CLC GetCare- CLC SET User Guide

Guidance for Creating and Updating Client Files within the CLC-GetCare System

Please note that the WA CLC-GetCare system (and therefore this manual) is subject to alteration. Modifications/updates to the manual may result from changes in policies and procedures, GetCare system upgrades, or other factors.

Contents

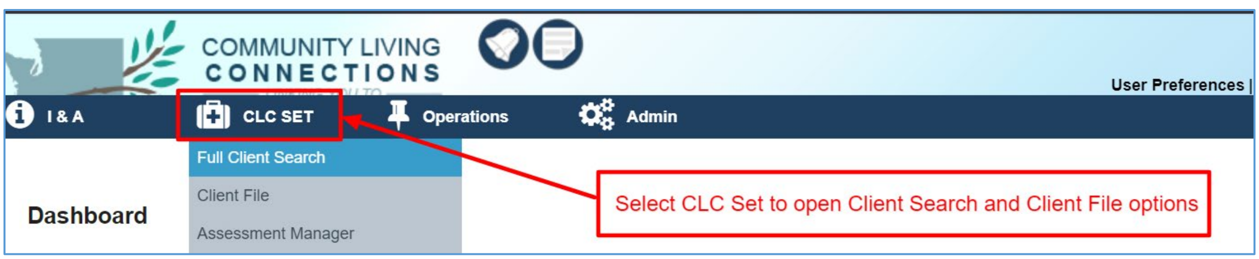
Logging in to GetCare and opening the CLC SET tool

Clicking on this link https://waclc.org/paceseam/ will take you to the login screen for SAW. Please see refer to guidance "Accessing GetCare and linking to your SAW Account" for more information about accessing GetCare through SAW.

Once you log in, on the top right **User Preferences** will allow you to:
1. Re-set your password
2. Re-set your signature password
3. Change your pagination
4. Change your email address
5. Change your address

CLC Set Location and Functions

Upon each successful log-in, your Dashboard will display. From here, select CLC Set. Find out more about Dashboard Notices and To Do's in the GetCare Help Library, look for "Your Dashboard in GetCare".



Searching for a Client and Adding New Client Records

Client Searches are available through two methods: Full Client searches and Ajax searches.

Full Client Searches

Using the Full Client search option, you will enter Name, Gender, Region, Nickname, DOB, or other information and click search. This will produce a list of records that were already entered into GetCare. Use Full Client Search when preparing to add a new client record into GetCare, this will reduce the incidence of duplicating an existing record.   → If any searches find client records with matching information, those records will show in the possible duplicates search and will have the matching information highlighted in red.   If you find the client you are searching for already exists, select the record, this will open the existing record.

TIP: *When searching, less is more. Searching using fewer parameters and fewer letters means you will get more results (and avoid missing a duplicate record with a typo).*

View Excluded Records

Some existing records may be inactive. If search results includes a link 'View Excluded Records' then be sure to also select this view list of inactivated records.

Ajax Searches

In the Client File, use the Ajax search bar at the top of the record. This type of search displays a drop-down list of results as soon as you begin typing. As you type, the list shortens, displaying only the appropriate options based on exactly what has been typed at the present moment. The search results will include the last name, first name, date of birth, and phone number of the client or consumer the search is for.   Use this option when searching client records already entered into the system.

Again, use Full Client Search to check if the record already exists. The Client File search will only show you the *active* clients in your region, unlike the full client search which will show you clients (active or inactive/excluded records) from all regions across the State although you will only be able to access clients from your region. See below to **request reassignment** if you find your client record is located with another PSA.

Adding a New Client

Before choosing to add a new record, use Full Client Search to check the client records of similar names to ensure they are not existing records for the current client. After searching, a list will be generated of clients that fit the search parameters. If none of the clients match who you are trying to add, then click on **add new record**.

Once the ‘Add New Client’ overlay comes up, you can type in the information that you have for the client. You have to add a first and last name, region, and then one of the 4 criteria below need to be met in order to save the new record.
Last Name, First Name, DOB, Gender
Last Name, First Name, SSN
Last Name, First Name, Phone Number
Last Name, First Name, Email
NOTE: If a field has been forgotten or improperly filled out it, there will be a validation that alerts the user to complete required fields.

- ➔ **For further guidance,** please refer to *‘Searching for Existing Records and Adding a New Client Record in CLC GetCare’* from the GetCare Help Library – CLC Set category.

Reassigning a Client to another Region (Requesting Reassignment)

When a user is entering a new client that already exists in the CLC-GetCare system, but the record is under another PSA region you can request the record be reassigned to your PSA. From the Full Client Search results, there will be a **Reassign** link to the right of the record details.

When you click on the ‘Reassign’ option a pop-up will display allowing you to select which region to reassign the record to. This will send the request to the PSA where the record is currently assigned for their approval.

