



# JSA CALLTRACKER.NET

Product Documentation

Patient Care Intervention Center

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## 2 GENERAL ORIENTATION

### 2.1 CALLTRACKER.NET OVERVIEW

CallTracker.NET is an application that utilizes a web based user interface that makes adding and editing patient sessions fast and efficient. The Application involves Call Coordinators, Administrators, Doctors, AdminDoctors and System Administrators. System Administrator has the complete privilege of changing the system settings at any time. This application provides a user interface that allows users to input all the session details to create a new session, helps in managing and auditing the sessions and a dashboard to help performance measurement. The application also supports the notification services to users via text and voice messages.

### 2.2 SYSTEM REQUIREMENTS

CallTracker.NET uses the Software as a Service (SaaS) model to provide the web service and only requires a web browser to access the application. No additional 3<sup>rd</sup> party client application is required to be installed on a user's workstation.

The following web browsers have been tested and are supported:

- Microsoft® Internet Explorer 10 and above
- Mozilla® Firefox 3.0 and above
- Google® Chrome 5.0 and above
- Opera® 9.0 and above
- Opera® and above for Mobile Phones

### 3 GETTING STARTED

#### 3.1 CALLTRACKER LOG-IN PAGE

The CallTracker.NET login page can be accessed via the URL [jsacalltracker.com](http://jsacalltracker.com). The URL directs the user to the login page to verify authentication. This is the first step in accessing the application. It is required anytime a user's session expires (session will expire when the user becomes inactive for more than 60 seconds). The "Remember me next time" checkbox, shown as (#4) in Figure 2.1 can be used to save a user's username for the next time they access the application.

##### 3.1.1 USER LOGIN

Users can log into the system by entering their username or email address in the "Username/Email" field (#1) and their password in the password input field (#2), then clicking on the "Login" button (#5) as shown in Figure 2.1. On successful login, users will land on the portal page. If the system is unable to authenticate a user successfully, an "Invalid username and/or password. Please try again" (#1) message will be displayed in red in the login screen as in Figure 2.2.

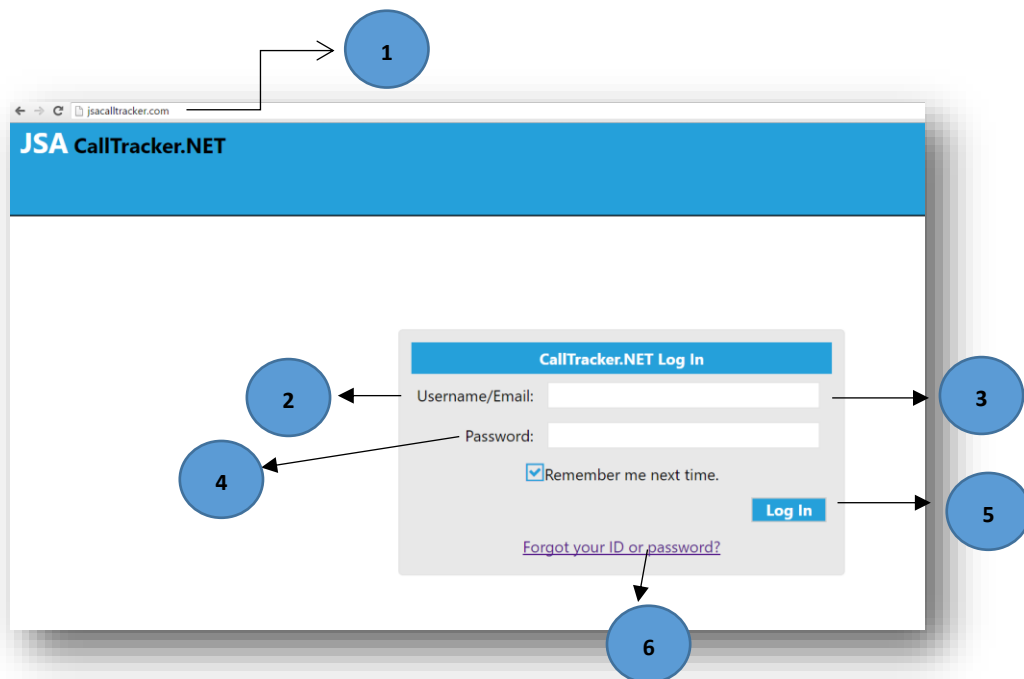


Figure 3:1 User Login

##### 3.1.2 RESET PASSWORD – FIRST TIME LOGIN & FORGET PASSWORD

A user account has to be created by system admin to be able to log into the system. If this is the first time the account is being accessed, a user's password can be reset by clicking on the "Forgot your ID or password" (#2) hyperlink as

shown in Figure 2.2, at the bottom of the login window as shown below. A user's password can also be reset at any time using the "Forgot your ID or password" link.

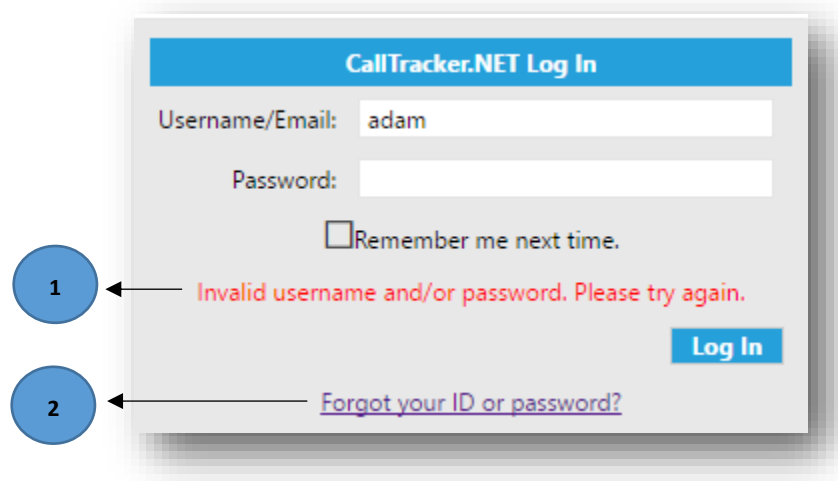


Figure 3:2 Invalid Username/Password

Clicking on the "Forgot your ID or password" link brings up the reset password page as shown in Figure 2.3

The Reset Password feature is intended for:

- Initially setting a user's password for a new account
- Resetting a user's password, if they have forgotten their existing passwords

**Step 1:** To reset a password, enter a valid email address (#1) that is registered in the system, in the text area as shown in Figure 2.3.



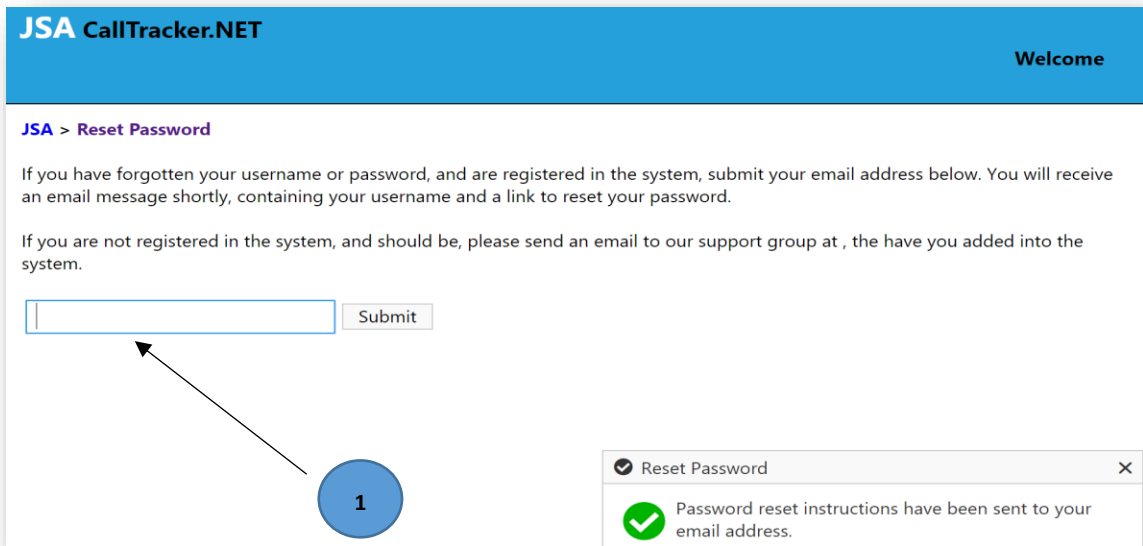


Figure 3:3 Enter the email address to reset the password

**Step 2:** Once submitted and validated with the user account in the system, an email (#2) is sent to the user with a link to reset their password.

An example email is as shown in Figure 2.4.

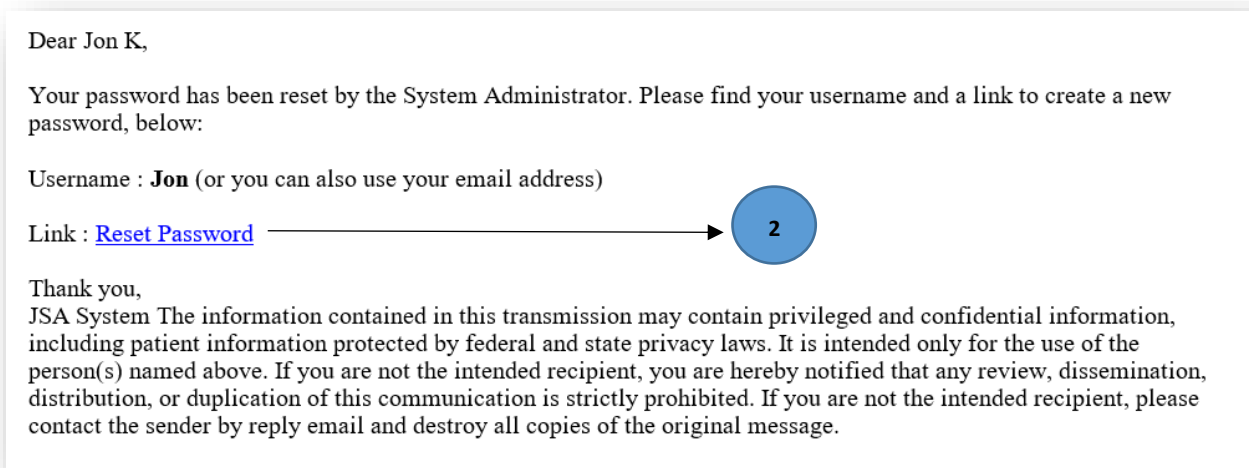


Figure 3:4: Email with Reset Password link

**Step 3:** After loading the page from the verification link, the user is prompted to enter a new password as shown in Figure 2.5. When a user clicks the “Submit Changes” button (#3), the new password is created and the user is redirected to the login page, where the new password can be used to log in to the system.

StreetEMR > Reset Password

Reset password for user : **athopegowda**

New password :

Confirm new password :

Submit Changes → 3

Figure 3:5 Enter new password to reset

After logging in, the user must select the site they are working for from the dropdown list of “Select the division for the session” and click “Continue” button (#1) as shown in Figure 2.6.

CallTracker.NET

Select Division

Select the division for this session: JSA - Houston ▼

Continue → 1

Figure 3:6 Select Site

### 3.2 CALLTRACKER DASHBOARD

Users will land on the “Portal” when they are successfully logged in. Portal page is a dashboard made up of seven visualizations which are as shown below:

- Average Session Count by “Call In Time”
- Average Wait Time By Hour of Day
- Average Wait Time by Client
- Average Time Spent By Service Type
- New (Emergent) vs Follow-up (Urgent) Sessions
- Session Counts By “Call Status”
- Average Wait Time
- Sessions By Client
- Average Wait Time By Doctor
- Average Session Duration By Doctor (mins)

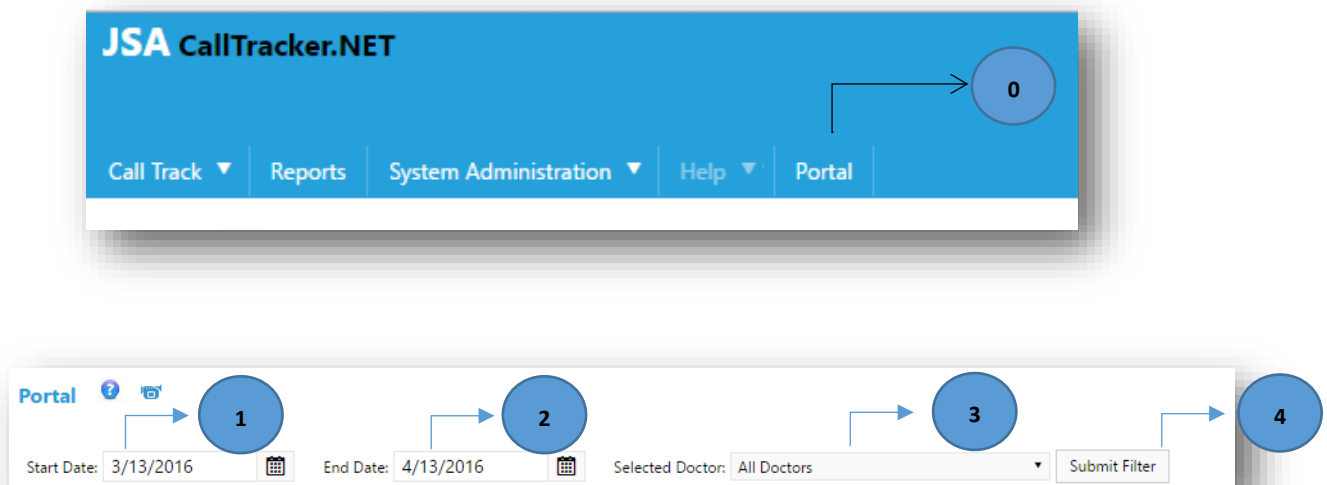
The visuals can provide business insights through graphical presentation of vital managerial data points. (Contents of the visuals will be explained in detail below.)

By default, the dashboard will show data looking one month back from the current date. But users have the option to reset “Start Date” (#1) and “End Date” (#2) to see the data within a desired time frame. Upon clicking the “Submit Filter” (#4) users will get the visualization pertaining to the date range and selected doctors.

All users have access to the dashboard, but data will be filtered out for each user based on their roles in the system, as described below:

- **System Administrators, Administrators and AdminDoctors:** These three application roles have privileges to view the aggregated dashboard of all the doctors and dashboard of any selected doctor (#3).
- **Doctors:** Will only have access to the aggregation view and their own data.
- **Call coordinators and users:** Will only have access to the aggregated dashboard.

Portal can be accessed at any time by clicking on the portal menu in the navigation bar on top of the page (#0).



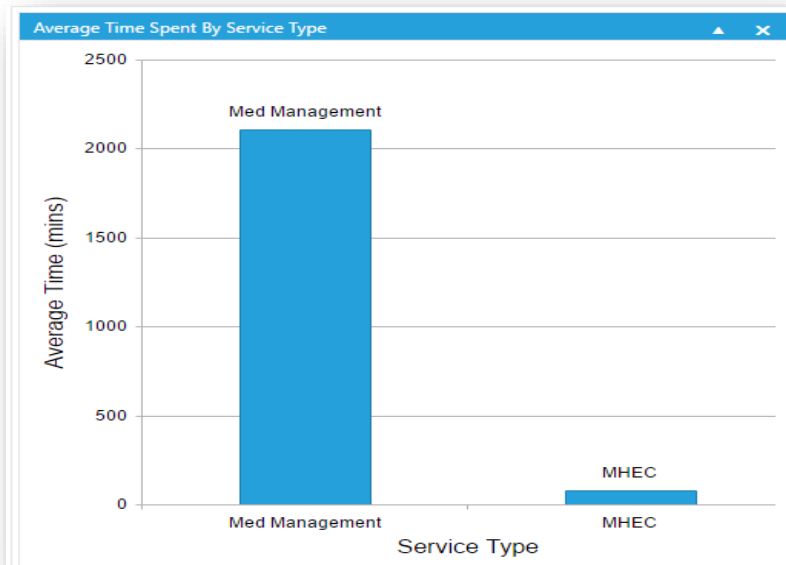


Figure 3:7 Average Time Spent by Service Type

The bar chart in Figure 2.6 is “Average Time Spent by Service Type” with x-axis as “Service Type” and y-axis as “Average Time”. The purpose of this visual is to show the average duration (in minutes) of a session for each service type in the selected time period for a specified doctor/all doctors. In the example above, we are showing the graph for the data from March 11 2016 to April 11 2016. Across all doctors, there were only 2 service types being used, and the average session duration for Med Management is xxx minutes and MHEC is xxx minutes.

When the user hovers the mouse on one of the bars, more detailed data points related to the Service Type will show up on a tooltip.

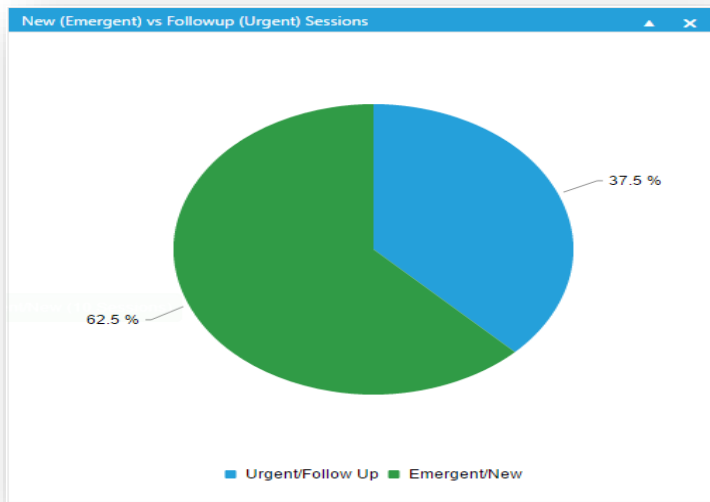


Figure 3:8 New (Emergent) vs Followup(Urgent) Sessions

The Pie chart in Figure 2.7 depicts the percentage ratio of “New (Emergent) vs Follow-up (Urgent) Sessions” handled by all doctors. The parameters are differentiated by the colors. Green represents the Emergent/New and Blue represents the Urgent/Follow-up. In the example above, we are showing from March 11 2016 to April 11 2016 across all the doctors for all new and follow up sessions.

When the user hovers the mouse on one of the region in the pie chart, more detailed data description related to the percentage of new and follow up will show up on a tooltip.

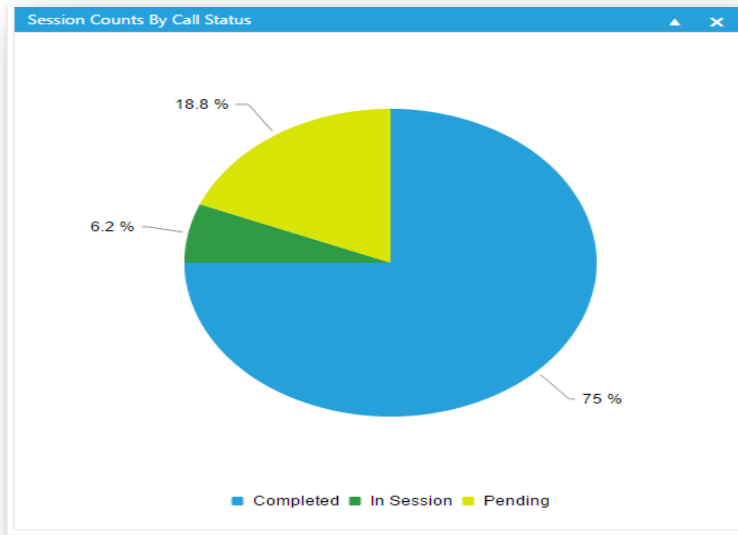


Figure 3:9 Session Counts by "Call Status"

The Pie chart in Figure 2.8 depicts the percentage of Completed, In Session and Pending sessions handled by all the doctors. The parameters are differentiated by the colors. The light green represents the Pending session, the dark green shows the In Session and the blue represents the Completed session. In the example above, we are showing from March 11 2016 to April 11 2016 across all doctors for all session statuses.

When the user hovers the mouse on one of the regions in the pie chart, more detailed data description related to the percentage of "Call Status" and the session counts will show up on a tooltip.

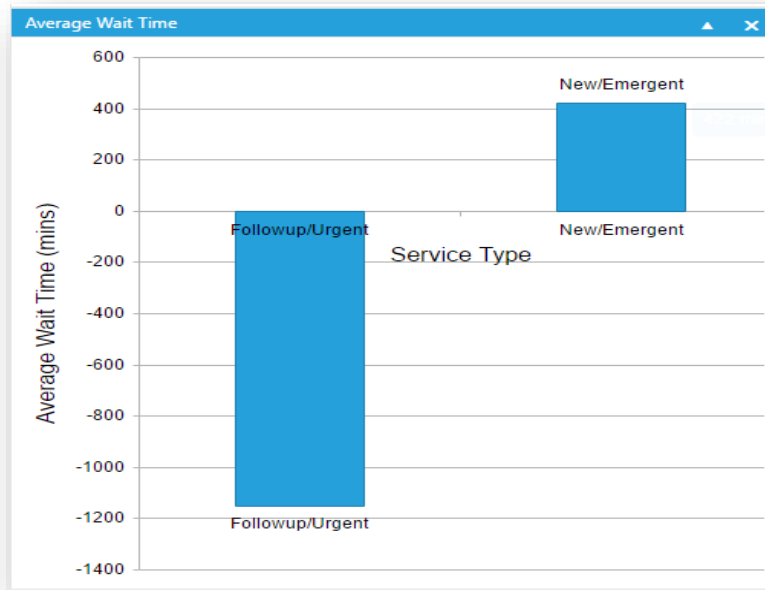


Figure 3:10 Average Wait Time

The bar chart in Figure 2.9 is “Average Wait Time Spent by Service Type” with x-axis as “Service Type” and y-axis as “Average Time”. The purpose of this visual is to show the average wait time (in minutes) of a session for each service type in the selected time period for a specified doctor/all doctors. In the example above, we are showing March 11 2016 to April 11 2016 across all doctors.

When the user hovers the mouse on one of the bars, more detailed data descriptions related to the average time and the service type show up on a tooltip.

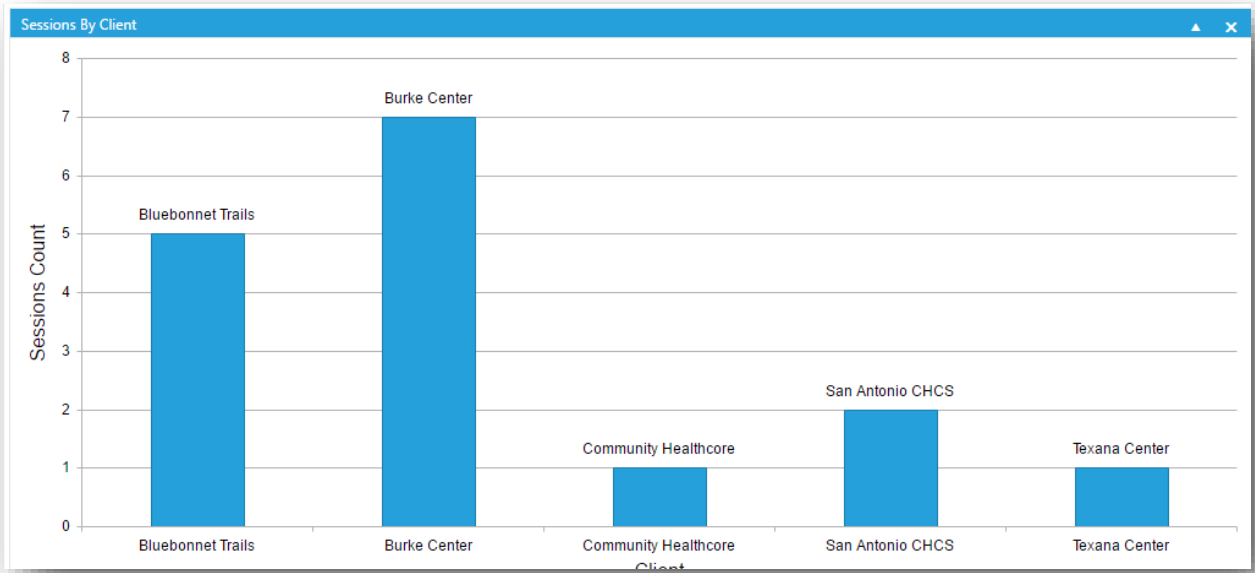


Figure 3:11 Session by Client

The bar chart in Figure 2.10 is “Session Count by Client” with x-axis as “Client” and y-axis as “Session Count”. The purpose of this visual is to show the average duration (in minutes) of a session for each service type in the selected time period for a specified doctor/all doctors. In the example above, we are showing from March 11 2016 to April 11 2016 across all doctors for different session counts of each Client.

When the user hovers the mouse on one of the bars more detailed data information related to the sessions will show up on a tooltip.



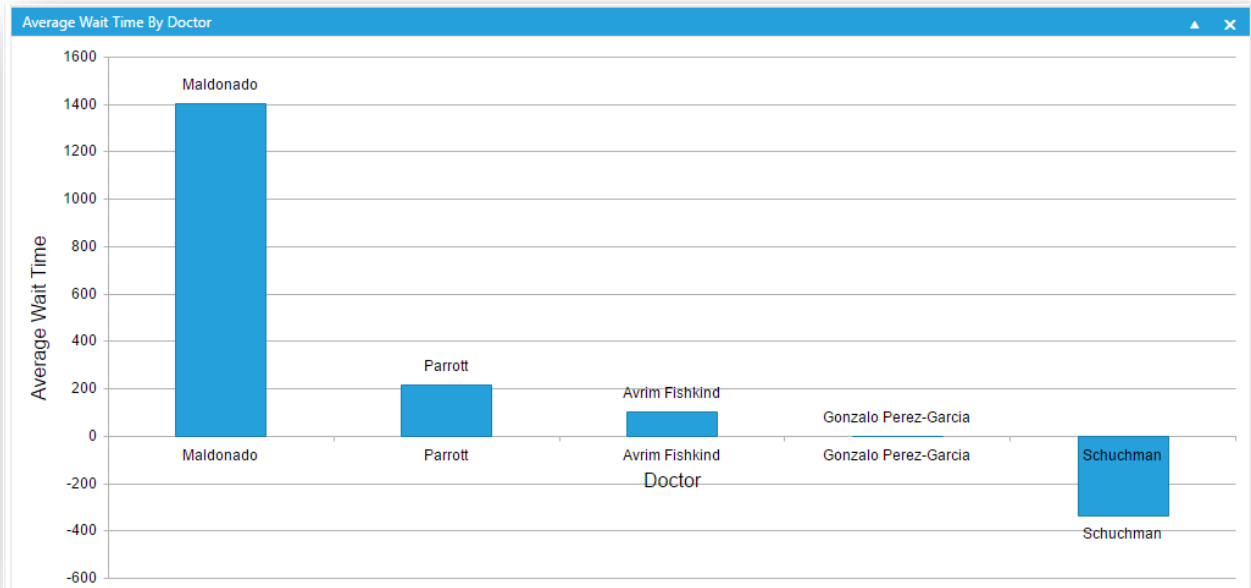


Figure 3:12 Average Wait Time By Doctor

The bar chart in Figure 2.11 is “Average Wait Time By Doctor” with x-axis as “Doctor” and y-axis as “Average Wait Time”. The purpose of this visual is to show the average wait time (in minutes) for the session of each doctor in the selected time period. In the example above, we are showing from March 11 2016 to April 11 2016 across all doctors.

When the user hovers the mouse on one of the bars more detailed data points related to the average wait time will show up on a tooltip.

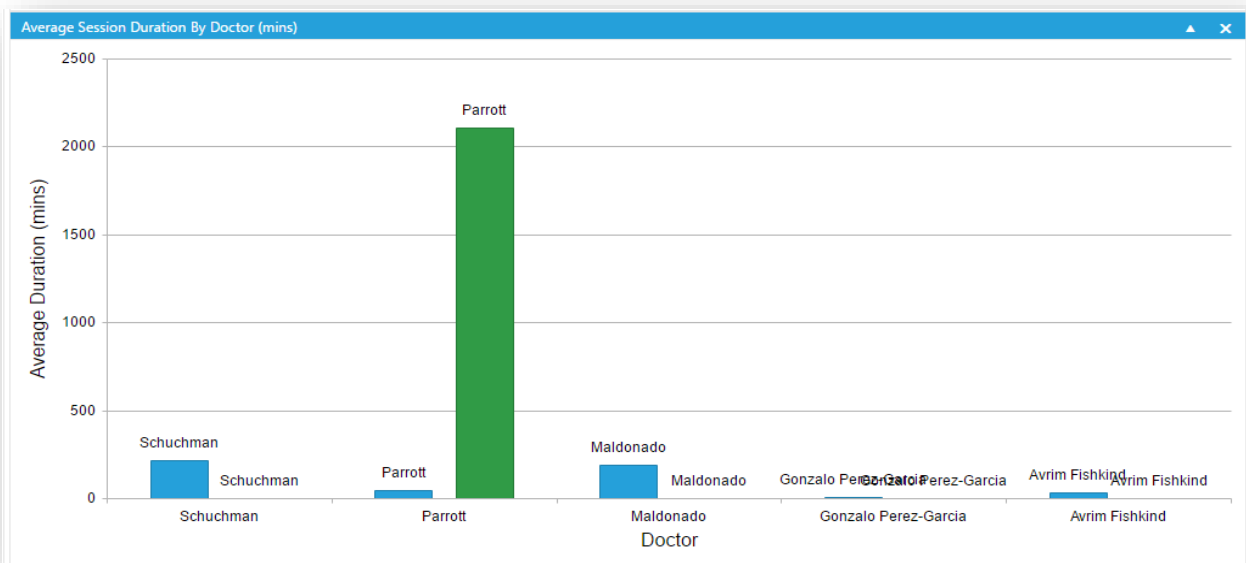


Figure 3:13 Average Session Duration By Doctor

The bar chart in Figure 2.12 is “Average Duration By Service Type” with x-axis as “Doctor” and y-axis as “Average Duration”. The purpose of this visual is to show the average duration (in minutes) of a session for each Doctor in the selected time period. In the example above, we are showing from March 11 2016 to April 11 2016 across all doctors.

When the user hovers the mouse on one of the bars more detailed data points for average waiting time will show up on a tooltip.

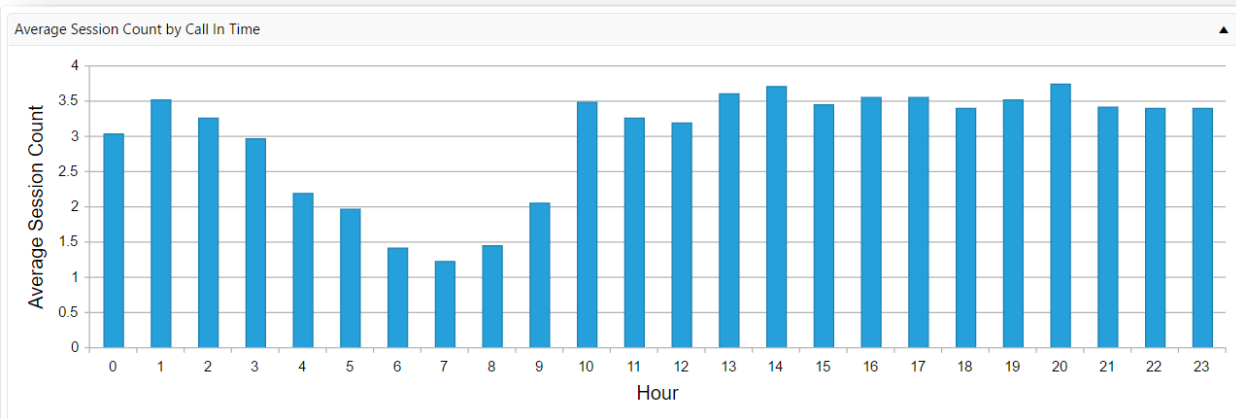


Figure 3:14 Average Session Count by “Call In Time”

The bar chart in Figure 2.13 is “Average Session Count by “Call In Time”” with x-axis as “Hour” and y-axis as “Average Session Count”. The purpose of this visual is to show the average sessions per “Call In Time”, in the selected time period. In the example above, we are showing March 11 2017 to April 11 2017.

When the user hovers the mouse on one of the bars more detailed data points for average session count will show up on a tooltip.

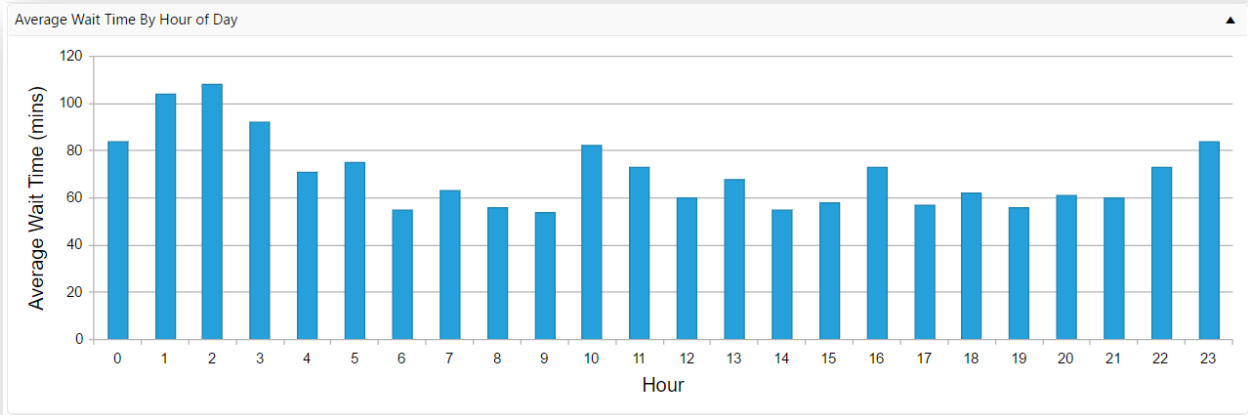


Figure 3:15 Average Wait Time By Hour of Day

The bar chart in Figure 2.14 is “Average Wait Time By Hour of Day” with x-axis as “Hour” and y-axis as “Average Wait Time (mins)”. The purpose of this visual is to show the average wait time across all clients every hour of the day, in the selected time period. In the example above, we are showing March 11 2017 to April 11 2017.

When the user hovers the mouse on one of the bars more detailed data points for average session count will show up on a tooltip.

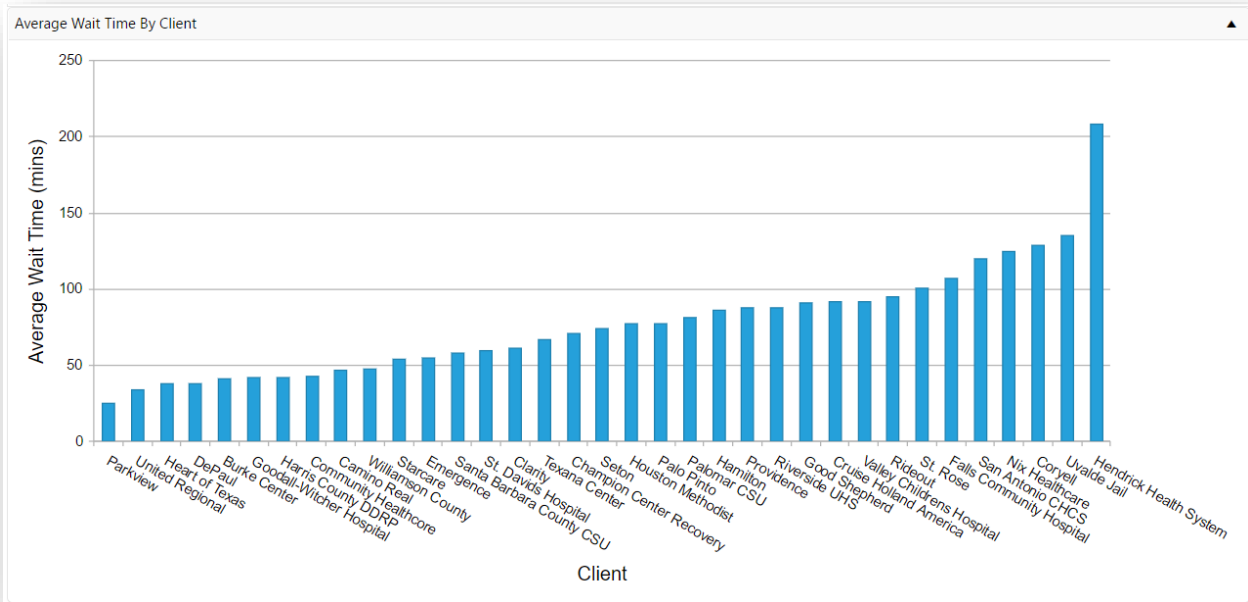


Figure 3:16 Average Wait Time By Client

The bar chart in Figure 2.15 is “Average Wait Time By Client” with x-axis as “Client” and y-axis as “Average Wait Time (mins)”. The purpose of this visual is to show the average wait time across all clients in the selected time period. In the example above, we are showing March 11 2017 to April 11 2017.

