page can be set in the **Records per page** dropdown, or one can continue to another page of notes with the Previous/Next buttons.

Encounters

On the assessment page, the left sidebar includes a section for Encounters.

Encounters function as a single collection of assessments from an Intake until a Discharge. Encounters are only valid for assessments that are submitted to IRRS. Each patient generally has one Encounter (as they have not yet been Discharged), and one encounter contains many Assessments, though screeners may overlap. It essentially functions as a container for assessments, or as a client file detailing a stay (a period of care from intake to discharge). When you have added an Intake, the Encounter is set to Open.

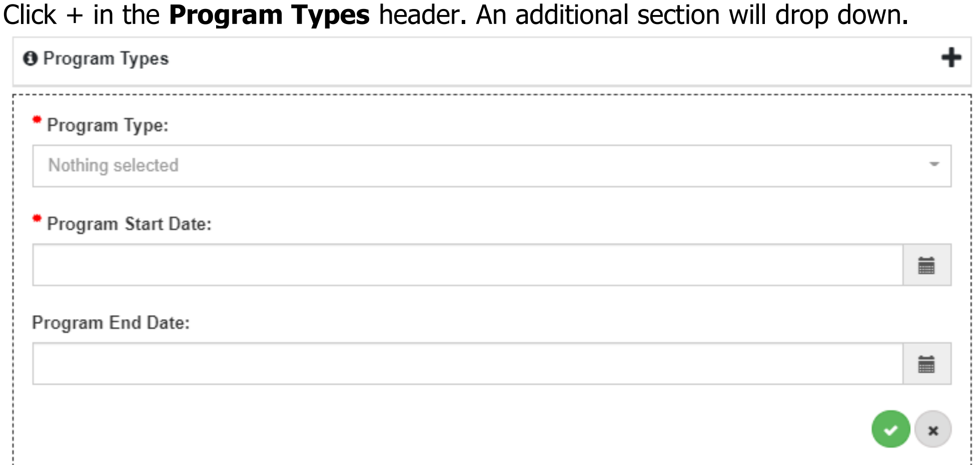
Click the Encounter in the sidebar to open the Encounter view.



In general, this simply displays an aggregate of information, though it is possible to add a Program Type to this screen. For example, the **Date Case Opened/Return Date** draws information from the intake assessment and will display the Intake Date. Likewise, the **Last Day of Stay** field draws information from a discharge assessment and will include the Discharge Date. Once you have discharged a client via a discharge assessment, the encounter will display as Closed in the sidebar, but may still be clicked to view all information from that encounter.

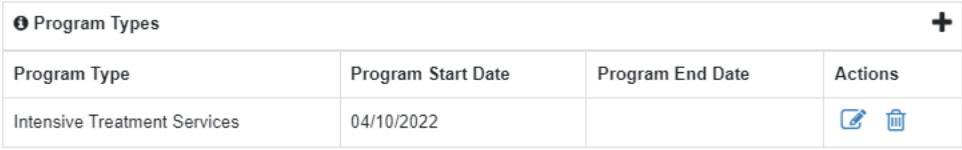
To Add a Program Type

1. Click + in the **Program Types** header. An additional section will drop down.



2. Select the **Program Type** (required if you are adding one, although Program Types are not themselves required).

3. Select the **Program Start Date** (required if you are adding a Program Type).
4. Optionally, select the **Program End Date** if known at this time. You can always go back and edit it to add it in when this is known at a later date.
5. Click the to save the Program Type to the Encounter. It will be added to the Encounter screen in a table beneath the Program Types header:

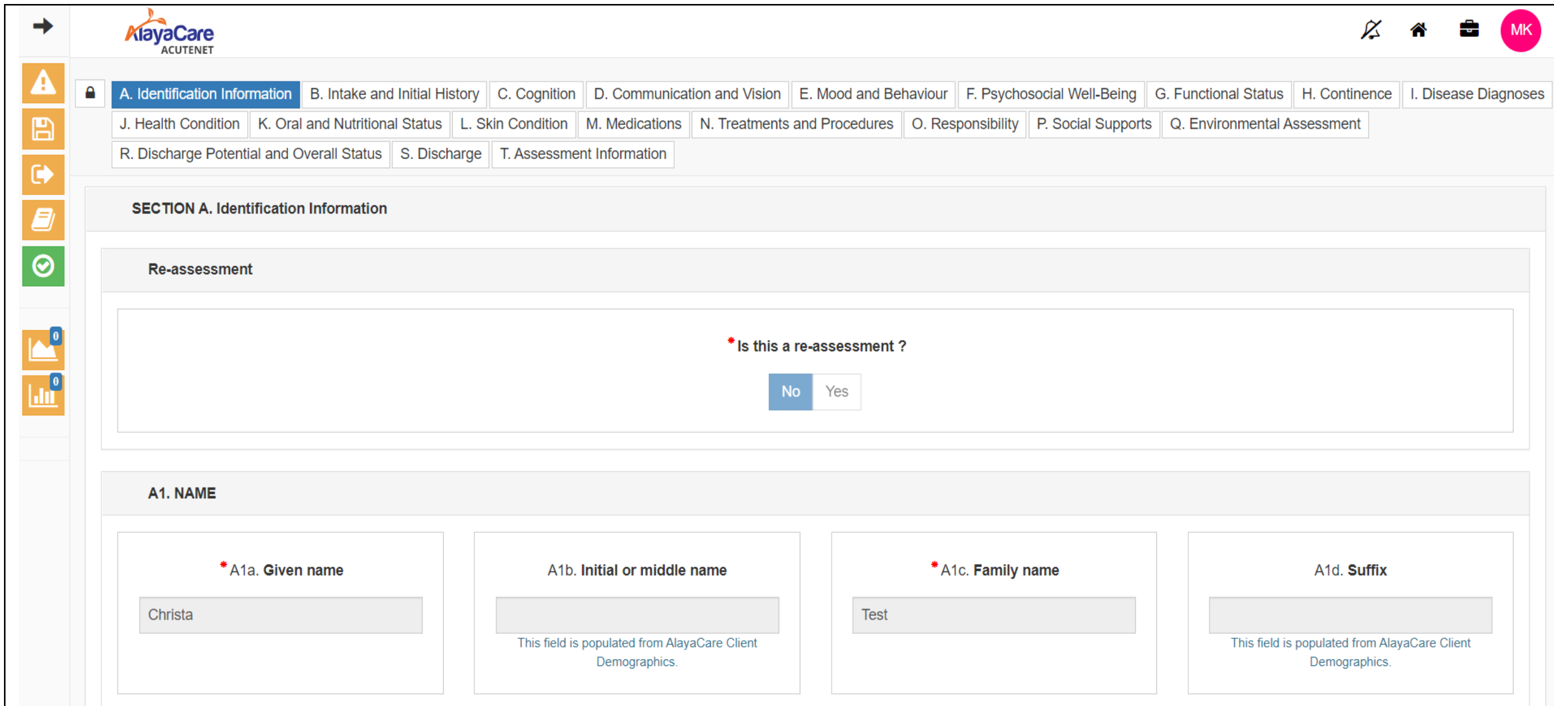


Program Types

Program Type	Program Start Date	Program End Date	Actions
Intensive Treatment Services	04/10/2022		

6. Click to reopen the Program Type as above, in edit mode.
7. Click to delete the Program Type from the table.

Assessment Details

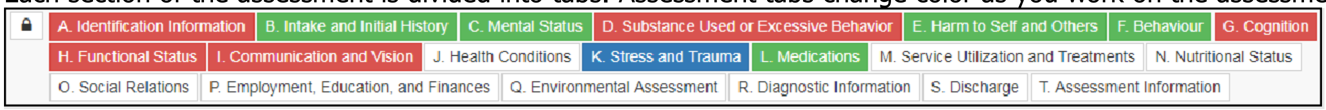


Left Panel Control: Switch between a full view (which includes the patient's personal info) and the icon-only view shown above.
View Errors: Show all errors that would otherwise prevent you from completing the assessment, allowing you to easily find and fix them.
Save: Saves the data on the assessment. The assessment data is also saved automatically every 1 minute that you stay on a specific tab, or instantly when switching between tabs or going to another application page.
Save and Go to Pathway: Saves the data and returns you to the Assessment Page.
Assessment Report: View this assessment in Report mode. Note: This is not the same as the Assessment Report Generation.
Complete Assessment: Finalize the assessment. If there are any errors on the assessment, they must be corrected before you can Complete the assessment.
CAPs: Access the CAPs triggered for the current assessment. The counter shows how many CAPs have been triggered.
Scales: Access the Scales triggered for the current assessment. The counter shows how many Scales have been triggered.
Lock Tab Control: Lock or unlock the order of tabs in the assessment. When unlocked, you can drag and drop tabs into any order you prefer.

Note: Each assessment type has its own individual form with tabs individual to that assessment. This document will not provide guidance toward any individual assessment type, but instead teaches you how to use the AcuteNet Assessment Framework to work with any of the included assessment types. Please see the individual interRAI Assessment Manuals if you need information on how to code specific assessments.

Assessment Tabs

Each section of the assessment is divided into tabs. Assessment tabs change color as you work on the assessment:



- **White:** You haven't visited this tab yet.
- **Red:** You've visited this tab, but either some required fields have not been filled in, or there are validation errors on this tab.
- **Green:** You've visited this tab and all answers are in order (all required fields are filled in and there are no validation errors).
- **Blue:** You are currently viewing this tab.

To Fill out an Assessment

1. Click on the tab that you want to work with first.
    a. If you have a specific order of information that you prefer to work with, you can rearrange the tabs. Click the lock icon, . This puts the tabs into a mode where you can drag and drop them into whatever order you prefer. When you're done, click it again to ensure that your new order is saved.
    b. Note: The changed order of tabs will apply to <u>all</u> assessments of this type (i.e. interRAI-CHA) for <u>all</u> clients, so only change this if you want it to apply globally.
2. Fill out the fields with appropriate information. At the very least, required fields must be entered. See the appropriate interRAI Assessment Manual for information on coding your particular Assessment Type. If not ready to Complete the document, you can click to save the in-progress assessment.
3. Errors can be seen by clicking to view all errors in a list, or by clicking any red tab and scrolling for any field outlined in red.
4. When the assessment is fully filled out (no tabs are in red or white), it can be completed by clicking .