NOTE: *Only certain roles will have the ability to approve or deny these reassignment requests. Those roles include: System Administrator & Back-up- AAA and Direct Service- Supervisor/Program Manager, Contract Support (AAA), Contract Support & Data Entry Nutrition (AAA), and Contract Support & Data Entry Additional Programs (AAA).*

To summarize, when a request has been created a notice will be sent to the system administrator (and/or staff with record re-assignment role permissions as noted above) for the current “home” PSA for the client that is asking for reassignment of the client. The notice will show in their dashboard. Staff with reassignment roles are designated with the authority to approve or decline the transfer of the client. Before the “home” PSA system administrator approves the transfer, they should review the client record and confirm that it is appropriate to release control of the client to the PSA requesting the reassignment. → It is recommended to also reach out to the home PSA staff once a reassignment request has been created. This will help to expedite the process and avoid delays for the staff with the requesting PSA to have access to the record.

Once the client is approved for reassignment, the system will transfer "ownership" of the record to the requesting PSA, you will then be able to enroll the client into services in their new region.

Important: The PSA that released the client by approving the reassignment will still be able to access and modify any enrollments that existed during the time that PSA "owned" the client, allowing them to record any services that were provided prior to the reassignment. Once all services have been processed at the "previous" PSA, those service enrollments should be closed (dis-enrolled). Those dis-enrollments will not impact any enrollments at the "new" PSA. Please refer to Client Transfer – Closing Cases checklist in the GetCare Help Library.

Client File

The Client File section of the CLC SET Module is where the client information is stored. Within the Client File you can update the identification information, demographics, client contacts (such as emergency, medical contacts, etc.), complete assessments, create service enrollments, add progress notes and action plans for the client. You can also pull reports for demographics and other client related details from the Client File page. The next few pages of the user manual will walk through each section of the Client File.

- ➔ For further Guidance, refer to '*CLC Set - Adding a Client Record + CLC Set Reports*' from the GetCare Help Library – CLC Set.

Identification Section

Once you have selected or added your client, you will see the identification section populate with the client's information. If you would like to edit the name, SSN, or DOB of the client, click the Edit link to the left of the client's name.

This will bring up a small overlay that will allow you to edit the last name, suffix, first name, middle name, DOB, SSN, and View in Client Search fields. If the Date of Birth field is updated, that will automatically update the age of the client. There are a few different options for the SSN field. You can enter a full SSN, check the

No SSN Provided box or check off the Last 4 of SSN Only Box. You may only choose ONE of those options. Once you have picked one SSN entry option the other options will become grayed out.

View in Client Search: This determines the client's status within the system.

> **Yes:** This means that the client is currently enrolled and receiving services and is active in the system. Clients who have this option chosen for View in Client Search will be searchable in both the full client search and Client File search.
>
> **No:** This client is no longer receiving services. Clients who have this status will only be able to be found by using the full client search and then clicking on the 'View Excluded Records' link at the bottom of the results.

After making adjustments to this section (if necessary), click **Save and Continue**. If no adjustments are necessary or you do not want your changes to be saved, then click the **X** in the upper right hand corner of the overlay.

As you look at the rest of the identification section you can update various fields. The **Region** field will default to that client's primary Region. This pull down will only have regions that you have access to in them.

Below the photo field, there is a browse button. You can use this photo field if you would like to upload a picture of the client.

Below the region and field there are two display only fields. Those are:
Caregiver Relationship: This will display the names of any relationships linked to this record and the relationship type. This information pulls from the Caregiver Relationship fields within the Contacts section of the Client File.

NSIP Eligible: This field will display the answer that is chosen in the Client File Demographics section for the NSIP Eligibility question.

If you would like to update either of those fields you will have to go to the corresponding section of the Client File.

You can also denote whether a client will need assistance in an emergency by checking off the checkbox to the right of '**Requires assistance in an emergency'**. If you would like to include notes about what specific assistance would be needed you can use the notes field. This checkbox will also be used to populate the Emergency Evacuation List Report.

The **Address, Phone and Email** fields have some of the same basic features. Each of those fields will have valid dates, a type pull down, and the ability to add or remove additional phone numbers, email address or addresses. To add a second one, click on the **+** sign for the field you would like to add an additional for. Once there are two or more, you will notice that the last one will also have a **minus (-)** sign. By clicking on the minus sign, you will remove whichever the last added field is.

Address Fields will populate using a Google Address feature. Once you begin to enter an address, options to complete the address fields will display, you can select address if it populates to the list so you do not have to complete each address field or you can continue adding the address.

The format for the address should be just like it is when you are addressing an envelope. The address field also has a county pull down. It will not automatically populate based off of the address that is input in to the system, select the client's county from the list.