When the user hovers the mouse on one of the bars more detailed data points for average session count will show up on a tooltip.

## 4 GRID FEATURES

### 4.1 GRID ORGANIZATION

Call Tracker uses the grid organizational structure to make the user interface interactive by enabling filtering, drill down, and collapsing features. All the grid organizational features will be shown at the top left corner of the screen (beneath the page name), on the grid header or under the “Edit/View” on the left side of the grid. As shown in Figure 3.0 users can resize, reorder and filter the columns (#1), group columns (#2), and apply grid actions (#3).

**JSA CallTracker.NET**

Call Track ▾ Reports ▾ System Administration ▾ Help ▾ Portal

**Case Review & Audits** ? 📄

Column resizing  Column reorder  No Filter  Column Filter  Advanced Filter

Select date filter : 1/19/2016 📅 4/18/2016 📅 Submit

Drag a column header and drop it here to group by that column

Edit/View	Case Audit	Session ID	Service Type	Patient Name	Patient Type	Client name	Client Location	Call In Time	Session Start Time	Session End Time	Time Of Fax	Expected Duration
<a href="#">[View]</a>	8 yes_3 no_1	8	MHEC	user eleven	Adult	Bluebonnet Trails	Georgetown EOU	3/22/2016 4:05:31 PM			4:05PM	60
<a href="#">[View]</a>	Omitted	7	MHEC	test user	Adult	Bluebonnet Trails	Georgetown EOU	3/22/2016 3:51:03 PM	3/22/2016 3:52:01 PM	3/22/2016 9:38:36 PM	10:00AM	60
<a href="#">[View]</a>	Omitted	6	Med Management	ksm test	Adult	Burke Center	Burke Center MHEC	3/22/2016 3:42:46 PM	3/22/2016 8:17:44 PM	3/23/2016 9:20:13 AM	1:00PM	60

Figure 4:1 Grid Organization

#### 4.1.1 COLUMN RESIZING AND REORDERING

Users can resize the columns in the grid by checking “Column resizing” and reorder the columns by checking “Column reorder” (checked by default). Column reorder and resize are temporary actions when the user stays on the page. Once the user leaves the page the settings are changed back to system defaults.

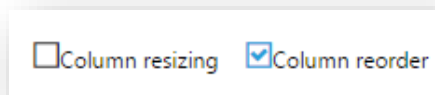


Figure 4:2 Checking Column resizing/ Column reorder

Drag a column header and drop it here to group by that column

+ Add New User

<input type="checkbox"/>	Edit	ID	User Name	Is System Admin	First Name	Middle Initial
<input type="checkbox"/>	[Edit]	2	kmahata	<input checked="" type="checkbox"/>	Kallol	S
<input type="checkbox"/>	[Edit]	3	wyancy	<input checked="" type="checkbox"/>	Will	
<input type="checkbox"/>	[Edit]	4	ebello	<input type="checkbox"/>	Elizabeth	
<input type="checkbox"/>	[Edit]	1003	athopegowda	<input checked="" type="checkbox"/>	Arpitha	
<input type="checkbox"/>	[Edit]	2003	afishkind	<input type="checkbox"/>	Avrim	
<input type="checkbox"/>	[Edit]	2004	gperez-garcia	<input type="checkbox"/>	Gonzalo	

Figure 4:3 Before Column Resizing

Drag a column header and drop it here to group by that column

+ Add New User

<input type="checkbox"/>	Edit	ID	User Name	Is System Admin	First Name	Middle Initial
<input type="checkbox"/>	[Edit]	2	kmahata	<input checked="" type="checkbox"/>	Kallol	S
<input type="checkbox"/>	[Edit]	3	wyancy	<input checked="" type="checkbox"/>	Will	
<input type="checkbox"/>	[Edit]	4	ebello	<input type="checkbox"/>	Elizabeth	
<input type="checkbox"/>	[Edit]	1003	athopegowda	<input checked="" type="checkbox"/>	Arpitha	
<input type="checkbox"/>	[Edit]	2003	afishkind	<input type="checkbox"/>	Avrim	
<input type="checkbox"/>	[Edit]	2004	gperez-garcia	<input type="checkbox"/>	Gonzalo	

Figure 3.3: After Column Resizing

Drag a column header and drop it here to group by that column

+ Add New User

<input type="checkbox"/>	Edit	ID	User Name	Is System Admin	First Name	Middle Initial
<input type="checkbox"/>	[Edit]	4	ebello	<input type="checkbox"/>	Elizabeth	
<input type="checkbox"/>	[Edit]	2003	afishkind	<input type="checkbox"/>	Avrim	
<input type="checkbox"/>	[Edit]	2004	gperez-garcia	<input type="checkbox"/>	Gonzalo	
<input type="checkbox"/>	[Edit]	2	kmahata	<input checked="" type="checkbox"/>	Kallol	S
<input type="checkbox"/>	[Edit]	3	wyancy	<input checked="" type="checkbox"/>	Will	
<input type="checkbox"/>	[Edit]	1003	athopegowda	<input checked="" type="checkbox"/>	Arpitha	

Figure 4:4 Before Column Reordering

Drag a column header and drop it here to group by that column

+ Add New User

<input type="checkbox"/>	Edit	ID	User Name	First Name	Is System Admin	Middle Initial
<input type="checkbox"/>	[Edit]	4	ebello	Elizabeth	<input type="checkbox"/>	
<input type="checkbox"/>	[Edit]	2003	afishkind	Avrim	<input type="checkbox"/>	
<input type="checkbox"/>	[Edit]	2004	gperez-garcia	Gonzalo	<input type="checkbox"/>	
<input type="checkbox"/>	[Edit]	2	kmahata	Kallol	<input checked="" type="checkbox"/>	S
<input type="checkbox"/>	[Edit]	3	wyancy	Will	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	[Edit]	1003	athopegowda	Arpitha	<input checked="" type="checkbox"/>	

Figure 4:5 After Column Reordering

When “Column Resizing” is not checked, the width and height of the columns are set to system default as shown in Figure 3.2. Users can check on column resizing to override the system default and to set all the columns width and height to the same value as shown in Figure 3.3. When user chooses to reorder the columns, they should drag and drop a column to the desired position on the grid as shown in Figure 3.4. When dragging the column, the grid is altered as shown in Figure 3.5.

#### 4.1.1.1 GRID FILTERING

Call Tracker uses grid filtering which enables the user to dynamically filter the records displayed in the grid by any column(s) name depending on how they want to explore the data.

##### 4.1.1.1.1 DATE AND TIME FILTER

Users can select the start and end date as in Figure 3.6 to sort the data to be displayed. The Start Date is defaulted to three months before the end date. But users always have the option to reset “Start Date” and “End Date” to see data within the desired time frame.



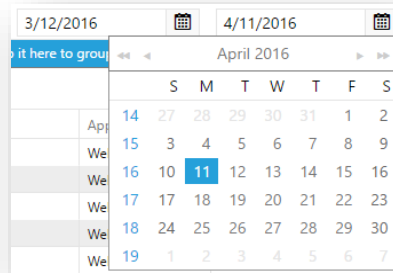
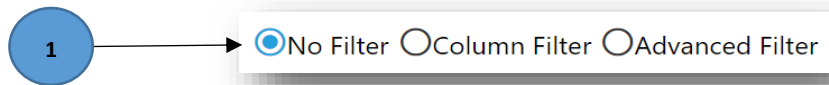


Figure 4:6 Date and time filter

#### 4.1.1.1.2 NO FILTER

On selecting the radio button “No filter” (#1) the data gets displayed on the grid without any filter criteria as shown in Figure 3.7.



Drag a column header and drop it here to group by that column			
+ Add new record			
ID	User	Application Type	Login Time

Figure 4:7 No Filter

#### 4.1.1.1.3 COLUMN FILTER

Users on selecting the radio button “Column Filter” (#1) as shown in Figure 3.8 a blank row will be added below the column header giving the users option to choose which columns to filter and what rules to apply. By clicking on the funnel shaped button (#2) next to the box, users can specify the rule to apply to that column by selecting one of the options from the dropdown list shown. The user can always reset rules by clicking on the “Clear Filter” button (#3). The clear filter button pops up only when selecting the column filter.

The filtering is dependent on the type of data being sorted. Character type data have more features compared to the Number and Date type data.

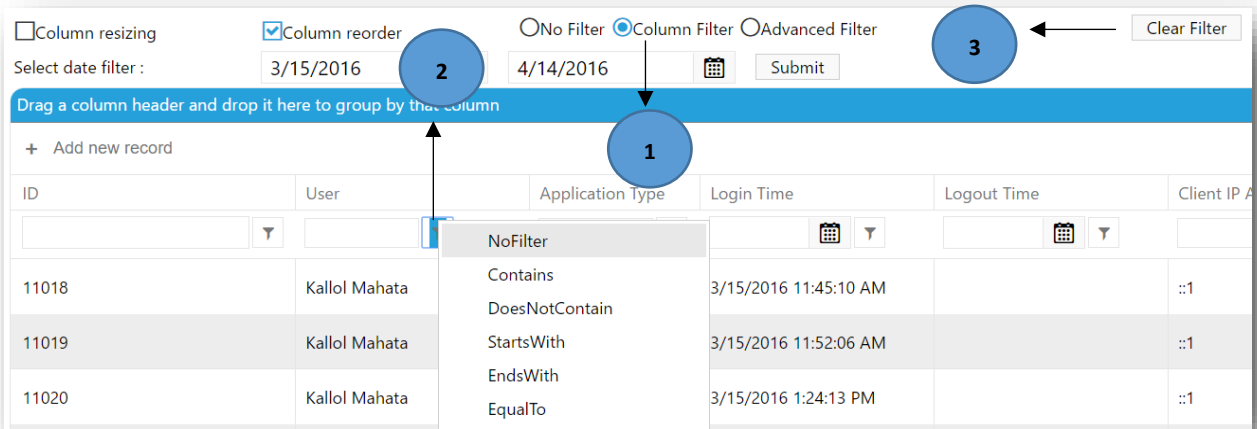


Figure 4:8 On click of the column filter

As shown in figure 3.9 and 3.10, the web framework offers more possibilities for the user to sort the data in the grids.

The image shows a software interface with a table and an open dropdown menu. The table has two columns: 'First Name' and 'Admin'. The 'Admin' column contains the following rows: 'Admin', 'Call Coordinator', 'Doctor', 'admin', 'cc', and 'doctor'. The 'admin' and 'doctor' rows are highlighted in grey. A dropdown menu is open over the 'Admin' column, listing various filtering options. The 'NoFilter' option is selected and highlighted with a blue border. The other options in the dropdown are: 'Contains', 'DoesNotContain', 'StartsWith', 'EndsWith', 'EqualTo', 'NotEqualTo', 'GreaterThan', 'LessThan', 'GreaterThanOrEqualTo', 'LessThanOrEqualTo', 'Between', 'NotBetween', 'IsEmpty', 'NotIsEmpty', 'IsNull', and 'NotNull'.

First Name	Admin
	Admin
	Call Coordinator
	Doctor
	admin
	cc
	doctor

- NoFilter
- Contains
- DoesNotContain
- StartsWith
- EndsWith
- EqualTo
- NotEqualTo
- GreaterThan
- LessThan
- GreaterThanOrEqualTo
- LessThanOrEqualTo
- Between
- NotBetween
- IsEmpty
- NotIsEmpty
- IsNull
- NotNull

- NoFilter
- Contains
- DoesNotContain
- StartsWith
- EndsWith
- EqualTo
- NotEqualTo
- GreaterThan
- LessThan
- GreaterThanOrEqualTo
- LessThanOrEqualTo
- Between
- NotBetween
- IsEmpty
- NotIsEmpty
- IsNull
- NotIsNull

Figure 4:9 Sorting options for character type data

ID	User Name
2021	
2022	
2023	
2024	
2026	
2033	

- NoFilter
- EqualTo
- NotEqualTo
- GreaterThan
- LessThan
- GreaterThanOrEqualTo
- LessThanOrEqualTo
- IsNull
- NotNull

- NoFilter
- EqualTo
- NotEqualTo
- GreaterThan
- LessThan
- GreaterThanOrEqualTo
- LessThanOrEqualTo
- IsNull
- NotNull

Figure 4:10 Sorting options for number type data

#### 4.1.1.1.4 ADVANCED FILTER

Users on selecting the radio button “Advanced Filter” (#0) as shown in Figure 3.9 a window pops up with multiple buttons as shown below. By clicking on the button (#1) next to the box, users can select the column name and specify the rule to apply to that column by selecting one of the options from the dropdown list (#2). The user can set rules by clicking on the “Apply Filter” button (#3).

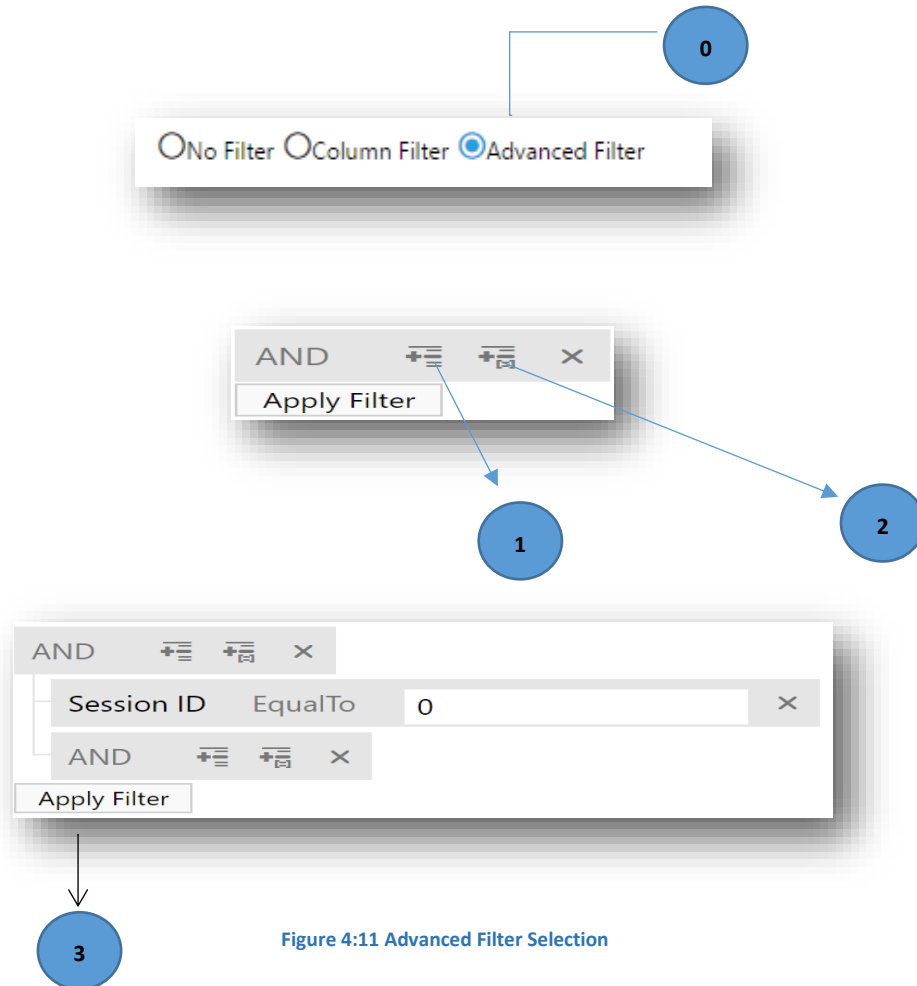


Figure 4:11 Advanced Filter Selection

#### 4.1.1.1.5 GRID SORTING

Users can visualize the data in an organized way through grid sorting as shown in Figure 3.5. Users can right click on any of the column name and select the sorting method. The data can be sorted by using “Sort Ascending” or in “Sort Descending” (#1) as below. Users also have the option of performing multi-column sorting by clicking on “Columns” (#2) and by checking the required columns from the dropdown list.

Users can reset sorting by clicking on the “Clear Sorting” (#3). Users can group the data by selecting on the “Group By” (#4), and they can always reset by clicking “Ungroup” (#5).

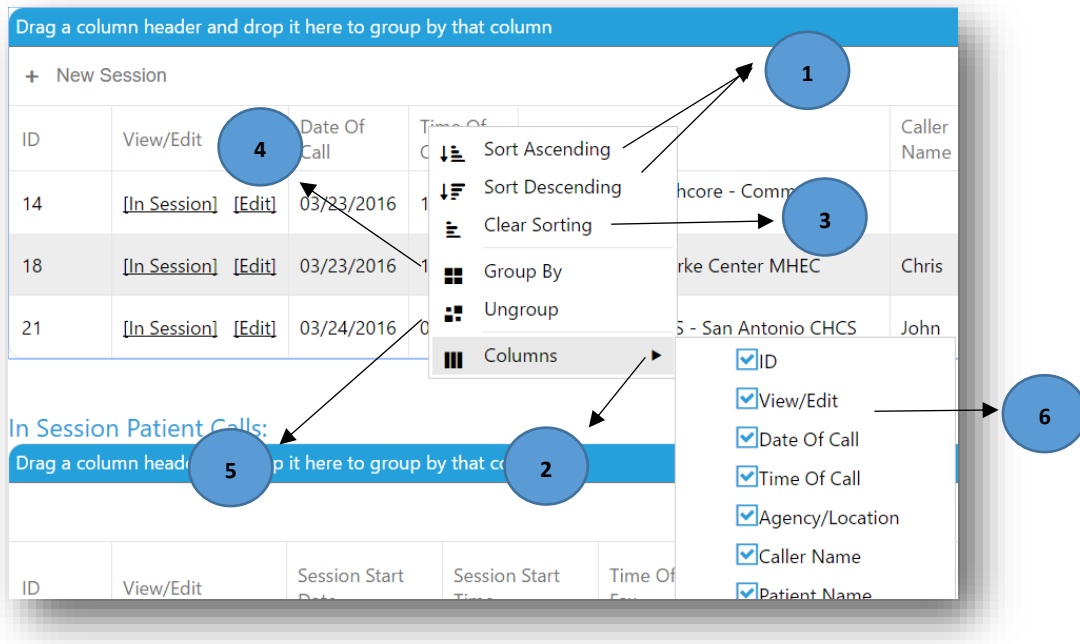


Figure 4:12 Pending and In Session Calls

#### 4.1.1.1.6 GRID GROUPING

Call Tracker uses the approach of grid grouping which simplifies the grouping of data by the specific field. Users can drag and drop a column header to group into a certain field (as shown in Figure 3.6). In the image below, the data is grouped by the Date of Call and Agency/Location.

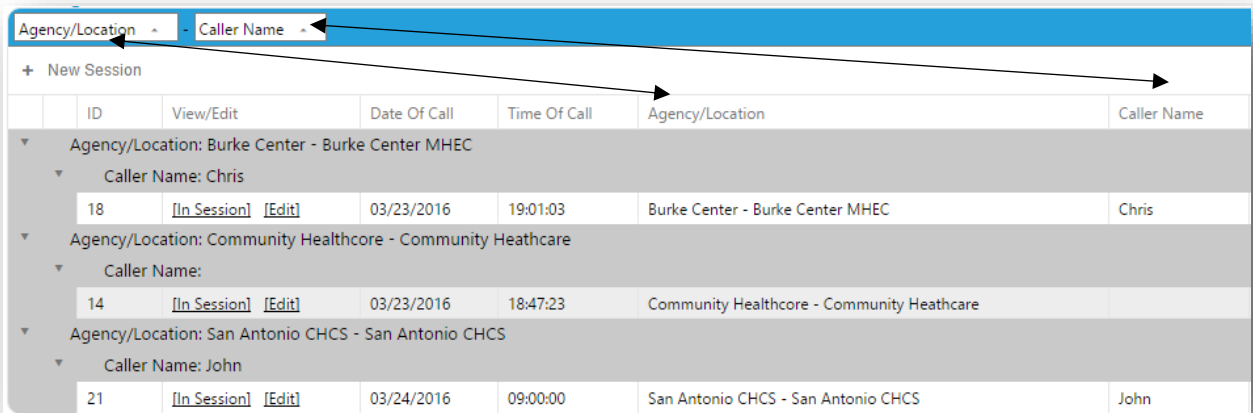


Figure 4:13 Pending and In Session Calls

## 4.2 GRID ACTIONS

All the grid organization features will be shown at the left top corner of the grid (beneath the page name), on the grid header, or under the “Edit/View” on the left side of the grid. The “+ Add new record” button is always placed on the left top corner of the grid and the “Delete” button is always located to the right end of each record (on the grid). When the button is clicked, the records will either be added or deleted and the grid sizes will be altered as per the actions. The column ordering, resizing and filtering buttons are always placed at the top left corner of the screen and a right click on the column header in the grid gives the user all sorting options. Users can drag and drop a column to the desired position on the grid. On dragging the column, the grid is altered (as shown in Figure 4:5).



## 5 CALL TRACK

### 5.1 CALL CENTER

The call center mainly carries out the functionality of creating a new session, moving pending session to in session when the session starts, and then moving in session to complete when the session ends. User also has the option of moving the pending session to no show and the in session back to pending/no show in case client drops the call.

---

#### 5.1.1 ADDING A NEW SESSION

**Step 1:** Click on “+ New Session” (#1) to bring up the window with the “Session Information”, ““Call Status” Audit” and “Workflow” tabs. Under “Session Information” users can fill in the “Session Creation Information” from left to right or from top to bottom. Fill in the “Call Status” field by selecting a value from the dropdown list as below. The “Call Status” for a newly created session is always defaulted to “Pending”. By default, the ““Call In Time”” is auto filled with the current date and time. (“Call In Time” is a mandatory field). Users can change ““Call In Time”” either by typing in the date and time in the textbox or by clicking on the date and time picker as shown in Figure 4.0. Users also have the option of quickly changing the date and time by hovering over the part of the date and time and scroll up and down to add or subtract a time unit.

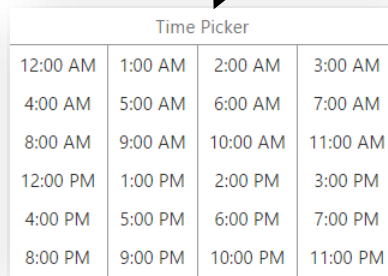
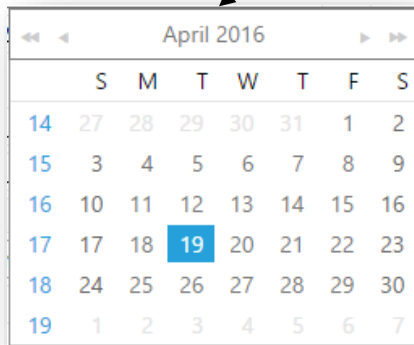
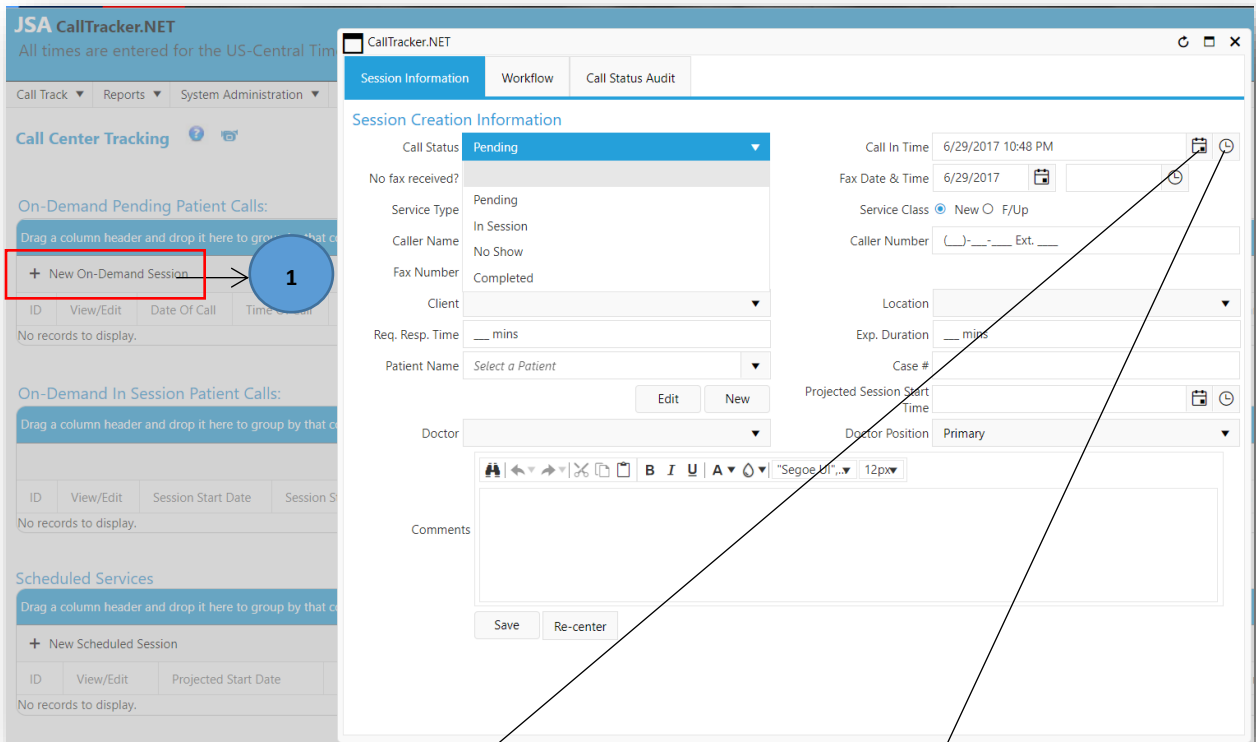


Figure 5:1 Adding a new session

**Step 2:** Users can either Check or Uncheck the “No fax received?”, if fax is not received then users can check the “No fax received?” and can come back and edit later. On the right-hand side, users can also fill in the “Fax Date & Time” in the same manner. Fax time is not a required entry for the Doctor to fill in.

**Case 1:** When “No fax received?” is checked the “Fax Date & Time” will be disabled.

The screenshot shows the 'Session Creation Information' form in the CallTracker.NET application. The 'Call Status' is set to 'Pending'. The 'No fax received?' checkbox is checked and highlighted with a red box. The 'Fax Date & Time' field is disabled. Other fields include 'Service Type', 'Caller Name', 'Fax Number', 'Client', 'Req. Resp. Time', 'Patient Name', 'Doctor', 'Call In Time', 'Service Class', 'Caller Number', 'Location', 'Exp. Duration', 'Case #', 'Projected Session Start Time', and 'Doctor Position'. A rich text editor for 'Comments' is at the bottom.

Call Status	Pending	Call In Time	6/29/2017 10:48 PM
No fax received?	<input checked="" type="checkbox"/>	Fax Date & Time	6/29/2017
Service Type		Service Class	New <input checked="" type="radio"/> F/Up <input type="radio"/>
Caller Name		Caller Number	( ) - - - Ext. - - -
Fax Number	( ) - - -	Location	
Client		Exp. Duration	__ mins
Req. Resp. Time	__ mins	Case #	
Patient Name	Select a Patient	Projected Session Start Time	
Doctor		Doctor Position	Primary

Figure 5:2 No fax received is checked

**Case 2:** When “No fax received?” is unchecked the Fax date is defaulted to today’s date and the user can always modify either by typing in the date and time in the textbox or by clicking on the date and time picker (Figure 4.3). Users also have the option of quickly changing the date and time by hovering over the part of the date and time while scrolling up and down using the mouse scroller to add or subtract a time unit.

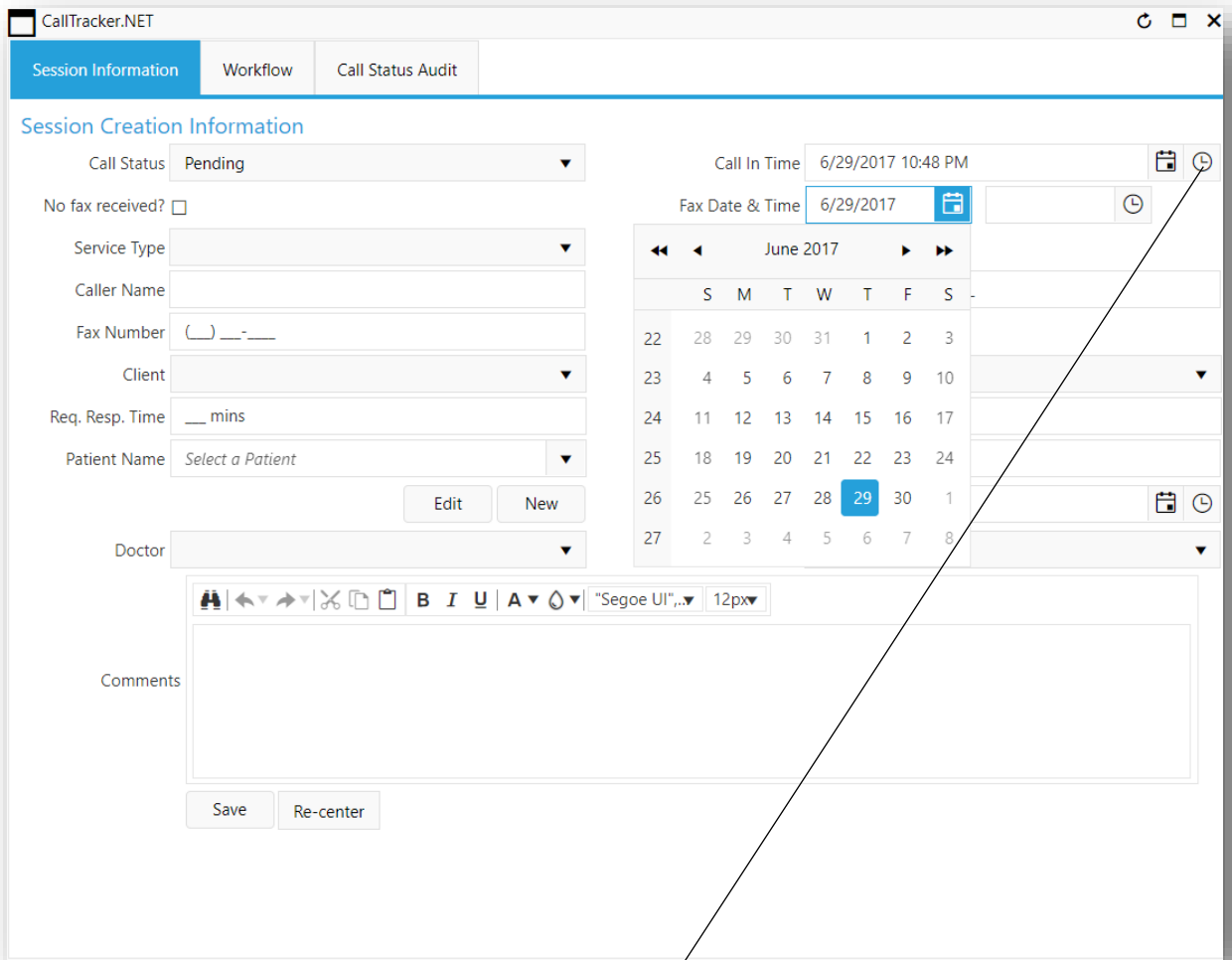


Figure 5:3 No fax received is unchecked

Time Picker			
12:00 AM	1:00 AM	2:00 AM	3:00 AM
4:00 AM	5:00 AM	6:00 AM	7:00 AM
8:00 AM	9:00 AM	10:00 AM	11:00 AM
12:00 PM	1:00 PM	2:00 PM	3:00 PM
4:00 PM	5:00 PM	6:00 PM	7:00 PM
8:00 PM	9:00 PM	10:00 PM	11:00 PM

**Step 3:** Select the “Service Type” from the dropdown list as shown below. Then select “New” or “F/up” from “Service Class” on the right. If no selection is made the service class is always defaulted to “New”. (“Service Type” and “Service Class” are both mandatory fields.)

The screenshot shows the 'Session Creation Information' form in the CallTracker.NET application. The form is divided into several sections. At the top, there are tabs for 'Session Information', 'Workflow', and 'Call Status Audit'. The 'Session Information' tab is active. The form contains the following fields and controls:

- Call Status:** A dropdown menu set to 'Pending'.
- No fax received?:** A checkbox that is currently unchecked.
- Service Type:** A dropdown menu with 'Med Management' selected. This field is highlighted with a red box.
- Service Class:** Radio buttons for 'New' (selected) and 'F/Up'. This field is also highlighted with a red box.
- Call In Time:** A date and time picker set to '6/29/2017 10:48 PM'.
- Fax Date & Time:** A date and time picker set to '6/29/2017'.
- Caller Number:** A text input field with a placeholder '( )- - - Ext. '.
- Caller Name:** A text input field with 'Cruise Line' entered.
- Fax Number:** A text input field with 'delete this' entered.
- Client:** A dropdown menu with 'Hospital Consult' selected.
- Req. Resp. Time:** A dropdown menu with 'Med Management' selected.
- Patient Name:** A dropdown menu with 'MHEC' selected.
- Doctor:** A dropdown menu with 'probably' selected.
- Location:** A dropdown menu.
- Exp. Duration:** A text input field with '\_\_\_ mins' entered.
- Case #:** A text input field.
- Projected Session Start Time:** A date and time picker.
- Doctor Position:** A dropdown menu with 'Primary' selected.

At the bottom of the form, there is a rich text editor for 'Comments' with a toolbar containing icons for undo, redo, bold, italic, underline, text color, and font size. Below the editor are 'Save' and 'Re-center' buttons.

Figure 5:4 Selecting Service Type

**Step 4:** Fill in the “Caller Name”, “Call Number”, if provided by the caller. These 2 fields are not mandatory.

The screenshot shows the 'Session Creation Information' form in the CallTracker.NET application. The form is divided into several sections. The 'Caller Name' and 'Caller Number' fields are highlighted with a red border. The 'Caller Name' field is currently empty, and the 'Caller Number' field contains the placeholder text '( )-\_\_-\_\_ Ext. \_\_'. Other fields include 'Call Status' (Pending), 'Call In Time' (6/29/2017 10:48 PM), 'Fax Date & Time' (6/29/2017), 'Service Type' (Med Management), 'Service Class' (New), 'Fax Number', 'Client', 'Location', 'Req. Resp. Time', 'Exp. Duration', 'Patient Name' (Select a Patient), 'Case #', 'Projected Session Start Time', 'Doctor', and 'Doctor Position' (Primary). There is also a 'Comments' text area with a rich text editor toolbar and 'Save' and 'Re-center' buttons at the bottom.