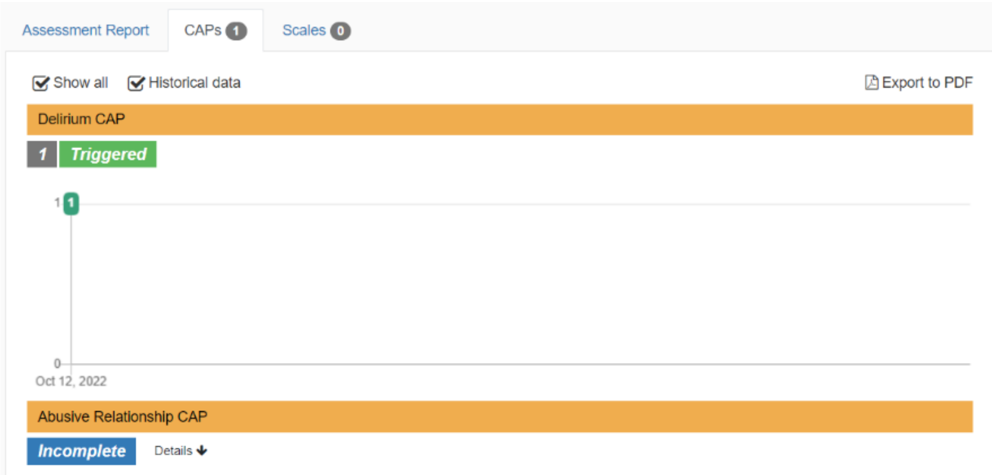
To Remove all Answers from a Tab

Sometimes, users might need to clear answers quickly from sections of an assessment.

1. Hover over the tab you are currently viewing (blue). An eraser icon will appear: A. Identification Information.
2. Click on the eraser icon (if you click on any other part of this tab, nothing will happen).
3. A confirmation will pop-up reading "Are you sure you want to remove all responses in this section?". Click Yes.
4. All answers will be removed from the section.

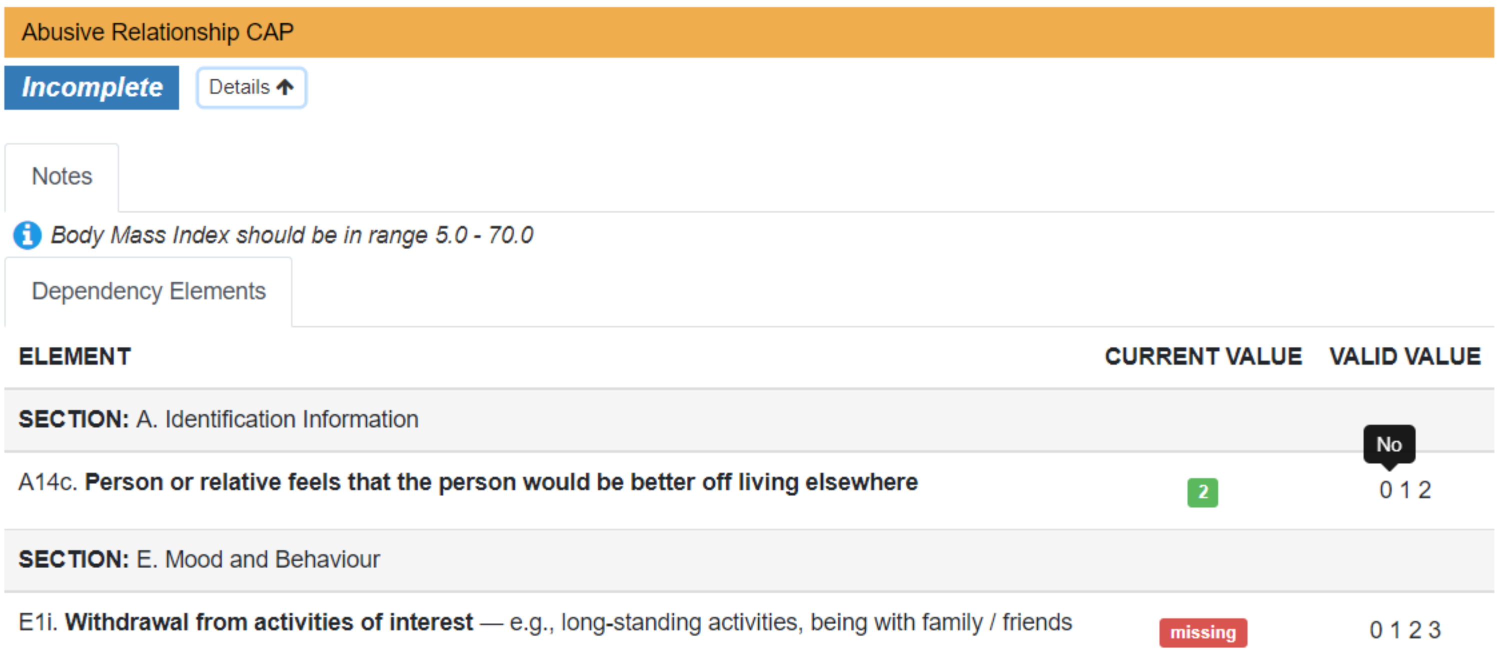
Caps, Scales, and Assessment Report

Outcomes are triggered automatically while answering the assessment questions. You can look at them by clicking to see CAPs, to see Scales, or you can see all by clicking to view the assessment report. The information below assumes you are looking at the Assessment Report.

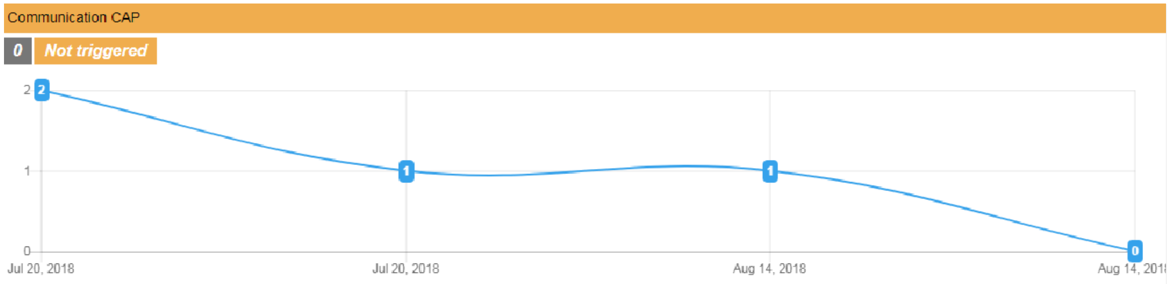


To select what displays on a CAPs or Scales tab:

1. Click **Show All** to display all the relevant Outcomes available for the assessment type (both triggered and missing outcomes). If the outcome is missing from the current assessment, it will be shown as **Incomplete**. Click **Details** next to an Incomplete Outcome; the **Current Value** column will display missing for any non-selected values, while the **Valid Value** column displays the value expected here; hover over a value to see its coding (i.e. 0 = no).



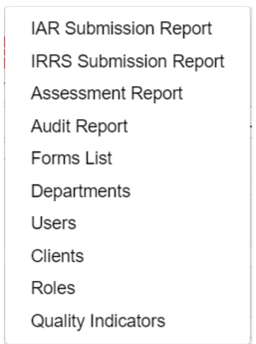
2. Click **Historical Data** to display a graph that displays the outcomes triggered for all clients' assessments of the same type:



3. Click **Export to PDF** to download the outcome report in PDF format to your computer. This PDF always exports in the Historical Data view rather than the consolidated view. If you want to see the Scales and CAPs in consolidated view, go to the assessment itself and print that as pdf instead. This data will be included on the final pages.

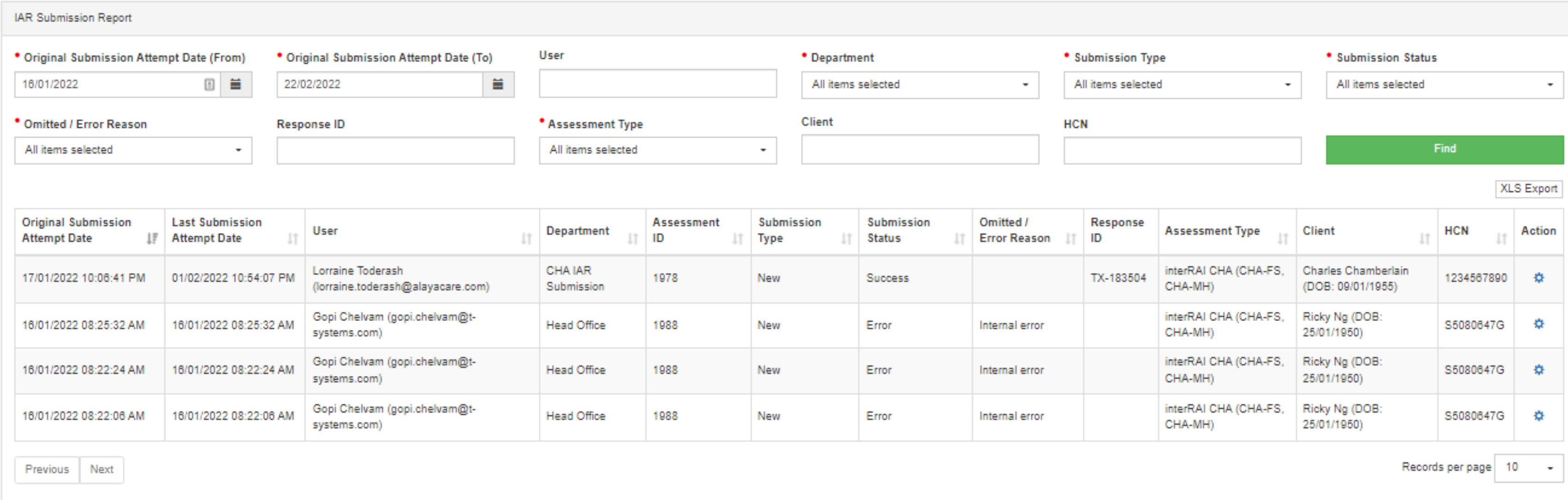
Chapter 3 – Admin Section

The **Admin Section** can be found by going to the top right bar and clicking on the Admin icon. The options available in this dropdown depend on what access privileges that user has (widgets assigned to their role).



IAR Submission Report

To track the status of assessments submitted to IAR, go to the top right bar and click the Admin icon, then select **IAR Submission Report**. Users will be brought to the IAR Submission Report page.