All **Contact information** is date specific by type. This means the system will not let you enter in multiple address, phone number, or e-mail types for the same date range.

At the bottom of this section you will see a row that says **Update date, Update Agent, Agent Agency**, with the corresponding information next to it. These fields will update with the last updated information when a user saves this section.
Important: Once you are done with updating the Identification section, make sure you save the changes using the **Save** button in the bottom right hand corner of the section.

Demographics

The Demographics section is where users can update the client's demographics information.

Some of the questions here will be used for NAPIS purposes, but no fields are required in the system. The fields that are required for NAPIS are denoted with an asterisk (*). Those fields include:

– Ethnicity

– Race

– Household Composition (Lives Alone)

– Urban/rural

– Sex/gender

– At or below 100% FPL

When looking at the demographics screen below, there are a few different types of questions and fields that exist, some of which include:

- **Disability type:** You can select multiple answers from this question, unless Declined to state or No Disability is checked off. If either one of those is checked off, then you will not be able to select any other options.
- **Language, Residence Type, Household Composition (Lives Alone), Legal Status:** These questions all have a second field available to help answer the question if the answer in the first pull down (on the left) is selected as other. The '**If Other, Specify'** fields will be inactive unless **Other** is selected as the primary answer for that question.
- **Means of Transportation:** This is a multi-select field. You can choose to select one option by just clicking on that one option, or you can select multiple options by holding down the Ctrl key (or Cmd key on Macs) and selecting all of the options that are applicable.
- **Veteran Status:** If **Yes** is selected then the Veteran # field to the right of that pull down will become active so that a Veteran number can be entered if applicable.
- **Presenting Situation (Intake Summary):** This is a free text field that you can type in to. If you are using a browser that is HTML 5 compatible (IE 10 and higher, Firefox and Chrome), then you will be able to expand this field by clicking on the three diagonal lines in the bottom right hand corner of the text area and drag the text field to be as large as you would like it to be.

NOTE: Program specific requirements drive which demographic questions should be answered, please refer to program and policy guidance to complete required demographic fields. At the bottom of this section you will also see the update date, update agent and agent agency fields.

Contacts

Below the Demographics section, there is a section to add known contacts for each client. The contacts are separated in to four sections:

- **Close Contacts:** This section lists contact types that have a close relationship with the client, whether they be family or friends. Examples of these contact types include Emergency Contact and Next of Kin.
- **Medical Contacts:** The contacts included in this section are contacts that are typically related to medical needs. Examples of these contact types include Primary Physician and Homecare Aide.
- **Assessment Contacts:** The contacts listed in this section are contacts related to the assessment needs of the client. These contacts include the Durable power of attorney for healthcare (DPOAH) and Referral Source.
- **Caregiver Relationship:** This contact type will link a caregiver with a care receiver. Each contact that is listed here will have their own unique client file created for them.

How to Add a New Contact

There are two ways to add a new contact:

- The first way is to search for them using the ajax search associated with each contact type. Located to the right of the contact label, there is a field, known as an ajax search, which is labeled **Search contact**. When you click in this field, the ghost text of Search contact will go away, and the search results for the available contacts will start to appear as you start typing. When you are looking to add a new contact to 'Close' contacts and 'Assessment' contacts, the only names that will appear in the ajax searches are contacts that have already been associated with that client.
  NOTE: Medical contacts and FCSP/Caregiver Relationship contacts will pull names from the entire system. Medical contacts will only pull contacts that have been associated with at least one client as a medical contact. The FCSP/Caregiver Relationship search will generate results from every client in the system.

- If the contact that you are searching for does not come up in the ajax search (or if you have the JAWS permission associated with your account), you can add a new contact by clicking on the Add New Contact button on the bottom of the contacts screen.
  Note: This button should be used to add contacts to Close Contacts, Medical Contacts and Assessments Contacts. FCSP/Caregiver Relationships are added in their own section.

After you have clicked on **Add New Contact** (which can also be selected at the top of the ajax search results), an Add New Contact overlay will come up.

If you add a new contact using the link found in the ajax search the last name, first name, and type of contact fields will populate with the data entered before the link was selected. The Type of Contact field will default to the name of the contact that you were searching in (Emergency Contact, Homecare Aide, etc.). After you have added the name and selected the type of contact, you will notice that the relationship field will populate with different options. This field populates depending on the type of contact that is selected. After you have added in all of the information you have for the contact, click **Save**.

Once the contact has been added it will display in the contact section with all of the information that was added about the contact. There will be a notes section on the second line that will list any notes associated with that contact.

If you would like to edit a contact that has already been added, click on the contact and then click on the **Edit Contact** button.

If you would like to remove a contact that has already been added, click on the contact and once it is highlighted in a salmon color, click the **Remove Contact** button at the bottom of the contact screen.