Figure 5:5 Caller Name and Caller Number

**Step 5:** Select the “Client” from the drop-down list. Only the clients with the selected service type will show up in the list. Then select the “Location” on the right as below. Only locations belonging to the selected clients will show up in the list. “Client” and “Locations” are both mandatory fields. After selecting the client and locations the “Req. Resp. Time” (Required Response Time) and “Exp. Duration” (Expected Duration) gets auto filled.

The screenshot shows the 'Session Creation Information' form in CallTracker.NET. The form is divided into several sections. The 'Client' and 'Location' fields are highlighted with a red border. The 'Client' is set to 'Bluebonnet Trails' and the 'Location' is set to 'Georgetown EOU'. The 'Req. Resp. Time' and 'Exp. Duration' fields are both set to '60\_mins'. Other fields include 'Call Status' (Pending), 'Service Type' (Med Management), 'Service Class' (New), 'Caller Name', 'Fax Number', 'Patient Name' (Select a Patient), 'Doctor', 'Doctor Position' (Primary), and 'Projected Session Start Time'. There are also buttons for 'Edit', 'New', 'Save', and 'Re-center'.

Call Status	Pending	Call In Time	6/29/2017 10:48 PM
No fax received?	<input type="checkbox"/>	Fax Date & Time	6/29/2017
Service Type	Med Management	Service Class	<input checked="" type="radio"/> New <input type="radio"/> F/Up
Caller Name		Caller Number	( )-__-__ Ext. __
Fax Number	( ) __-__		
Client	Bluebonnet Trails	Location	Georgetown EOU
Req. Resp. Time	60_mins	Exp. Duration	60_mins
Patient Name	Select a Patient	Case #	
Doctor		Projected Session Start Time	
Doctor Position	Primary		

Figure 5:6 Selecting Client and Location

**Step 6:** Fill in the “Patient Name”. User should always type in the name and check whether the patient already exists. If so, then select the patient name. Otherwise, click on the “New” button, fill in the Patient Information, click on the “Save Patient Info” button, and the newly added patient will show up in the patient name textbox.

The screenshot shows the 'Session Creation Information' form in CallTracker.NET. The 'Patient Name' field is highlighted with a red box and has a dropdown menu open. The dropdown menu contains the following data:

Name	DOB
<b>John</b> Doe	6/8/1982
<b>John</b> Smith	3/5/1980
<b>john</b> smith 3	3/5/1980
<b>john</b> smith 4	3/5/1980

Other form fields include: Call Status (Pending), No fax received? (checkbox), Service Type (Med Management), Caller Name, Fax Number, Client (Bluebonnet Trails), Req. Resp. Time (60\_mins), Call In Time (6/29/2017 10:48 PM), Fax Date & Time (6/29/2017), Service Class (New), Caller Number, Location (Georgetown EOU), Exp. Duration (60\_mins), Case #, Projected Session Start Time, and Doctor Position (Primary).

Figure 5:7 Selecting Patient Name



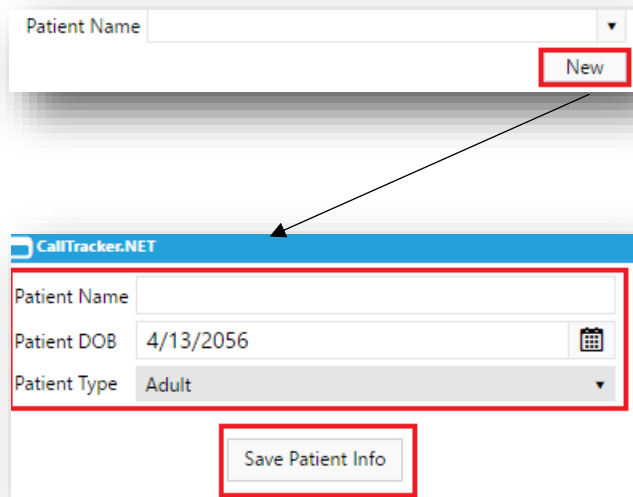


Figure 5:8 Adding a New Patient

The user also has the option to edit the details of a selected patient.

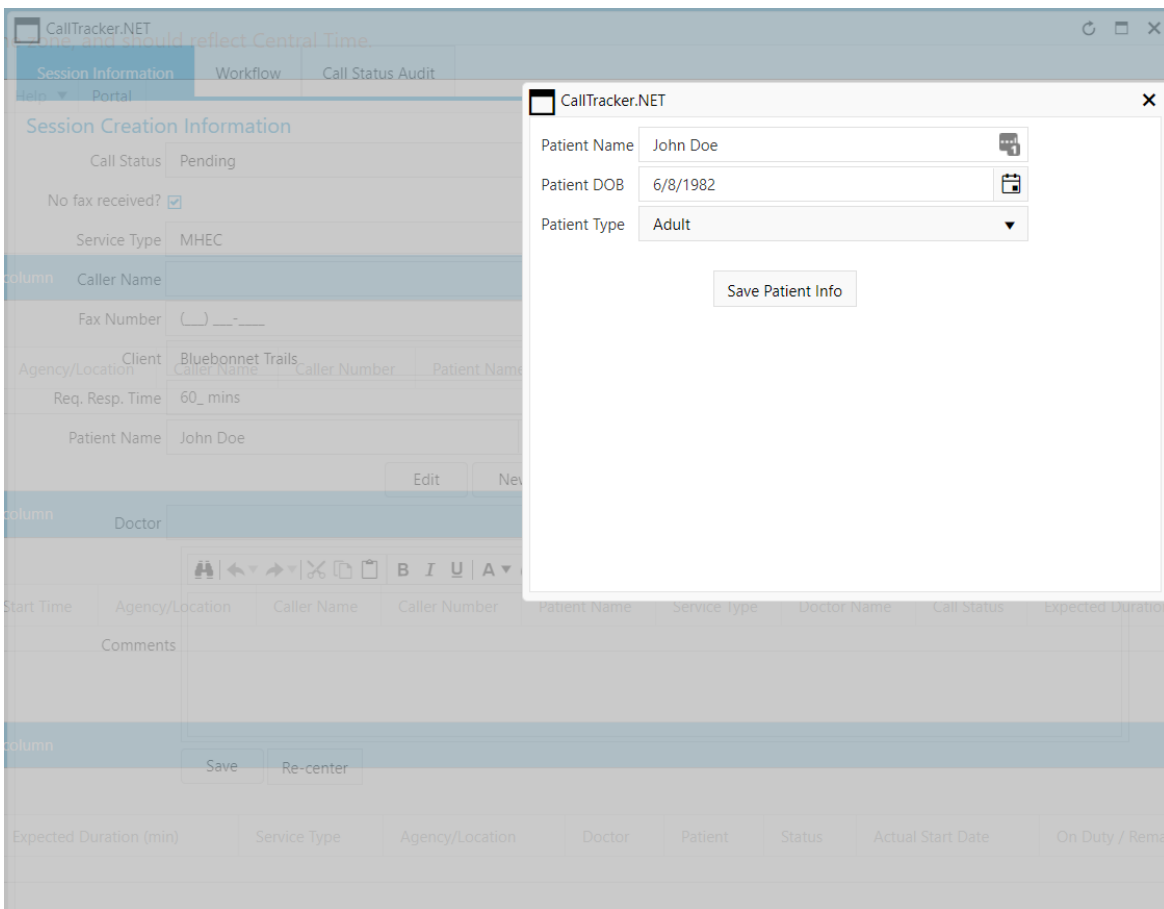


Figure 5:9 Edit Patient Information

**Step 7:** Fill in the “Doctor” and the “Doctor Position” if the doctor was assigned. These 2 fields are not mandatory. If no doctor was assigned then user can leave the fields blank and edit the doctor and doctor position while moving the sessions from “Pending” to “In session”.

The screenshot shows the 'Session Creation Information' form in CallTracker.NET. The form is divided into two columns. The left column contains fields for 'Call Status' (Pending), 'No fax received?' (checkbox), 'Service Type' (Med Management), 'Caller Name', 'Fax Number', 'Client' (Bluebonnet Trails), 'Req. Resp. Time' (60\_mins), and 'Patient Name' (John Doe). The right column contains fields for 'Call In Time' (6/29/2017 10:48 PM), 'Fax Date & Time' (6/29/2017), 'Service Class' (New), 'Caller Number', 'Location' (Georgetown EOU), 'Exp. Duration' (60\_mins), 'Case #', and 'Projected Session Start Time'. Below these columns are 'Edit' and 'New' buttons. A red box highlights the 'Doctor' and 'Doctor Position' fields, which are currently blank and 'Primary' respectively. Below these fields is a rich text editor for 'Comments' with a toolbar and 'Save' and 'Re-center' buttons.

Figure 5:10 Selecting Doctor and Doctor Position

**Step 8:** Enter any comments related to the session. The “Comments” box allows you to format the text similar to Microsoft Word. The user can change font, text size, text color etc.

CallTracker.NET

Session Information | Workflow | Call Status Audit

### Session Creation Information

Call Status	Pending	Call In Time	6/29/2017 10:48 PM
No fax received?	<input type="checkbox"/>	Fax Date & Time	6/29/2017
Service Type	Med Management	Service Class	<input checked="" type="radio"/> New <input type="radio"/> F/Up
Caller Name		Caller Number	( ) - - - Ext. - - -
Fax Number	( ) - - -	Location	Georgetown EOU
Client	Bluebonnet Trails	Exp. Duration	60_mins
Req. Resp. Time	60_mins	Case #	
Patient Name	John Doe	Projected Session Start Time	
Doctor		Doctor Position	Primary

Edit New

Comments

Save Re-center

Figure 5:11 Adding Comments

**Step 9:** To save the session click on “Save” button. If all the mandatory fields are entered then the message “The session has been created successfully” pops up at the right end corner in green. If not, then “Data Validation failed” message pops up in red in the bottom right corner indicating which fields need to be filled to proceed.

The screenshot shows the CallTracker.NET application window. At the top, there is a 'Client Audit Information' section with the following details: Session ID - 5039, Created On - 6/29/2017 11:07:10 PM, Created By - Puneeth Bharadwaj, Last Updated On - , and Last Updated By - . Below this is a navigation bar with three tabs: 'Session Information' (selected), 'Workflow', and 'Call Status Audit'. The main area is titled 'Session Creation Information' and contains various input fields and dropdown menus. The 'Call Status' is set to 'Pending'. The 'No fax received?' checkbox is checked. The 'Service Type' is 'MHEC'. The 'Client' is 'Bluebonnet Trails'. The 'Req. Resp. Time' is '60\_mins'. The 'Patient Name' is 'Arlington'. The 'Doctor' field is empty. The 'Call In Time' is '6/29/2017 11:06 PM'. The 'Fax Date & Time' is '6/29/2017'. The 'Service Class' is 'New'. The 'Caller Number' is '( )-\_\_-\_\_ Ext. \_\_'. The 'Location' is 'Georgetown EOU'. The 'Exp. Duration' is '60\_mins'. The 'Case #' is empty. The 'Projected Session Start Time' is empty. The 'Doctor Position' is 'Primary'. At the bottom of the form, there is a 'Comments' text area with a rich text editor toolbar. The 'Save' button is highlighted with a red box, and the 'Re-center' button is also visible.

Figure 5:12 Saving a New Session

Client Audit Information will be displayed with the session details and the user information. All the saved session will be moved to the “Call Status Audit” screen, and when the “Call Status Audit” menu is clicked, the user can see all the information on session changes.

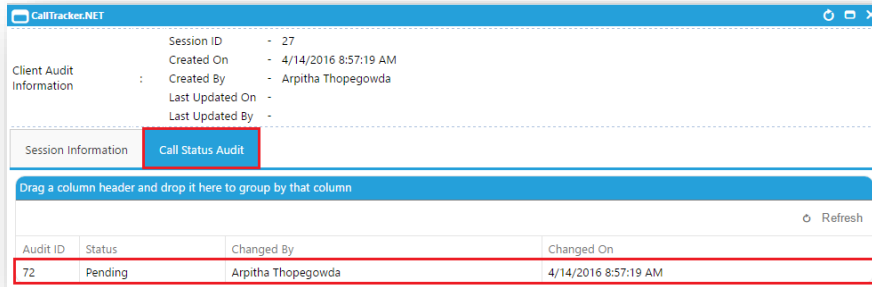


Figure 5:13 Viewing “Call Status” Audit

The user interface supports SignalR. This shows the call coordinators if any other users are editing the same session. This is demonstrated in the below picture. This allows for better collaboration and lowers the chances of mistakes.

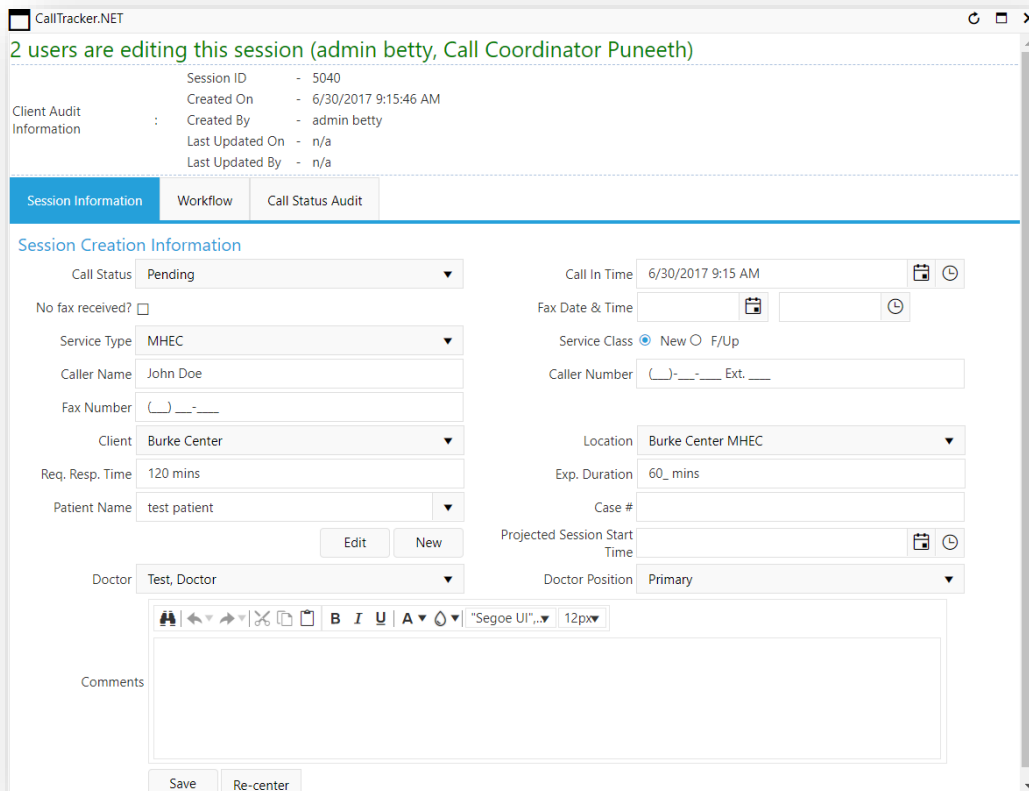


Figure 5:14 SignalR Demo

If there are more than 3 users editing the same session, the message in green will show the count of users instead of user names.

The “Re-center” button will align the above window to the center of your browser. For example, if your session window has been moved away from the center and you cannot view a part of the window, then clicking on the “Re-center” button will align the window back to the center, enabling you to view the complete window.

### 5.1.2 UPDATING A SESSION

To update an existing session, click on the “Edit” button (#1) to bring up the window with the Session Information and “Call Status Audit” tabs. Under “Session Information”, update the required values and click save (#2) as in Figure 4.4. The Client audit information also gets updated on saving the session information. The session information can be updated only by application roles like Call Coordinators and System Administrators.

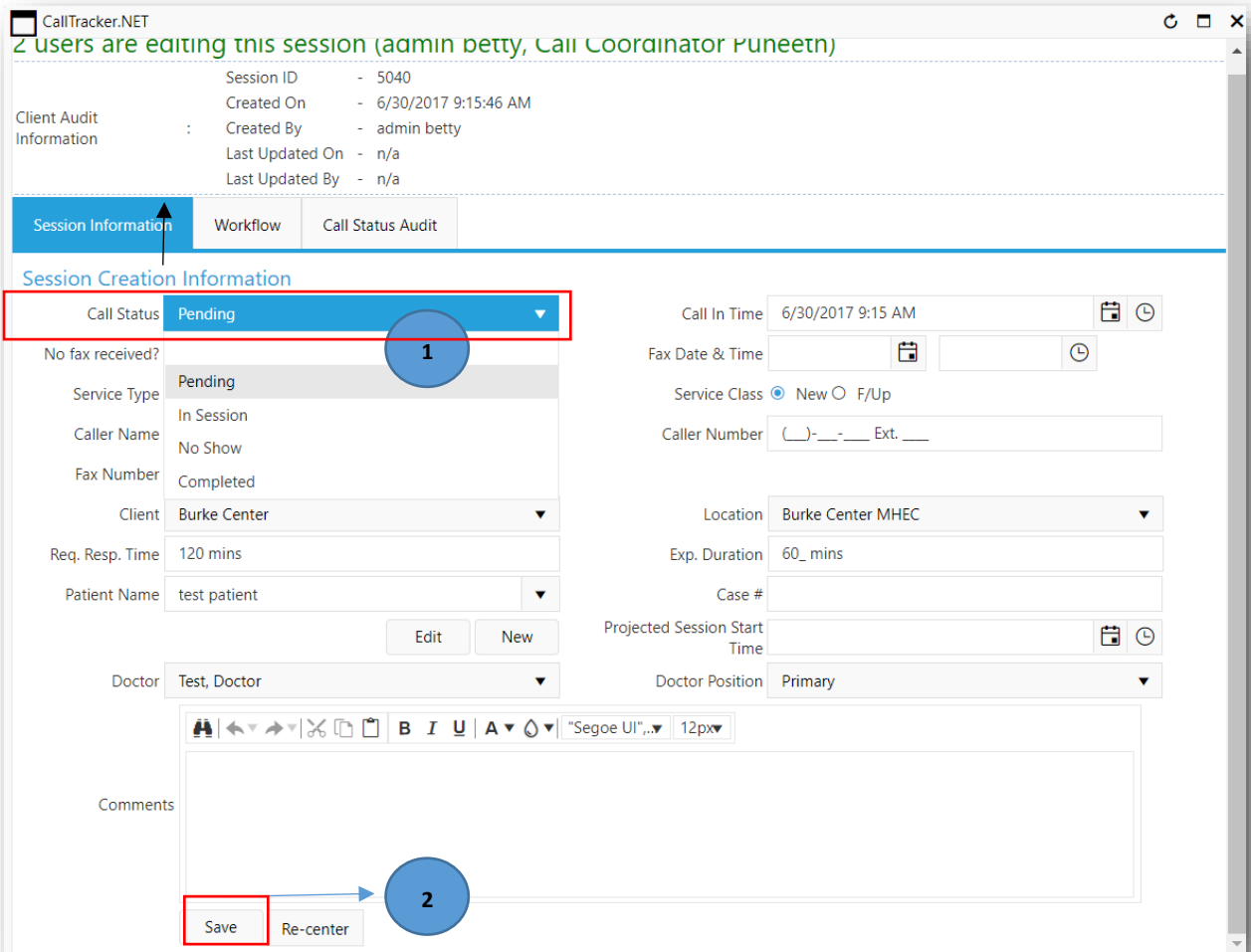


Figure 5:15 Updating a Session

### 5.1.2.1.1 MOVING SESSIONS FROM PENDING TO NO SHOW

The two ways of moving a session from “Pending” to “No Show” are:

- Right click on the session and select the “No Show” (#1) as in Figure 4.5.
- Click on edit and change the “Call Status” field in the session information tab to “No Show” and click “Save”.

Only System Administrator can change the “No Show” sessions back to “Pending”.

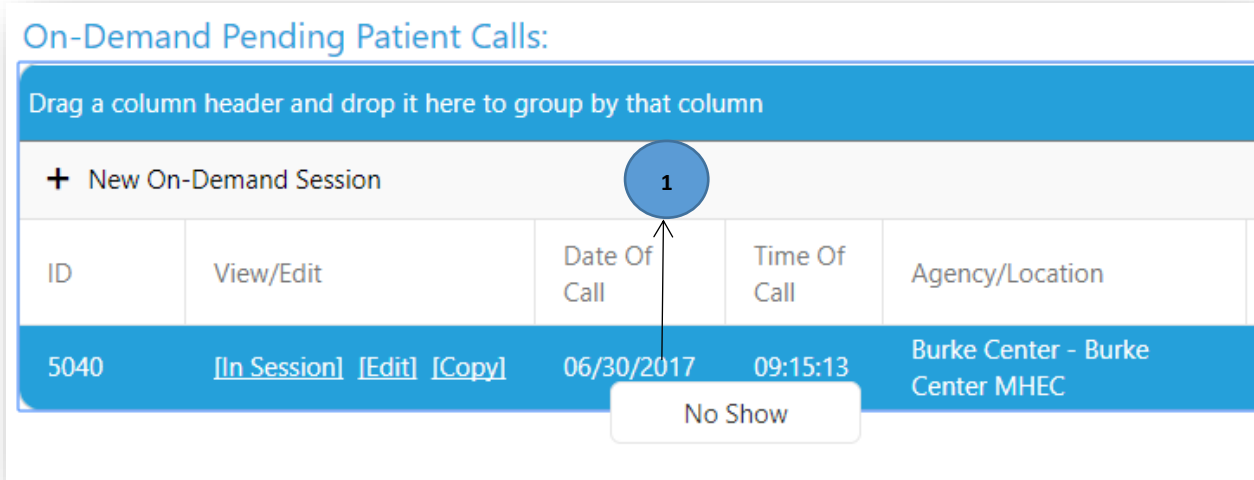


Figure 5:16 Pending to Now Show

### 5.1.2.1.2 MOVING SESSIONS FROM PENDING TO IN SESSION

Select edit in the “Pending” tab (#1) and change the “Call Status” from “Pending” to “In Session” (#2) as in Figure 4.6. On changing the “Call Status”, the “Session Progress and Completion Information” pops up. Fill in the session start time and hit “Save” (#3). “Session Start Time” should not be greater than current date and time and “Session end date” is disabled while moving sessions from “Pending” to “In Session”.

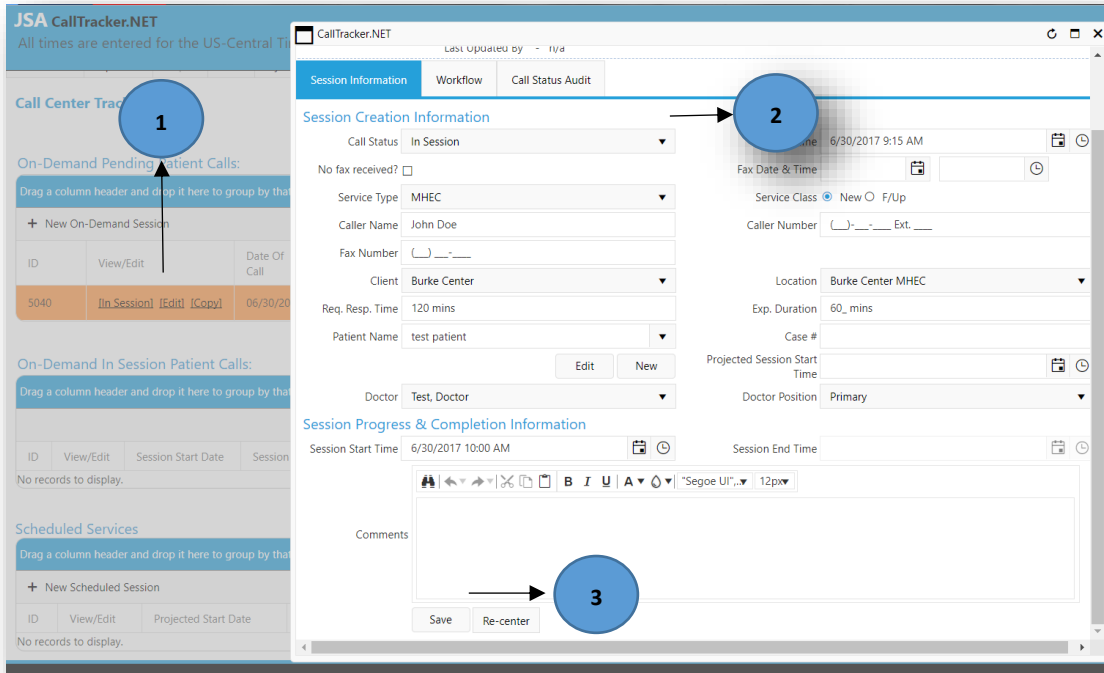


Figure 5:17 Moving Sessions from Pending to In Session

After clicking “Save”, session goes from “Pending” to “In Session” (#4) as in Figure 4.18.



### On-Demand In Session Patient Calls:

Drag a column header and drop it here to group by that column

ID	View/Edit	Session Start Date	Session Start Time	Agency/Location	Caller Name
5040	[Complete] [Edit] [Copy]	06/30/2017	10:00:00	Burke Center - Burke Center MHEC	John Doe



Figure 5:18 Pending to In Session

#### 5.1.2.1.3 MOVING SSESSIONS FROM IN SESSION TO COMPLETED

**Step 1:** Select “Edit” (#1) as in the Figure 4.19.

### On-Demand In Session Patient Calls:

Drag a column header and drop it here to group by that column

ID	View/Edit	Session Start Date	Session Start Time	Agency/Location	Caller Name
5040	[Complete] [Edit] [Copy]	06/30/2017	10:00:00	Burke Center - Burke Center MHEC	John Doe



Figure 5:19 Selection of Edit button in the In Session calls

**Step 2:** Change the “Call Status” from “In Session” to “Complete”. On changing the “Call Status”, the “Session Progress and Completion Information” pops up as in Figure 4.9.

The screenshot displays the CallTracker.NET application window. The interface is divided into two main sections: "Session Creation Information" and "Session Progress & Completion Information".

**Session Creation Information:**

- Call Status: Completed (dropdown)
- No fax received?:
- Service Type: MHEC (dropdown)
- Caller Name: John Doe
- Fax Number: ( ) - - -
- Client: Burke Center (dropdown)
- Req. Resp. Time: 120 mins
- Patient Name: test patient (dropdown)
- Buttons: Edit, New
- Doctor: Test, Doctor (dropdown)
- Call In Time: 6/30/2017 9:15 AM (calendar/time picker)
- Fax Date & Time: (calendar/time picker)
- Service Class:  New  F/Up
- Caller Number: ( ) - - - Ext. - - -
- Location: Burke Center MHEC (dropdown)
- Exp. Duration: 60\_mins
- Case #: (text field)
- Projected Session Start Time: (calendar/time picker)
- Doctor Position: Primary (dropdown)

**Session Progress & Completion Information:**

- Session Start Time: 6/30/2017 10:00 AM (calendar/time picker)
- Wait Time: (text field)
- In Session Timely?:  Yes  No
- Out of Compliance?:  Yes  No
- Dropped Reason: (text field)
- Session End Time: 7/2/2017 11:00 AM (calendar/time picker)
- Session Duration: (text field)
- Reason: (text field)
- Reason: (text field)
- Charge: (text field) Buttons: Change, Re-evaluate

**Comments:**

- Rich text editor toolbar with icons for undo, redo, bold, italic, underline, text color, background color, font face, and font size.
- Comments text area.
- Buttons: Save, Re-center

Figure 5:20 Session Information

**Step 3:** Fill in the “Session Start Time”, “Session End time” (a mandatory field), “In Session Timely” (select one of the option either “Yes” or “No”), “Reason”, “Out of Compliance” (select one of the option either “Yes” or “No”), “Reason”, “Dropped Reason”. The “Charge” will be automatically calculated when a session completes, depending on all the parameters associated with that session, and if user has doubts on the result they can either click on “Re-evaluate”(#1) (telling the system to re-calculate) or manually override the charge by clicking on “Charge” button (#2) as shown in Figure 4.10.

Figure 5:21 Session Progress & Completion Information

“Charge” can be modified only by **System Administrators, Administrators** and **AdminDoctors**. All other system roles will only be allowed to Re-evaluate the charges.

### 5.1.2.1.4 DELETING A PENDING SESSION

Users can either right click on the session to select “Delete” option or can click on the delete symbol at the right end of the grid as shown in Figure 4.22 to delete the sessions. The deleted sessions will be removed from the grid.

On-Demand Pending Patient Calls:

Drag a column header and drop it here to group by that column

+ New On-Demand Session														Refresh
ID	View/Edit	Date Of Call	Time Of Call	Agency/Location	Caller Name	Caller Number	Patient Name	Service Type	DOB	New/Followup	Doctor Name	Projected Session Start Date	Waiting / Remaining	Created By
5040	[In Session] [Edit] [Copy]	06/30/2017	09:15:13	Burke Center - Burke Center MHEC	John Doe		test patient	MHEC	06/02/1978	Emergent/New	Test Doctor		Over by 2 days, 02 hours, 47 min	betty.admin

Figure 5:22 Deleting a Pending Session

## 5.2 DOCTOR WORKFLOW

The Doctor Workflow helps in keeping track of time taken during acknowledgement of the session, reviewing the patient records, starting the call with client, and Telemed session. The workflow requires the doctor to complete each step in sequence. This helps to accurately track the amount of time spent during each step on a client. The doctor need not click on the “Session Information” tab to change any data during the session progress.


A session summary will contain the time spent on each step. These values are automatically calculated by the system. The calculation for each step will be shown up after the completion of the step.

The doctor also has the option to edit the times as required, before completing a session. They can only review the session information. If any changes are required, they have to contact the Admin of the site.

Please note any editing to the system filled time may cause errors in calculation of the time. Please make sure the “End Time” of step is earlier than the “Start Time” of the next step.

The color coding for the buttons are as follows:

- Pending Actions are in Blue.
- In Progress actions are in Yellow.
- Completed actions are in Green.

Please note, the “Reset” button  Reset in the screenshots shown below, will set all the times to blank. It is recommended that the button be not clicked unless absolutely necessary.

### 5.2.1 ACKNOWLEDGE PENDING SESSION

The doctor starts by acknowledging the session once it is assigned to them. Click on “Acknowledge Pending Session” as shown in Figure 4.13. The button turns green and the “Start Time” is automatically filled in by the system (Figure 4.14).

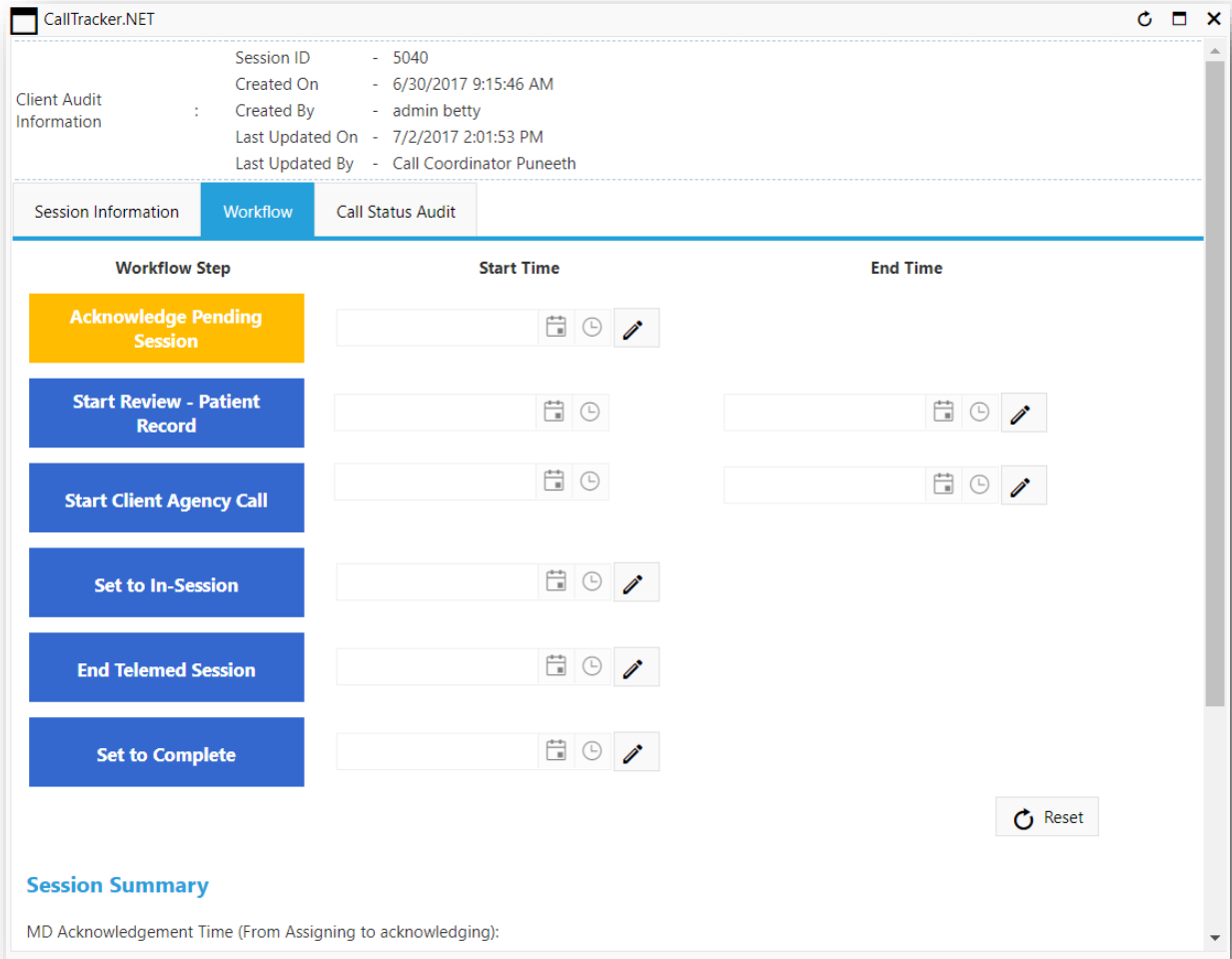


Figure 5:23 Acknowledge Pending Session

CallTracker.NET

Client Audit Information : Session ID - 5040  
 Created On - 6/30/2017 9:15:46 AM  
 Created By - admin betty  
 Last Updated On - 7/2/2017 2:14:08 PM  
 Last Updated By - Doctor Test

Session Information | **Workflow** | Call Status Audit

Workflow Step	Start Time	End Time
<b>Acknowledge Pending Session</b>	7/2/2017 2:59 PM	
<b>Start Review - Patient Record</b>		
<b>Start Client Agency Call</b>		
<b>Set to In-Session</b>		
<b>End Telemed Session</b>		
<b>Set to Complete</b>		



**Session Summary**  
 MD Acknowledgement Time (From Assigning to acknowledging): **58 minutes**

Reset

✓ Acknowledgement Recorded

✓ Session acknowledgement recorded successfully.

Figure 5:24 Acknowledge Pending Session - Start Time is auto filled

The Doctor can change the “Start Time” of the “Acknowledge Pending Session” by clicking the pencil icon  as in Figure 4.25. Select the required date and time then click the floppy disk icon . The new date and time will be saved to the database.