IAR Submission Report

* Original Submission Attempt Date (From): 16/01/2022
* Original Submission Attempt Date (To): 22/02/2022
User:
* Department: All items selected
* Submission Type: All items selected
* Submission Status: All items selected
* Omitted / Error Reason: All items selected
Response ID:
* Assessment Type: All items selected
Client:
HCN:
Find
XLS Export

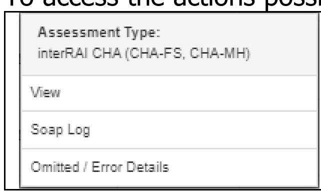
Original Submission Attempt Date	Last Submission Attempt Date	User	Department	Assessment ID	Submission Type	Submission Status	Omitted / Error Reason	Response ID	Assessment Type	Client	HCN	Action
17/01/2022 10:06:41 PM	01/02/2022 10:54:07 PM	Lorraine Toderash (lorraine.toderash@alayacare.com)	CHA IAR Submission	1978	New	Success		TX-183504	interRAI CHA (CHA-FS, CHA-MH)	Charles Chamberlain (DOB: 09/01/1955)	1234567890	
16/01/2022 08:25:32 AM	16/01/2022 08:25:32 AM	Gopi Chelvam (gopi.chelvam@t-systems.com)	Head Office	1988	New	Error	Internal error		interRAI CHA (CHA-FS, CHA-MH)	Ricky Ng (DOB: 25/01/1950)	S5080647G	
16/01/2022 08:22:24 AM	16/01/2022 08:22:24 AM	Gopi Chelvam (gopi.chelvam@t-systems.com)	Head Office	1988	New	Error	Internal error		interRAI CHA (CHA-FS, CHA-MH)	Ricky Ng (DOB: 25/01/1950)	S5080647G	
16/01/2022 08:22:06 AM	16/01/2022 08:22:06 AM	Gopi Chelvam (gopi.chelvam@t-systems.com)	Head Office	1988	New	Error	Internal error		interRAI CHA (CHA-FS, CHA-MH)	Ricky Ng (DOB: 25/01/1950)	S5080647G	

Previous Next
Records per page 10

Original Submission Attempt Date (From): The earliest the system should look to find submission attempt records to include in the report.
Original Submission Attempt Date (To): The latest the system should look to find submission attempt records to include in the report. The period between the two dates should not exceed 92 days.
User: Include records if the User who finalized the assessment matches.
Department: Include records if the selected department(s) which finalized the assessment match.
Submission Type: Include records if the selected Submission Type(s) match (**New** for Completed assessments; **Correction** for Corrected assessments; **Delete** for Deleted assessments).
Submission Status: Include records if the selected Submission Status(es) match (**Pending** for assessments waiting to be sent to IAR; **Success** for successfully sent assessments; **Omitted** for assessments that are not sent to IAR due to no consent granted; **Error** for assessments that have not been sent to IAR due to an error).
Omitted / Error Reason: Include records in Omitted or Error status that furthermore fit the selected Omitted / Error reason(s).
Response ID: Include records matching the entered Response ID. Response IDs can be found in the IAR user interface and be used to search in AcuteNet IAR logs.
Assessment Type: Include records matching the selected Assessment Type(s) submitted to IAR.
Client: Include records with a matching name for the Client(s) for whom the assessment was submitted.
Client HCN: Include records with a matching HCN for the Client(s) for whom the assessment was submitted.

To Run the IAR Submission Report:

1. Enter the filters that can be used to determine which records should be included in the report, then click **Find.** Records matching the selected criteria will be displayed in the table below. All columns except Response ID and Action can be sorted by clicking on the column header.
2. If there is more than one line of results for the same assessment (such as in the case where the assessment was first completed and then corrected), check the Assessment ID column – if this is the case, the ID will be the same.
3. If you want to download an Excel version of the displayed table of search results, click **XLS Report**. The file will save to your device.
4. To access the actions possible for a selected individual submitted record in the table, click the actions icon, . The list of actions will display.

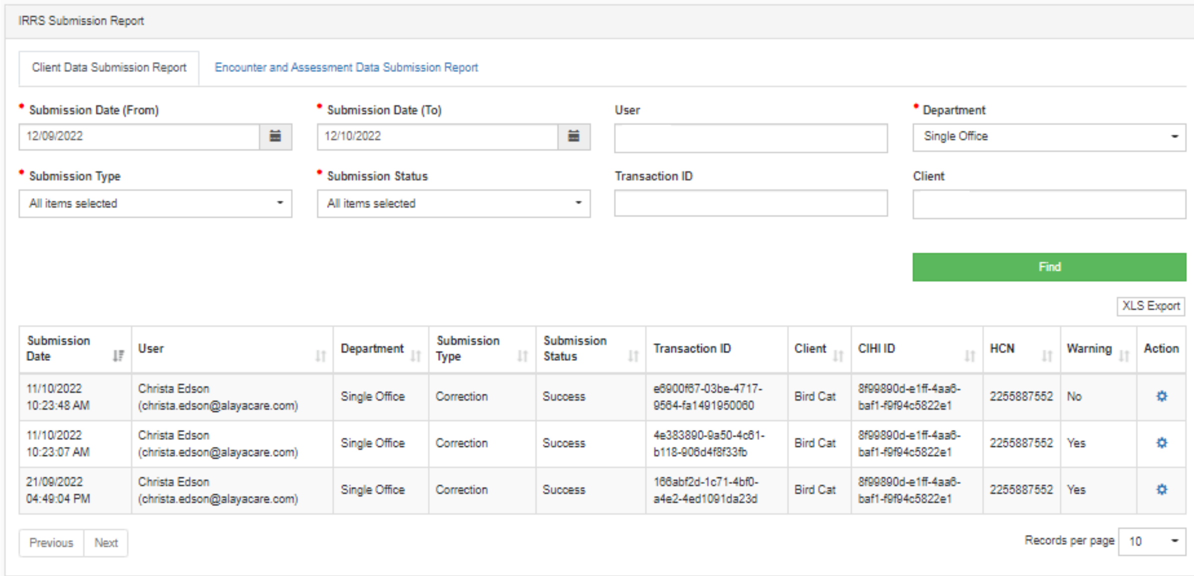


Assessment Type:
interRAI CHA (CHA-FS, CHA-MH)
View
Soap Log
Omitted / Error Details

View: Access the assessment for which the submission was attempted.
Soap Log: Displays the technical information of the submission, such as the request (information sent) and response (status of submission: Success or Fail).
Omitted / Error Details: Displays the details of an Omitted or Error submission. Present for Omitted/Error statuses.

IRRS Submission Report

To view records of the assessments sent to IRRS (if applicable), go to the top right bar and click the Admin icon, then select **IRRS Submission Report**. Users will be brought to the IRRS Submission Report page. There are two reports that can be sent from here. These display the information previously submitted to IRRS.



__Shared Fields__

Submission Date (From): The earliest the system should look to find records for the report.
Submission Date (To): The latest the system should look to find records for the report. Maximum 92 days between From Date and To Date.
User: Include records if any part of the User Name matches.
Department: Include records matching the selected department(s)
Submission Status: Include records matching the selected Submission Status.
Transaction ID: Include records matching the entered Transaction ID.
Client: Include records if any part of the Client Name matches.

__Additional Client Data Submission Report Fields__

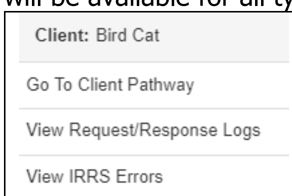
Submission Type: Include records matching the selected Submission Type.

__Additional Encounter and Assessment Data Submission Report Fields__

Assessment ID: Include records matching the selected Assessment ID.
Encounter ID: Include records matching the selected Encounter ID.
Assessment Type: Include records matching the selected Assessment Type.
Assessment Submission Type: Include records matching the selected Assessment Submission Type.
Encounter Submission Type: Include records matching the selected Encounter Submission Type.

To Run the Submission Reports:

1. There are two tabs: **Client Data Submission Report** and **Encounter and Assessment Data Submission** Report. Click the tab for whichever one you want to see the information for.
2. Enter the filters that can be used to determine which records should be included in the report, then click **Find**. Only records matching the selected criteria will be displayed in the table below.
3. To access the actions possible for a selected individual submitted record in the table, click the actions icon. The list of actions will display. The actions available for a given record depends on which version of the report you are viewing, the settings applied, and the status of the submission; not all actions will be available for all types or statuses.

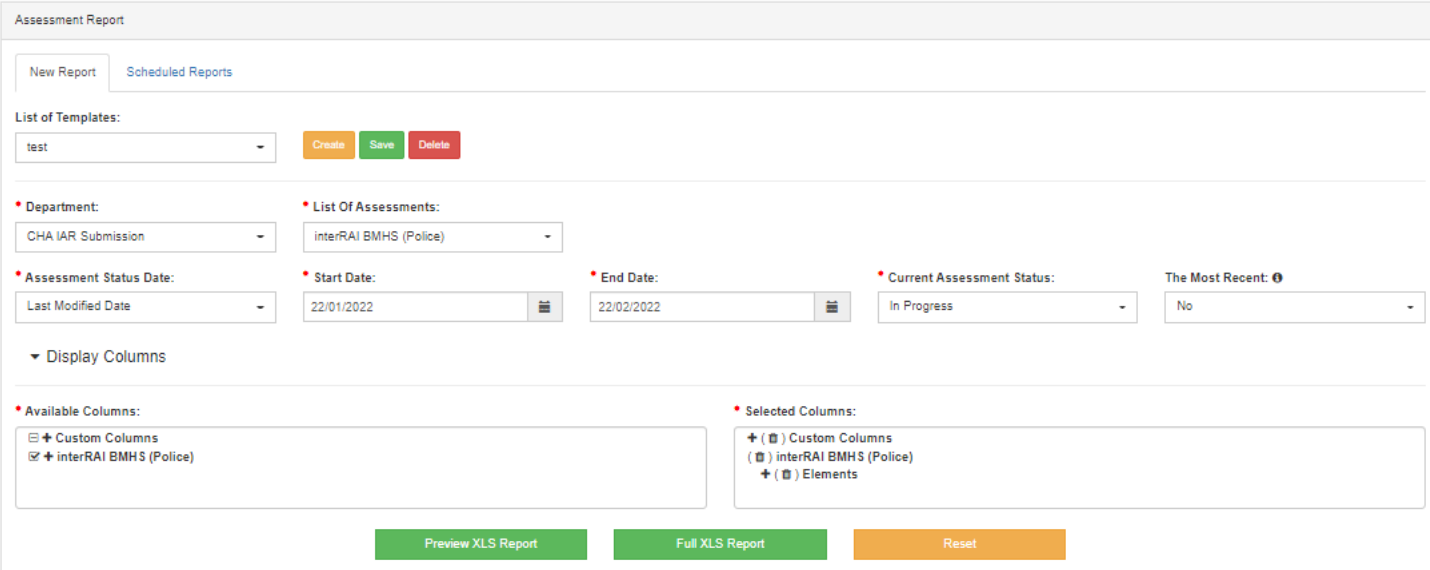


Go to Client Pathway: Displays the Client Pathway.
View Client Profile: Displays the Client Profile.
View Assessment: View relevant Assessment.
View Request/Response Log: Displays the technical information of the submission, such as the request (information sent to IRRS) and response (status of submission: Success or Fail).
View IRRS errors: Displays any errors associated with the submission.