Adding a Caregiver Relationship

To add a new Caregiver Relationship, search in the ajax search labeled *Search Client*. This ajax search will generate results for **all** clients in the system that are not excluded from view (ref: client ID). If the contact you are looking to add, does not populate to the ajax list and after conducting a full client search, then click on the add new client link (see section above **Adding New Client** for more details on how to fill out this overlay).

Once you have selected a client or created a new one, select if the contact is the caregiver or care receiver, their Relationship and, for MAC/TOSA clients, select the Role Responsibilities (only required for MAC/TSOA). Make sure to click the **Add** button to the right of the Role Responsibility. <u>This is what saves your work</u>.

Notice that the name of the care receiver is now a hyperlink. You can now click on the name and will be taken to the care receiver's client file. When a Caregiver Relationship is added, the inverse relationship is added to the other clients file. If you would like to edit a Caregiver relationship after it has been added, click the **Edit** hyperlink that appears to the right of the Role Responsibility field and the fields will become active for you to be able to change and then **Save**.

Assessments

To open or create an assessment, go to CLC SET, then Client File and search for a client. Once you have the client file open, scroll down to **Assessments** and click the arrow on the right-hand side of the assessment section to expand it.

Here you can use the filters (and click **Apply**) to search for an existing assessment, or simply select the assessment from the list. To search existing assessments, fill in one or two of the filters and click **Apply**. If that does not narrow the results enough to allow you to easily locate the assessment you are looking for, use more filters and enter more specific information. A summary list of all assessments will populate based on search filters. If not filters are selected then all assessments and their history statuses will populated to the summary list.

If there is a **draft** of an assessment started, then you will not be able to start a new assessment of the same assessment type until the draft has been completed and locked. This prevents multiple assessments for the same time period being entered and potentially not being completed or having conflicting sets of information.

Click on the assessment date for the assessment you would like to fill out. This will open that section beneath the assessment list. From here you have the option to create a copy of a previous assessment for the purpose of a review. You must first open the locked assessment. A new button will appear, labeled **Copy for Review**. When you click on this button a copy is created with all the information filled in. You can then edit the information as needed.

Assessment Statuses and Completion Options

You may also click to adjust the assessment's status. This will have different effects depending on the status of the assessment.

- A status of **Draft** means that the assessment was started by a user and/or has been opened at least once without being completed. Clicking the status of **Draft** will give you the options **View**, or **Cancel**.
- A status of **Locked** means that the assessment was completed. Clicking a status of **Locked** brings up the option to **View** or **Cancel**. Locked assessments cannot be edited.

Once the assessment is open, each section can be expanded by clicking the triangle on the right side of that section.

If you need to save the assessment before you are able to complete and lock it, click **Draft** at the bottom of the assessment. You will now be able to return to the assessment at any time to save with signature.

When you are completely finished, click **Lock** at the bottom of the assessment (above the Service Enrollments section of the Client File). This will prompt you for your signature password and will then save the assessment, marking it as complete and locking the fields.

If you do not wish to save the changes you've made to the assessment, click **Cancel**.

To create a new assessment, click on **Add new assessment**. Select the assessment type that you wish to complete and then enter the date of assessment. Place the cursor in the text box and a calendar will open up. Fundamental client information, such as identification, contacts and demographic information, will be pre-filled in a new assessment; however, all other fields will be blank.

NOTE: Please refer to program specific guidance when working with TCARE and MAC/TSOA related screens and assessments.

Service Enrollment

Service Enrollments are used to track which services each client is receiving, for what amount of time and amount of service, and their status with each service. The **Service Enrollments** section is located in the CLC SET (Community Living Connections Screening and Enrollment Tool) Client File.

- ➔ For more details about working with Service Enrollments in GetCare, go to the Help Library, under "CLC SET" category and select: *CLC Set - Adding a Client Record + CLC Set Reports.*

Adding an Enrollment

To add a new enrollment**,** click **Add New Enrollment**. Once Add New Enrollment has been selected, an overlay titled Add New Enrollment will appear.
The clients name will be auto-populated in the Client field. To start select the **Provider** that will be providing the service. Note that at each selection it will narrow down the results in the other pull down fields. Then select the **Scope of Work**, **Program** and **Service Detail** and **Site** (if needed).

Adding New Service Sets and Providers: If the service set is not available for enrollment then it needs to be added to GetCare and associated to the provider that is delivering the service.

Use Issue Manager to request services that are not currently included on the GetCare master service lines (refer to Help Library to review the most current list of services – under Category: Service Recording - 'GetCare Service List').