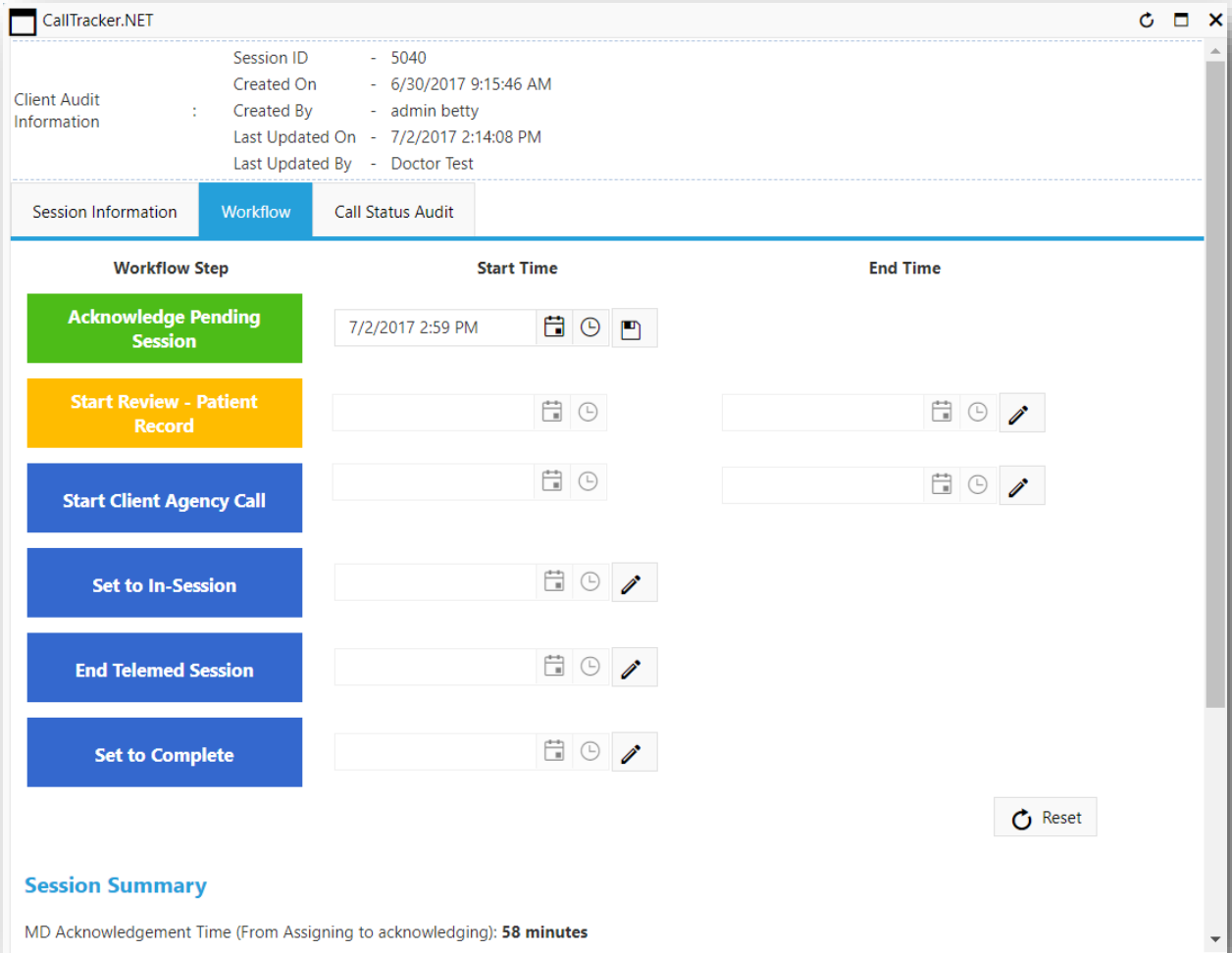


Figure 5:25 Change the Date and Time of Acknowledgement

## 5.2.2 START AND END REVIEW – PATIENT RECORD

The doctor will select the “Start Review – Patient Record” (Figure 4.26). The date and time will be automatically saved (Figure 4.27).

CallTracker.NET

Client Audit Information : Session ID - 5040  
Created On - 6/30/2017 9:15:46 AM  
Created By - admin betty  
Last Updated On - 7/2/2017 2:14:08 PM  
Last Updated By - Doctor Test

Session Information | **Workflow** | Call Status Audit

Workflow Step	Start Time	End Time
Acknowledge Pending Session	7/2/2017 2:59 PM	
<b>Start Review - Patient Record</b>		
Start Client Agency Call		
Set to In-Session		
End Telemed Session		
Set to Complete		

Reset

**Session Summary**  
MD Acknowledgement Time (From Assigning to acknowledging): **58 minutes**

Figure 5:26 Start Review - Patient Record



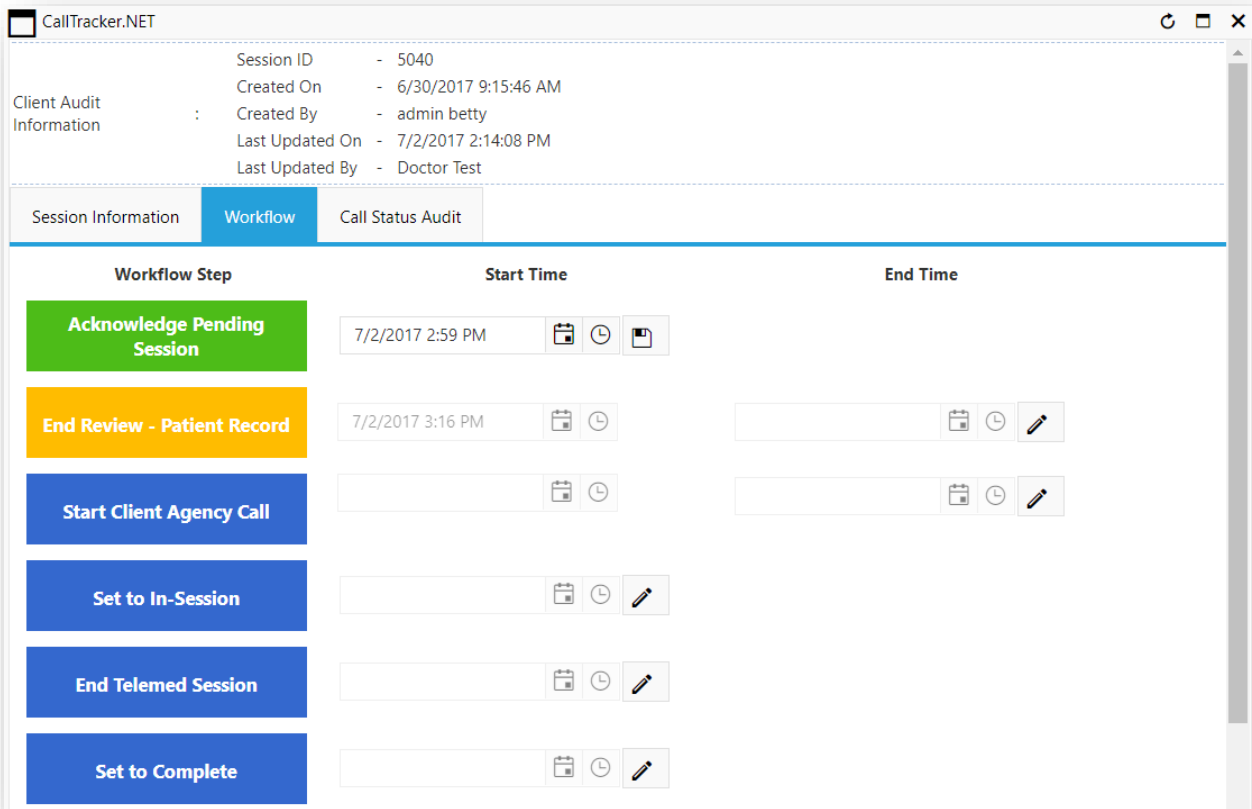


Figure 5:27 Start Review – Patient Record

After the doctor completes reviewing the patient record, they have to click on the “End Review – Patient Record” button. The date and time will be automatically filled in by the system (Figure 4.28).

The doctor can click on the pencil icon to enable change the date and time of both “Start Review – Patient Record” and “End Review – Patient Record”, choose the required date and time, and click on the floppy disk icon to save the newly select date and time (Figure 4.16d).

CallTracker.NET

Session Information | **Workflow** | Call Status Audit

Workflow Step	Start Time	End Time
<b>Acknowledge Pending Session</b>	7/2/2017 2:59 PM	
<b>Start Review - Patient Record</b>	7/2/2017 3:16 PM	7/2/2017 4:17 PM
<b>Start Client Agency Call</b>		
<b>Set to In-Session</b>		
<b>End Telemed Session</b>		
<b>Set to Complete</b>		

Reset

**Session Summary**

MD Acknowledgement Time (From Assigning to acknowledging): **58 minutes**

Acknowledge to Review Time (From Acknowledge to Review Patient Record): **17 minutes**

Review Patient Record Time (From Start Review to End Review Record): **61 minutes**

Review to Call Client Time (From End Review to Call Client Agency):

Review End Time Recorded X

Patient record review end time recorded successfully.

Figure 5:28 End Review – Patient Record

CallTracker.NET

Client Audit Information : Session ID - 5040  
 Created On - 6/30/2017 9:15:46 AM  
 Created By - admin betty  
 Last Updated On - 7/2/2017 4:36:41 PM  
 Last Updated By - Doctor Test

Session Information | **Workflow** | Call Status Audit

Workflow Step	Start Time	End Time
Acknowledge Pending Session	7/2/2017 2:59 PM	
Start Review - Patient Record	7/2/2017 3:16 PM	7/2/2017 4:17 PM
Start Client Agency Call		
Set to In-Session		
End Telemed Session		
Set to Complete		

Reset

Figure 5:29 End Review – Patient Record

### 5.2.3 START AND END CLIENT AGENCY CALL

When the doctor starts the call with the client agency, they have to click on “Start Client Agency Call” (Figure 4.18a). The date and time will be automatically filled into the “Start Time” (Figure 4.18b).

The screenshot displays the CallTracker.NET application window. At the top, there are three tabs: "Session Information", "Workflow" (which is active), and "Call Status Audit". Below the tabs is a table with three columns: "Workflow Step", "Start Time", and "End Time".

Workflow Step	Start Time	End Time
Acknowledge Pending Session	7/2/2017 2:59 PM	
Start Review - Patient Record	7/2/2017 3:16 PM	7/2/2017 4:17 PM
Start Client Agency Call		
Set to In-Session		
End Telemed Session		
Set to Complete		

Below the table is a "Reset" button. Underneath is a "Session Summary" section with the following text:

- MD Acknowledgement Time (From Assigning to acknowledging): **58 minutes**
- Acknowledge to Review Time (From Acknowledge to Review Patient Record): **17 minutes**
- Review Patient Record Time (From Start Review to End Review Record): **61 minutes**
- Review to Call Client Time (From End Review to Call Client Agency):

In the bottom right corner, there is a notification box with a green checkmark icon and the text: "Review End Time Recorded" and "Patient record review end time recorded successfully."

Figure 5:30 Start Client Agency Call

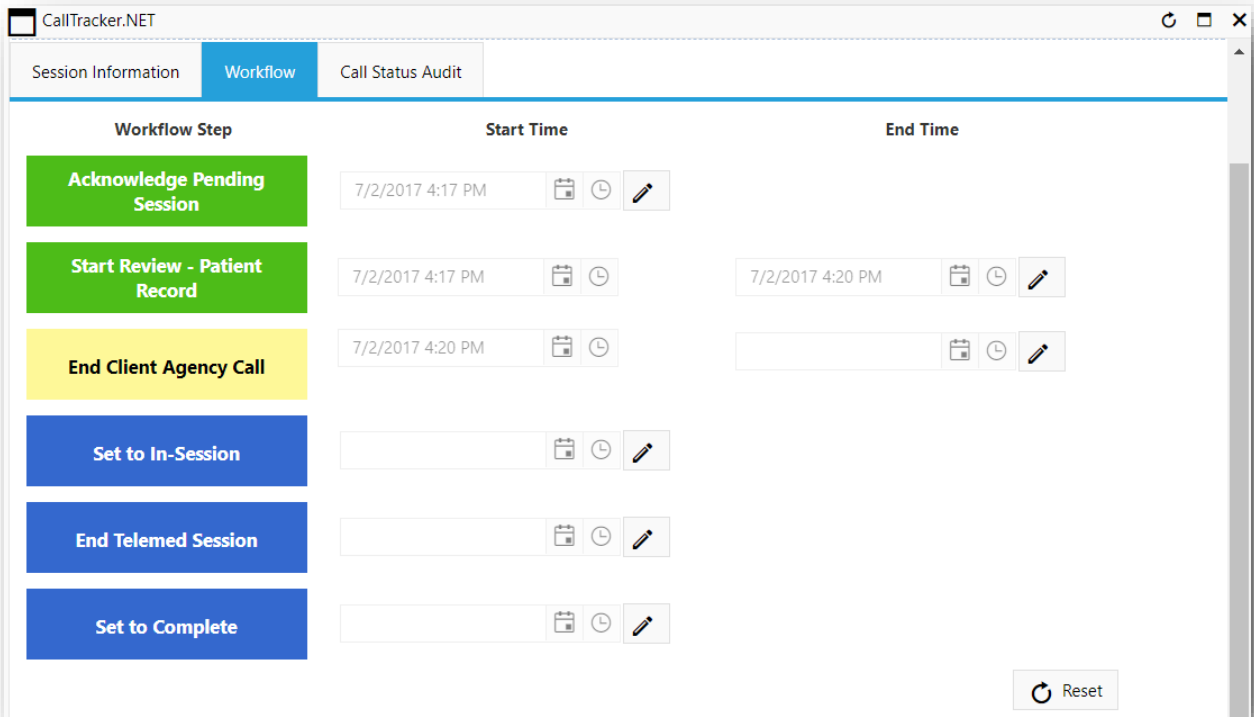


Figure 5:31 End Client Agency Call

After the call is completed with the client agency choose “End Client Agency Call”. The end time will be recorded by the system. The doctor can then change the date and time of the “End Client Agency Call” by clicking the pencil icon, choosing the required date and time, and clicking on the floppy disk icon to save the newly select date and time (Figure 4.19).

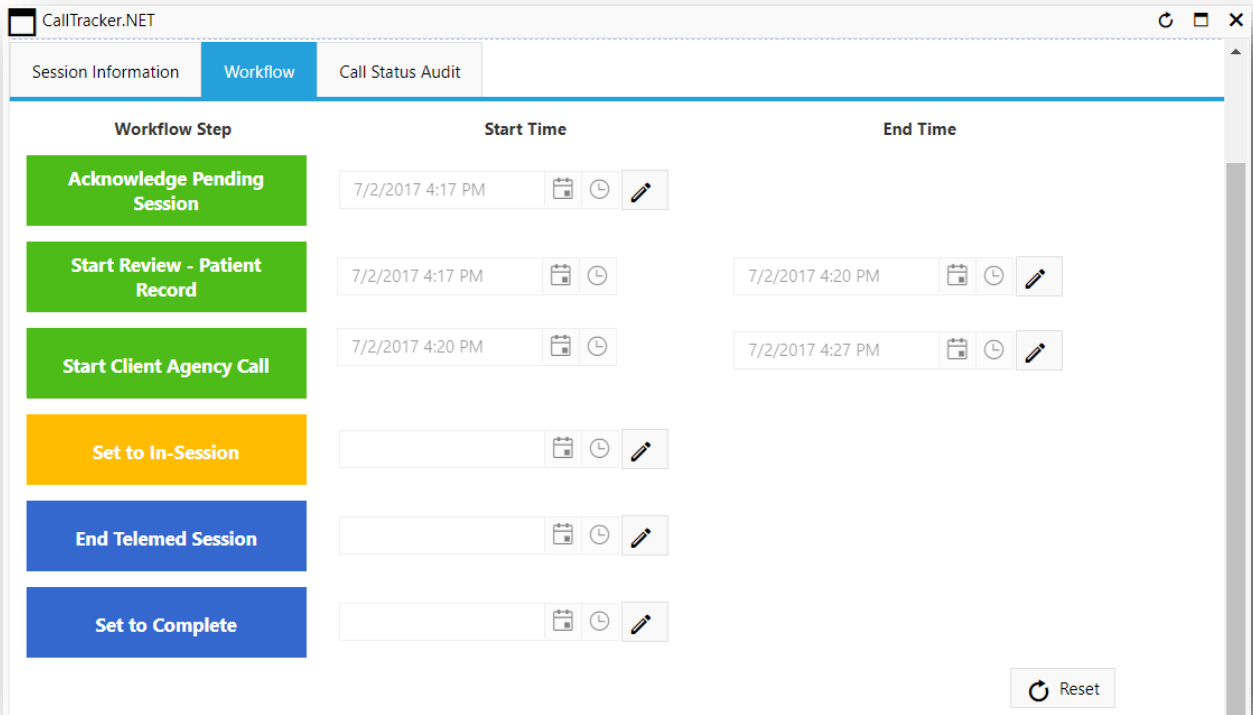


Figure 5:32 End Client Agency Call

## 5.2.4 SET TO IN-SESSION

The doctor will click the “Set to In-Session” button when they are ready to start the Telemed session with the client. This action will be in line with starting the Telemed session with the patient(s). The “Start Time” will be automatically populated (Figure 4.20a).

When the doctor puts the session to “In-Session” the “Call Status” in the “Session Information” tab is changed to “In Session” (Figure 4.20b)

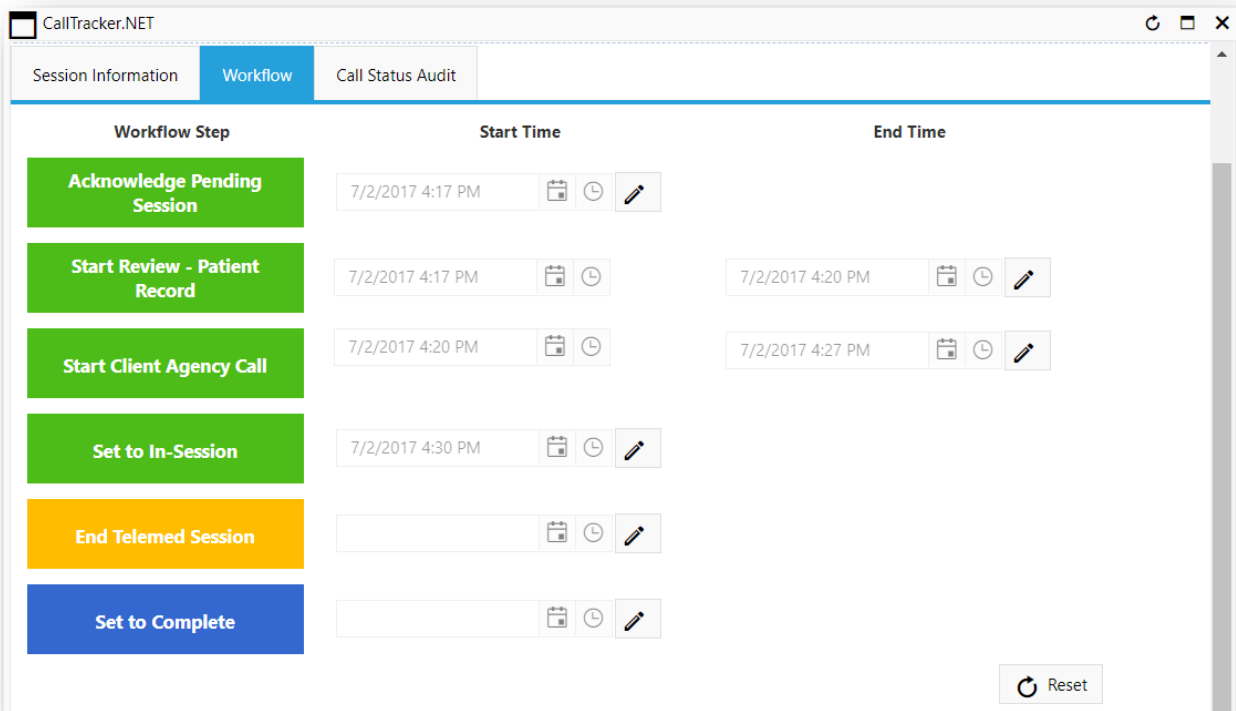


Figure 5:33 Set to In Session

Session Information		Workflow	Call Status Audit
<b>Session Creation Information</b>			
Call Status	In Session	Call In Time	6/30/2017 9:15 AM
No fax received?	<input checked="" type="checkbox"/>	Fax Date & Time	
Service Type	MHEC	Service Class	<input checked="" type="radio"/> New <input type="radio"/> F/Up
Caller Name	John Doe	Caller Number	( )-__-__ Ext. __
Fax Number	( ) __-__	Location	Burke Center MHEC
Client	Burke Center	Exp. Duration	60_mins
Req. Resp. Time	120 mins	Case #	
Patient Name	test patient	Projected Session Start Time	6/30/2017 9:15 AM
<input type="button" value="Edit"/> <input type="button" value="New"/>		Doctor Position	Primary
Doctor	Test, Doctor		
<b>Session Progress &amp; Completion Information</b>			
Session Start Time	7/2/2017 4:30 PM	Session End Time	
<div style="border: 1px solid #ccc; padding: 5px;"> </div>			
Comments			
<input type="button" value="Save"/> <input type="button" value="Re-center"/>			

Figure 5:34 Set to In Session - Session Information Tab



### 5.2.5 END TELEMED SESSION

Once the doctor completes the Telemed session with the client, they have click the “End Telemed Session”. This will record the end time of the Telemed session. The duration of the Telemed session will be recorded as the on-screen time of the doctor.

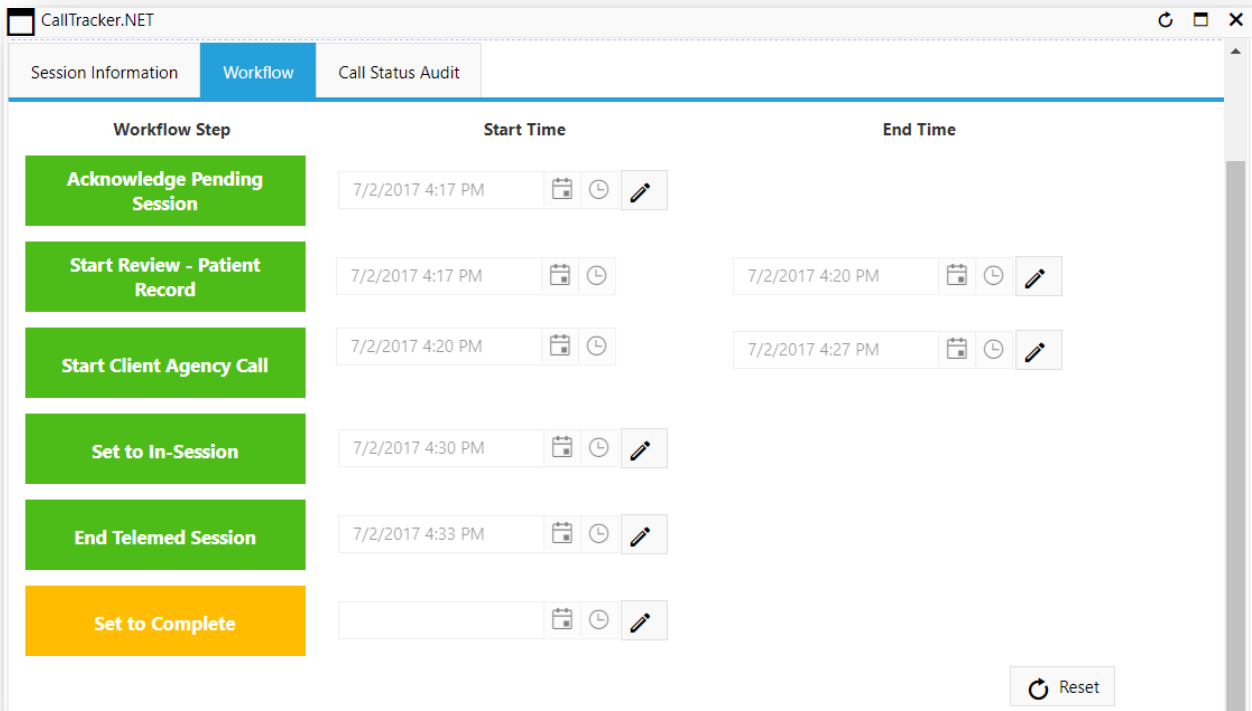


Figure 5:35 End Telemed Session

## 5.2.6 SET TO COMPLETE

The doctor will set the session to complete after completing the required steps post Telemed session. This could include taking notes, prescribing medicines etc.

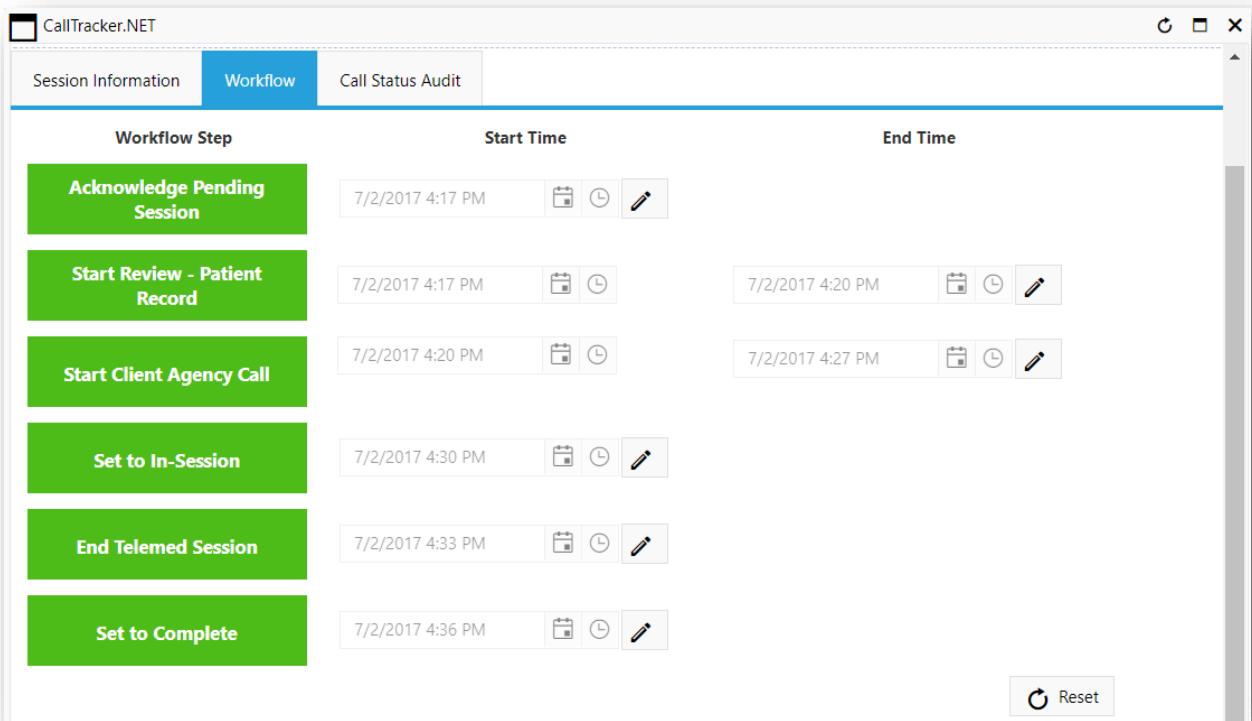



Figure 5:36 Set to Complete

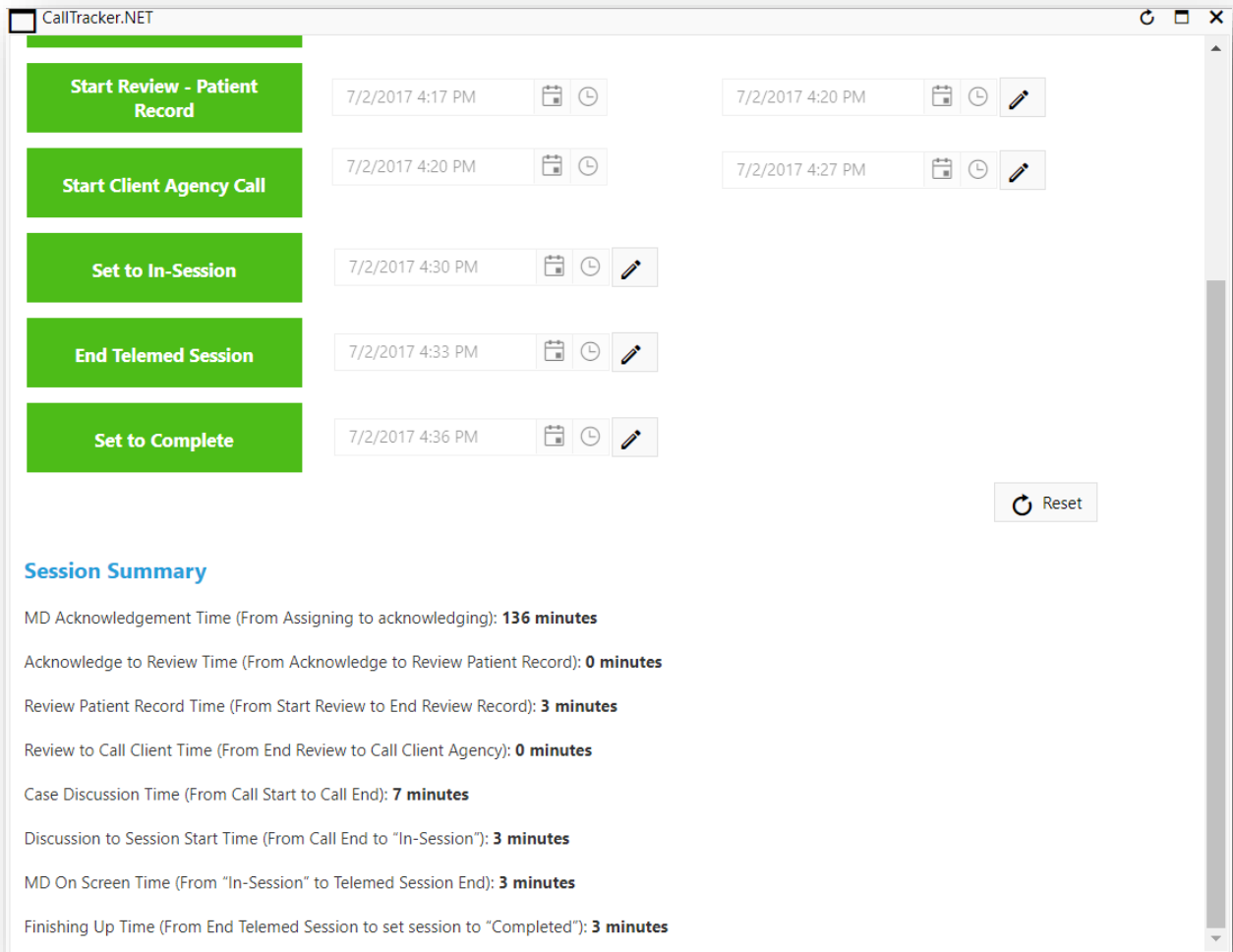
After the session is set to complete, the "Call Status" in the "Session Information" is changed to "Completed". If the change is not reflected, please click on the refresh button  the top right corner.

Session Information	Workflow	Call Status Audit
<b>Session Creation Information</b>		
Call Status	Completed	
No fax received?	<input checked="" type="checkbox"/>	
Service Type	MHEC	
Caller Name	John Doe	
Fax Number	( ) - -	
Client	Burke Center	
Req. Resp. Time	120 mins	
Patient Name	test patient	
	<input type="button" value="Edit"/> <input type="button" value="New"/>	
Doctor	Test, Doctor	
Call In Time	7/2/2017 4:00 PM	
Fax Date & Time		
Service Class	<input checked="" type="radio"/> New <input type="radio"/> F/Up	
Caller Number	( ) - - - Ext. - -	
Location	Burke Center MHEC	
Exp. Duration	60_ mins	
Case #		
Projected Session Start Time	6/30/2017 9:15 AM	
Doctor Position	Primary	
<b>Session Progress &amp; Completion Information</b>		
Session Start Time	7/2/2017 4:30 PM	
Wait Time	30 min(s)	
In Session Timely?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Out of Compliance?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Dropped Reason		
Session End Time	7/2/2017 4:36 PM	
Session Duration	6 min(s)	
Reason	Auto-filled by workflow.	
Reason	Auto-filled by workflow.	
Charge	\$297.00	<input type="button" value="Change"/> <input type="button" value="Re-evaluate"/>

Figure 5:37 Set to Complete - Session Information Tab

## 5.2.7 SESSION SUMMARY

All the above processes are recorded as part of the session summary. This summary can be viewed at the bottom of the screen, by scrolling down in any of the previous screenshots, as shown below.



The screenshot displays the CallTracker.NET application window. On the left, there is a vertical list of green buttons representing session actions. To the right of each button is a timestamp and a set of icons (calendar, clock, and edit). Below this list is a 'Reset' button. At the bottom, a 'Session Summary' section provides a breakdown of time spent on various tasks.

Action	Timestamp	Icons
Start Review - Patient Record	7/2/2017 4:17 PM	Calendar, Clock
	7/2/2017 4:20 PM	Calendar, Clock, Edit
Start Client Agency Call	7/2/2017 4:20 PM	Calendar, Clock
	7/2/2017 4:27 PM	Calendar, Clock, Edit
Set to In-Session	7/2/2017 4:30 PM	Calendar, Clock, Edit
End Telemed Session	7/2/2017 4:33 PM	Calendar, Clock, Edit
Set to Complete	7/2/2017 4:36 PM	Calendar, Clock, Edit

**Session Summary**

- MD Acknowledgement Time (From Assigning to acknowledging): **136 minutes**
- Acknowledge to Review Time (From Acknowledge to Review Patient Record): **0 minutes**
- Review Patient Record Time (From Start Review to End Review Record): **3 minutes**
- Review to Call Client Time (From End Review to Call Client Agency): **0 minutes**
- Case Discussion Time (From Call Start to Call End): **7 minutes**
- Discussion to Session Start Time (From Call End to "In-Session"): **3 minutes**
- MD On Screen Time (From "In-Session" to Telemed Session End): **3 minutes**
- Finishing Up Time (From End Telemed Session to set session to "Completed"): **3 minutes**

Figure 5:38 Session Summary

### 5.3 PATIENT MANAGEMENT

The Patient Management page allows the users to add, edit and delete a patient record. Patient Management is accessible to all roles.

On this page, the user can sort based on the Patient Name and their Type (Adult or Child). The user has to click “Submit Filter” after changing the sort selections.

#### 5.3.1 SORT OPTIONS

The application provides the feature of sorting based on the patient name.

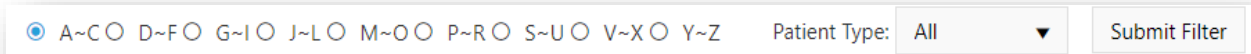


Figure 5:39 Sort Options

#### 5.3.2 SORTING PATIENTS

In the following figure, the user can select the range the patient name starts with and the patient type.

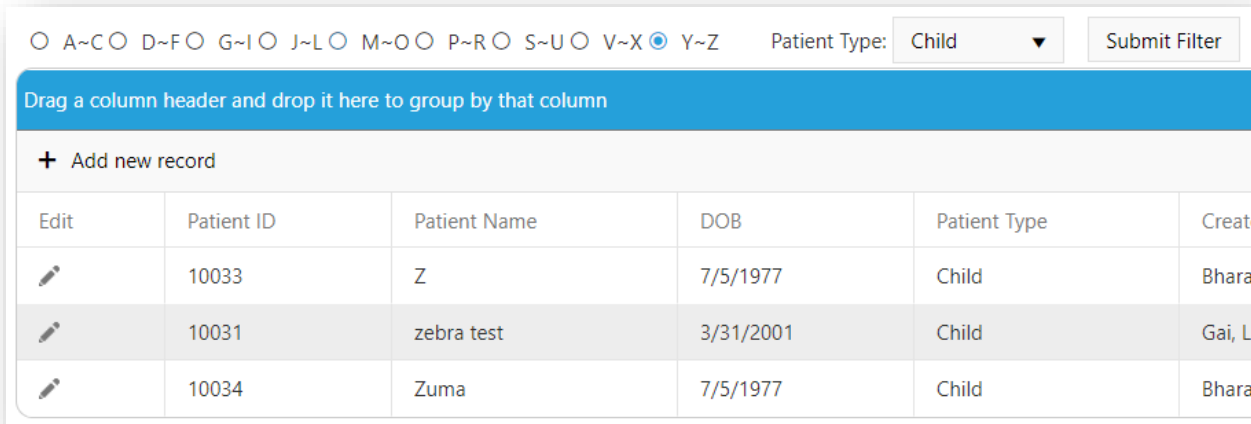



Figure 5:40 Select Names start with Y or Z and patient is a Child

#### 5.3.3 ADDING A NEW PATIENT


- Click on the “Add new record”
- Type in the “Patient Name”
- Select the “Date of Birth”
- Select the “Patient Type”

**+ Add new record**

Edit	Patient ID	Patient Name
		Patient Name: Zumba
	DOB: 1/1/2000	
	Patient Type: Child	▼

✓ ✕

Figure 5:41 Adding Patient - Patient Name, DOB and Type

- Click the  icon to save the patient information.