Assessment Report

To build, run, and schedule reports based on assessment data, go to the top right bar and click the Admin icon, then select **Assessment Report**. Users will be brought to the Assessment Report page. There are 2 tabs available at the top: **New Report** and **Scheduled Reports**; depending on your role's permissions, you may see one or both of these sections. **New Report** is the tab that opens by default.

New Report



List of Templates: A drop-down field containing all previously-created templates available for a particular user. A Template is a saved set of search criteria. Note that a user can only see the reports that user created, and you can only select one template at a time. When a template is selected, the corresponding data is added to the page elements below. In addition, 3 options are available:

- **Create**: Create a new Template out of your currently selected fields.
- **Save:** Save the changes made to the fields to the currently-selected Template.
- **Delete:** Delete the selected template.

Department: Select the department(s) to include in the report. Available options are those that you have access to (by default, this is all departments).

List of Assessments: Select one or more active assessment form(s) you have access to. By default, nothing is selected.

Assessment Status Dates: Select one of the available assessment date values. By default, nothing is selected. Options are: **Creation Date**; **Last Modified Date**; or **Original Completion Date**.

Start Date: The earliest date to which the report will look back to find assessments to report on. By default, one month before the current date is selected.

End Date: The latest date to which the report will look back to find assessments to report on. Defaults to 'today'. The time between the two dates cannot be more than 92 days.

Current Assessment Status: Select the status(es) that you want to report on. The values available are based on the value selected in Assessment Status Date. If "Creation Date" or "Last Modified" date are selected, then the options available are: **In Progress**, **Cancelled**, **Completed**, **Correcting**, **Corrected**, and **Deleted**. If "Original Completion Date" is selected, then only **Completed**, **Correcting**, **Corrected**, and **Deleted** are available.

The Most Recent: A Yes/No selector. If "Yes" is selected, only the most recent assessment per patient, assessment type, and assessment status is displayed. If No, all matching assessments display.

Display Columns: Allows you to select columns which will be displayed in the Report. There are two fields available in this section: **Available Columns** and **Selected Columns**.

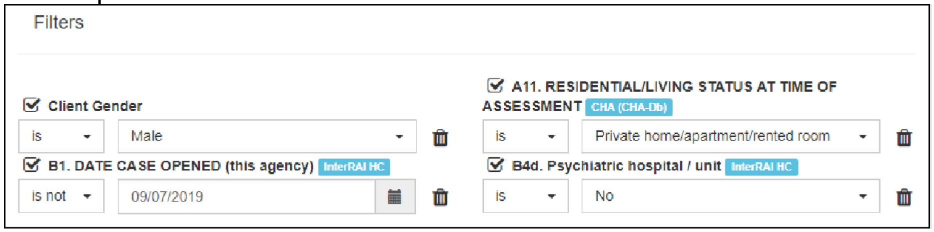
- **Available Columns:** An expandable, hierarchical tree of assessment fields based on selected dates, including the Assessment Name, section name, supplement, formulas, etc. You can select multiple fields; when a checkbox is selected, that field will appear in the Selected Columns field; unchecking will remove it. Click + to expand sub elements or – to collapse them.
- **Selected Columns:** An expandable, hierarchical tree of assessment fields you've chosen to display on the report. You can click the Remove icon to remove it from the Selected Columns section (or uncheck it in Available). You can also select Add Filter for certain fields, and an appropriate field will appear in the Filters section below. Click + to expand sub elements or – to collapse them.
- **Custom Columns:** By default, the Available Columns includes a Custom Columns section, with predefined assessment fields based on client needs that can be added to selected Columns. They include Creation Date, Last Modified Date, Original Completion Date, Current Assessment Status, Created By, Updated By, Originally Completed By, Client Gender, Client DOB, and Client.

Filters: This area appears if at least one filter was added to an element in Selected Columns. These can be used to narrow the search results.

To Run a New Report

1. Go to **Admin | Assessment Report.** Optionally, set a Template.
2. Fill out all the fields to indicate what assessments you want to report on.
3. In **Available Columns**, check the checkbox next to the columns to be included on the report. These will be added to the **Selected Columns** field.
4. For some columns, you can add additional filters to narrow the results to return something more specific. Next to these, click . A section will be added into the **Filters** field at the bottom of the screen. Each has two sections – one that determines how to narrow it, and one that lets you select one or more

of the options available for that field on the assessment.



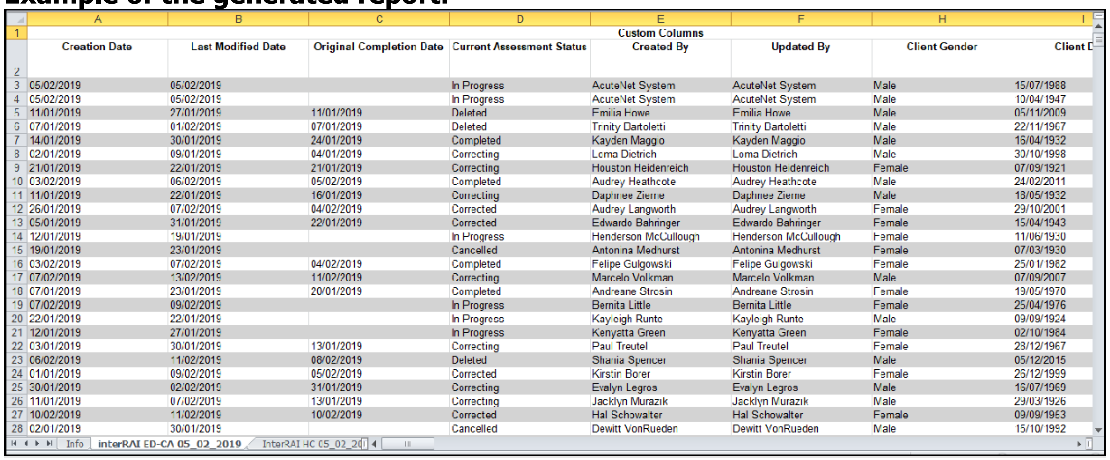
a. In the first field, select the factor which will narrow the fields down. Options vary depending on the field, but include **Is** (you include what is selected); **Is not** (You include the things that have not been selected); **between** (include values between the options); **>=** (include things greater than the option), and **<=** (include things less than the option).

b. In the second field, select one or more of the options to apply the first field to.

c. If you want to remove a filter you have selected, click the delete 🗑 button.

5. To preview the XLS report, click **Preview XLS Report**. A sample of the XLS file will be generated on the fly and will automatically be downloaded to your browser's download folder. It will only include the first 15 rows.
6. To run the full report, click **Full XLS Report**. It will get added to the queue. Once generated, you will receive a notification when the report is available for downloading, and you can click on that notification to start the download (if the "Assessment Report is generated" notification setting is set for your account).
7. To instantly clear all fields, click **Reset**.

Example of the generated report:



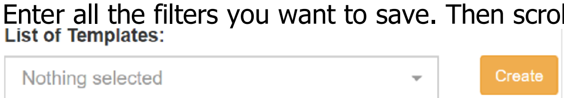
	A	B	C	D	E	F	H	I
1					Custom Columns			
2	Creation Date	Last Modified Date	Original Completion Date	Current Assessment Status	Created By	Updated By	Client Gender	Client D
3	05/02/2019	05/02/2019		In Progress	AcuteNet System	AcuteNet System	Male	15/07/1988
4	05/02/2019	05/02/2019		In Progress	AcuteNet System	AcuteNet System	Male	10/04/1947
5	11/01/2019	27/01/2019	11/01/2019	Deleted	Emilia Howe	Emilia Howe	Male	05/11/2009
6	07/01/2019	01/02/2019	07/01/2019	Deleted	Trinity Bartoletti	Trinity Bartoletti	Male	22/11/1967
7	14/01/2019	30/01/2019	24/01/2019	Completed	Kayden Maggio	Kayden Maggio	Male	16/04/1932
8	02/01/2019	09/01/2019	04/01/2019	Correcting	Loma Dietrich	Loma Dietrich	Male	30/10/1998
9	21/01/2019	22/01/2019	21/01/2019	Correcting	Houston Heidenreich	Houston Heidenreich	Female	07/09/1921
10	03/02/2019	06/02/2019	05/02/2019	Completed	Audrey Heathcote	Audrey Heathcote	Male	24/02/2011
11	11/01/2019	22/01/2019	16/01/2019	Correcting	Daphnee Zieme	Daphnee Zieme	Male	13/05/1932
12	26/01/2019	07/02/2019	04/02/2019	Corrected	Audrey Langworth	Audrey Langworth	Female	29/10/2001
13	05/01/2019	31/01/2019	22/01/2019	Corrected	Edwardo Bahringer	Edwardo Bahringer	Female	15/04/1943
14	12/01/2019	19/01/2019		In Progress	Henderson McCullough	Henderson McCullough	Female	11/06/1930
15	19/01/2019	23/01/2019		Cancelled	Antonina Medhurst	Antonina Medhurst	Female	07/03/1930
16	03/02/2019	07/02/2019	04/02/2019	Completed	Felipe Gulgowski	Felipe Gulgowski	Female	25/01/1982
17	07/02/2019	13/02/2019	11/02/2019	Correcting	Marcelo Volkman	Marcelo Volkman	Male	07/09/2007
18	07/01/2019	23/01/2019	20/01/2019	Completed	Andreane Strosin	Andreane Strosin	Female	19/05/1970
19	07/02/2019	09/02/2019		In Progress	Bernita Little	Bernita Little	Female	25/04/1976
20	22/01/2019	22/01/2019		In Progress	Kayleigh Runte	Kayleigh Runte	Male	09/09/1924
21	12/01/2019	27/01/2019		In Progress	Kenyatta Green	Kenyatta Green	Female	02/10/1984
22	03/01/2019	30/01/2019	13/01/2019	Correcting	Paul Treutel	Paul Treutel	Female	23/12/1967
23	06/02/2019	11/02/2019	08/02/2019	Deleted	Shania Spencer	Shania Spencer	Male	05/12/2015
24	01/01/2019	09/02/2019	05/02/2019	Corrected	Kirstin Borer	Kirstin Borer	Female	25/12/1999
25	30/01/2019	02/02/2019	31/01/2019	Correcting	Evalyn Legros	Evalyn Legros	Male	16/07/1969
26	11/01/2019	07/02/2019	13/01/2019	Correcting	Jacklyn Murazik	Jacklyn Murazik	Male	29/03/1926
27	10/02/2019	11/02/2019	10/02/2019	Corrected	Hal Schowalter	Hal Schowalter	Female	09/09/1963
28	02/01/2019	30/01/2019		Cancelled	Dewitt VonRueden	Dewitt VonRueden	Male	15/10/1992