Although it is preferred to use the established master service list options, sometimes a unique program or locally funded service needs to be included. Provide the following details:

- Scope of Work
- Program
- Service Detail
- Provider Name
- Provider Start Date

The next step is to indicate what type of enrollment this is. The options are **Referral, Waitlist, Enrollment.** You do so by clicking on one of those 3 buttons. The most commonly used type is Enrollment, refer to your local policy or program guidance for use of Referral and Waitlist enrollment options.

After clicking on the **Enrollment** type the screen will update to be editable. When you are filling out the enrollment status section and have to enter in dates, you will see an option called ‘end of FY’ and ‘ongoing’.

- **End of FY** is the end of the Federal fiscal year, which is September 30.
- To designate that there is no set end date, or to ensure that the specified item will not expire, choose '**Ongoing**'.

After the necessary fields have been entered, click **Save**. After the dates have been entered and saved the Enrollment section will update to be a view and will be available to show a history of the statuses.

If the service the client is enrolling in has an authorized limit, select the arrow to expand the **Authorization** section. Then in the Authorized Qty: fill in the number and in the pull down to the right of it select the unit type and period.

If the service the client is enrolling in is delivered at more than one site then select the arrow to expand the **Schedule** Section.

Click on **Order** to save the enrollment.

Once the enrollment has been saved, the client will show in Service Recording and will be available to log units.

NOTE: The GetCare system will not allow there to be overlapping enrollments. An overlapping enrollment is defined as an enrollment that has the same service set and provider and part of the date ranges overlap. The user will receive a validation stopping them from adding the overlapping enrollment.

Viewing Existing Enrollments

Enrollment History for existing enrollments will be viewable and editable. In the below example the client was on the Waitlist for January-February, then they were enrolled for the first half of March. They became dis-enrolled in the last half of March then returned to service beginning in April.

Tips on how to use the Enrollment section:

– The edit link will display after saving an enrollment in order to make a modification to that status history if needed.
– The status will update to 'Disenrolled' when entering a thru date before today's date.
– If the thru date is changed to anything other than 12/31/9999 the disenrollment 'Reason' field will become editable.
– If the Status is either Waitlist or Enrolled, there is an option to click **On Hold** to the right of the edit link. This is used when there is a need to indicate the client is still enrolled to receive the service but the client is temporarily on hold (in the hospital or out of town for example) and will be returning in the future.

Enrollment

Current Status:Enrolled

Add: Referral Waitlist Enrollment

Status History	From	Thru	Reason	Needed Qty	Unmet Need		
Waitlisted	01/01/2017	02/28/2017		/		Edit	On Hold
Enrolled	03/01/2017	03/15/2017	Another source available	/	0.0	Edit	On Hold
Disenrolled	03/16/2017	03/31/2017					
Enrolled	04/01/2017	12/31/9999		/	0.0	Edit	On Hold

– A warning is added when adding an authorization that will cover 2 enrollment status periods: "Warning: An authorization is not within the enrollment date range added"
– A validation appears when saving a blank date on the status of "Status History date range cannot be blank"
– Validation appears when enrollment status overlap o "The status History date range cannot overlap other Status History"

Viewing Units Delivered

If an enrollment has had units assigned to it you can view those units in the Units Delivered sub-section. This section has a date range filter as well as a selection for which enrollment(s) to show the units for. Click on one or more of the enrollments and then click on Apply. Below the list will display a total Census count of the units displaying as well as every unit date and unit count recorded.

Note: Enrollments and Service Recording modules are closely connected. The enrollments that you enroll clients in, in the Client File module are the same enrollments that will populate the Service Recording page. For service recording information refer to the Help Library for Service Recording guides.

Progress Notes

The Progress Notes section can be used for case managers and to add notes to a client's file. When you first expand the Progress Notes section of the Client File, you will see a set of filters. The filters allow you to filter for specific progress notes, once the list gets long.

- **All Clients/Specific Client:** These radio buttons will allow you to choose if you would like to filter for all clients or the specific clients Client File you are in. The default for this set of filters is **Specific Client** with the name of the client whose Client File you are in, selected.
- **Date Range:** By selecting a date range, users will only see notes created within those dates.
- **Time Range:** By selecting a time frame, users will only see notes created within that time period.
- **Event:** Using this filter will result in users being able to see all notes that are tagged as having one specific event, such as a fall at home or a hospitalization.
- **Mode:** The mode of the note is the method in which the user received the note. Examples of modes are Email, Family, Fax, etc.
- **Note Contains:** Users can search here using words that the note contains. This will then filter only notes that contain words that you have used in this filter.
- **Signature status:** Using this filter, the users can choose the signature status of the notes that they would like to view. An example would be if users only wanted to see notes that were awaiting signature. The user would then filter for **Unsigned**.