The new patient will be shown on the grid as follows.

○ A~C ○ D~F ○ G~I ○ J~L ○ M~O ○ P~R ○ S~U ○ V~X  Y~Z Patient Type: Child ▼

Drag a column header and drop it here to group by that column

**+ Add new record**






Edit	Patient ID	Patient Name	DOB	Patient Type
	10033	Z	7/5/1977	Child
	10031	zebra test	3/31/2001	Child
	10034	Zuma	7/5/1977	Child
	10035	Zumba	1/1/2000	Child


Figure 5:42 New Patient on the Grid


The user can click the  to cancel adding the new patient.

---


### 5.3.4 EDITING AN EXISTING PATIENT

The user can edit patient information by following the steps described below:

1. Click the  icon on the left side of the patient name on the grid. This action will open up the fields related to the patients at the bottom on the record.


Edit	Patient ID	Patient Name	DOB	Patient Type
	10033	Z	7/5/1977	Child

Patient Name:	<input type="text" value="Z"/>
DOB:	<input type="text" value="7/5/1977"/> 
Patient Type:	<input type="text" value="Child"/> ▼

✓ ✕

Figure 5:43 Edit Patient Information

2. The user can now change the required fields.
3. Click the  icon to save the patient information.

The grid will now have the updated data for the patient.




Edit	Patient ID	Patient Name	DOB	Patient Type
	10033	Zachary	7/5/1977	Child

Figure 5:44 Updated Patient Information Reflected on the Grid

The user can click the  to cancel editing the patient information.

---

### 5.3.5 DELETING A PATIENT

The user can delete a patient by clicking on the  icon on the right most column of the grid.



Edit	Patient ID	Patient Name	DOB	Patient Type	Created By	Created On	Update By	Update On	Delete
	10033	Zachary	7/5/1977	Child	Bharadwaj, Puneeth	7/5/2017 2:24:50 PM	Bharadwaj, Puneeth	7/5/2017 4:38:49 PM	

Figure 5:45 Click on the  icon

This action will prompt a pop-up window asking for confirmation from the user to delete a record. Click “OK” to delete the record permanently. If the user clicks “Cancel”, the record will not be deleted.

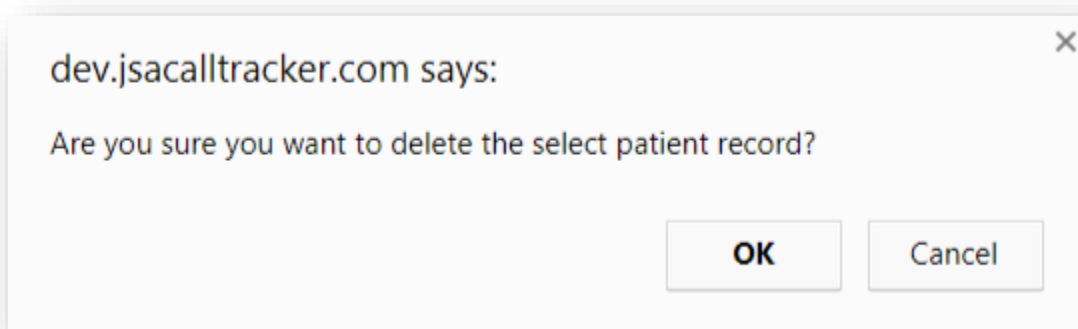


Figure 5:46 Pop-up window requesting user's confirmation

## 5.4 CASE REVIEW AND AUDITS

All the completed sessions are moved to the Case Review. All users have access to the case review and audits, but data can be modified only by specific roles in the system, as described below:

- **System Administrators, Administrators and AdminDoctors:** These three application roles have privileges to edit the sessions in “Case Review” pages and perform auditing.
- **Doctors, Call coordinators and users:** They will only have permissions to view the sessions during case reviews and audits.

### 5.4.1 CASE REVIEW ON-DEMAND AND SCHEDULED



The Case Review On-Demand contains a list of all completed sessions. This web page allows the users to edit a session's information.

**Case Review - On Demand** ? 📷

Column resizing  Column reorder  No Filter  Column Filter  Advanced Filter


Select date filter :  📅 ⌚  📅 ⌚

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Edit/View	Session ID	Service Type	Patient Name	Patient Type	Client name	Client Location	Call In Time
<input type="checkbox"/>	[Edit]	5040	MHEC	test patient	Adult	Burke Center	Burke Center MHEC	7/2/2017 4:00:00 PM
<input type="checkbox"/>	[Edit]	5039	MHEC	Arlington	Adult	Bluebonnet Trails	Georgetown EOU	6/29/2017 11:06:48 PM

Figure 5:47 Case Review and Audits

#### 5.4.1.1 EDIT A SESSION INFORMATION

The user can click on “Edit” next to the Session ID. This will open up the “Session Information” screen. The user can then make the required changes and click on the “Save” button. The user can click the  on the top right corner to close the window.

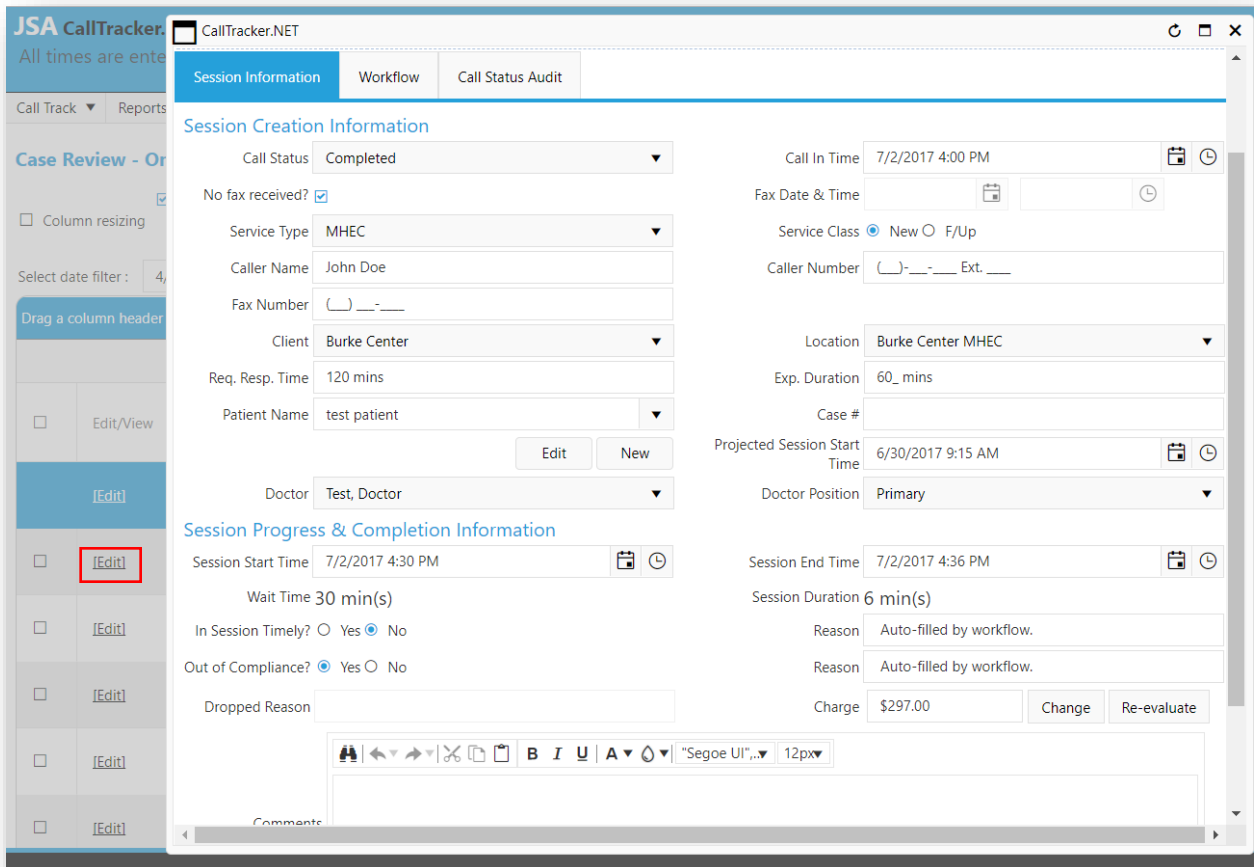


Figure 5:48 Edit Session Information

#### 5.4.1.2 FILTERING THE GRID

Please refer to [Grid Organization](#) (press Ctrl and left click the mouse) to know more about Sorting, Reorganizing, Resizing and other actions related to the Grids.

#### 5.4.1.3 RE-EVALUATE CHARGE

The users can use the Re-evaluate the charge for a specific session, selected sessions or all the session in the Case Review screen. This action will calculate the charges for the session(s) if the charge was not calculated previously or calculate the charge if the changes were made to a session.

It is recommended to use this button to Re-evaluate the charges, when a change is made to the Client Service's charge.

Re-evaluate Charge

Figure 5:49 Re-evaluate Charge

5.4.2 CASE AUDIT

Case Audits helps the user provide feedback related to a Doctor’s performance.

**Case Audits** ? 📄

Column resizing     Column reorder     No Filter     Column Filter     Advanced Filter

Select date filter :    4/6/2017 📅    7/5/2017 📅    Submit

Drag a column header and drop it here to group by that column

Edit/View	Case Audit	Session ID	Service Type	Patient Name	Patient Type	Client name
<a href="#">[View]</a>	<u>Omitted</u>	5041	MHEC	atest	Child	Bluebonnet Trails

Figure 5:50 Case Audit of Sessions

5.4.2.1 PROVIDING FEEDBACK

By default, all sessions contain the “Omitted” value in the “Case Audit”. The user can click on “Omitted” to open a window with questions related to Doctor’s actions.

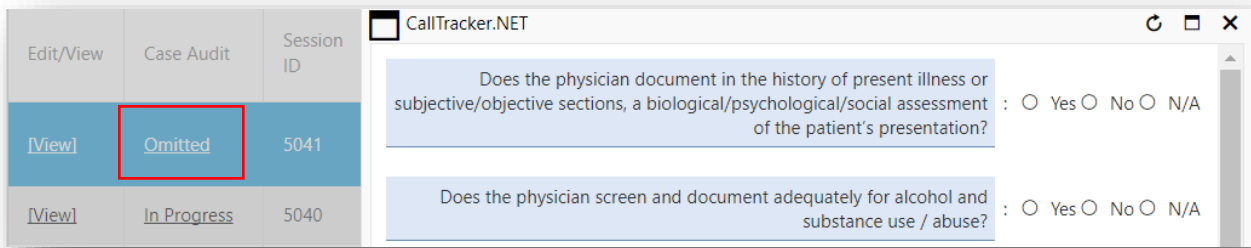


Figure 5:51 Click on Omitted

The questions are as shown in the below figure. The user can answer either “Yes”, “No” or “N/A” for any of the question and click “Save”. This will save the current status of the questionnaire and change the status of the “Case Audit” to “In Progress”.

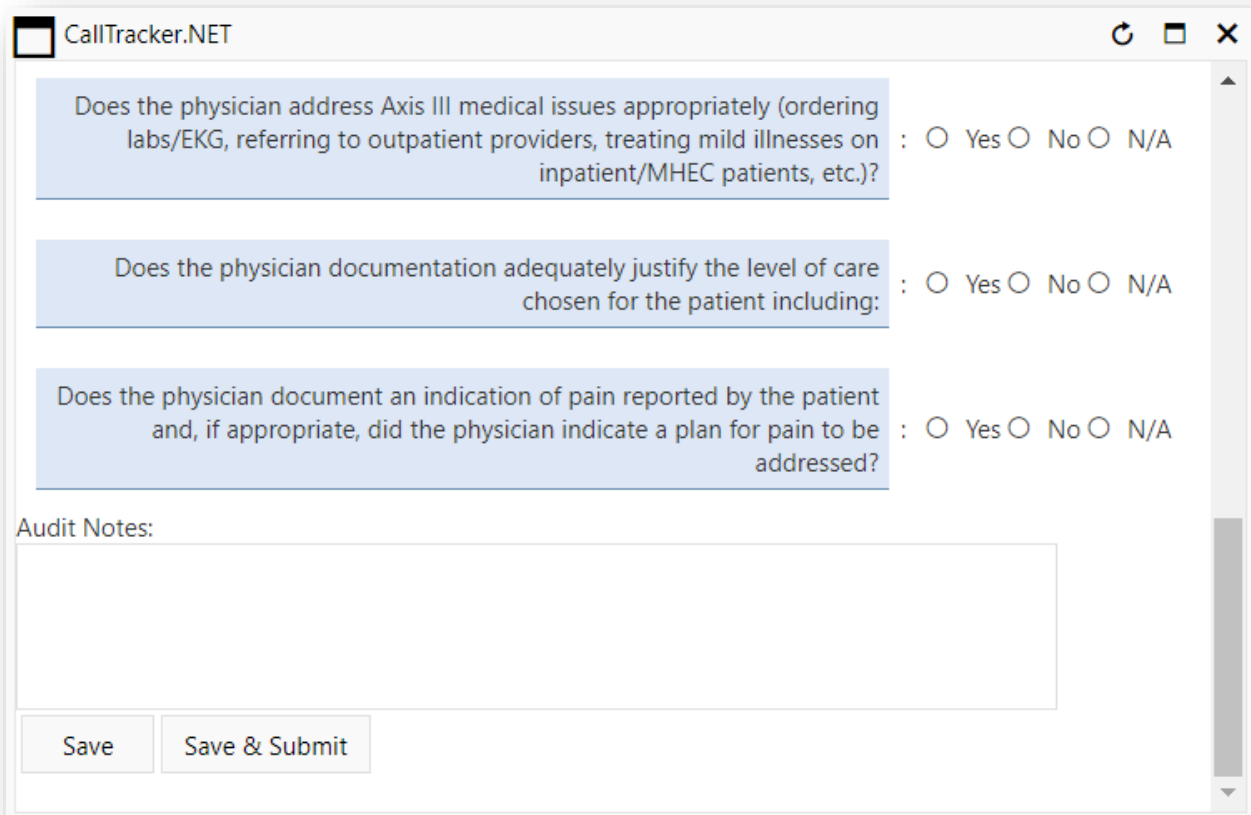


Figure 5:52 Answering the Questions

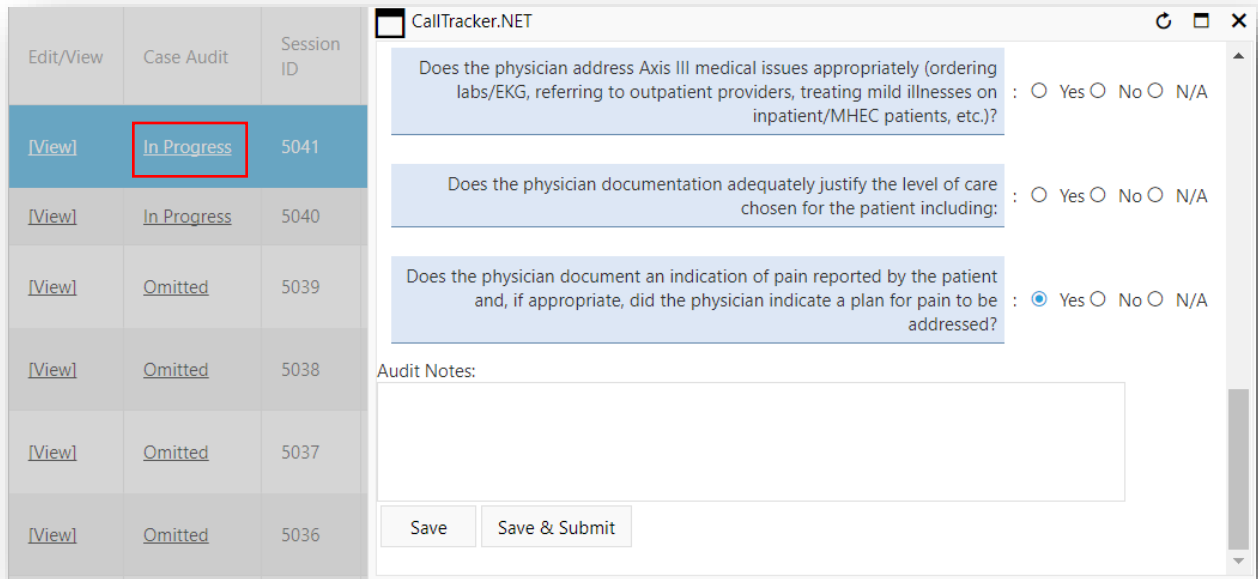


Figure 5:53 Case Audit Status set to "In Progress"

The user can click on "In Progress" to complete the questionnaire. Once the user has completed the questionnaire, to submit the answer they have to click the "Save & Submit" button. This action will update the Case Audit status. The status will now show the number questions answered.

Edit/View	Case Audit	Session ID	Service Type
<a href="#">[View]</a>	4 yes, 4 no, 4 na	5041	MHEC

Figure 5:54 Case Audit status update with number of questions answered

To reset the answer the user can now click on the "Case Audit" link to open up the questionnaire, and click the "Reset Submit Flag". This will reset the status to "In Progress".

Edit/View	Case Audit	Session ID
[View]	4 yes, 4 no, 4 na	5041
[View]	<u>In Progress</u>	5040
[View]	<u>Omitted</u>	5039
[View]	<u>Omitted</u>	5038
[View]	<u>Omitted</u>	5037

CallTracker.NET

Does the physician documentation adequately justify the level of care chosen for the patient including:  Yes  No  N/A

Does the physician document an indication of pain reported by the patient and, if appropriate, did the physician indicate a plan for pain to be addressed?  Yes  No  N/A

Audit Notes:

Figure 5:55 Click Reset Submit Flag

Edit/View	Case Audit	Session ID
<u>[View]</u>	<u>In Progress</u>	5041

Figure 5:56 Case Audit changed to "In Progress"

## 6 REPORTS

The user can access the reports by click selecting the Reports dropdown menu in top bar as shown in the Figure 5.1.

Please refer to the below table for role based access.

Report Name	Admins	Admin Doctors	Doctors	Call Coordinators	Users
Audit Analysis	✓	✓	✗	✗	✗
Client Statistics Report	✓	✓	✗	✗	✗
Top Client Report	✓	✓	✗	✗	✗
Rolling Weekly On-demand Report	✓	✓	✗	✗	✗
Rolling Weekly Scheduled Report	✓	✓	✗	✗	✗
Rolling Monthly On-demand Report	✓	✓	✗	✗	✗
Rolling Monthly Scheduled Report	✓	✓	✗	✗	✗

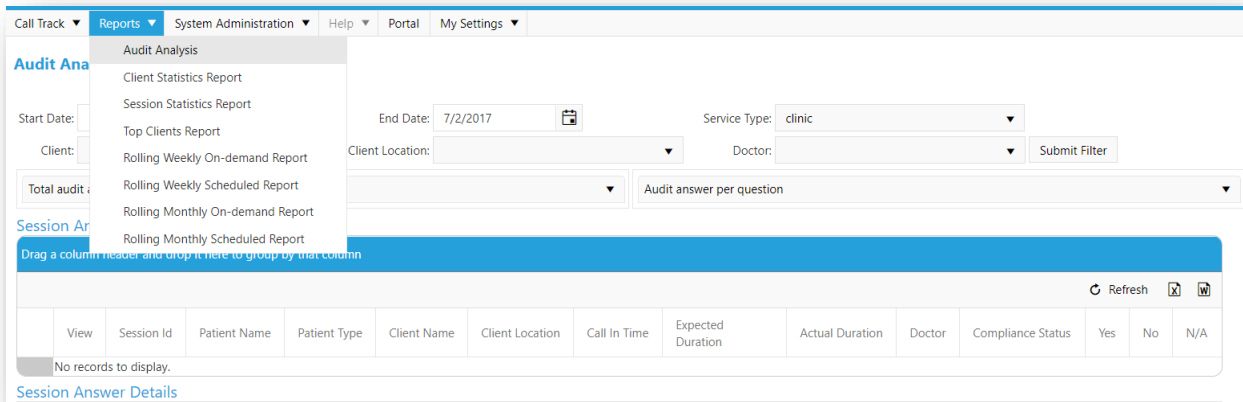


Figure 6:1 Selecting the Reports

The toolbar for all the reports is shown below.

1. Navigate between multiple reports generated using different filter criteria  
The arrows can be used to navigate between multiple reports that were generated by changed the filter parameters. For example, if a user generates a “Session Statistics” report between 1/1/2017 – 2/1/2017

and 2/1/2017 – 3/1/2017, the user can navigate between these 2 reports without having to regenerate the reports. This option does not reload the webpage.

2. Navigate within the report

These options allow the user to move backward and forward within a report containing multiple pages.

The user can choose

< to view a previous page

> to view a next page

|< to go the first page of the report

>| to go the last page of the report

The user can also type in the page number and press enter to go to a specific page of the report

3. Exporting a report

The user can any of the file formats and click on “Export” to export the data to the required file format. It is recommended to user PDF or Excel for best results.

4. Refresh button

This button will regenerate the report with the previously chosen filters. This option allows the user to regenerate a report, without having to reload the page, select the filter criteria and click on Preview

5. Print Preview

When the user clicks this button, the view displays the way the report will be printed on the paper. The paper size by default is 8x11 Letter.

6. Print Button

The user can use this button to print the report directly from the web browser. This button removes the need for the user to download the file and then print it.

7. Email Button

The user can attach this report to an Email and send it to the intended receiver(s).

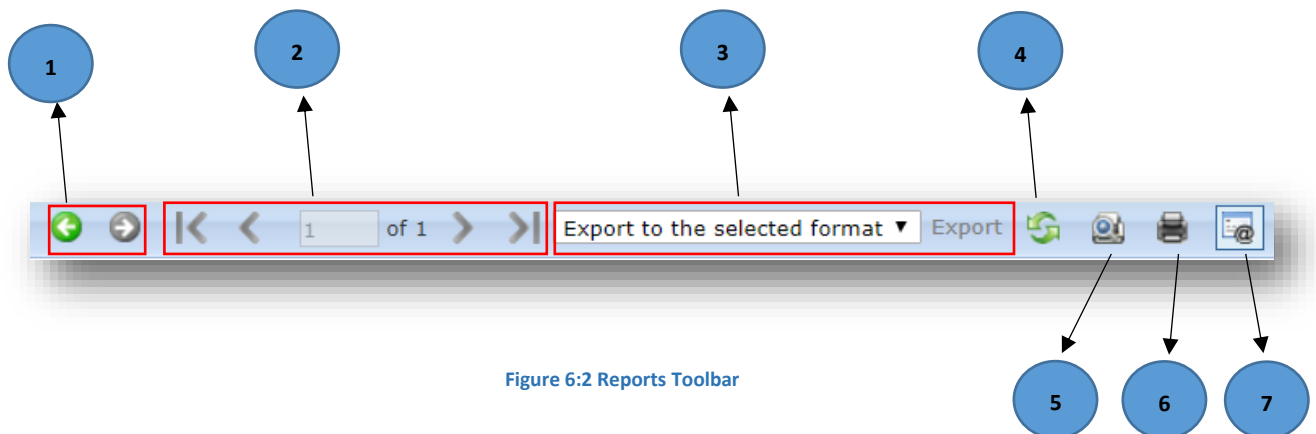


Figure 6:2 Reports Toolbar



## 6.1 AUDIT ANALYSIS

Audit Analysis helps in evaluating the performance of doctors in the select time range. The default time range is today's date and a month back. The Admins and Admin Doctors can select the "Service Type", the "Client", the "Client Location" and the "Doctor" to evaluate. Then click "Submit Filter".

The graphs will load based the filter criteria.

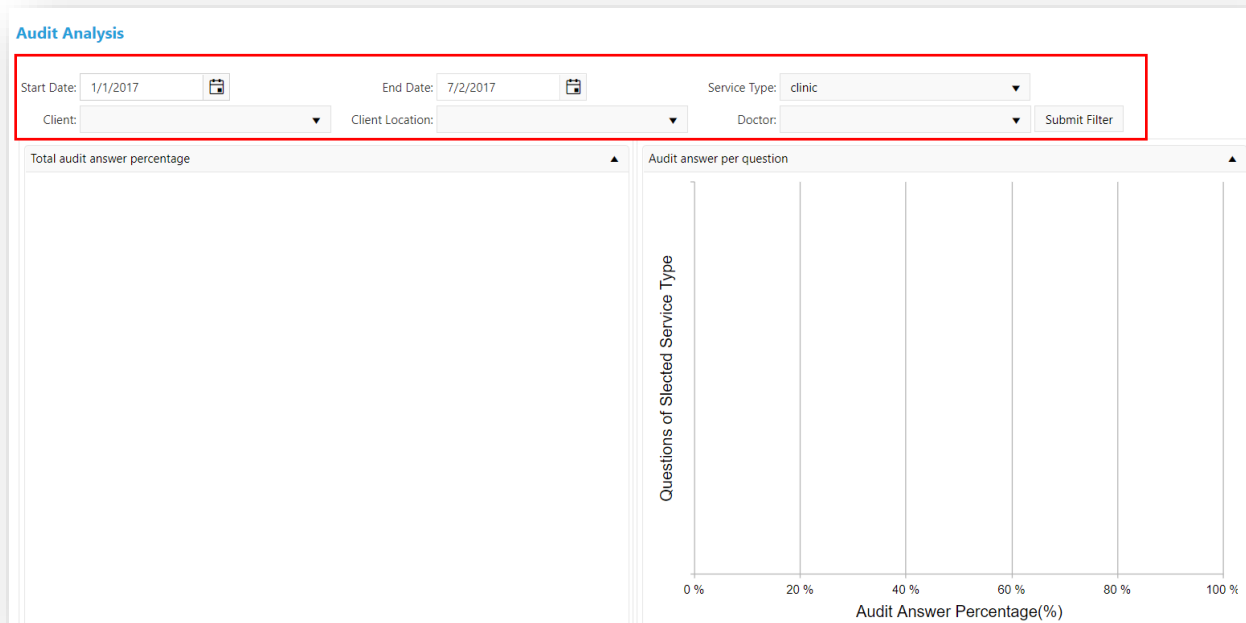


Figure 6:3 Audit Analysis

The Admins and Admin Doctors can select the "Answers" from the list in the "Session Answers" grid. When the Admins and Admin Doctors select an answer from the grid, the corresponding details will load in the "Session Answer Details".

**Audit Analysis**

Start Date: 1/1/2017  End Date: 7/2/2017  Service Type: clinic

Client:  Client Location:  Doctor:

Total audit answer percentage  Audit answer per question

**Session Answers**

Drag a column header and drop it here to group by that column

	View	Session Id	Patient Name	Patient Type	Client Name	Client Location	Call In Time	Expected Duration	Actual Duration	Doctor	Compliance Status	Yes	No	N/A
No records to display.														

[Session Answer Details](#)

Figure 6:4 Audit Analysis - Answers and Answer Details

## 6.2 CLIENT STATISTICS REPORT

The Client Statistics Report contains the details of a “Client, the “Client Location”, “Required Response Time”, “Avg Session Length”, “Avg Response Time”, “Total Sessions”, “Total Compliant Session”, “% Compliant”, “% Non-Compliant”, “Timely Sessions”, “% Timely” and “%Non-Timely Session” for that “Client Location”

The user can export the report to their desired format by selecting the type of file, they want the data exported to, in the “Export to selected format” drop-down and click the “Export” button next to it.

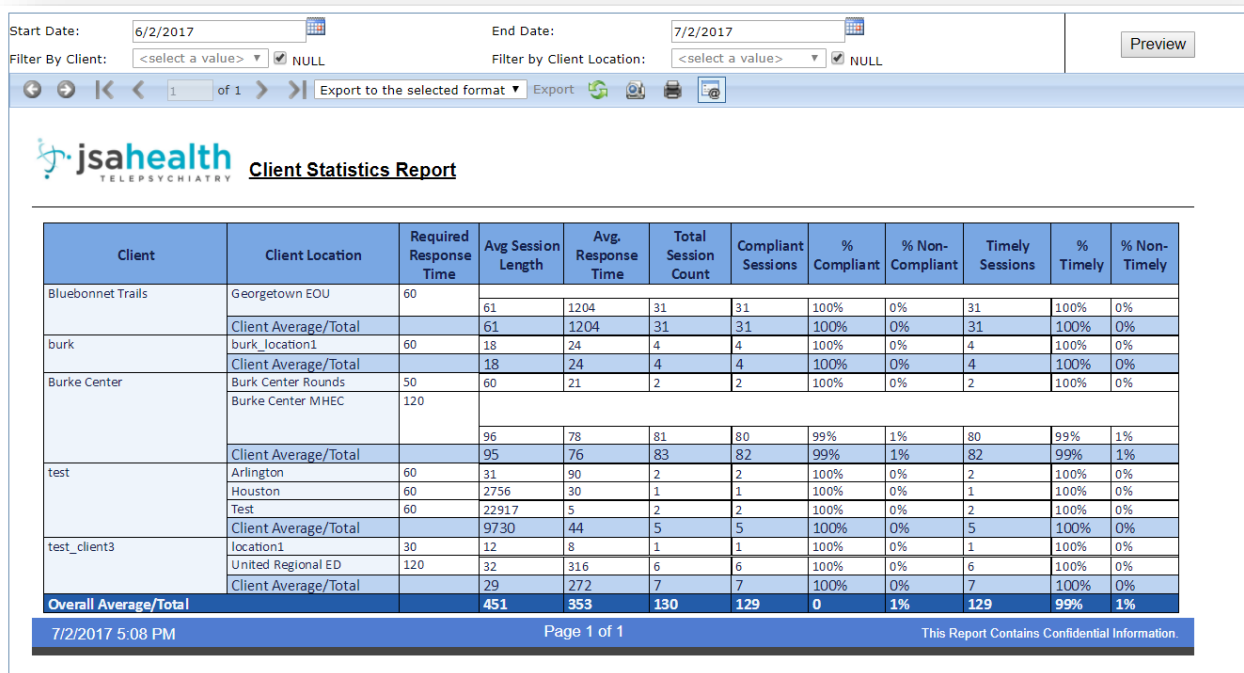


Figure 6:5 Client Statistics Report

### 6.3 SESSION STATISTICS REPORT

Session Statics Report contains the following sections.

- The session details section  
The details for each session is provided in this section: Session ID, doctor assigned to this session, start and end dates and times, duration of the session, category of session – on demand or scheduled and type of visit – emergent, urgent or phone
- The Doctor section count details sections  
This section gives the metrics for each doctor, the number urgent and emergent visits they handled, the total count for On-Demand and Scheduled visits and average On-Demand duration for the selected range of dates.
- The Doctor on-demand and scheduled details section  
This section displays the count of emergent and urgent visits under On-Demand sessions, and click and round type session under Scheduled sessions, and the total count of all the sessions handled by the doctor

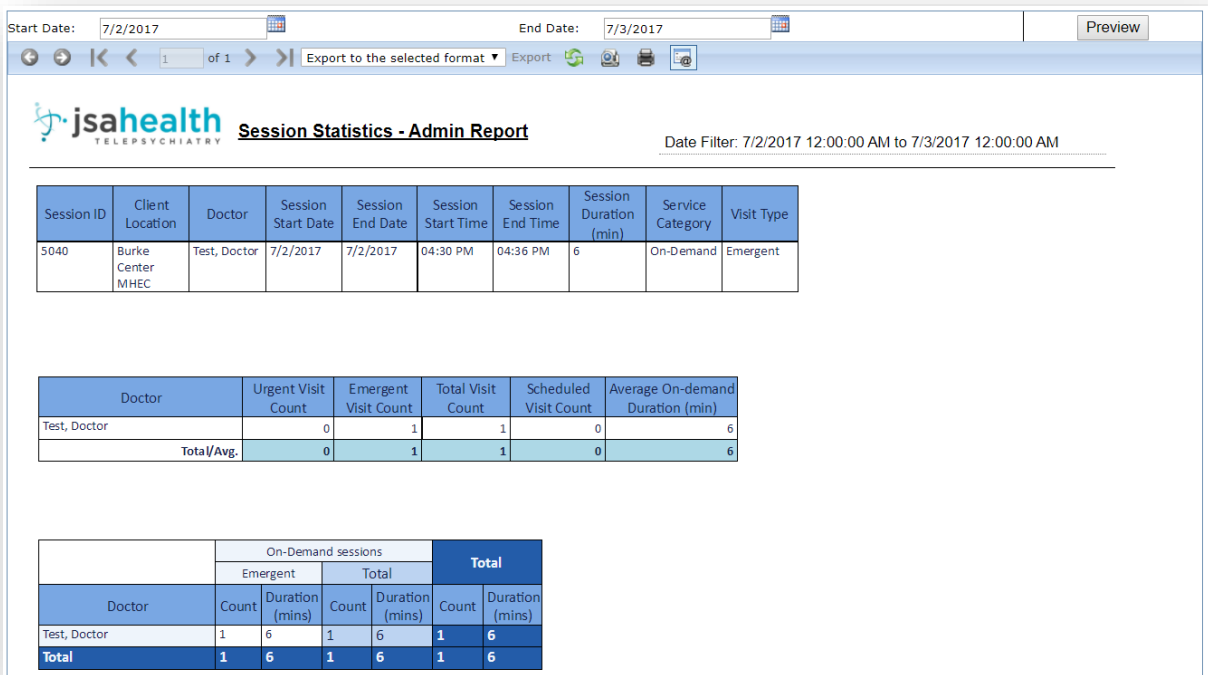


Figure 6:6 Session Statistics Report

## 6.4 TOP CLIENT REPORT

This report contains 2 grids

- A list of clients with the maximum number sessions each month for the last 12 months
- A count of sessions per month for the last 12 months.

End Date: 7/2/2017 NULL Top N clients: 15 NULL

Export to the selected format Export

**jsahealth** TELEPSYCHIATRY **Top Clients - Rolling 12 months** End Date: 7/2/2017 12:00:00 AM

Client	Jun 2017		May 2017		Apr 2017		Mar 2017		Feb 2017		Jan 2017		Dec 2016		Nov 2016		Oct 2016		Sep 2016		Aug 2016		Jul 2016	
	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions	Rank	Sessions
Bluebonnet Trails	2	31	2	30	2	42	2	65	2	54	2	79	2	83	2	56	2	51	2	60	2	38	2	26
burk	5	4	4	3	4	9	5	10	3	8	5	12	5	14	5	6	5	9	4	9	5	4	4	5
Burke Center	1	83	1	195	1	138	1	188	1	212	1	245	1	203	1	117	1	120	1	66	1	76	1	56
test	4	5	3	5	5	8	4	15	4	4	4	15	4	18	4	8	4	10	4	9	4	6	4	5
test_client3	3	7	3	5	3	14	3	19	3	8	3	26	3	25	3	15	3	15	3	18	3	7	3	9

Month	Top 15 Session Count	Total Session Count	% Top Clients
June 2017	130	130	100.00 %
May 2017	238	238	100.00 %
April 2017	211	211	100.00 %
March 2017	297	297	100.00 %
February 2017	286	286	100.00 %
January 2017	377	377	100.00 %
December 2016	343	343	100.00 %
November 2016	202	202	100.00 %
October 2016	205	205	100.00 %
September 2016	162	162	100.00 %
August 2016	131	131	100.00 %
July 2016	101	101	100.00 %

Figure 6:7 Top Clients

## 6.5 ROLLING MONTHLY ON-DEMAND REPORT

Rolling Monthly On-demand report contains 4 grids.