Each assessment (or each version of the same type of assessment) will be displayed in separate tabs. Tabs include assessment names and version (interRAI ED-CA 05_02_2019).The first tab of the report is titled "Info" and displays all the dropdowns and filters with selected values:

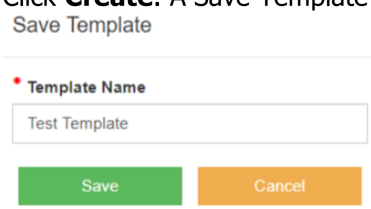
The following criteria were used to generate the report					
Department:	AcuteNet	Filters			
List Of Assessments:	InterRAI HC	(InterRAI HC) A2. GENDER	is	Male	
Assessment Status Date:	Creation Date	(InterRAI HC) A4. MARITAL STATUS	is	Married	
Start Date:	01/01/2019	(InterRAI HC) A5b. Province or Territory	is not	Ontario	
End Date:	25/03/2019				
Current Assessment Status:	In Progress				
	Cancelled				
	Completed				
	Correcting				
	Corrected				
	Deleted				
The Most Recent:	No				

Assessment Report Templates
If there is a set of filters that you are likely to use frequently, you can save them as a template (except for Start/End date). By then later selecting the template, it will automatically fill in all those fields.

1. Enter all the filters you want to save. Then scroll back up to the List of Templates.

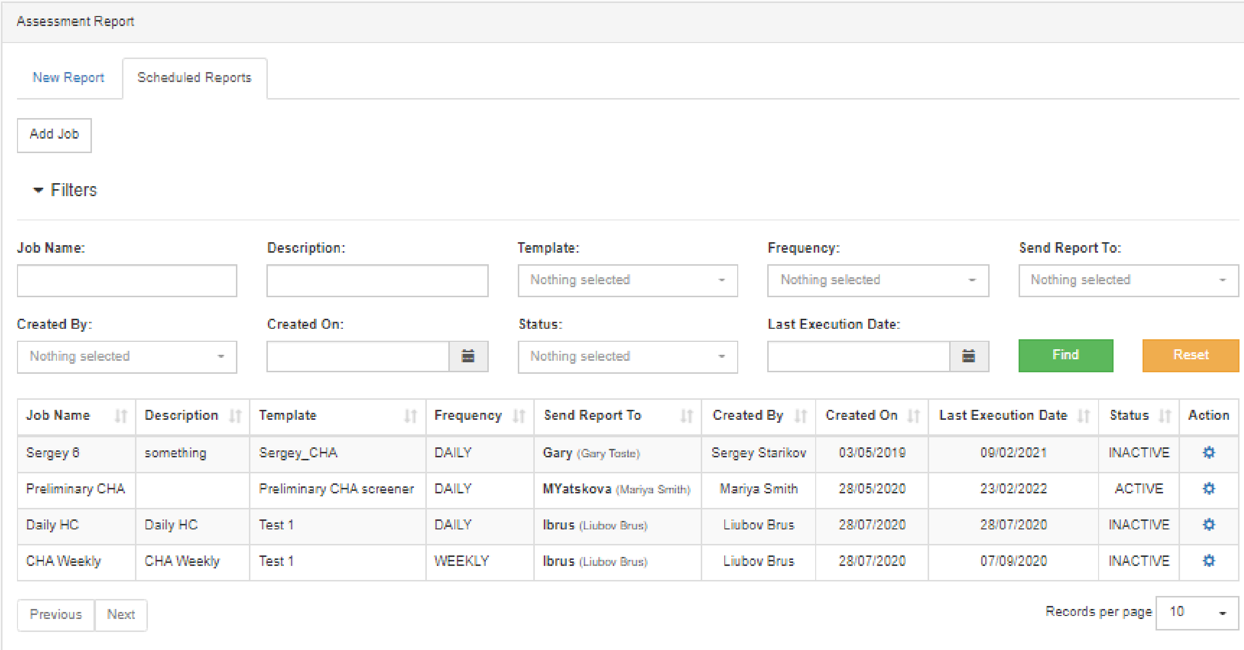


2. Click **Create**. A Save Template option will pop-up. Enter the **Template Name**.



3. The Template is saved under the name you gave it, and you can select this template from the **List of Templates** at any time in the future to automatically fill in your selected filters. In addition, two more options appear: **Save** and **Delete**.
4. If you are using a selected template, and change any filters, you can *either* create a new template from those changes by selecting **Create** again or save the changes to the *currently selected* template by clicking **Save**.
5. If you no longer need a template, delete it by selecting it and then clicking **Delete**. Note: scheduled jobs that use the template will also be deleted.

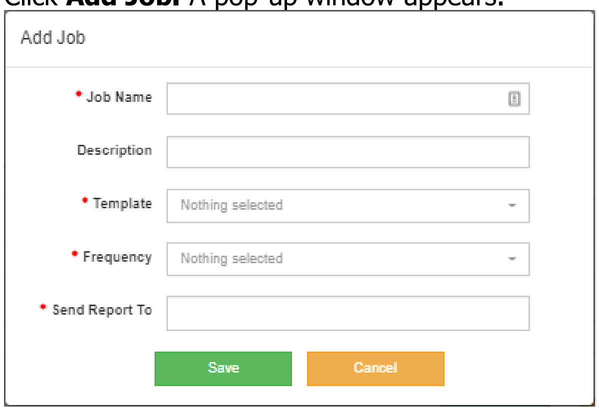
Scheduled Reports
The Scheduled Reports tab allows users to schedule reports (and manage previously-scheduled reports) to run automatically based on the Templates you've created.



Add Job: Create a new scheduled report job. See below.
Filters: Enter to narrow down the data displaying in the job table, which shows previous user-created jobs.
Job Name: A name specified for previous jobs.
Description: A description specified for previous job.
Template: Template(s) selected for previous jobs.
Frequency: Frequency(ies) selected for previous jobs.
Send Report To: Recipient(s) selected for previous jobs.
Created By: Creator(s) selected for previous jobs.
Created On: A creation date selected for previous jobs.
Status: Status(es) selected for previous jobs.
Last Execution Date: A date selected on which the previous job was last executed.
Find: Apply the filters to the job table below.
Reset: Remove all data from filters.
⚙: Apply an action to the previous job in the table. See below.
Previous: Move to the previous set of records in the table.
Next: Move to the next set of records in the table.
Records per Page: Determines the number of records to display per page of the job table.

To Add a Scheduled Reports Job

1. Click **Add Job.** A pop-up window appears.



2. Enter a **Job Name** to add a title for the job you will add to your scheduler (max. 30 characters, required). Must be unique per user (if a job with the same name exists, an error message will be displayed).
3. Optionally, entre a **Description** of the job to add to the scheduler (max. 50 characters).
4. Select the **Template** you would like to use when running the job. Required. Only one Template can be used per job.
5. Select the **Frequency** on which the scheduled job should run. Required. Only one Frequency can be used per job. Your options are **Daily** (report will be generated and sent each day for the past day); **Weekly** (report will be generated and sent each week on Monday for the past week); and **Monthly** (report will be generated and sent on the 1st day of each month for the past month).
6. Select who to **Send Report To**. This field functions as a search bar where you can find users who are registered in the system. Enter at least 3

characters and the system will search on all available Usernames and return the options you can select from. You can select more than one username and include them in the field. To remove any usernames from this field, click the remove icon, .

7. When you're ready, click **Save**. The job will be added to the job table.

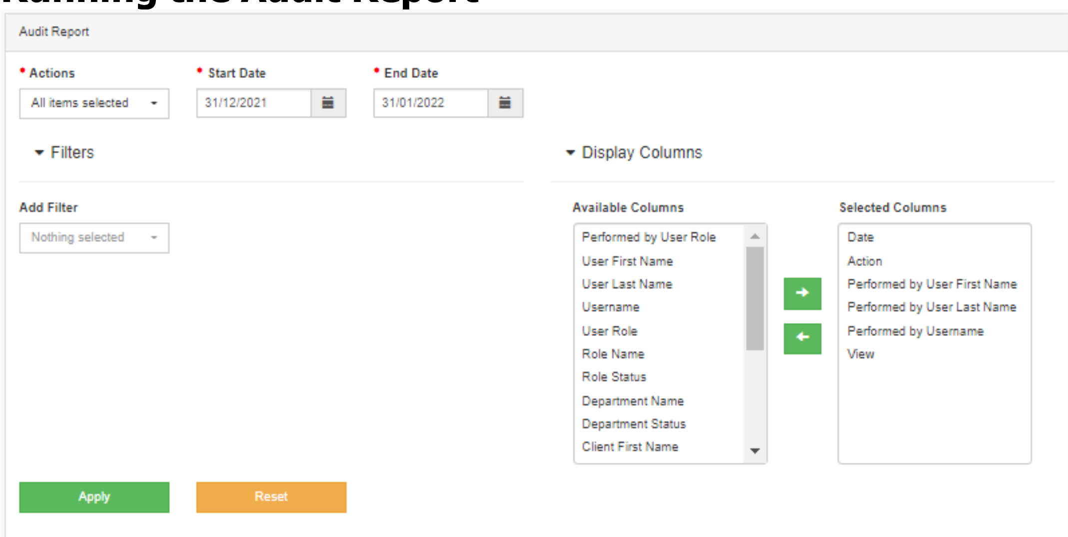
To Work with Jobs in the Job Table.