- **Signer:** This is an ajax search of staff members for the regions that you have access to. Searching for a user in this field, you will get notes that have been signed by that particular user.
- **Drafter:** This is an ajax search of staff members for the regions that you have access to. Searching for a user in this field, you will get notes that have been written by that particular user.

After selecting the desired filters, click **Apply**. If you would like to clear all of the filters and restart, you can do so by clicking on the Reset button.

Adding a New Note

Click on the **Add New Note** button in the top left hand corner of the progress notes section. After the user has clicked on the button, a blank note section will appear. The note section is rich text capable. This means that users will be able to format it and spell check, provided the browser is HTML 5 capable, which Chrome and Firefox and the most recent versions of IE are.

In the top right-hand corner of the progress notes, users can edit the date and the time that the note is for, if it is different than today's date.

Who Can View Notes

Every user in the system will be able to view the date and time a note was entered, the drafter of the note, the signer of the note, the client the note was entered for and the viewable by option. The option that is selected in the '**Viewable By'** pull down determines which users can see the actual note content. The three options in the pull down are:

- Everyone: viewable to anyone who has access to the client file regardless of user's agency. *Note is viewable by all users across all PSA's (regions).*
- Region/PSA: viewable to anyone within the PSA who has access to the client file. *If a user's profile Provider /Agency access is set to 'All' they will see the note.*
- Agency/Provider: viewable only to users who have access to enter enrollments within the client file for the specified agency (i.e., a subcontracted provider, and the AAA, and the state). Select this and enter the name of the agency/provider in the ajax search field if you do not want the note to be viewable to other providers. The AAA who has access to the

provider's records will also be able to see this note. ->This applies to any user whose profile for Provider/Agency access is set to 'All'.

When adding a note with the Region/PSA provider option selected, the note content will be viewable by any user who is assigned to the same region as the user who added the note.

When adding a note with the option of Agency/Provider selected, an additional field comes up where users will have the ability to select which agency's/providers the note should be viewable by. If a note should be viewable by multiple providers, then a user should select multiple providers. In order to do this, the user should select multiple providers using the plus (+) sign associated with the ajax search. Only providers that the users account has access to, will show in the ajax search.

Select Element

An element is not required to save or sign the note. Depending on the type of element that is chosen, there may be additional fields that come up. An example is if **Mode** is chosen from the **Select Element** pull down then there will be a **Type** pull down that will come up after that element is chosen. Users should then fill out the additional fields. If additional elements should also be attached to this note, users can do so, by selecting **Add Additional Element**.
Save as Draft: Clicking on this will allow the user to save their work and return to the note later to review and then Sign.

Signing Notes

Clicking on this button will allow a user to type in their signature password and sign the progress note. Any user who has access to the clients file will be able to see certain aspects of every note. The actual note content is what is limited by the option selected in the viewable by field. Below is what a user would see if a note was written by someone who had access to an agency/region that their account did not.

After **Draft** notes have been added to the Client File, the link for the Date and Time will open up the note into the editable fields to be able to change the note and Save as Draft or Sign. There is also an arrow on the right-hand side of the note. Clicking on this will give the user the option to **Sign** or **Delete** the note.

Delete: This button will only exist for notes that are not signed. If this button is clicked, a validation will appear that asks the user if they are sure they want to delete the progress note. If they are, then Yes should be selected. If they clicked on that button by mistake, then No should be selected.
When a note is **Signed** it will display in black text and won't be editable.
There is an arrow on the right-hand side of the note that will open up the display to see if there were elements associated with the note as well as an option to strike out the note.

Strike Out: When this is chosen then a reason pull down will appear along with a text area to explain why the user is striking out the note. Striking out a note after it is signed is the equivalent of deleting a note before it is signed. Once a reason and explanation has been entered, users looking to strike out a note, should click **Sign**. They will then enter their signature password again and strike out the note.

Print Notes: Select the check boxes to the left of the notes. If all notes are needed click in the check box in the header and it will select all notes automatically. Once the notes to print are selected the options One Note per Page, One Participant per Page and One Case Manager per Page are available options to select for before clicking on **Print Selected Notes**.

An **Addendum** can be added to an existing note. This is used if the original note missed a key point or requires a minor edit. Open the existing note and select "add addendum" this will create a new field to enter additional notes and this will nest under the original note selected.

Electronic File Cabinet

The Electronic File Cabinet is a place to store documents that are specific to that client. Examples of files that can be stored here are client signatures or medical documents or notes about that client that are made outside the system that should be a part of the Client File. After the Electronic File Cabinet section is opened, there will be a filter section up top where users can filter for Client Name, Category, Date Range, User, Provider. The filter section will be useful when there is a long list of files that have been uploaded. As a default, all files that have been uploaded will be showing.