- The Weekly On-Demand calls attended by doctor, broken down by the visit type – Emergent, Phone and Urgent – broken down by Weekly count for the last 3 weeks
- Week and Day report by doctor – Count of sessions broken down by week, broken down by day of the week. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Shift report by doctor – Count of sessions broken down by week, drilled down again by shift of day. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Hour report by doctor – Count of session broken down by week, drilled down by hour of day the doctor attended the session. These are further split based on the type of visit – Emergent, Phone and Urgent

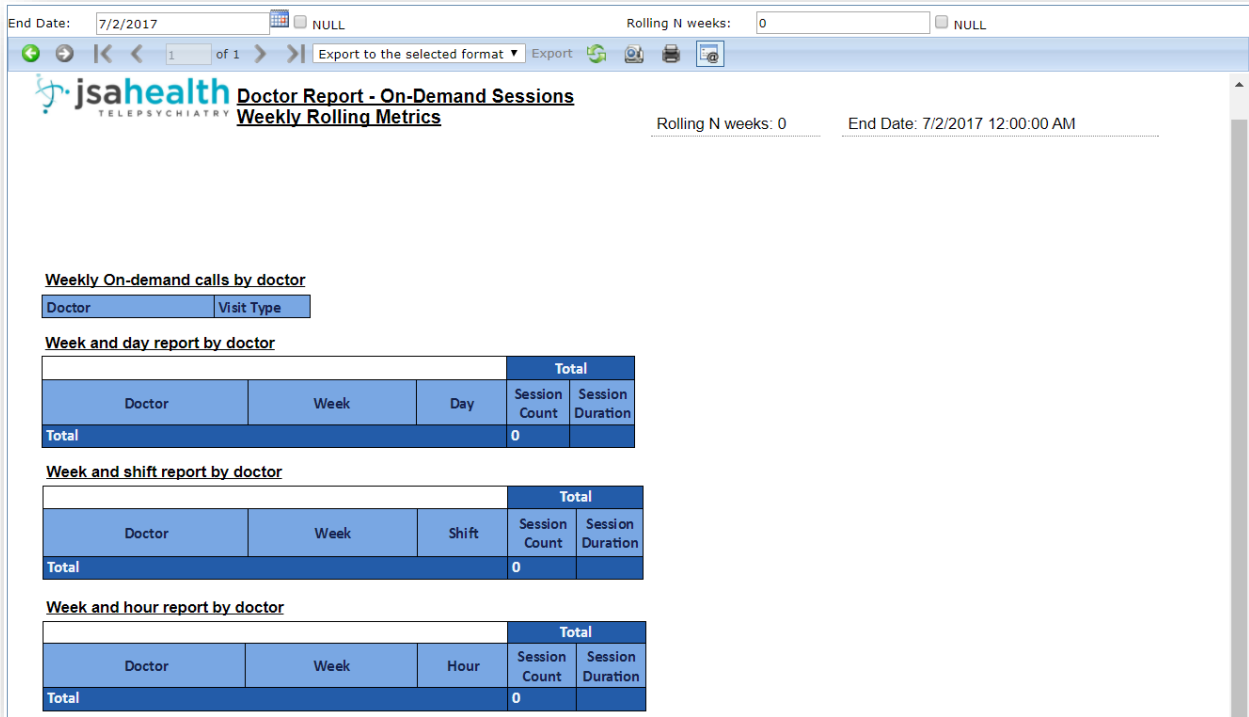


Figure 6:8 Rolling Weekly On-Demand Report

## 6.6 ROLLING MONTHLY SCHEDULED REPORT

Rolling Monthly Scheduled report contains 4 grids.

- The Weekly Scheduled calls attended by doctor, broken down by the visit type – Emergent, Phone and Urgent – broken down by Weekly count for the last 3 weeks
- Week and Day report by doctor – Count of sessions broken down by week, broken down by day of the week. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Shift report by doctor – Count of sessions broken down by week, drilled down again by shift of day. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Hour report by doctor – Count of session broken down by week, drilled down by hour of day the doctor attended the session. These are further split based on the type of visit – Emergent, Phone and Urgent

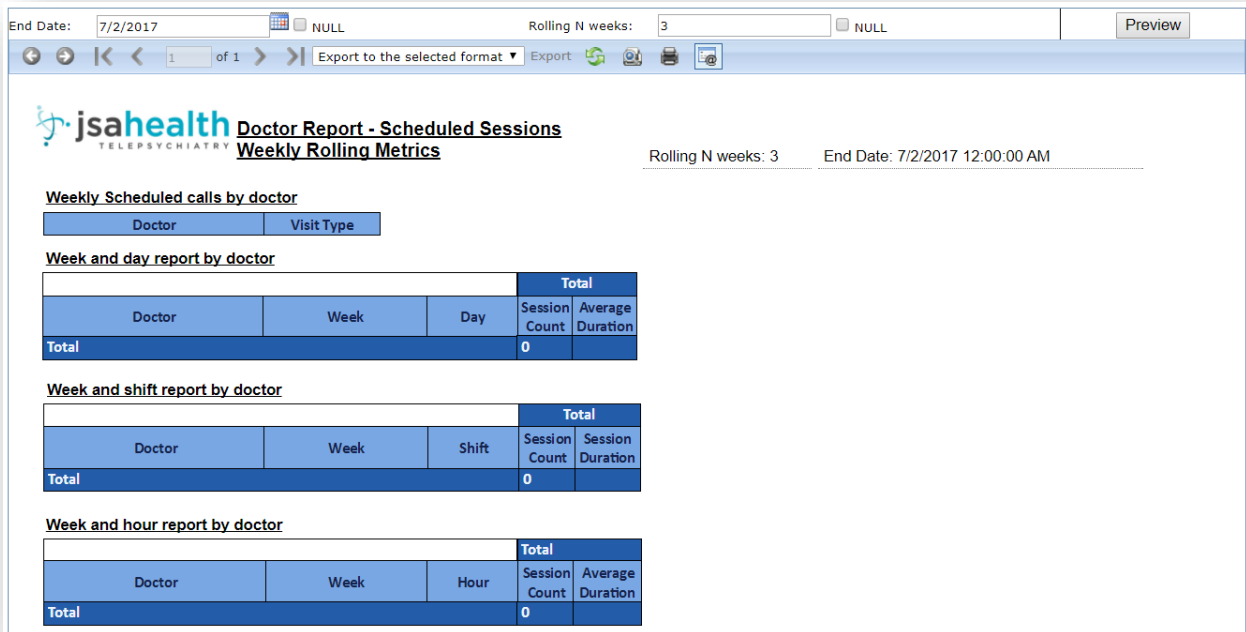


Figure 6:9 Rolling Weekly Scheduled Report

## 6.7 ROLLING WEEKLY ON-DEMAND REPORT

Rolling Weekly On-demand report contains 4 grids.

- The Weekly On-Demand calls attended by doctor, broken down by the visit type – Emergent, Phone and Urgent – broken down by Weekly count for the last 3 weeks
- Week and Day report by doctor – Count of sessions broken down by week, broken down by day of the week. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Shift report by doctor – Count of sessions broken down by week, drilled down again by shift of day. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Hour report by doctor – Count of session broken down by week, drilled down by hour of day the doctor attended the session. These are further split based on the type of visit – Emergent, Phone and Urgent

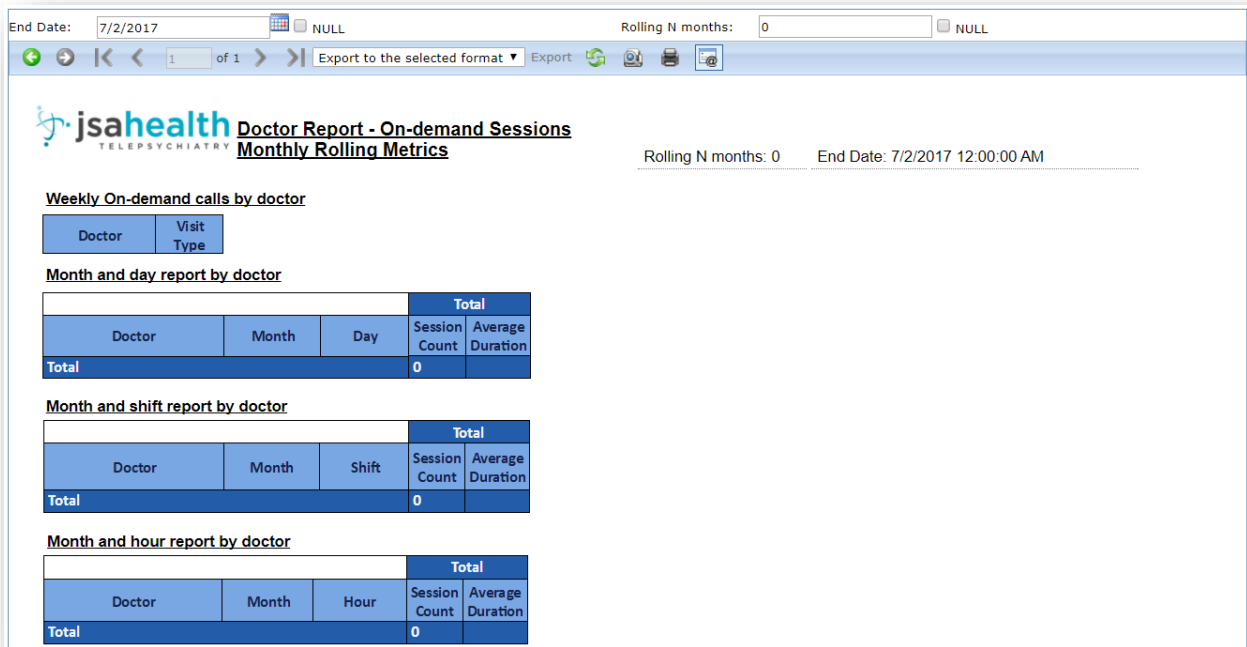


Figure 6:10 Rolling Monthly On-Demand Report



## 6.8 ROLLING MONTHLY SCHEDULED REPORT

Rolling Monthly On-demand report contains 4 grids.

- The Weekly On-Demand calls attended by doctor, broken down by the visit type – Emergent, Phone and Urgent – broken down by Weekly count for the last 3 weeks
- Week and Day report by doctor – Count of sessions broken down by week, broken down by day of the week. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Shift report by doctor – Count of sessions broken down by week, drilled down again by shift of day. These are further split based on the type of visit – Emergent, Phone and Urgent
- Week and Hour report by doctor – Count of session broken down by week, drilled down by hour of day the doctor attended the session. These are further split based on the type of visit – Emergent, Phone and Urgent

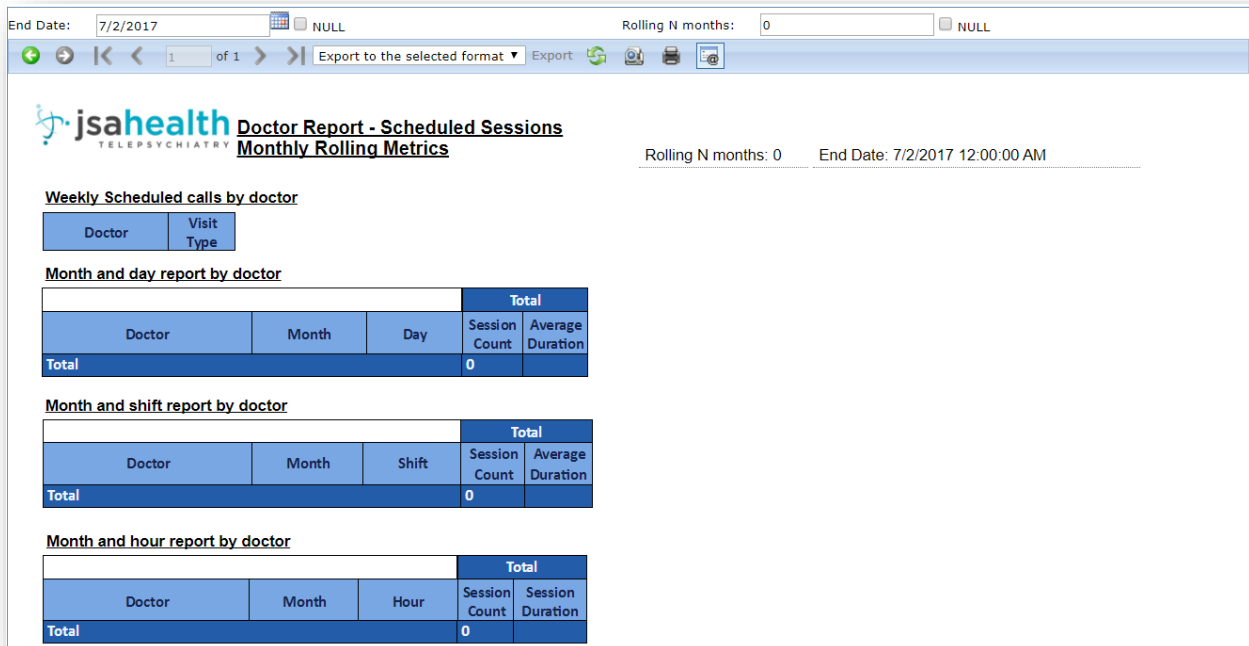


Figure 6:11 Rolling Monthly Scheduled Report

7.1 DIVISION

Divisions can be added and edited only by System Administrators.

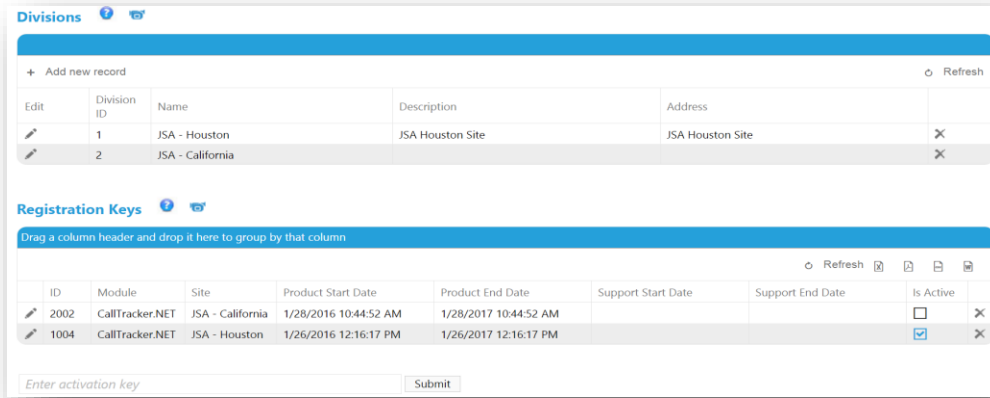


Figure 7:1 Divisions and Registration Keys

7.1.1 ADD A NEW DIVISION

As shown in Figure 6.2, system administrators can add a new division by clicking on the “+ Add new record” button (#1) then enter the “Name” (mandatory field), “Description” and “Address” and select the “v” (#2) to save or “x” (#3) to cancel.

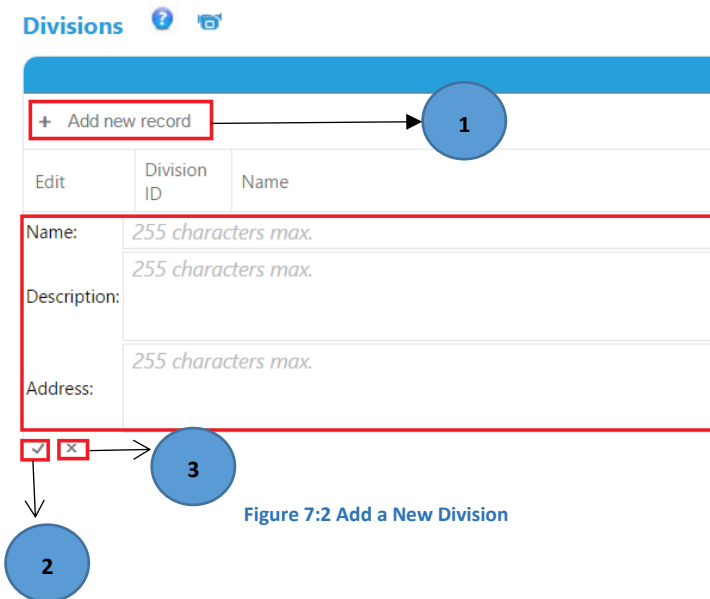


Figure 7:2 Add a New Division

### 7.1.2 UPDATE A DIVISION

As shown in Figure 6.3 system administrators can click on the “Edit” button (#1) and select the “v” (#2) to save or “x” (#3) to cancel.

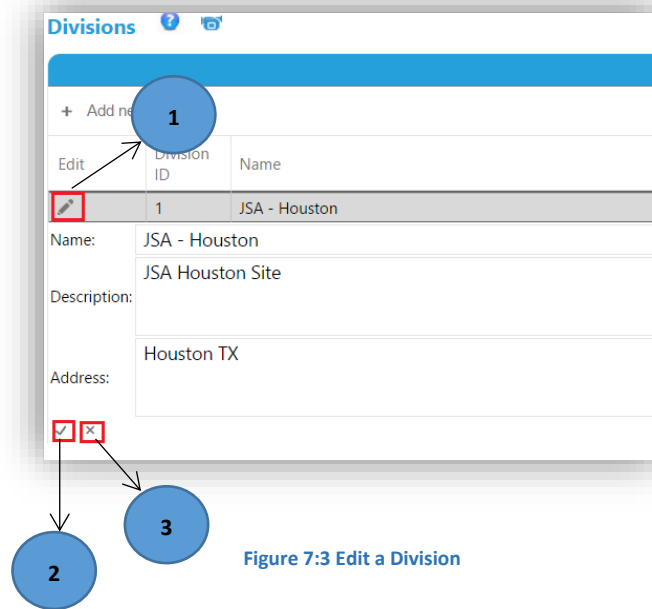


Figure 7:3 Edit a Division

### 7.1.3 DELETING A DIVISION

Users can click on the delete button at the right side of the grid as shown in Figure 6.4 to delete the existing divisions.

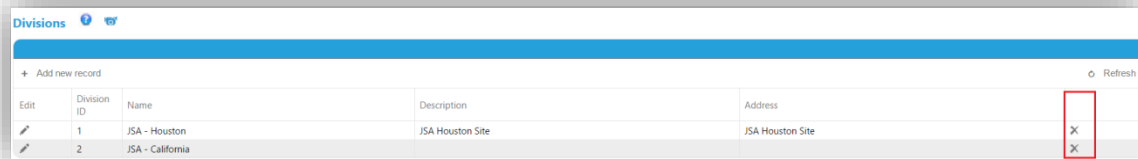


Figure 7:4 Delete a Division

### 7.1.4 UPDATE OR DELETE A REGISTRATION KEY:

As shown in Figure 6.5 users can click on the “Edit” button (#1) and check or uncheck “Is Active” (#1) to keep the site active or inactive and select the “v” (#2) to save or “x” (#3) to cancel. System Administrators can delete the registration key by clicking on the “x” (#3) at the right end corner.

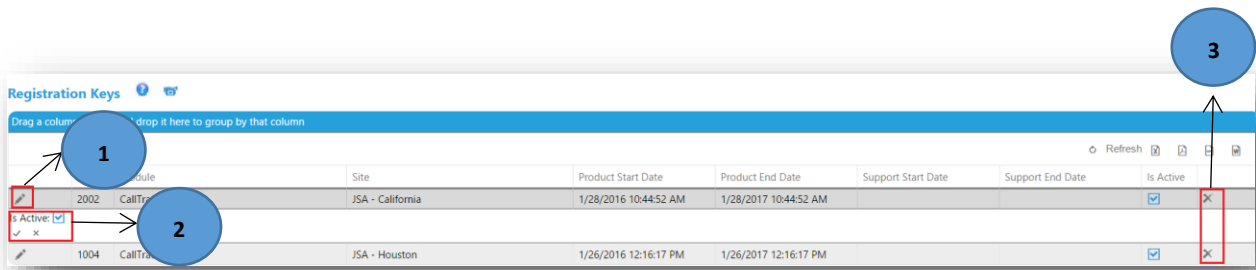


Figure 7:5 Update a Registration Key

## 7.2 CLIENTS

Clients can be added and updated only by the system administrators. The “Client Locations”, “Client Services” and “Notes” will be enabled only after adding a new Client.

### 7.2.1 ADD A NEW CLIENT

As shown in Figure 6.6 System Administrators can click on the “Add New Client” button (#1) and fill in the “Client Information” (#2) from left to right and top to bottom and click “Save” (#3).

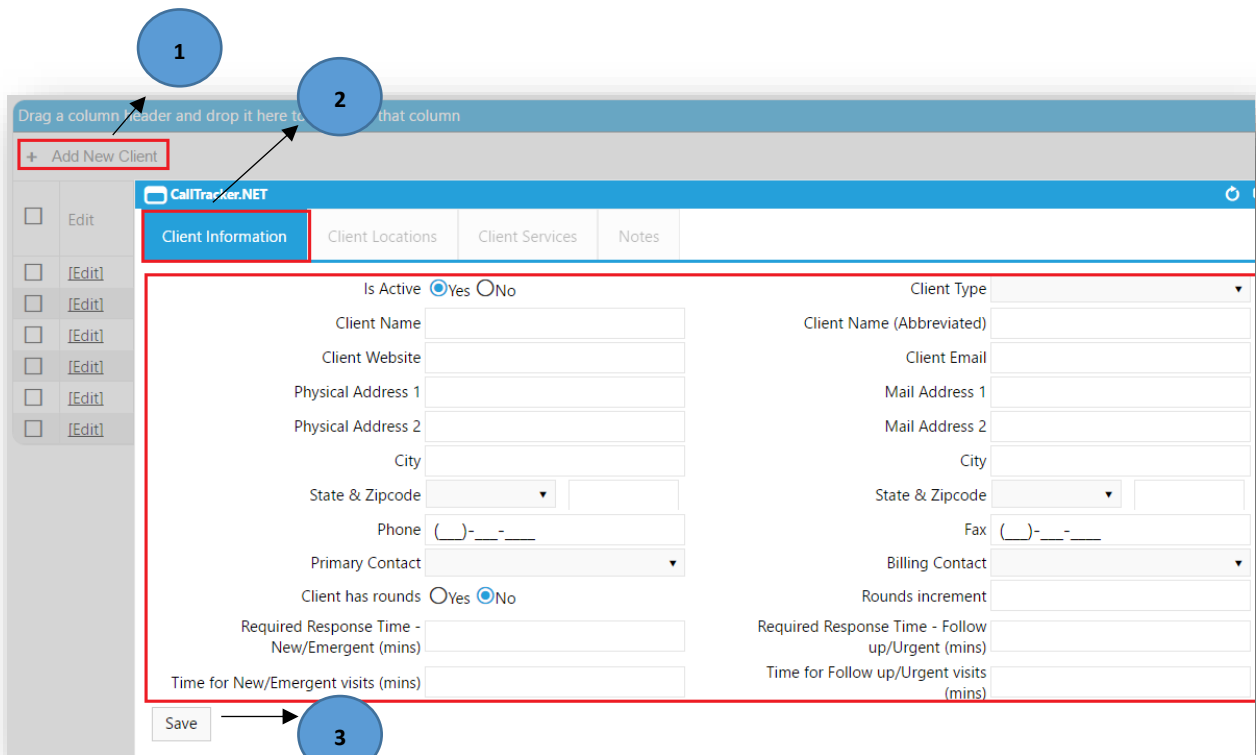


Figure 7:6 Add a New Client

As in Figure 6.6 on click of “Save” button (#3) the message “The client record has been added successfully” is displayed at the bottom right end in green and also the Client Audit information is updated in the header (#1) as shown in Figure 6.7.

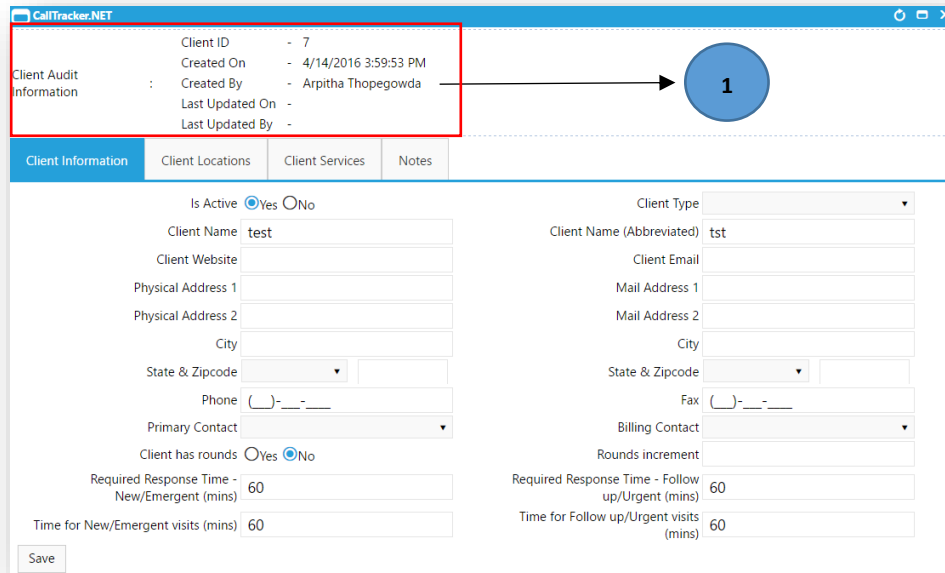


Figure 7:7 Client Audit Information

### 7.2.2 ADD NEW CLIENT LOCATION

Click on “Add New Location” button (#1) and then fill in the required information and click on “Insert” button (#2) as in Figure 6.8 and a message “The client location has been added successfully” pops up at the right bottom corner in green.

The “Required Responses Time” values are applicable only to “On-Demand” sessions.

The expected duration for “New/Emergent” visits will be set in the box for “Time for New/Emergent” visits. The value is in minutes.

The expected duration for “Follow-up/Urgent” visits will be set in the box for “Time for Follow-up/Urgent” visits. The value is in minutes.

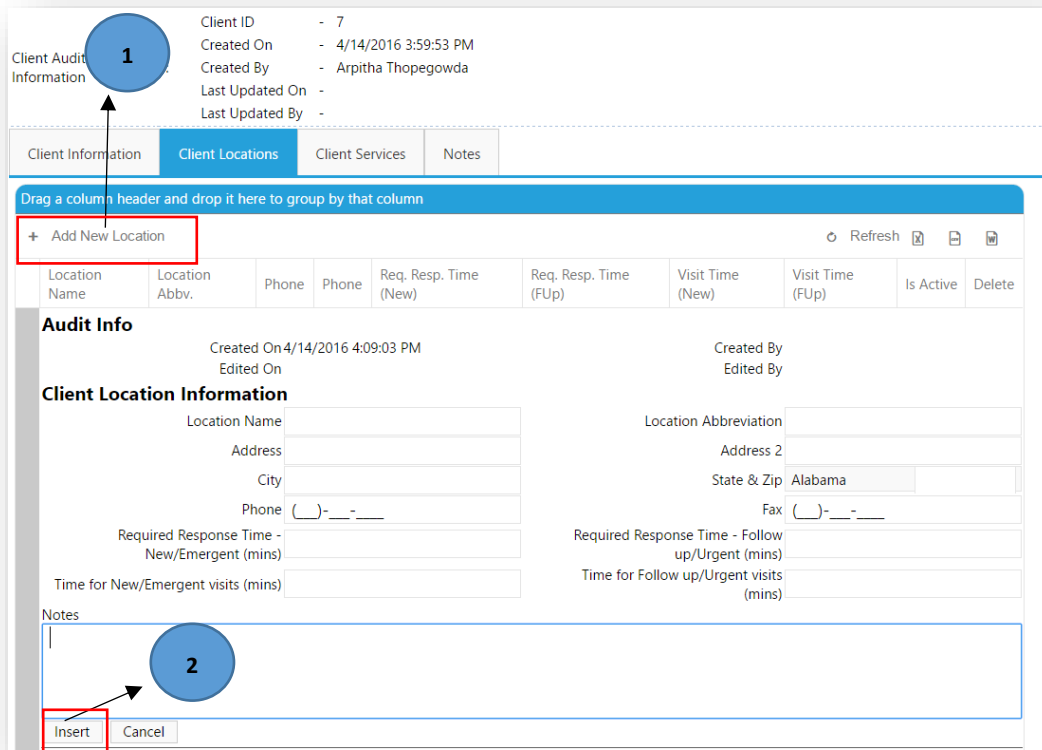


Figure 7:8 Add a Client Location

### 7.2.3 ADD CLIENT SERVICES

Click on the “Client Services” tab and users can see all the existing services on the left-hand side and “No Services have been assigned to the client location” message in the textbox on the left-hand side as in Figure 6.9. Click on the “Add New Service” button (#1). Choose the “Client Location” from the dropdown (#2). Click the “Service Type” from the dropdown to be added (#3). Fill in the “Expected Duration - New (mins)” and “Expected Duration - Follow up (mins)” and click “Insert” (#4). The duration values under Scheduled Sessions are required for Service Types that are not On-Demand.

Figure 7:9 Add a New Client Service

### 7.2.3.1 CHARGES

Charges can be set up only by the site Admin for “Service Types” under each Client.

Service Types are divided into two main “Charge” types – charge per instance and charge not per instance (per block of time).

Figure 7:10 Charge Information

- “Is New or Follow Up”:

This dropdown has 3 options – “New”, “Follow-up” and “Either”. The value is always defaulted to “New”. Each of these options corresponds to the type of session being created for a client. Please refer 5.1.1. When the user chooses the “Either” option, the charge will be applied to a session that is neither New or Follow-Up. For example – a phone call or rounds.

- Is Per Instance (Required Field)

This check box will always default to Yes (checked value).

When the box is checked, a fixed amount will be charged to the client, irrespective of the duration of the session.

When the box is not checked, “Unit Duration (in minutes)”, “Overtime Threshold”, “Overtime Unit Duration (in minutes)” and “Overtime Unit Charge” are to be filled in appropriately.

- Unit Duration (in minutes)

This value is the smallest or default block of time a session will be charged.

- Overtime Threshold

The block of time that will not be charged if the session exceeds the “Unit Duration” of a session.

- Overtime Unit Duration

The smallest block of time that will be accounted for a charge, after the “Overtime Threshold” for a session is passed or “Unit Duration” is passed when no “Overtime Threshold” is setup.

- Overtime Unit Charge

Whenever a session goes over the “Threshold” or the “Unit Duration” (when no “Overtime Threshold” is setup), the “Overtime Unit Charge” will be applied to each block of “Overtime Unit Duration” passed.

- Is Child

This setting has a default value of “No”. However, the user can choose “Yes” or “N/A”.

Value is No – The charge is applied only to Adults

Value is Yes – The charge is applied only to Children

Value is N/A – The charge is applied to Adults and Children

- Is No Show

This setting has a default value of “No”. However, the user can choose “Yes” or “N/A”.

Value is No – The charge is applied to not No Show sessions

Value is Yes – The charge is applied to No Show Sessions

Value is N/A – The charge is applied to sessions that do not have the concept of No Show applied to them

- Is Holiday

This setting has a default value of “No”. However, the user can choose “Yes” or “N/A”.



Value is No – The charge is applied to sessions not performed on a Holiday  
Value is Yes – The charge is applied to sessions perform on a Holiday  
Value is N/A – The charge is applied to sessions irrespective of Holiday or not

- Time Period

The default value of this setting is blank. However, the user can choose “Weekday”, “Weekday After Hours” or “Weekend”

Value is Blank – The charge is applied to session irrespective of the time of day they were performed on  
Value is Weekday – The charge is applied to sessions performed on Weekdays between Monday to Friday between 8AM to 5PM

Value is Weekday After Hours - The charge is applied to sessions performed on Weekdays between Monday to Thursday between 5PM and 8AM next day. Friday from 5PM to Saturday 8AM.

Value is Weekend - The charge is applied to sessions performed on Weekends between Saturday 8AM to Monday 8AM

- Unit Charge (Required Field)

The “Unit Charge” will always override the default charge set up for the “Service Type”. Please refer 7.4.1. This is the smallest unit of charge applied to session.

#### Example 1 – Not Per Instance Charge Settings

The user can fill in both “Overtime Threshold” and “Overtime Unit Duration”. The user can also leave these 2 fields as blank.

Burk has scheduled a round from 8:00 am – 10:00 am, but they actually finished the round at 10:50 am.

If you have a setting of

Unit Duration = 60 minutes

Unit Charge = \$150

Overtime Threshold = 15 minutes

Overtime Unit Duration = 20 minutes and

Overtime Unit Charge = \$50

Then for this round session Burk will be charged:  $\$150 \times 2 + \$50 \times 3 = \$450$

The reason for additional charge is:

The first 15 minutes of overtime (from 10:00 – 10:15) Burk will not be charged but any time after 10:15 Burk will be charged \$50 every 20 minutes (if less than 20 then round up) they utilized. When the time hit 10:16, the charge will start calculating from 10:00.

In this case Burk over-used 35 minutes, so they will be charge an additional \$150 ( $\$50 \times 3$ ).

Please note that you can opt out on the overtime all together if it does not apply to a client. But if you set “Overtime Unit Duration” then it makes sense to fill in “Overtime Unit Charge” as well.

Example 2 – Per Instance Charge Settings

The user has to set values for “Is New or Follow up”, “Unit Charge”, “Is per Instance”, “Is Child”, “Is No Show”, “Is Holiday” and “Time Period”

Burk has a MHEC session from 8:00 am – 10:00 am on Monday

If you have a setting of

Is New or Follow Up = Neither

Unit Charge = \$150

Is per Instance = Checked

Is Child = No

Is No Show = No

Is Holiday = N/A

Time Period = Weekday

Then for this session Burk will be charged: \$150.

Please note if the Overtime values are set, the system will ignore those values.

### 7.2.3.1.1 ADD A CHARGE TO A CLIENT SERVICE

Click on the arrow (#1), click on “Add Charge” (#2), select and enter the required information under “Charge Information” and click Insert (#3).

Georgetown EOU Clinics clinic 120 60 Mahata, Kallol 7/20/2016 10:54:27 AM Gai, Li 4/13/2017 1:43:41 PM

Client Specific Service Charges

+ Add Charge Refresh

New or Follow-up	Default Charge	Charge Per Instance?	Unit Duration	Overtime Threshold (min)	Overtime Unit Increment (min)	Overtime Unit Cost	Is Child?	Is No Show?	Is Holiday?	Time Period	Delete
------------------	----------------	----------------------	---------------	--------------------------	-------------------------------	--------------------	-----------	-------------	-------------	-------------	--------

**Audit Info**  
Created On 7/5/2017 9:34:14 PM Created By  
Edited On Edited By

**Charge Information**

Is New or Follow Up New  
Is per instance   
Overtime Threshold  
Overtime Unit Charge  
Is No Show No  
Time Period  
Unit Charge  
Unit Duration (mins)  
Overtime Unit Duration  
Is Child No  
Is Holiday No

Insert Cancel

Figure 7:11 Add a Charge to a Client Service

### 7.2.3.1.2 EDIT A CHARGE TO A CLIENT SERVICE

Click on the arrow icon (#1), click on pencil icon (#2) of the charge the user wants to edit, select and enter the required information under “Charge Information” and click “Insert” (#3).