1. Each job in the table has an action icon, . Selecting this action gives the following possible actions: Edit, Delete, Run Now, and Enable/Disable.
2. Users might want to edit a job to change the template, frequency, or to add/remove senders. To do this, click and select **Edit**. The "Add Job" window will appear with the details of the job as saved, allowing you to edit them. When you're done, click **Save**. You can only edit a job you created.
3. When a job is no longer required and will never be required again, users may want to delete it. To do this, click and select **Delete**, then click "Yes" on the confirmation window that pops up.
4. When a job is no longer required but you may require it again, you might instead prefer to disable it so you do not need to recreate it. To do this, click and select **Disable**. This changes the Status in the table to Inactive. If you wish to change an inactive job to active, click and select **Enable**.
5. Occasionally, users may wish to run a job immediately instead of waiting for its scheduled period. To do this, click and select **Run Now**. After a confirmation window is approved, the job will immediately be run for the set Frequency.

Audit Report

To review all actions performed by Users in the system, go to the top right bar and click the Admin icon , then select Audit Report.

Running the Audit Report



1. From the **Actions** menu, select from the dropdown one or more actions performed by the User. This will determine the Actions included in the Audit Report. By default, all actions are selected. Available actions include:

Assessment Access	Assessment Assignment	Assessment Cancel Correction	Assessment Cancel Deletion	Assessment Cancellation
Assessment Complete Correction	Assessment Completion	Assessment Copying	Assessment Creation	Assessment Deletion
Assessment PDF Download	Assessment Report Generation	Assessment Restoration	Assessment Start Correction	Assessment Update
Client Creation	Client Lock	Client Merged as Child	Client Merged as Master	Client Modification

Client Unlock	Client Unmerged as Child	Client Unmerged as Master	Delete assessment assignment	Department Creation
Department Modification	Encounter Change Status	Encounter Create	Encounter Transfer	Encounter Update
Force Logout	Login	Logout	Pathway Access	Patient Search
Role Creation	Role Modification	Task Creation	Task Update	User Creation
User Modification	User Password Reset	User Password Update	User Password Update at next Logon	

2. Select the **Start Date** to look at records to include in the report. Default: One month before today.
3. Select the **End Date** to look at records to include in the report. Default is today. Note that the period between the Start Date and the End Date cannot be more than 92 days long (configurable by community).
4. From the **Add Filter** menu, select from the dropdown one or more filters to determine additional Search criteria for the Report. Default: Nothing. Once selected, they will appear on the Audit Report screen as fields that can be filled out as you prefer. Available Filters are below; see also **Table Results**.

Assessment Type	Client Department (s)	Client First Name	Client Last Name
Department Name	Department Status (Active, Disabled)	HCN	Performed by User Department (s)
Performed by User First Name	Performed by User Last Name	Performed by User Role	Performed by Username
Role Name	Role Status (Active, Disabled)	Status (Success, Fail)	User Department (s)
User First Name	User Last Name	User Role	Username

5. In the Display Columns section, move any columns you want to be included in the report from **Available Columns** to **Selected Columns** (and vice versa for any columns you do *not* want to be included in the Report. Available Columns depend on Actions; only values displayed to the selected Actions will be displayed in this field. You must include at least 2 columns. Default: Date, Action, Performed by User First Name, Performed by User Last Name, Performed by Username, and View. See also **Table Results**.
6. When ready, click **Apply** to generate an Audit Report, or, to quickly remove all data from the report window, click **Reset**.

Table Results

Each Action selected will result in specific Columns becoming available to include on the Report. Below is the mapping of these Columns, and what actions make these columns available.

Available Column	Description	List of actions that make it available
Date	Date and time when the selected action occurred.	(All)
Action	Displays the name of the action being taken.	(All)
Performed by User First Name	First name of the user who performed the selected action.	(All EXCEPT **User Password Update**)
Performed by User Last Name	Last name of the user who performed the selected action.	(All EXCEPT **User Password Update**)
Performed by Username	Username of the user who performed the selected action.	(All EXCEPT **User Password Update**)
Performed by User Role	Role of the user who performed the selected action.	(All EXCEPT **User Password Update**)
Client First Name	First name of the Client associated with the selected action.	Assessment Access, Assessment Assignment, Assessment Cancel Correction, Assessment Cancel Deletion, Assessment Cancellation, Assessment Complete Correction, Assessment Completion, Assessment Copying, Assessment Creation, Assessment Deletion, Assessment PDF Download, Assessment Restoration, Assessment Start Correction, Assessment Update, Client Creation, Client Lock, Client Merged as Child, Client Merged as Master, Client Modification, Client Unlock, Client Unmerged as Child, Client Unmerged as Master, Delete Assessment Assignment, Encounter Change Status, Encounter Create, Encounter Transfer, Encounter Update, Pathway Access, Task Creation, Task Update
Client Last Name	Last name of the client associated with the selected action	Assessment Access, Assessment Assignment, Assessment Cancel Correction, Assessment Cancel Deletion, Assessment Cancellation, Assessment Complete Correction, Assessment Completion, Assessment Copying, Assessment Creation, Assessment Deletion, Assessment PDF Download, Assessment Restoration, Assessment Start Correction, Assessment Update, Client Creation, Client Lock, Client Merged as Child, Client Merged as Master, Client Modification, Client Unlock, Client Unmerged as Child, Client Unmerged as Master, Delete Assessment Assignment, Encounter Change Status, Encounter Create, Encounter Transfer, Encounter Update, Pathway Access, Task Creation, Task Update
Username	Username of the User for whom the selected action was performed.	Assessment Assignment, Assessment Report Generation, Delete Assessment Assignment, Force Logout, Task Creation, Task Update, User Creation, User Modification, User Password Reset, User Password Update, User Password Update at Next Logon

Assessment Type	The Assessment Type to which the selected action applied.	Assessment Access, Assessment Assignment, Assessment Cancel Correction, Assessment Cancel Deletion, Assessment Cancellation, Assessment Complete Correction, Assessment Completion, Assessment Copying, Assessment Creation, Assessment Deletion, Assessment PDF Download, Assessment Restoration, Assessment Start Correction, Assessment Update, Delete Assessment Assignment,
User First Name	First name of the user for whom the selected action was performed.	Assessment Assignment, Assessment Report Generation, Delete Assessment Assignment, Force Logout, Task Creation, Task Update, User Creation, User Modification, User Password Reset, User Password Update, User Password Update at Next Logon
User Last Name	Last name of the user for whom the selected action was performed.	Assessment Assignment, Assessment Report Generation, Delete Assessment Assignment, Force Logout, Task Creation, Task Update, User Creation, User Modification, User Password Reset, User Password Update, User Password Update at Next Logon
User Role	Role of the user for whom the selected action was performed.	Delete Assessment Assignment, Force Logout, user Care Plan Access, User Care Plan Update, Role Modification, User Creation, User Modification, User Password Reset, User Password Update, User Password Update at Next Logon
Status	The status of the selected action (Success or Fail).	(All)
IP	The IP from which the action was performed.	(All)
HCN	The HCN of the client associated with the selected action.	Assessment Access, Assessment Assignment, Assessment Cancel Correction, Assessment Cancel Deletion, Assessment Cancellation, Assessment Complete Correction, Assessment Completion, Assessment Copying, Assessment Creation, Assessment Deletion, Assessment PDF Download, Assessment Restoration, Assessment Start Correction, Assessment Update, Client Creation, Client Lock, Client Merged as Child, Client Merged as Master, Client Modification, Client Unlock, Client Unmerged as Child, Client Unmerged as Master, Delete Assessment Assignment, Encounter Change Status, Encounter Create, Encounter Transfer, Encounter Update, Pathway Access
Encounter ID	The ID number of the Encounter.	Encounter Change Status Encounter Create, Encounter Transfer, Encounter Update
Browser	The browser from which the action was performed.	(All)
Reason of Failure	The reason the action failed (only if Status = Fail).	(All)
View	Actions with a View column get an eye icon, . On click of this icon, they view relevant information about the action.	Assessment Assignment, Assessment Copying, Assessment Report Generation, Assessment Update, Client Lock, Client Merged as Child, Client Merged as Master, Client Modification, Client Unlock, Client Unmerged as Child, Client Unmerged as Master, Department Modification, Encounter Change Status, Encounter Create, Encounter Transfer, Encounter Update, Patient Search, Role Modification, Task Creation, Task Update, User Modification
Source	Whether the action was performed by a user (manual) or automatically (system).	(All)
Role Name	The name of the Role to which the selected action applied.	Role Creation, Role Modification
Role Status	The status of the Role to which the selected action applied.	Role Creation, Role Modification
Department Name	The name of the Department to which the action applied.	Department Creation, Department Modification
Department Status	The status of the Department to which the action applied.	Department Creation, Department Modification
User Task Title	The title of the Task to which the action applied.	Task Creation, Task Update, Task Modification.

Example of Table Results:

XLS Export

Date	Action	Performed by User First Name	Performed by User Last Name	Performed by Username
01/02/2022 03:56:04 PM	Login	Meredith	Katz	meredith
01/02/2022 03:55:12 PM	Login			
31/01/2022 08:11:08 PM	Assessment Report Generation	Maryna	Khyzhniak	mkhyzhniak
31/01/2022 08:11:08 PM	Assessment Report Generation	Mariya	Smith	MYatskova
31/01/2022 05:36:48 PM	User Creation	Meredith	Katz	meredith
31/01/2022 05:05:27 PM	Login	Meredith	Katz	meredith
31/01/2022 07:34:37 AM	Login	Mariya	Smith	MYatskova
30/01/2022 08:11:08 PM	Assessment Report Generation	Maryna	Khyzhniak	mkhyzhniak
30/01/2022 08:11:08 PM	Assessment Report Generation	Mariya	Smith	MYatskova
29/01/2022 08:11:08 PM	Assessment Report Generation	Maryna	Khyzhniak	mkhyzhniak