- **Category:** This filter can be used to filter for a specific category. All files uploaded within the Electronic File will have a category of "Electronic File Cabinet". If a file is uploaded in another section of the system, you can use this filter to sort for the other categories.
- **User:** This is an ajax search of all users in the system. Users should use this filter to select a certain user who uploaded documents to that clients file.

To upload a file, click **Browse**. This will bring up an overlay with an Add button. Click on **Add** and that will allow you to search your computer for the file. Once you have selected the file, you can clear the file by clicking on **Clear**, or the **Clear All** button. In order to finish uploading the file, click **Save**. After a file has been uploaded and you would like to view the file, click on the name of the file and once it is highlighted in orange, click **View**. If you would like to delete a file, highlight the file and then click **Delete**.

Action Plan

This section will allow users to create a plan of care for the client. To start, click the **Start new Action Plan** button. This will open up a blank action plan with the following fields:

- **Client:** This will display the client's name that the action plan is being created for.
- **Action Plan:** This will display the action plan number along with the date that the action plan was started on.
- **Date Column:** On the right hand side of the action plan, there is a column with date fields. These date fields will allow users to select a date for each action or question within the action plan. Users can choose to either type the date in manually, or use the calendar overlay to select the date.
- **Goal 1:** This is where the overall goal of the action plan should be put.
- Below the Goal field, there is a **Task** label. Users can click **X** on the right hand side of the task bar and remove the tasks if you would like.
- What you'll do: This field should be used to write out what the client will do to complete this goal/task.
- **What others will do:** This field should be used to write out what others will do to complete this goal/task.

- **Important to:** Use this question to determine how important on a scale of 1 to 10 completion of this goal is to the client.
- **Confidence:** Use this question to determine how confident the client is on a scale of 1 to 10 that they will complete this goal.
- **Next Steps/Follow-Up:** The next steps for completing this goal should be included in this field.
- **Client Signature:** Using an HTML 5 capable browser, users can have the client sign the action plan using the computer mouse or track pad, or finger if it is a touch screen. If the client would like to redo their signature, they can do so by clicking on the clear link on the upper right hand side of the signature field.
- **Options Counselor Signature:** Using an HTML 5 capable browser, the Options Counselor can sign the action plan using the computer mouse or track pad, or finger if it is a touch screen. If the Options Counselor would like to redo their signature, they can do so by clicking on the clear link on the upper right hand side of the signature field.

If the options counselor or client would like to add additional tasks or goals, those can be added by clicking on **Add a New Task** or **Add a New Goal**. Once the Action Plan is complete, the Options Counselor should click **Save**. If the user would not like to keep the action plan, then **Cancel** should be clicked. If the Options Counselor or client would like to print a completed action plan, this can be done by clicking the **Print** link on the right hand column of Action Plan list.

Reports

List of available filters:

From: Start Date for the report date range
To: End Date for the report date range
Provider: The agency or agencies that you would like to include in the report (Example: Loaves and Fishes)
Site: You have the option to filter to a specific service location/site (Example: Battleground). If no site is selected, then information for all sites will be included.
Route: For Nutrition Programs, this is an optional way to filter to include data only for a specific route.
Scope of Work: The specific service(s) that you would like include in the report

(Example: Congregate Meals).
Program: The funding Program(s) you would like to include on the report (Example: OAA TIIIE)
Service Detail: Any additional specifications for the service (example: Units, etc.) that can be included in the report.
Newly Enrolled: This filter will allow you to filter for clients who are newly enrolled during the selected date range, or not. The default for this filter is "All", which means it includes both newly enrolled and previously enrolled. Received more than 0 units: This checkbox indicates to only include the clients who are have units associated with them, during the selected date range.
Enrollment Status: Here you can choose to filter based on the status of the enrollments that show up. The default value for this filter is "Enrolled and Disenrolled".
Sort By: This will allow the user to sort the results either by site or by route.
County: This will display the counties associated with the clients enrolled in providers and service sets selected.
Report Export Type: This lists the report output options. Some reports will only have one output option. Typical report output options include PDF or XLS. The Custom Export reports can also be exported to a CSV format file. A CSV file format would be used if the document had too many rows to be exported in excel. There is no maximum limit for CSV files as far as the amount of data that can be exported.
Zip Code: This filter will update with all of the zip codes attached to client's addresses for the specific set of filters that you are searching for.
Received more than zero units: This filter allows users to only include clients who have received greater than zero units in the report period on the report.

The following filters are available on some reports, but not all:
Assigned Staff: Specific staff members who are assigned to the service enrollments for the service set(s) you have filtered for will appear here. You can choose to filter for a specific staff member or leave it as all.
Client: Using this ajax search you can select a specific client to run the report for.
Case Manager Status: This will allow you to filter on active or inactive case managers.
The default for this filter is "All". If left as "All" it will include both active and inactive case managers. The case managers that are included in this report are the case managers associated with the service set(s) you have filtered for.