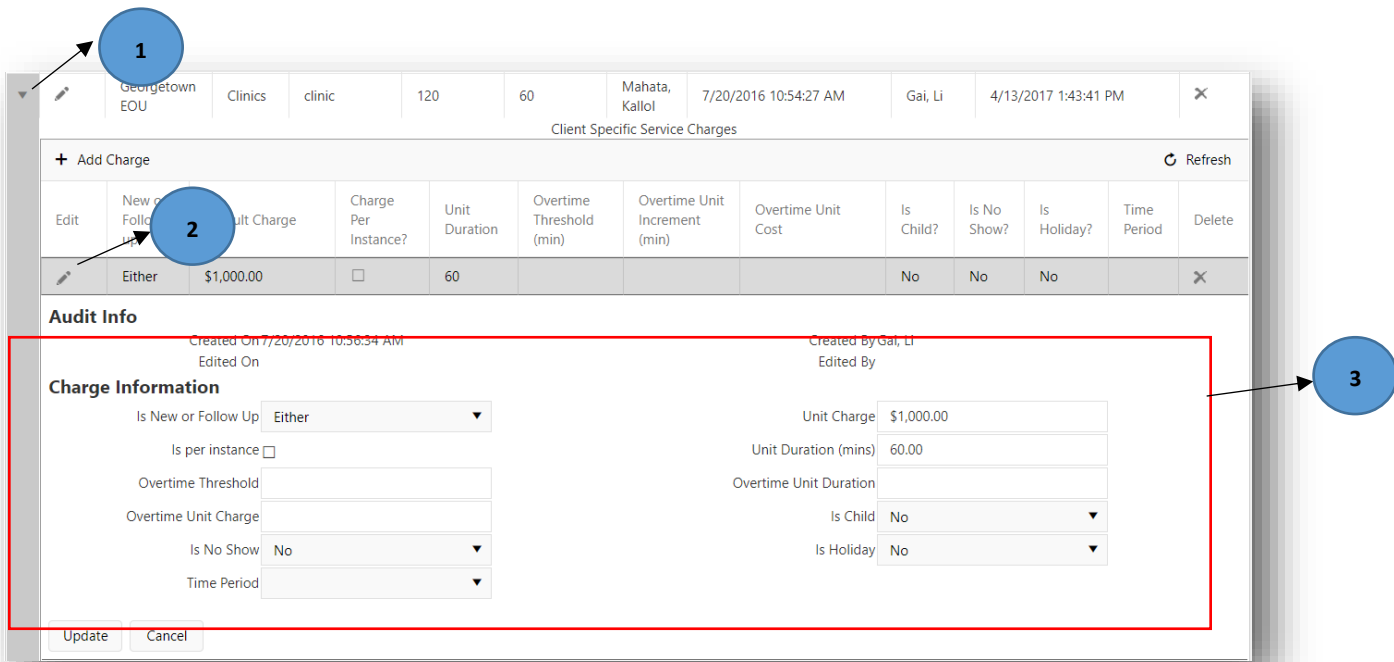



Figure 7:12 Edit a Charge to a Client Service

### 7.2.3.1.3 DELETE A CHARGE TO A CLIENT SERVICE

To delete a charge, click on the arrow (#1) and then delete a charge by clicking on the  icon (#2). A confirmation dialog will pop, click "OK" to delete the charge (#3).

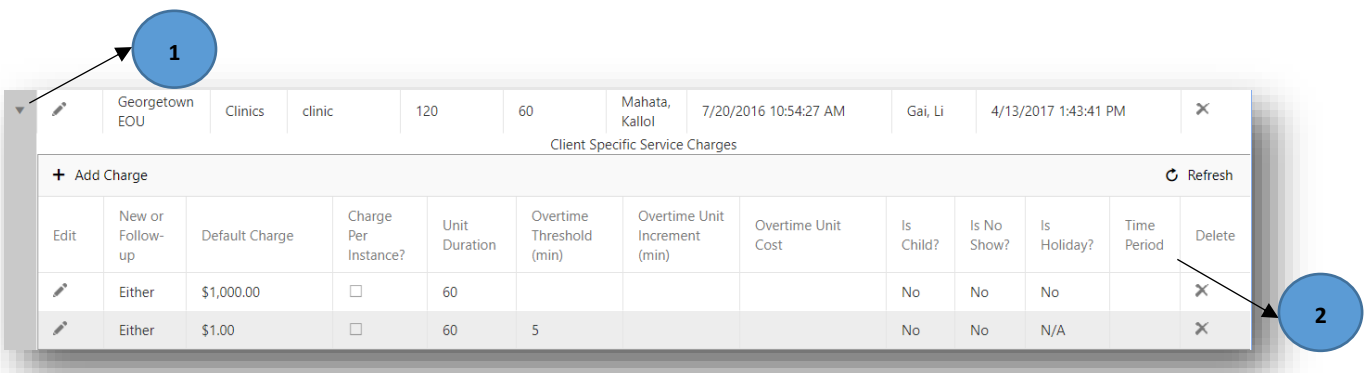


Figure 7:13 Delete a Charge to a Client Service

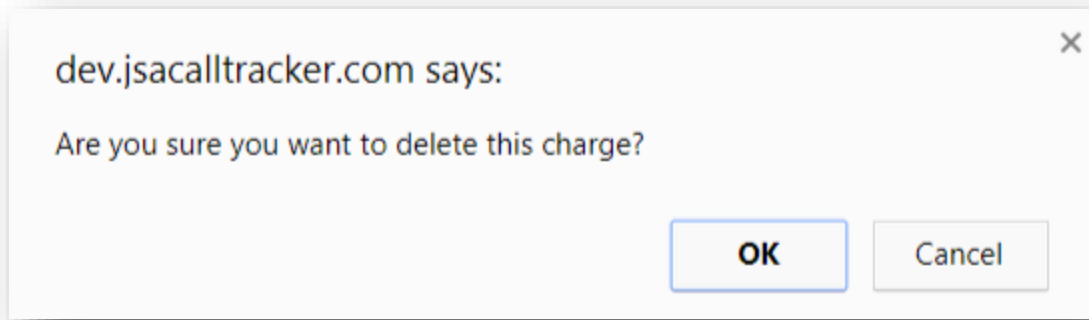


Figure 7:14 Click OK to confirm Delete of a Charge

---

#### 7.2.4 ADD NOTES

Click on the "Notes" tab (#1) and enter the text and if required select the text styling options (#2) provided at the top line and click "Save" (#3) as in Figure 6.10.

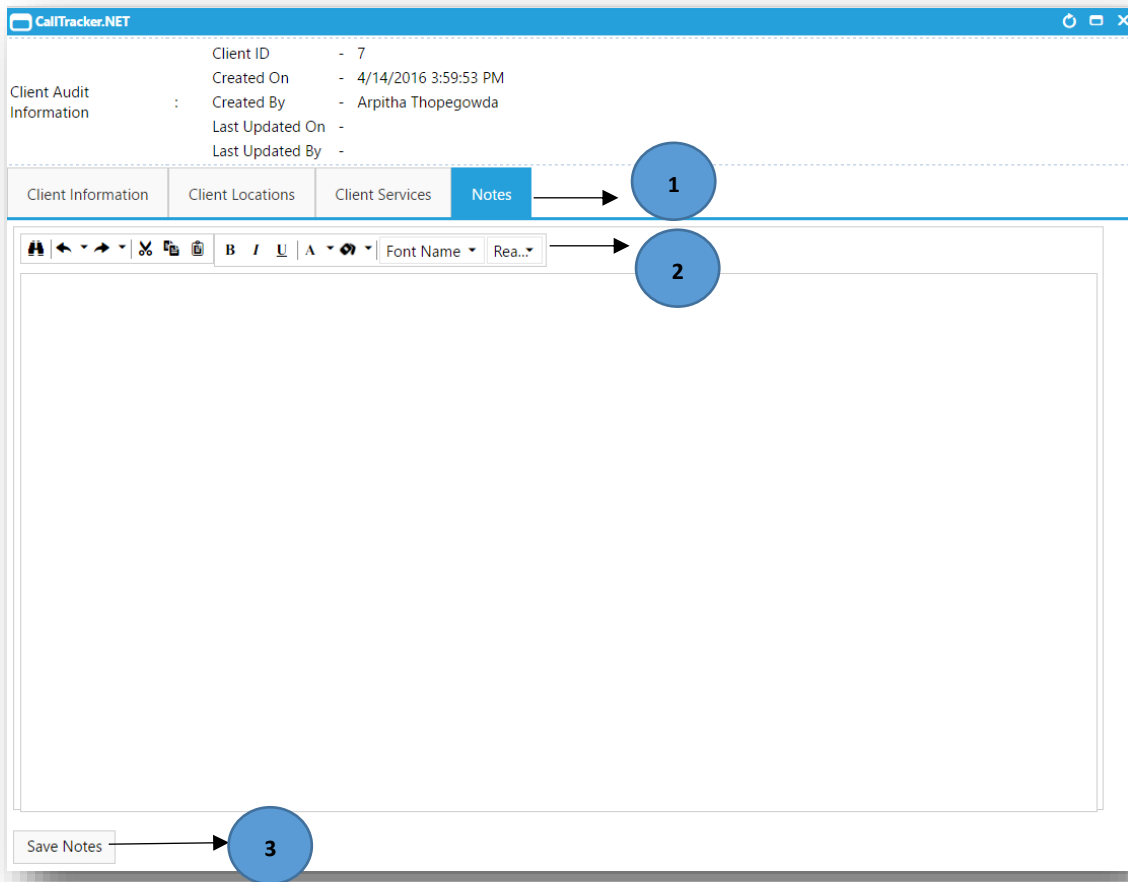


Figure 7:15 Add Notes

### 7.3 LOOKUPS

Lookups gives the metadata information of the different data fields. To search for the available information of a particular field select the “Lookup specific type” (#1) and the “Specific type value” (#2) as in Figure 6.11 and then expand the arrow down button (#3). Both Active and Inactive items are listed. Lookups gives the user a description about all the fields used in the application.

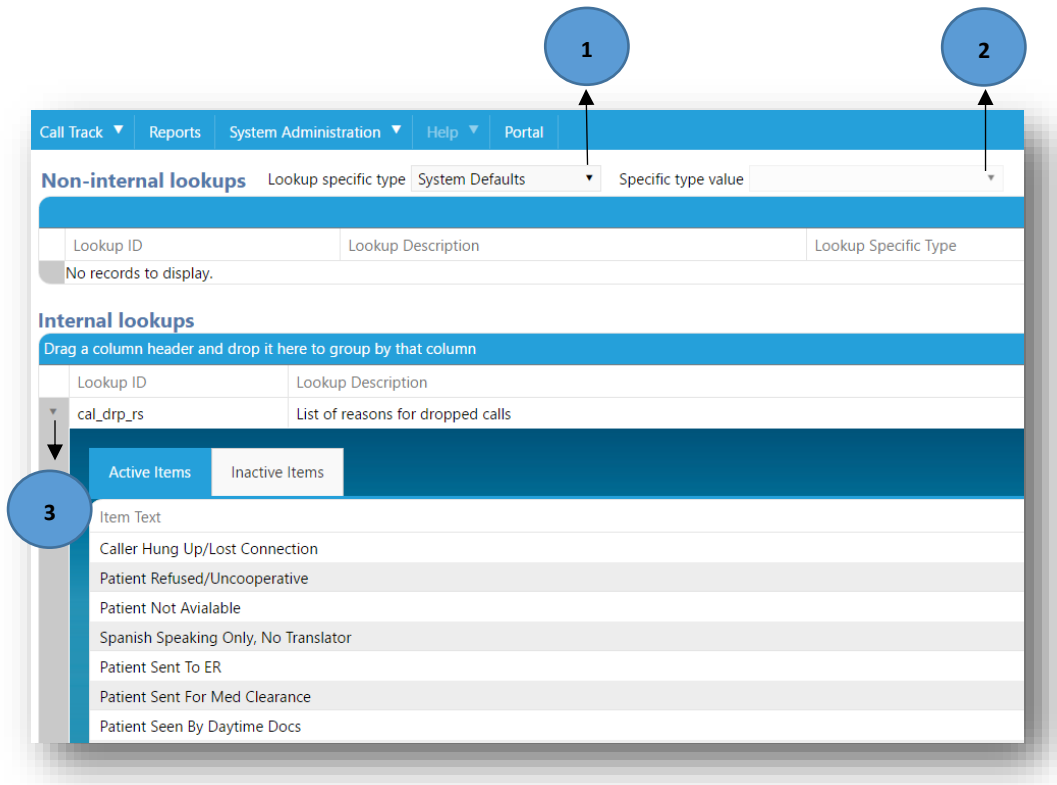


Figure 7:16 Lookups

## 7.4 SERVICE TYPES

### 7.4.1 ADD A NEW SERVICE TYPE

Click on the “+Add new record” button (#1) and fill in the data and click on the tick mark to save the information.

+ Add new record → 1				
Edit	ID	Service Type	Service Type Text	Is Active
Service Type:		10 characters max.		
Service Type Text:		50 characters max.		
Is Active:		<input type="checkbox"/>		
Is On Demand:		<input type="checkbox"/>		
Is Per Instance?:		<input type="checkbox"/>		
Default Duration (min):		<input type="text"/>		
Default Charge:		<input type="text"/>		
Overtime Threshold (min):		<input type="text"/>		
Overtime Unit Increment (min):		<input type="text"/>		
Overtime Unit Cost:		<input type="text"/>		
✓ ✕				

Figure 7:17 Add a New Service Type

#### 7.4.2 UPDATE A SERVICE TYPE

Click on the “Edit” button (#1) and update the required information (#2) and click on the tick mark to save the information.



	9	Clinics	clinic
Service Type:	Clinics		
Service Type Text:	clinic		
Is Active:	<input checked="" type="checkbox"/>		
Is On Demand:	<input type="checkbox"/>		
Is Per Instance?:	<input type="checkbox"/>		
Default Duration (min):	120		
Default Charge:	\$500		
Overtime Threshold (min):	15		
Overtime Unit Increment (min):	15		
Overtime Unit Cost:	\$2,000		
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>			

Figure 7:18 Edit a Service Type

## 7.5 AUDIT TEMPLATES

### 7.5.1 ADD NEW TEMPLATE

Click on the “+Add New Template” button (#1) and fill in the “Template Name”, “Service Type” from the dropdown list and enter notes if any to the “Notes” field and click “Insert” button. On click of the “Insert” button, the “Audit Info” will be updated.

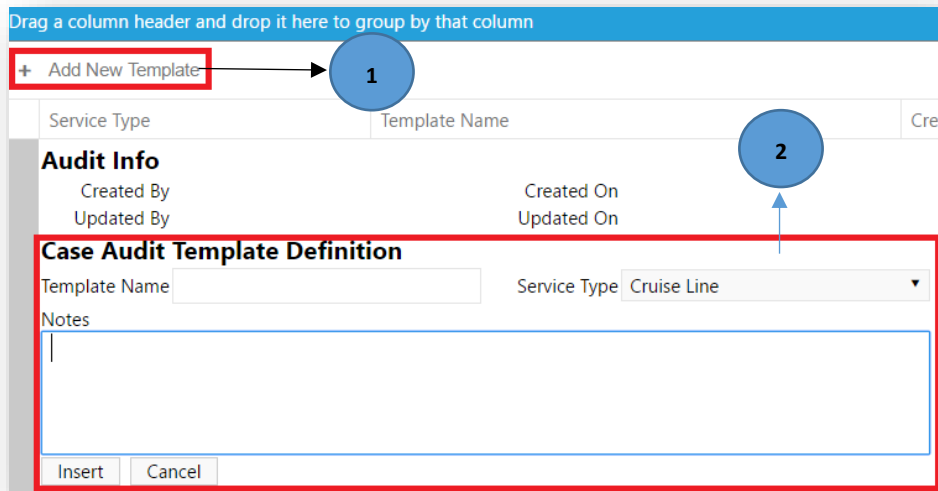


Figure 7:19 Add a New Template

### 7.5.2 ADD QUESTIONS

Click on the arrow down button (#1), click on “+Add Questions” button (#2), type in the “Question” and set “Is Active” field (#3), and click “Insert” button as below. Users can add as many questions as they want to a specific service type.

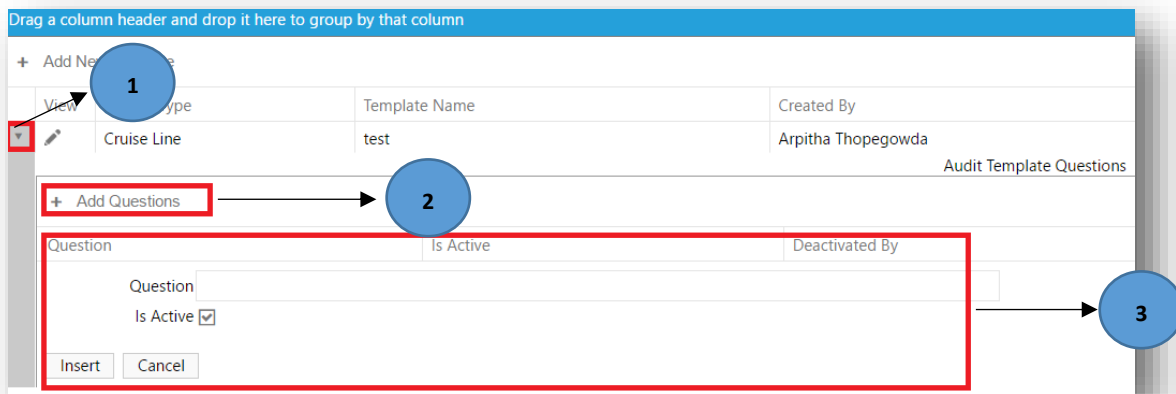
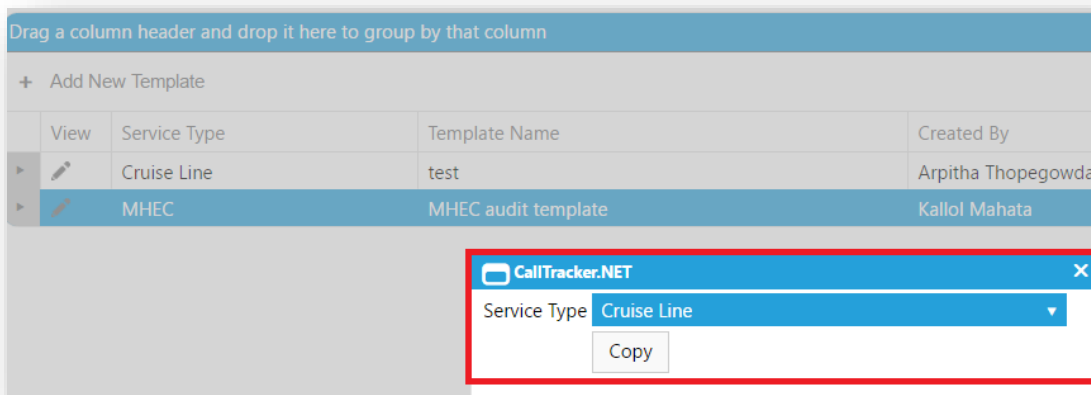
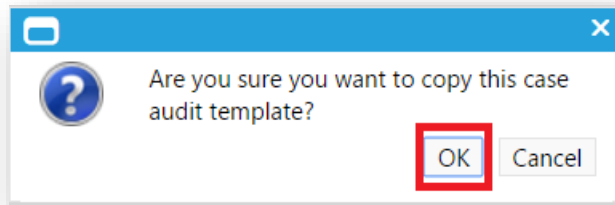
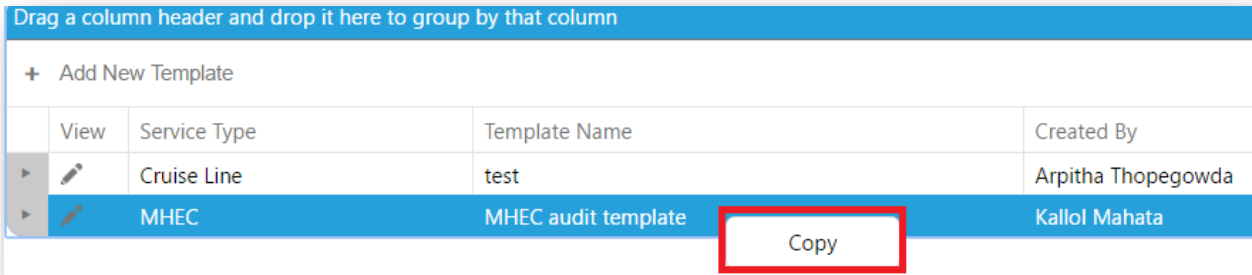


Figure 7:20 Add Questions

### 7.5.3 COPY THE AUDIT TEMPLATE

Users can right click on any "Service Type" and click "Copy". A window pops up with a message "Are you sure you want to copy this case audit template?" click "OK" button and select the Service Type from the dropdown list and click "Copy".



Drag a column header and drop it here to group by that column

+ Add New Template

View	Service Type	Template Name	Created By
	Cruise Line	test	Arpitha Thopegowda
	Hospital Consult	Copy of MHEC audit template	Arpitha Thopegowda

Audit Template Questions

+ Add Questions

View	Question
	Does the physician document in the history of present illness or subjective/objective sections, a biological/psychological/social assessment of the patient's present
	Does the physician screen and document adequately for alcohol and substance use / abuse?
	Does the physician adequately assess and document acute and chronic risk of suicide/violence? (If the patient is being moved from a higher to lower level of care,
	Does the physician document the rationale for starting, stopping, or changing medications in the Clinical Summary?
	Does the physician document the indication for medications in the med order section (i.e., Fluoxetine 20 mg PO Daily for depressn)
	Does the physician practice evidence-based decision making in their medication choices?
	Does the physician document that they explained risks/benefits/alternatives to psychotropic medications ordered?
	Does the physician provide documentation free from transcription errors and unclear abbreviations?
	Does the physician provide adequate evidence to support their chosen Axis I-IV dx, either in HPI, subjective/objective, or clinical summary?
	Does the physician address Axis III medical issues appropriately (ordering labs/EKG, referring to outpatient providers, treating mild illnesses on inpatient/MHEC pat
	Does the physician documentation adequately justify the level of care chosen for the patient including:
	Does the physician document an indication of pain reported by the patient and, if appropriate, did the physician indicate a plan for pain to be addressed?

	MHEC	MHEC audit template	Kallol Mahata
--	------	---------------------	---------------

Figure 7:21 Copy the Audit Template

## 7.6 ENVIRONMENT SETTINGS

The Environment Settings page is accessible only to the System Administrator and Admin roles.

Please refer to Chapter 7 for settings related to Notifications.

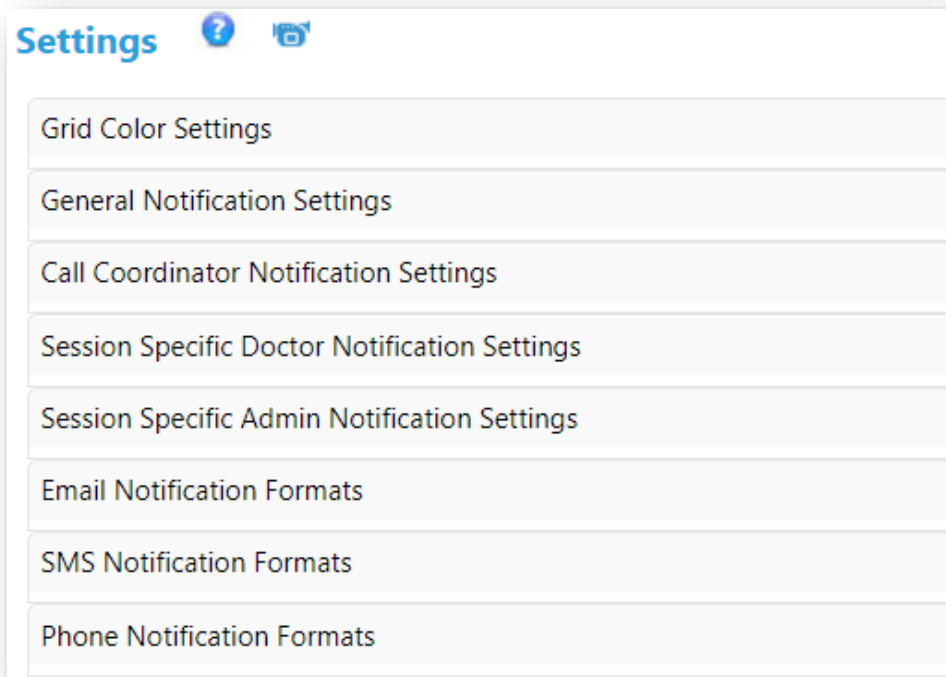


Figure 7:22 Environment Settings - sysadmin and admin View

---

### 7.6.1 GRID COLOR SETTINGS

Environment Settings helps in setting different colors to the sessions on the grid. Select two different remaining times (#1) and their corresponding colors to be displayed on the grid for both “Pending” and “In Session” (#2), and then click on Save Grid Color Settings (#3) as in (Figure 6.7). Then return back to the “Call Center” under “Call Track” to check the sessions with different grids based on the settings. This helps in differentiating the sessions based on color and remaining time.

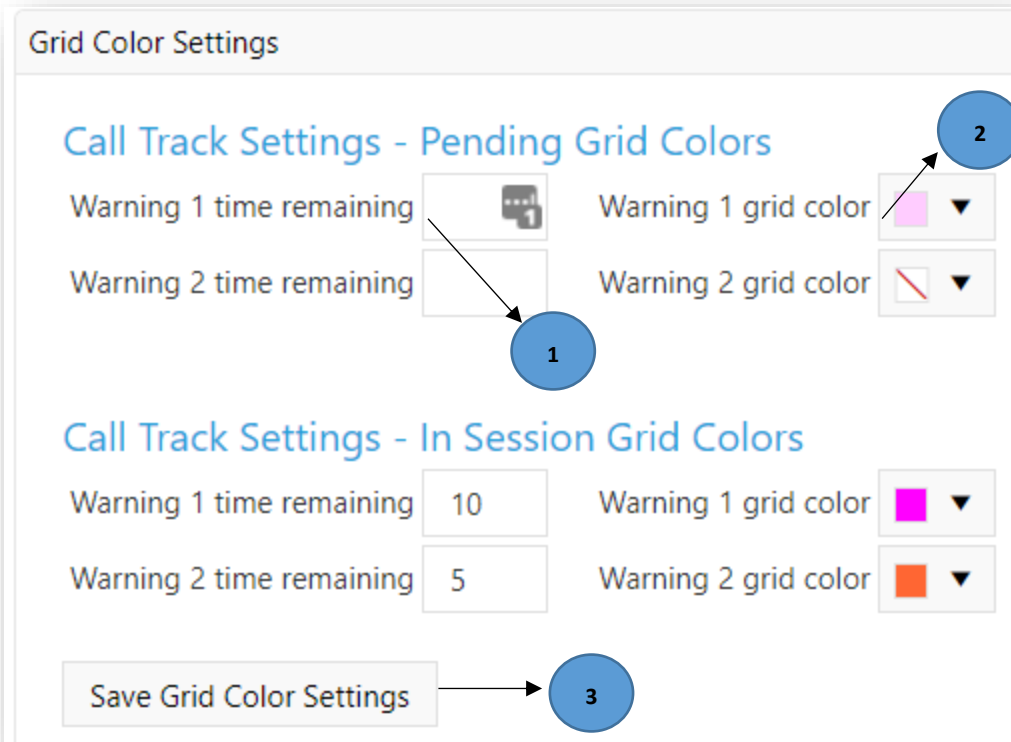


Figure 7:23 List of Grid Color Settings

---

### 7.6.2 GENERAL NOTIFICATION SETTINGS

These settings allow the System Administrator and the Admins to enable/disable a specific type of notification media for a specific site. In this example, all medias are disabled. Therefore, no user belonging to this site will receive any notifications, even if they have either personal or default settings.

General Notification Settings

Email notification state : Disabled ▼

Phone notification state : Disabled ▼

SMS notification state : Disabled ▼

Save Settings

Figure 7:24 Enable/Disable Notification Media Type

## 7.7 USER INFORMATION

User information contains user and the role details. Users and their roles can be added only by the System Administrators.

### 7.7.1 ADD A NEW USER

To add a new user, click on the “Add New User” button (#1) and fill the user information form and check for the username availability (#2) and set the role by clicking on the dropdown box (#3) and hit “Save” (#4). Users can get their newly added information emailed by clicking on the “Save & Email User” button (#5) as in Figure 6.8.

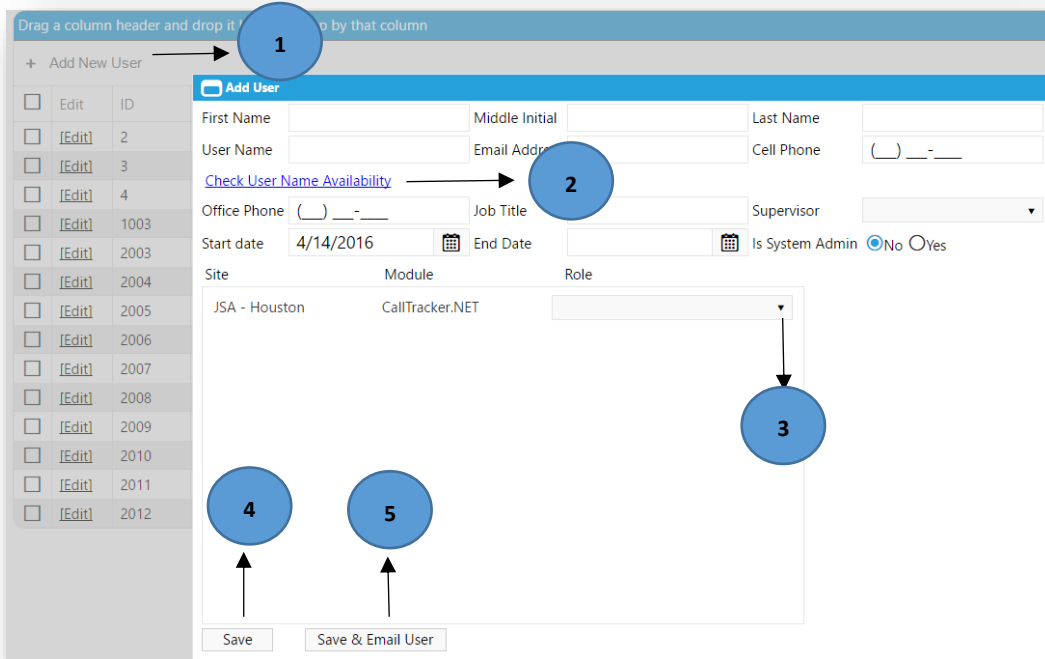
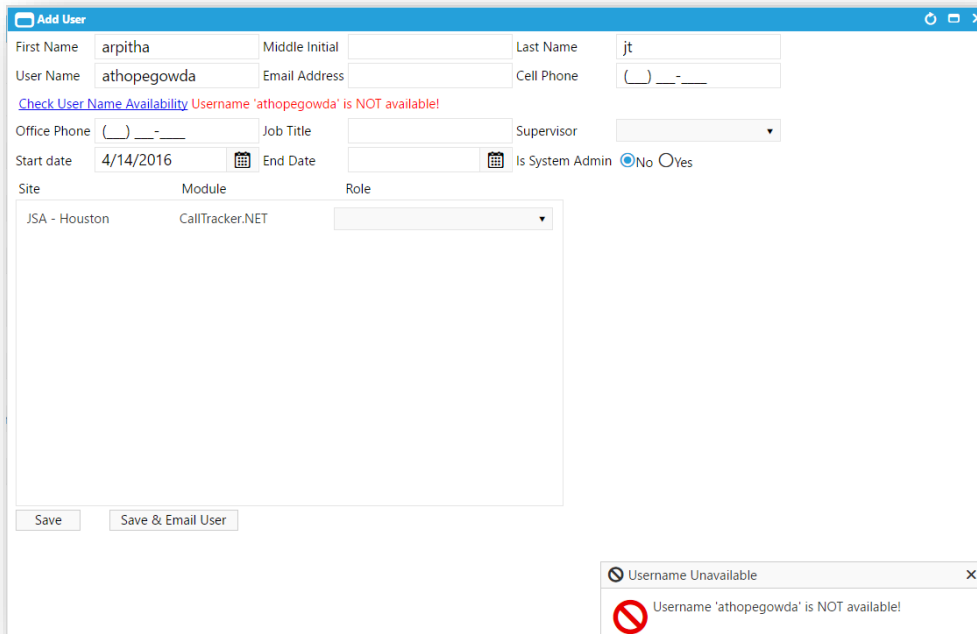


Figure 7:25 Add a New User

On Click of (#2) in Figure 6.8 the user will be prompted with a message in red stating the availability of the username as below. If username does not exist then a message pops up on the right bottom corner telling username entered is not available in red. If it available then the user will be prompted with a message in green color.





On click of (#5) the created by information is updated on the top of the page in the Figure 6.8 and the user will be prompted with a message in green at the right bottom corner showing the success and the password reset link will be emailed as in Figure 6.10. Now click on the reset link and change the password before the first login.

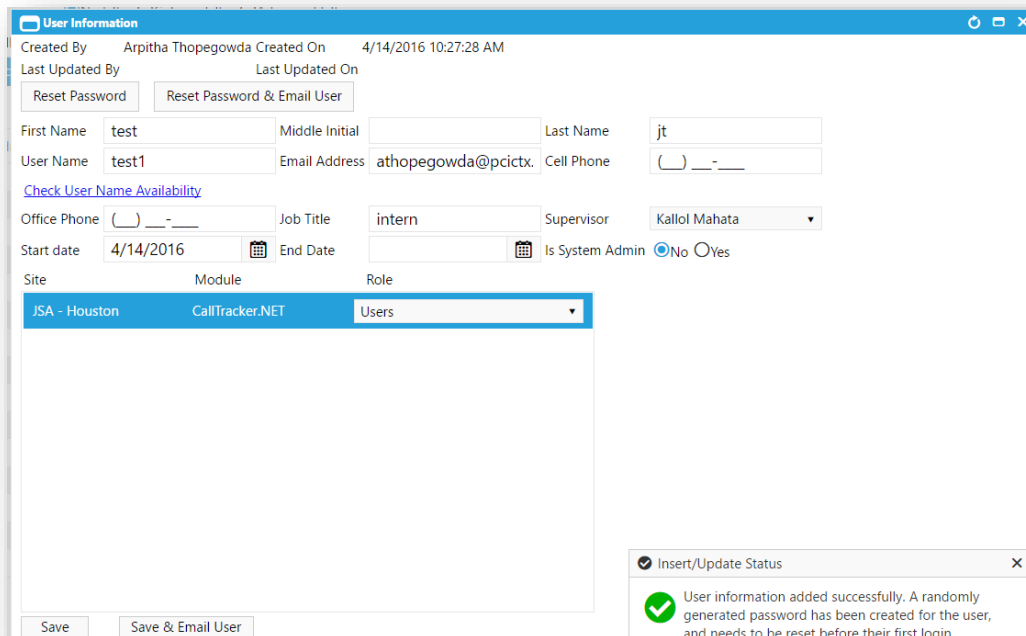


Figure 7:26 Save & Email User

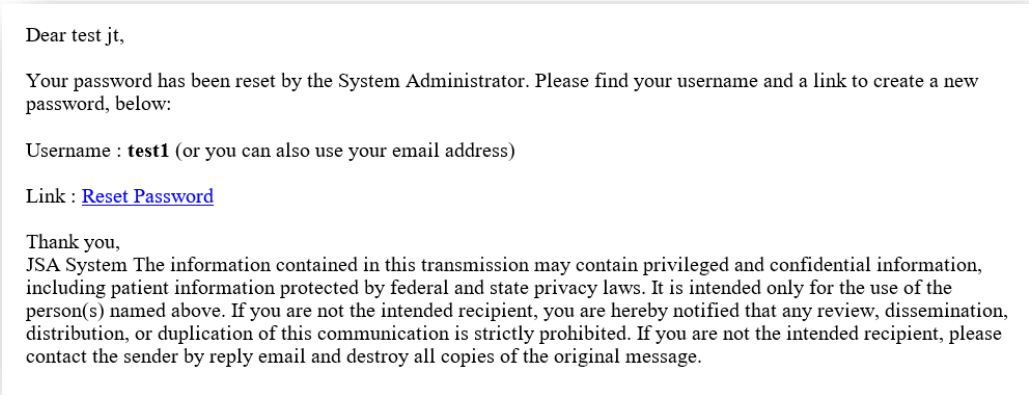


Figure 7:27 Email with a link to reset password

7.7.2 EDIT AN USER

System Administrator can use the "Edit User" button (#1) to make changes to the user information as shown in Figure 6.10. System Administrator can always click on the "Reset Password & Email User" (#2) to receive an email with the reset link to change the password as in Figure 6.10. On updating the information users either can select "Save" (#3) or "Save & Email user" (#4) button.