Previous Next

Records per page 10

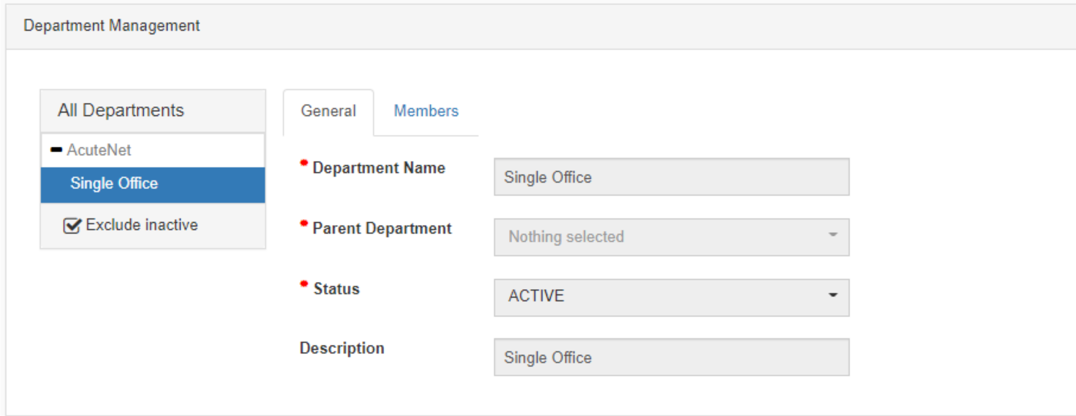
XLS Report

1. To export data to an XLS report, apply the filters to generate the Table Results, then press the XLS Export button.
2. The XLS Report will automatically generate. It will not appear on your screen. Instead, when complete, a pop-up message will read "XLS Audit Report has been sent to your email."
3. Check your email. You should shortly receive an email with the subject **Audit XLSX report**, and the report as an attached file. An example:

	A	B	C	D	E
1	Date	Action	Performed by User First Name	Performed by User Last Name	Performed by Username
2	01/02/2022 03:56 PM	Login	Meredith	Katz	meredith
3	01/02/2022 03:55 PM	Login			
4	31/01/2022 08:11 PM	Assessment Report Generation	Maryna	Khyzhniak	mkhyzhniak
5	31/01/2022 08:11 PM	Assessment Report Generation	Mariya	Smith	MYatskova

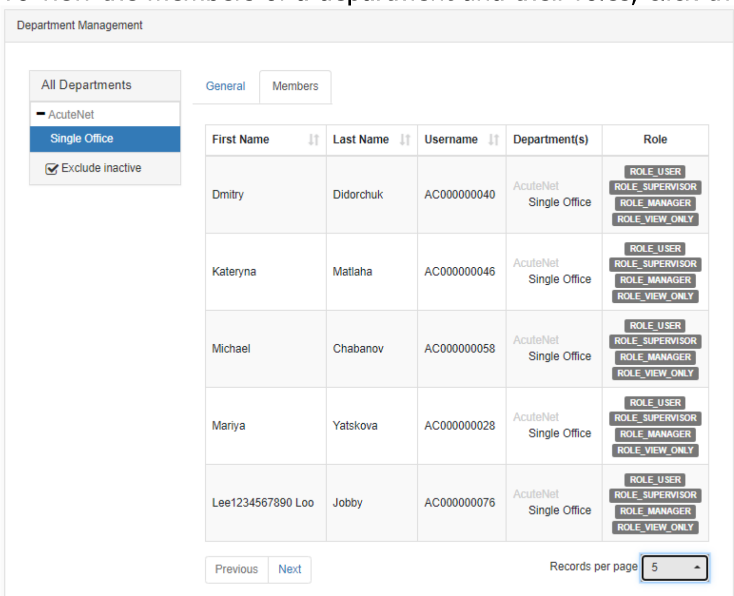
Departments

Departments can be viewed by going to the top right bar and clicking on the Admin icon, then selecting **Departments**. This brings you to the **Department Management** menu. On the left side, there is a list of already-added Departments. When one is selected, a right-hand pane appears that lists the department information. If **'Exclude inactive'** checkbox is selected, no Departments with the inactive status will be displayed in the list.



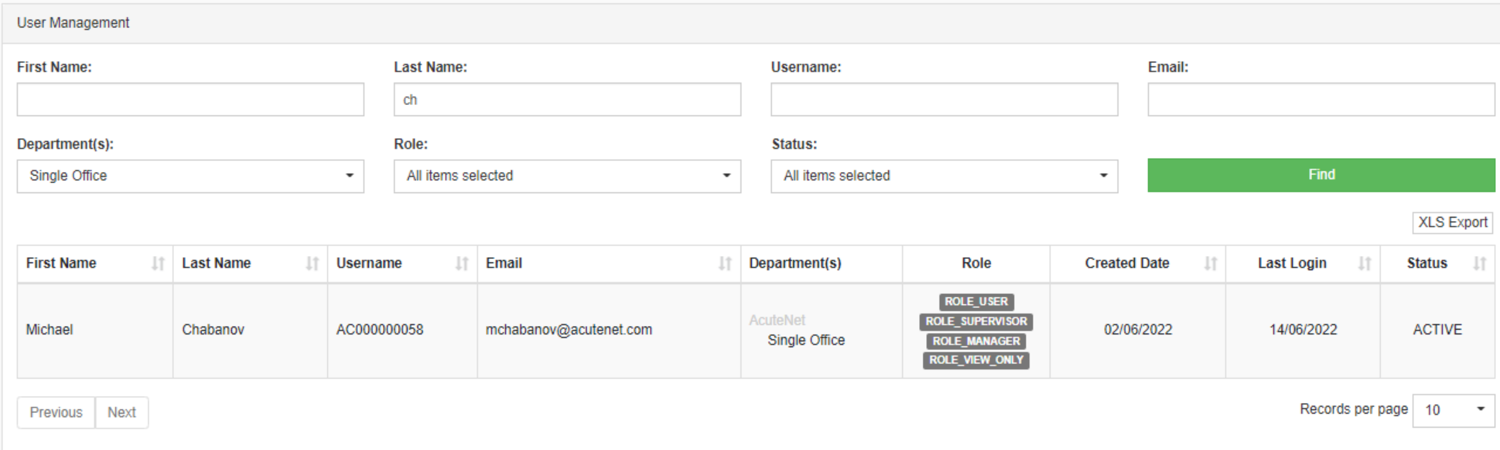
Department Tabs

1. To view a department's general details, select it. The pane on the right will show a filled-in and locked General tab, along with a Members tab.
2. To view the members of a department and their roles, click the **Members** tab. All users who are members of the parent department are listed.



Users

Users can be viewed by going to the top right bar and clicking on the Admin icon, then selecting **Users**. This brings you to the **User Management** Menu.



First Name: Filter users by First name.
Last Name: Filter users by Last name.
Username: Filter users by Username.
Email: Filter users by Email.
Departments: Filter users by Department (LHIN).
Role: Filter users by Role.
Status: Filter users by Status.
Find: Apply a search to the table below which will filter results by the filters set.
Previous | Next: Navigate to the previous or next page of user records.

XLS User Report

To export user data to an XLS report, click **XLS Export**. The report will generate. When complete, 'XLS has been downloaded successfully' will appear and your file will download. It contains the same details as the list of users on the User Management screen, e.g.:

J17

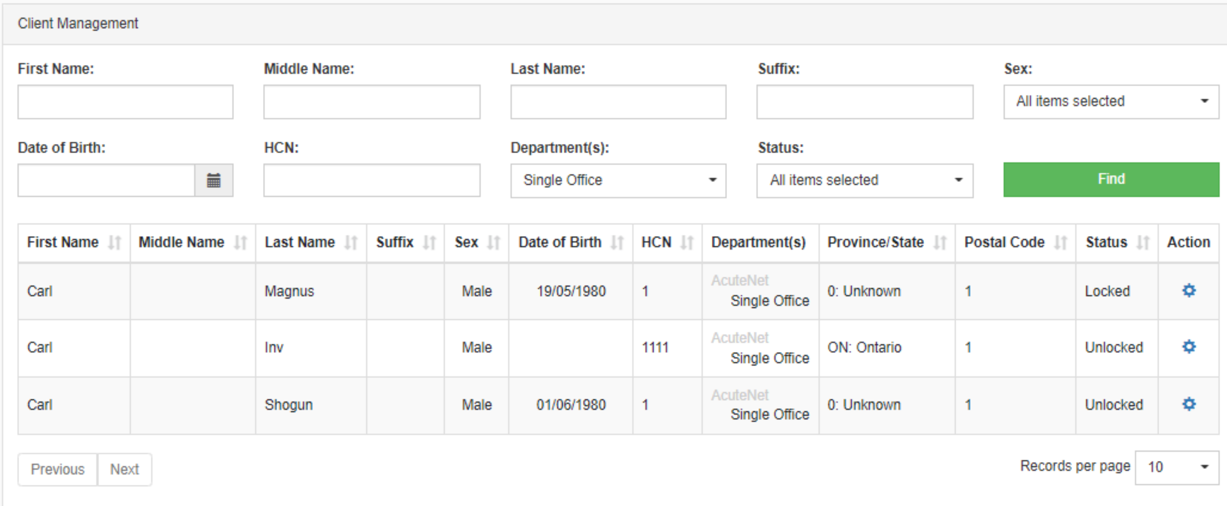
	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Username	Email	Department(s)	Role	Created Date	Last Login	Status
2	John	Smith	Demo	support	AcuteNet (ROLE_ADM	ROLE_	14/06/2018	13/11/2020	ACTIVE

The XLS report reflects the tree of departments and sub-departments, along with the roles they are assigned in those departments, e.g.:

Department(s)
AcuteNet (ROLE_ADMIN, ROLE_USER, Demo Role);

Clients

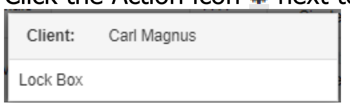
Clients can be viewed by going to the top right bar and clicking on the Admin icon, then selecting Clients. This brings you to the **Client Management** menu.



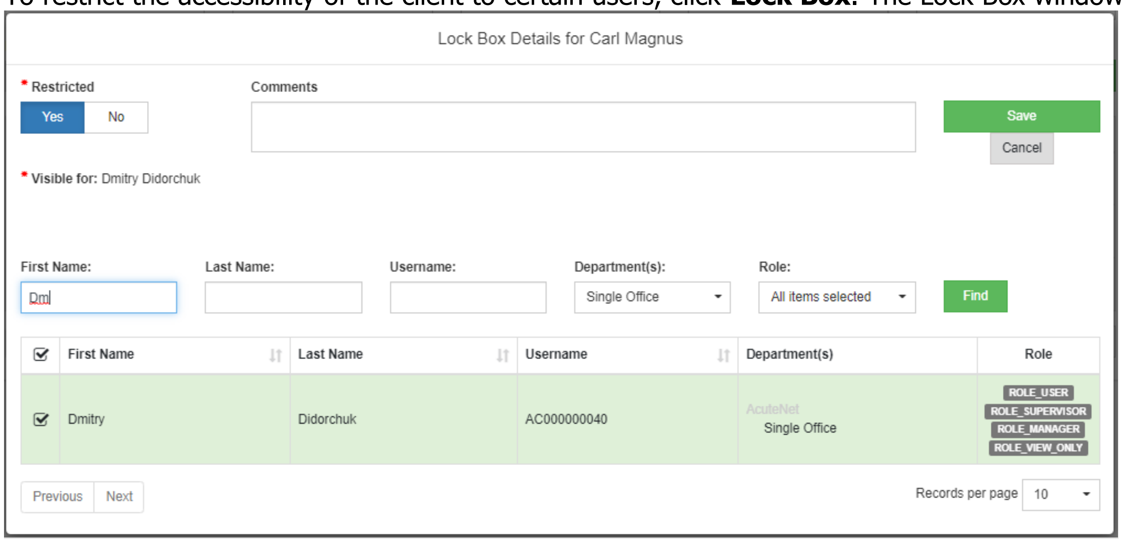
First Name: Filter clients by First name.
Middle Name: Filter clients by Middle name.
Last Name: Filter clients by Last name.
Suffix: Filter clients by Suffix.
Sex: Filter clients by Sex.
Date of Birth: Filter clients by their birth date.
HCN: Filter clients by their HCN.
Departments: Filter clients by Department (LHIN).
Status: Filter clients by Status.
Find: Apply a search to the table below which will filter results by the filters set.
Previous | Next: Navigate to the previous or next page of user records.