Disenrollment reason: You can choose one or more reasons for disenrollment to run the report for. If none are selected, the default will be "All".

Information by Report Format

The filters listed above are available on the reports in the following report types. As mentioned above, there are some filters that only show on certain reports. The filters work in combination with each other. This means that the options for certain filters will update depending on which options are chosen. The reports can be generated to the any of the available output options, unless the export option has a limit of how big the file can be. → Excel can only handle so many rows. If you run a report that has more rows than excel allows, the system will give you a notification letting you know that is the case. When this happens you can either pare down the filters, or choose to export as a CSV. CSV files do not have a limit as to how big they can be. There are no "required" filters, although the fewer filters used to run reports, the longer reports will take to be generated.

CLC-SET Report Descriptions

Demographics Analysis Report

Description: Runs summary information and percentages for demographic information collected in CLC-GetCare.

NAPIS Demographic Completion Summary

Description: Prints summary percentages for the selected agencies/scopes of work for all NAPIS required items.

Important Notes: This report will come up blank if all enrolled clients have all required NAPIS fields filled out.

Missing NAPIS Demographic and Functional Assessment Report

Description: Prints a list of consumers, their GetCare ID, the total # of missing NAPIS Demographic items along with an indication of the specific missing Demographic and ADL/IADL items.

Important Note: This report will come up blank if all enrolled clients have all required NAPIS fields filled out.

Missing NAPIS Demographic and Nutritional Assessment Report

Description: Prints a list of consumers, their GetCare ID, the total # of missing NAPIS Demographic items along with an indication of the specific missing Demographic and Nutrition Risk information
Important Note: This report will come up blank if all enrolled clients have all required NAPIS fields filled out.

Missing NAPIS Demographic and all Assessment Report
Description: Prints a list of consumers, their GetCare ID, the total # of missing NAPIS Demographic items along with an indication of the specific missing Demographic, Nutrition Risk and ADL/IADL information.
Important Notes: This report will come up blank if all enrolled clients have all required NAPIS fields filled out.

Missing NAPIS Demographic Report
Description: Prints a list of consumers, their GetCare ID, the total # of missing NAPIS Demographic items along with an indication of the specific missing demographic information. Note: This report will come up blank if all enrolled clients have all required NAPIS fields filled out.

Service Recipients with no care receiver linked
Description: This report is designed to run data for FCSP programs which require a linked caregiver. Prints a list of names, GetCare IDs, and statuses for any records which meet the criteria.

Enrollment Status Verification Report
Description: The report will include any client that has at least one enrollment that has a status of "Enrolled" and at least one enrollment that is "Disenrolled" to allow users to verify that clients are properly enrolled or disenrolled in services. Can filter to specify disenrollment reasons.

Name and Address List
Description: Prints a list of clients meeting the filter, their name, address, telephone and GetCare ID information.

Birthday List
Description: Prints a list of all clients that meet the report criteria with their GetCare ID, Date of Birth, and their age at their next birthday.

Mailing Labels
Description: Prints name and address information for the consumer records that meet the selected filters in a standard Avery 5160 mailing label. Types of mailing labels to select for print out can be filtered for Enrollments or Assessments.
Important Notes: Only clients with a valid mailing address (during the selected date range) for will appear in the report.

Assessment Score Summary Report
Description: This report lists the last assessment date, and last assessment date locked for both the Functional and Nutritional Assessment along with the ADL, IADL, Total (of ADL and IADL) and nutrition risk scores for each client during the date range filtered for.
Important Notes: Clients will only show up on this report if they have assessments due.

Case Manager Workload Report
Description: This report shows the clients and service enrollments and case managers assigned to the enrollment during the date range filtered for.
Important Notes: This report can be run for "inactive" case managers, "active case managers" or the default which is "all" case managers.

Enrollment Status Verification Report
Description: The report will include any client that has at least one enrollment that has a status of "Enrolled" and at least one enrollment that is "Disenrolled" to allow users to verify that clients are properly enrolled or disenrolled in services.
Important Notes: Only clients who have at least one enrollment with a status of disenrolled and another enrollment with a status of disenrolled will show on the report.

Disenrollment Reason- Verification Report
Description: Similar to the Enrollment Status Verification report, the goal of this report is to be able to look at all of the enrollments for a client and see if they have one or more enrollment that is marked as "Disenrolled", but have other enrollments that are left as "Enrolled". The user should be able to verify that all enrollments for each client have the correct status.

Additional Learning Resources

Available from the GetCare Help Library:

Category - CLC Set:

Adding a Client Record + CLC Set Reports
Quick Guide Duplicate Client Records and Requesting a Record Merge
Full Client Search
Creating and Opening an Assessment in GetCare