Lock Box

1. Click the Action icon ⚙ next to the client you want to edit. A window of the available client actions will appear. Currently, this is only "Lock Box".



2. To restrict the accessibility of the client to certain users, click **Lock Box**. The Lock Box window will appear:



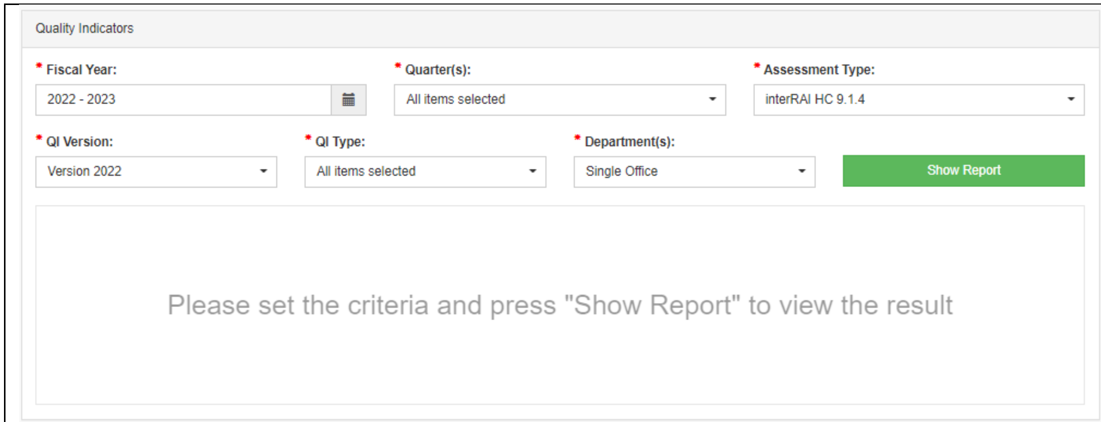
   a. To lock it to certain users, click **Yes**. The pane will expand to show a search box for users (as shown above). If you do not want it to be locked, keep restricted as **No**.
   b. In **Comments**, enter any reasons you want it to be restricted/unrestricted to users (max. 250 characters).

c. As needed, use the find boxes (**First name, Last Name, Username, Department(s),** and **Role**) and click **Find** to narrow the list of users down to those you want this client record to be restricted to. Then, check the checkbox next to their name.

d. When you're ready, click **Save**. Any users not on the list will not be able to find this client in the system.

Quality Indicators

Quality Indicators can be displayed as a report by going to the top right bar and clicking on the Admin icon, then selecting Quality Indicators. You are then brought to the **Quality Indicators** Menu:



Fiscal year: Filter the report by Fiscal Year.
Quarter(s): Filter the report by one or more Quarters.
Assessment Type: Filter the report by Assessment Type.
QI Version: Filter the report by the QI Version.
QI Type: Filter the report by the QI Type
Departments: Filter the reports by one or more Departments.
Show Report: Display report results based on your selected filters.

This menu displays a percentage of clients to whom the Qis apply, to help indicate the overall quality of care via what percentage of clients are declining and in what manner, and thus help an agency determine where the reason for a decline may be found. Note that not all patients will qualify for the calculation within every quarter; to qualify, a client needs an assessment in this quarter and a prior assessment in a set period before it, where both were done within a homecare environment.

To Work with the Report

1. Select your chosen filters and click **Show Report**. The report results will display in the table frame.

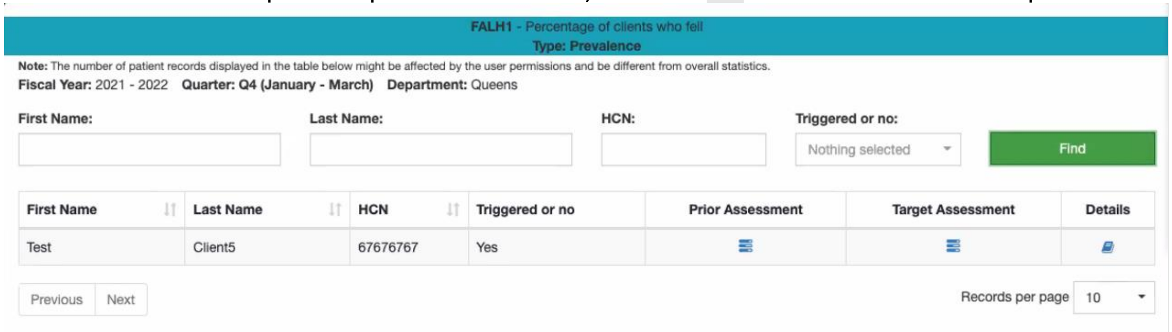
Quality Indicators Report, Year 2021 - 2022 (based on interRAI HC 9.1.4)

PDF Export XLS Export

Department(s)	Q1 (April - June)	Q2 (July - September)	Q3 (October - December)	Q4 (January - March)
ADLH2 - Percentage of clients whose ADL functioning declined (bathing, personal hygiene, locomotion) **Type: Incidence**				
Queens	No data available	No data available	No data available	1/1 Patients 100%
East Prince	No data available	No data available	No data available	No data available

2. There are two possible tabs to look at the data in. Click **Data** to view the report data in aggregate form. Click **Graph** to view the data in bar graph form.

3. You can export the results to file by clicking **PDF Export** or **XLS Export**. The file will be saved in the selected file format.
4. To drill down and see patient-specific information, click the icon. The data for the specific clients will be displayed:



   a. To narrow the list down to specific clients, enter filters (**First Name**, **Last Name**, **HCN**, and **Triggered or no**) then click **Find**. Only the relevant clients will then display in the table.
   b. To view the prior assessment or the target assessment, click in the relevant column.
   c. To view further details of the client's triggered or untriggered QI, click in the details column.

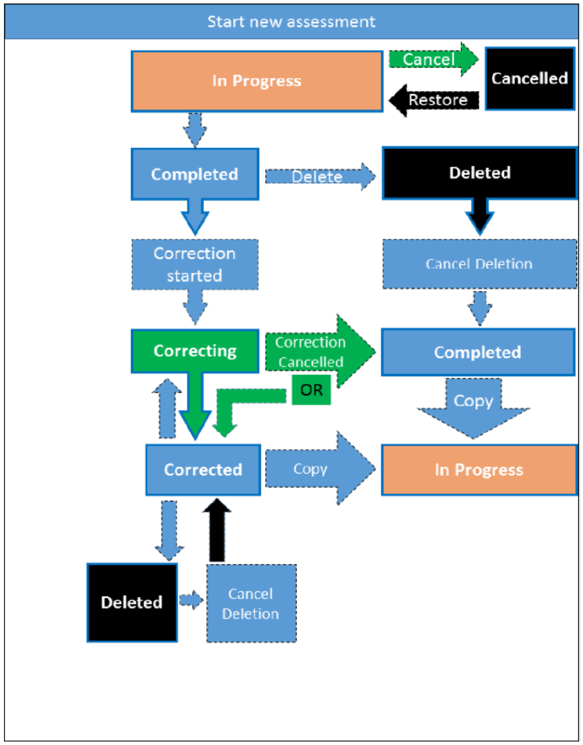
Appendices

Hotkeys

Following set of hotkeys is available for assessment:

General	Tab - next form field Shift+Tab - previous field Ctrl+Right - next section Ctrl+Left - previous section Ctrl+Enter - complete assessment
Dropdown, Checkbox, Radio	Right, Down - next option Left, Up - previous option Enter - choose value
DataTable	Right, Down - next record (or Add Button) Left, Up - previous record (or Add Button) Enter (on Add Button) - open add form Enter (on record) - open edit form Delete (on record) - delete record
DataTable Popup	Tab - next form field Shift+Tab - previous field Ctrl+c - Cancel form Escape - Cancel form Ctrl+s - Save form

Assessment statuses flow



AlayaCare ↔ AcuteNet Integrated Fields

Some demographic information is integrated. These mappings must be filled out in AlayaCare in order to appear correctly in the AcuteNet Assessments Framework unless otherwise stated. The same mappings should be applied across all the environments.

Context	AlayaCare API	AcuteNet Assessment Framework	Notes
Client Name	first_name	First Name	
Client Name	Last_name	Last Name	
Date of Birth	birthday	Date of birth	
Client Unique Identifier / Health Card Number	{provided in onboarding document}	HCN	As part of the submission process to IAR or IRRS, the health card number must be submitted. Thus, this number must be entered to complete the assessment. The field in which the number is entered may vary between customers
Case Record Number	AlayaCare ID	Case Record Number	
Sex or Gender	gender	Sex (sex at birth)	In the context of an interRAI assessment, Sex is defined as "Person's sex that was assigned at birth." There are additional fields related to Gender Identity, but only the default Gender

			field is used. The others are not currently integrated.
Marital Status (Optional for CHA and PS only)	marital_status	Marital Status	Marital status requirements differ based on the submission method, as submissions have different requirements and are bundled based on the endpoint requirements: <u>interRAI CHA with submission to IAR</u> Marital Status is not required for integration. If configuration is available and a match is found based on the list below, the marital status will be populated and can be changed in form. <u>interRAI HC-IRRS with submission to CIHI</u> Marital Status is required (custom integrations are not available) and must find a match from the list below which aligns with the answers in the form. • Never Married • Married • Partner / Significant Other • Widowed • Separated • Divorced
Postal Code/Zip Code	zip	Postal Code	