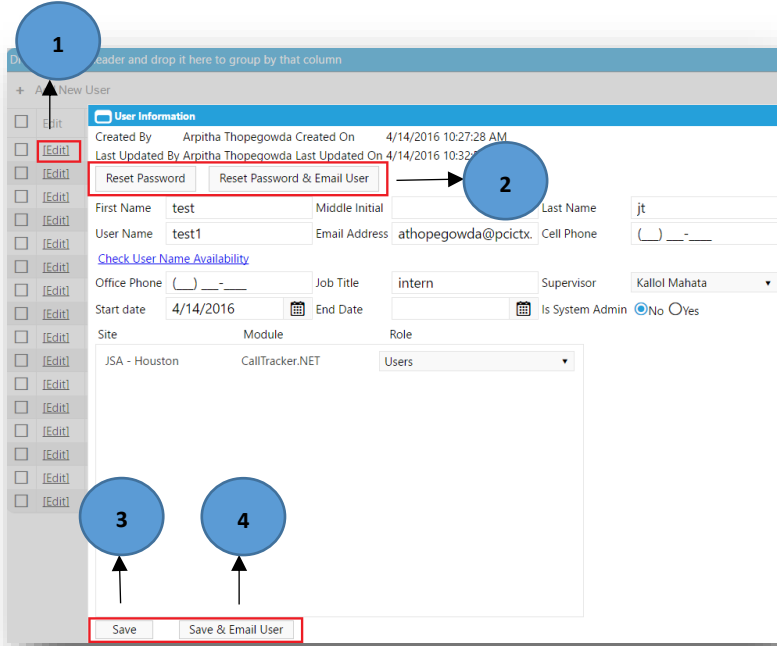


Figure 7:28 Edit User Information

### 7.7.3 DELETE AN USER

To delete a user, click on the cross mark at the right end as shown in Figure 6.12.

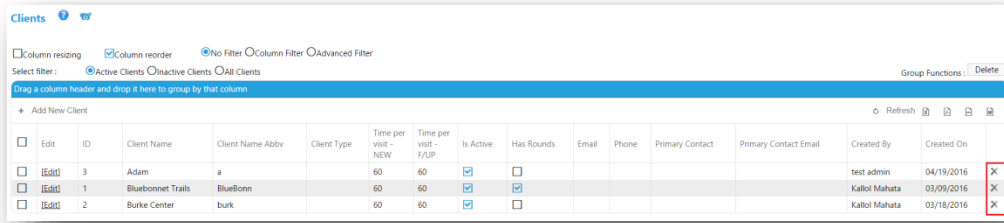


Figure 7:29 Delete an User

### 7.7.4 DOCTOR CREDENTIALING

Only the System Administrator has access to credential a doctor to client locations.

The credentialing window can be brought up clicking he “[Locations]” on the grid.

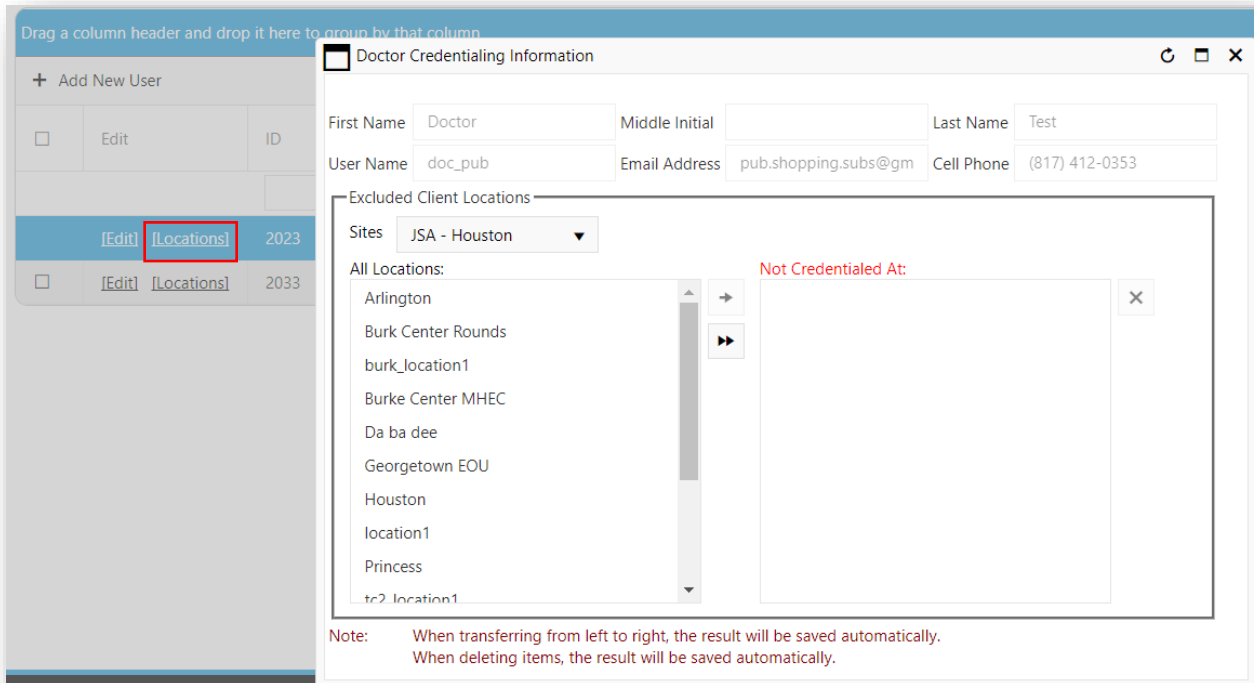


Figure 7:30 Launching Doctor Credentialing Information

#### 7.7.4.1 NOT CREDENTIALING AT A SELECTED LOCATION

The doctor can be “Not Credentialed At:” certain locations by selecting the location from “All Locations:” and click on the → icon.

The screenshot shows a window titled "Doctor Credentialing Information" with the following fields:

- First Name: Doctor
- Middle Initial: (empty)
- Last Name: Test
- User Name: doc\_pub
- Email Address: pub.shopping.subs@gm
- Cell Phone: (817) 412-0353

Below these fields is a section titled "Excluded Client Locations" with a "Sites" dropdown menu set to "JSA - Houston".

Under "All Locations:", a list of locations is shown. "Arlington" is selected and highlighted in blue. To the right of the list are two arrow icons: a single right-pointing arrow (→) and a double right-pointing arrow (⇒). The "Arlington" entry is positioned next to the single arrow icon.

To the right of the "All Locations:" list is a box titled "Not Credentialed At:" which is currently empty. A close button (X) is located in the top right corner of this box.

**Note:** When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:31 Select Arlington and press the → icon

Doctor Credentialing Information

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tc2\_location1
- tc2\_location2

Not Credentialed At:

- Arlington

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:32 The doctor is now not credentialed at Arlington

#### 7.7.4.2 CREDENTIALING USER AT SELECTED LOCATION

To credential the user at a selected location, select the location and click on the **X** icon.

**Doctor Credentialing Information**

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

Not Credentialed At:

- Arlington
- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tr2\_location1

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:33 Select Arlington and press the  icon

Doctor Credentialing Information

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations: Arlington

Not Credentialed At:

- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tc2\_location1
- tc2\_location2

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:34 The doctor is now credentialed at Arlington

#### 7.7.4.3 NOT CREDENTIALING AT MULTIPLE LOCATIONS

To select multiple locations, press Ctrl on the keyboard and click on the locations.

**Doctor Credentialing Information**

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tc2\_location1
- tc2\_location2

Not Credentialed At:

- Arlington

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:35 Selecting multiple locations to not credential a doctor and click on →

The doctor is now not credentialed at selected locations.



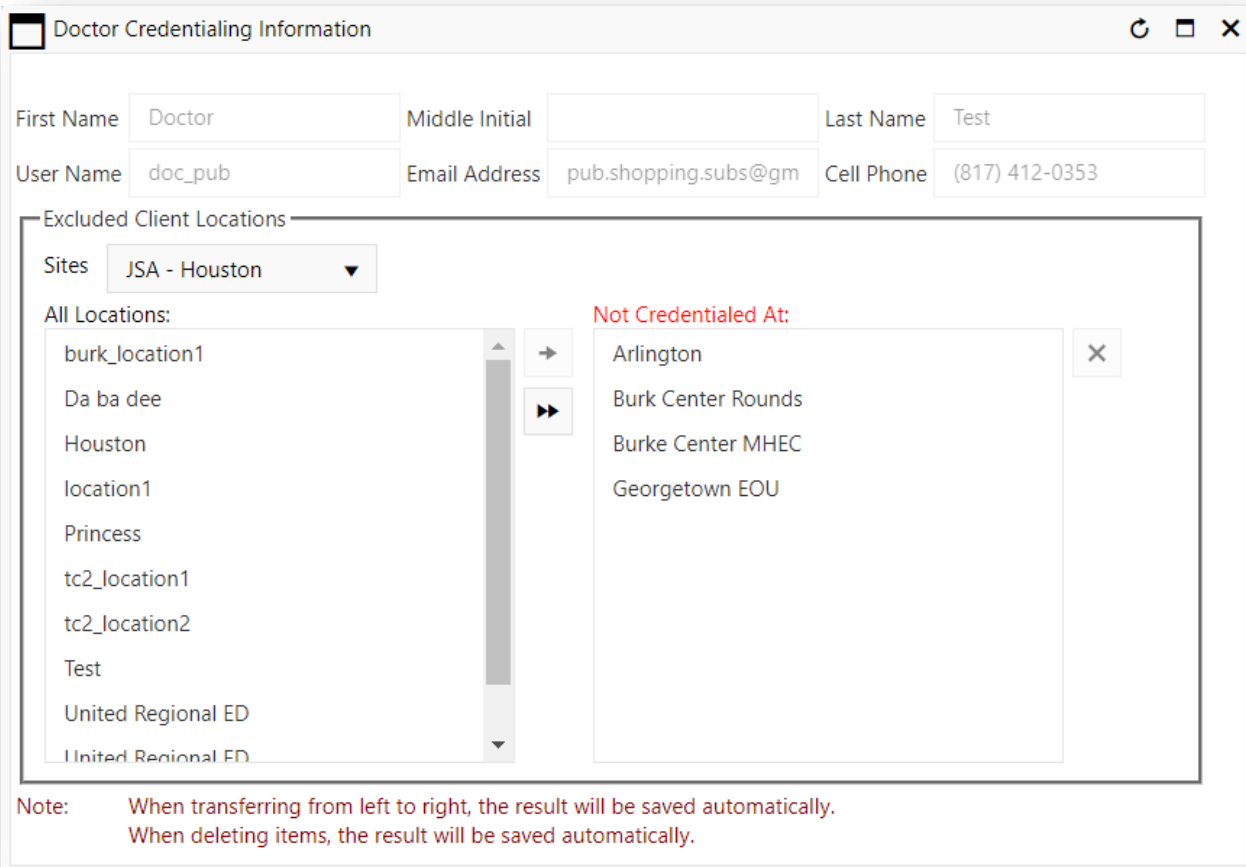


Figure 7:36 The doctor is now not credentialed at selected locations

#### 7.7.4.4 CREDENTIALING AT MULTIPLE LOCATIONS

To select multiple locations, press Ctrl on the keyboard and click on the locations.

**Doctor Credentialing Information**

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

- Arlington

Not Credentialed At:

- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tc2\_location1
- tc2\_location2

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:37 Selecting multiple locations to credential a doctor and click on **X**

Doctor Credentialing Information

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

- Arlington
- Burk Center Rounds
- Burke Center MHEC
- Georgetown EOU

Not Credentialed At:

- burk\_location1
- Da ba dee
- Houston
- location1
- Princess
- tc2\_location1
- tc2\_location2
- Test
- United Regional ED
- United Regional ED

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:38 The doctor is now credentialed at selected locations

#### 7.7.4.5 NOT CREDENTIALING AT ALL LOCATIONS

To not credential a user at all locations, click on the **▶▶**.

**Doctor Credentialing Information**

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

- Arlington
- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tc2\_location1

Not Credentialed At:

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:39 Click on the 

**Doctor Credentialing Information**

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

Not Credentialed At:

- Arlington
- Burk Center Rounds
- Burke Center MHEC
- Georgetown EOU
- burk\_location1
- Da ba dee
- Houston
- location1
- Princess
- tr2\_location1

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:40 The user is now not credentialed at all locations

7.7.4.6 CREDENTIALING AT ALL LOCATIONS

To not credential a user at select all locations and click on the X.

**Doctor Credentialing Information**

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

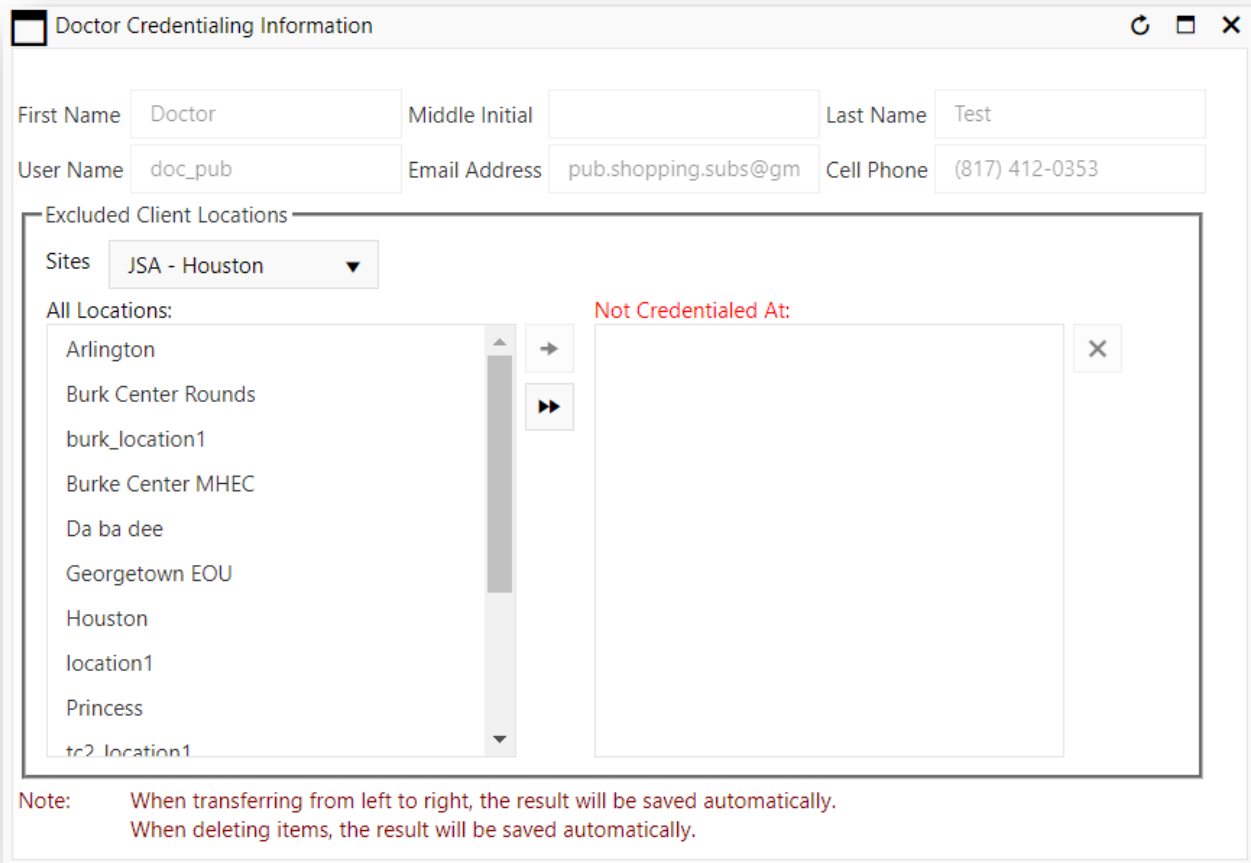
All Locations:

Not Credentialed At:

- Arlington
- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tc2\_location1

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:41 Select all locations and click on the X



Doctor Credentialing Information

First Name: Doctor Middle Initial: Last Name: Test

User Name: doc\_pub Email Address: pub.shopping.subs@gm Cell Phone: (817) 412-0353

Excluded Client Locations

Sites: JSA - Houston

All Locations:

- Arlington
- Burk Center Rounds
- burk\_location1
- Burke Center MHEC
- Da ba dee
- Georgetown EOU
- Houston
- location1
- Princess
- tc2\_location1

Not Credentialed At:

Note: When transferring from left to right, the result will be saved automatically.  
When deleting items, the result will be saved automatically.

Figure 7:42 Doctor is now credentialed at Locations

## 7.8 APPLICATION LOGS

All the user information pertaining to every login to the application will be present in the Application logs.

### 7.8.1 USER SESSION LOGS

This page is accessible only to the System Administrator. All the user logins and logouts are logged here. The sysadmin can go through these logs to figure out any suspicious logins.

**System Logs** ?

**User Session Log**

Column resizing   
 Column reorder   
 No Filter   
 Column Filter   
 Advanced Filter

Select date filter:

Drag a column header and drop it here to group by that column

Refresh    Print    Export    Import

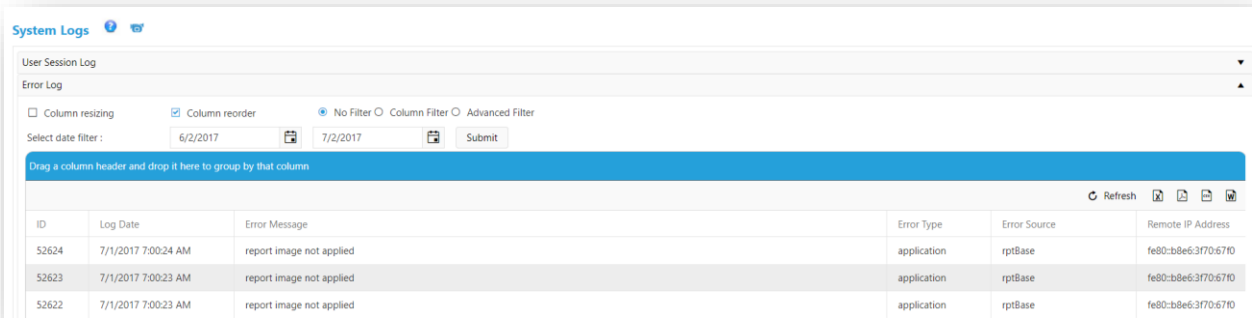
ID	User	Application Type	Login Time	Logout Time	Client IP Address	System Session Note
27536	Bharadwaj, Puneeth	Web Application	7/2/2017 5:26:12 PM		76.187.236.180	User successfully logged into application with role - System Administrator
27535	Puneeth, Admin	Web Application	7/2/2017 4:46:03 PM	7/2/2017 5:26:08 PM	76.187.236.180	User successfully logged into application with role - AdminsUser successfully logged out of the system.
27534	Test, Doctor	Web Application	7/2/2017 4:16:59 PM	7/2/2017 4:45:57 PM	76.187.236.180	User successfully logged into application with role - AdminDoctorsUser successfully logged out of the system.
27532	Test, Doctor	Web Application	7/2/2017 2:55:29 PM	7/2/2017 4:16:48 PM	76.187.236.180	User successfully logged into application with role - AdminDoctorsUser successfully logged out of the system.

**Figure 7:43 User Session Logs**



## 7.8.2 ERROR LOG

All the errors during the usage of the application are logged in this grid.



The screenshot shows a web interface titled "System Logs" with a sub-section for "Error Log". It includes a date filter (6/2/2017 to 7/2/2017) and a table of error logs. The table has columns for ID, Log Date, Error Message, Error Type, Error Source, and Remote IP Address. Three entries are visible, all with the message "report image not applied".

ID	Log Date	Error Message	Error Type	Error Source	Remote IP Address
52624	7/1/2017 7:00:24 AM	report image not applied	application	rptBase	fe80:b8e6:3f70:67f0
52623	7/1/2017 7:00:23 AM	report image not applied	application	rptBase	fe80:b8e6:3f70:67f0
52622	7/1/2017 7:00:23 AM	report image not applied	application	rptBase	fe80:b8e6:3f70:67f0

Figure 7:44 Error Logs

## 8 NOTIFICATIONS

There are 2 kinds of notifications used in the application.

- **Session Specific Notifications:**

The session specific notifications allow the user to create settings to allow to be reminded of the status of a session. The user has 2 options

1. Pending – The pending notifications are sent before a session is expected to start.
2. Overdue – The overdue notifications are sent after a session has started.

The following times are used to create the notifications.:

1. The Doctor notifications are based on “Projected Session Start Date”
2. Admin and Call Coordinator notifications are based on “Required Session Start Date” (“Call In Time” + Required Response Time)

Please note, if the “Projected Session Start Date” is no provided when creating the session, the system will consider “Required Session Start Date” for the calculation required to create the notifications.

- **Grouped Notifications:**

These notifications contain Daily, Weekly and Monthly reports and statistics regarding the application’s usage.

All users have default settings created by the System Administrator. The users can choose create their own specific setting by going to the “My Settings” page in the top menu. The user specific settings will always override the settings created by the System Administrator.

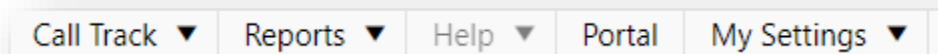


Figure 8:1 My Settings - Admins, Admin Doctors, Doctors and Call Coordinators

### 8.1 SESSION SPECIFIC CALL COORDINATOR, DOCTOR AND ADMIN NOTIFICATION SETTINGS

System Administrators and Admins will go to “Environment Settings” under “System Administration” to set the default settings for all users under a site.

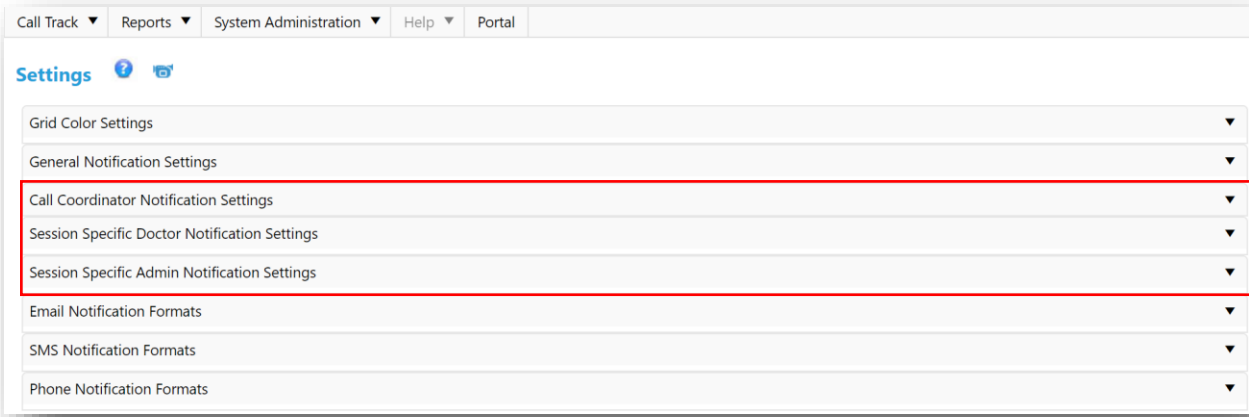


Figure 8:2 sysadmin and admins view of Notification Settings under Environment Settings

In addition, Admins have an option of setting personal settings by going to “My Settings” page.

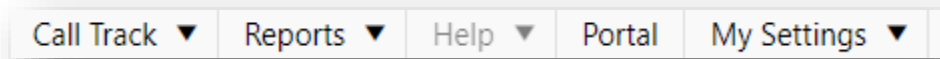


Figure 8:3 My Settings - Admins, Admin Doctors, Doctors and Call Coordinators

### Pending Email Notifications

Any time ▼

One notice

Minute(s) ▼

before session starts

Add

Clear

No pending notifications via email (Call Coordinators)



### Pending SMS Notifications

Any Time ▼

One notice

Minute(s) ▼

before session starts

Add

Clear

No pending notifications via SMS (Call Coordinators)



### Pending Phone Notifications

Any Time ▼

One notice

Minute(s) ▼

before session starts

Add

Clear

No pending notifications via Phone(Call Coordinators)



Figure 8:4 Pending Notifications

### Overdue Email Notifications

Any Time ▼
One notice 
Minute(s) ▼
after session starts
Add
Clear

No overdue notifications via Email(Call Coordinators) ✕

---

### Overdue SMS Notifications

Any Time ▼
One notice 
Minute(s) ▼
after session starts
Add
Clear

No overdue notifications via SMS (Call Coordinators) ✕

---

### Overdue Phone Notifications

Any Time ▼
One notice 
Minute(s) ▼
after session starts
Add
Clear

No overdue notifications via Phone (Call Coordinators) ✕

Figure 8:5 Overdue Notifications

## 8.2 ADDING SESSION SPECIFIC CALL COORDINATOR, DOCTOR AND ADMIN NOTIFICATION SETTINGS

For any type of notifications, the following set of steps are identical:

1. Choose the time of the notification
  - a. Any time – the notification created with this option will be received at any time during the 24-hour period.
  - b. Business hours – the notification created with this option will be received only during business hours, 8AM to 5PM.

- c. After hours – the notification created with this option will be received from 5PM (today evening) to 8AM (next day)
2. Select time before/after a session starts, a notification the user wants to receive the notification
3. Select minutes or hours option. This option goes together with Step 2. When selected, a notification is sent 'X' minutes or hours before/after a session starts.
4. Click the 'Add' button to save the notification to the Database.

Clear button will set all the options to default.

The screenshot shows three notification settings sections: 'Pending Phone Notifications', 'Overdue Email Notifications', and 'Overdue SMS Notifications'. Each section has a form with a time dropdown, a notice count input, a frequency dropdown, and a timing dropdown. The 'Pending Phone Notifications' section shows a notification for 'Any time: Make a call 10 minute(s) before session start time.' The 'Overdue Email Notifications' section shows 'No overdue notifications via Email(Call Coordinators)'. The 'Overdue SMS Notifications' section is empty. A success message 'Notification Settings Saved Successfully' is displayed at the bottom right.

Figure 8:6 Add a New Notification Setting

### 8.3 EDITING SESSION SPECIFIC CALL COORDINATOR, DOCTOR AND ADMIN NOTIFICATION SETTINGS

For any type of notifications, the following set of steps are the same.

1. Right click on the notification you want to edit, click the "Edit" button that will appear

The screenshot shows the 'Pending Phone Notifications' section. The notification 'Any time: Make a call 10 minute(s) before session start time' is highlighted in blue. An 'Edit' button is visible over the notification, indicating that the user has right-clicked on it to edit the setting.

Figure 8:7 Edit a Notification Setting

2. Select time before for Pending or after for Overdue a session starts
3. Select minutes or hours option. This option goes together with Step 2. When selected, a notification is sent 'X' minutes or hours before/after a session starts.
4. Click the 'Update' button to save the notification to the Database.

The screenshot shows a window titled "Pending Phone Notifications". At the top, there are several controls: a dropdown menu set to "Any Time", the text "One notice", a text input field containing "10.0", a dropdown menu set to "Minute(s)", and the text "before session starts". To the right of these controls are two buttons: "Update" and "Clear". Below these controls is a list of notifications. The first notification is highlighted in blue and reads "Any time: Make a call 10 minute(s) before session start time." To the right of this notification is a small square button with an "X" icon, indicating a delete action.

Figure 8:8 Update a Notification Setting

Clear button will set all the options to default.

#### 8.4 DELETING SESSION SPECIFIC CALL COORDINATOR, DOCTOR AND ADMIN NOTIFICATION SETTINGS

For any type of notifications, the following set of steps are identical:

1. Select the notification in the list to delete

The screenshot shows the same "Pending Phone Notifications" window. The controls at the top are now: a dropdown menu set to "Any Time", the text "One notice", an empty text input field, a dropdown menu set to "Minute(s)", and the text "before session starts". The buttons are now "Add" and "Clear". The list of notifications contains two items. The first is "Any time: Make a call 10.0 minute(s) before session start time." The second is "Business Hours: Make a call 15 minute(s) before session start time." This second notification is highlighted in blue, and the "X" delete button is visible to its right.

Figure 8:9 Select a Notification Setting to Delete

2. Click the 'X' button on the right side of the list. A pop-up will appear for confirmation

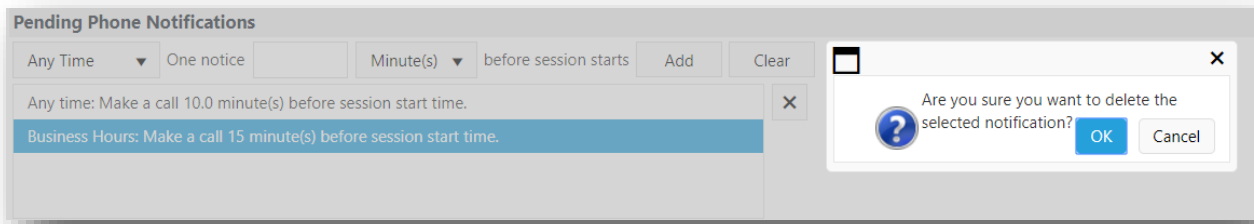


Figure 8:10 Click OK to Delete the Notification Setting

3. Click "OK" to delete the notification from the Database

## 8.5 GROUP STATUS NOTIFICATIONS

All user roles have access to this setting. The System Administrator can create settings that will reflect across all users. If the users set up their specific notifications, the System Administrator's settings will be overridden.

The user selects "Yes" or "No" for the Daily and/or Weekly Status Notification. Then click "Save Care Coordinator Settings" or "Save Doctor Settings" depending on the user role.

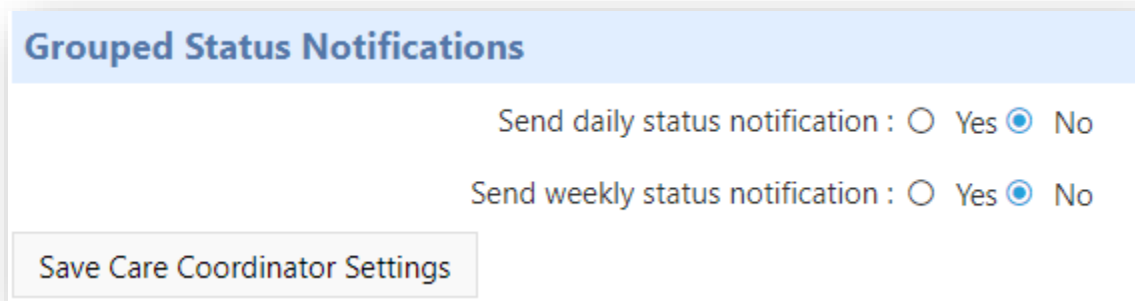


Figure 8:11 Save Care Coordinator Group Settings



**Grouped Status Notifications**

Send daily status notification :  Yes  No

Send weekly status notification :  Yes  No

Save Care Coordinator Settings

Figure 8:12 Save Doctor Group Settings

The Admins have more options as shown in the figure below.

**Grouped Status Notifications**

Send daily status notification : <input type="radio"/> Yes <input checked="" type="radio"/> No	Attach report	No reports attached	Report Format	Acrobat (PDF) File
Send weekly status notification : <input type="radio"/> Yes <input checked="" type="radio"/> No	Attach report	No reports attached	Report Format	Acrobat (PDF) File
Send monthly status notification : <input type="radio"/> Yes <input checked="" type="radio"/> No	Attach report	No reports attached	Report Format	Acrobat (PDF) File

Save Admin Settings

Figure 7.10: Admin Group settings

Select “Yes” or “No” for the frequency of status notification the Admin wants to receive. Then select the type of report from the drop down “Attach Report”.

**Grouped Status Notifications**

Send daily status notification : <input type="radio"/> Yes <input checked="" type="radio"/> No	Attach report	All items checked	Report Format	Acrobat (PDF) File
Send weekly status notification : <input type="radio"/> Yes <input checked="" type="radio"/> No	Attach report	<input checked="" type="checkbox"/> Check All	Report Format	Acrobat (PDF) File
Send monthly status notification : <input type="radio"/> Yes <input checked="" type="radio"/> No	Attach report	<input checked="" type="checkbox"/> Visit Report	Report Format	Acrobat (PDF) File

Save Admin Settings

Figure 8:13 Select the Report Type

Select the format of the report. It is recommended to select Excel and PDF formats for better report rendering.

**Grouped Status Notifications**

Send daily status notification :  Yes  No Attach report  All items checked Report Format **CSV (comma delimited)**

Send weekly status notification :  Yes  No Attach report  No reports attached Report Format Acrobat (PDF) File

Send monthly status notification :  Yes  No Attach report  No reports attached Report Format Acrobat (PDF) File

Save Admin Settings

Figure 8:14 Select the Report Format the data has to be sent in

Click “Save Admin settings” to save the settings to the Database.

## 8.6 NOTIFICATION FORMATS

This is accessible only to the System Administrators and Admin roles. This User Interface allows the sysadmin and admins to set the formats for email, sms and phone (voice calls) that will be used when session specific notifications are sent out by the system.

### 8.6.1 EMAIL NOTIFICATIONS FORMATS

This setting is accessible only to System Administrator and Admin roles. The user can set the subject of the email and the email body. They can also use HTML to format the email body as required.

**Email Notification Formats**

**Add/Edit Email Formats**

Email Notification Type

Email Subject

Email Body

Notification Types :

- Group Status Admin
- Group Status AdminDoctor
- Group Status Call Coordinator
- Group Status Doctor
- Overdue Admin
- Pending Admin**
- Overdue Doctor
- Pending Admin
- Pending Call Coordinator
- Pending Doctor

drag here

Design </> HTML Preview Words: 0 Characters: 0

Figure 8:15 Drag an Email Notifications Format to Edit

The user can edit the subject and the body of an email format by dragging any of the “Notification Types” on to the “drag here” column. This will load the format as shown below.

The user now has the option to edit the Email subject and Body. The email body consists of tools similar to Microsoft Word. Therefore, styling the email body is easy.

The words enclosed by “[\$\$]”, example “[\$\_\_user\$]”, are called tokens. These are used by the Application to act as a place holder. These tokens are replaced by the values stored in the database before an email is sent out. There are 2 types of tokens:

1. User Defined tokens. Example – [\$\_\_user\$]

The user defined tokens always begin with 2 underscores. This is a standard across all notifications formats used in the application. The application uses a specific logic to replace these tokens with the corresponding data.

2. Database tokens. Example – [\$on\_demand\_session\_count\$]

The database tokens are always enclosed between [\$ and \$]. They do not begin with 2 underscores. This is also a standard across all notification formats used in the application. The application uses this token to look for the respective data field and replaces the value from the data field.

Note: Please do not change the format of tokens. Adding and removing tokens will result in unexpected content and also might result in no email being sent. Please contact PCIC before making any changes to the tokens.

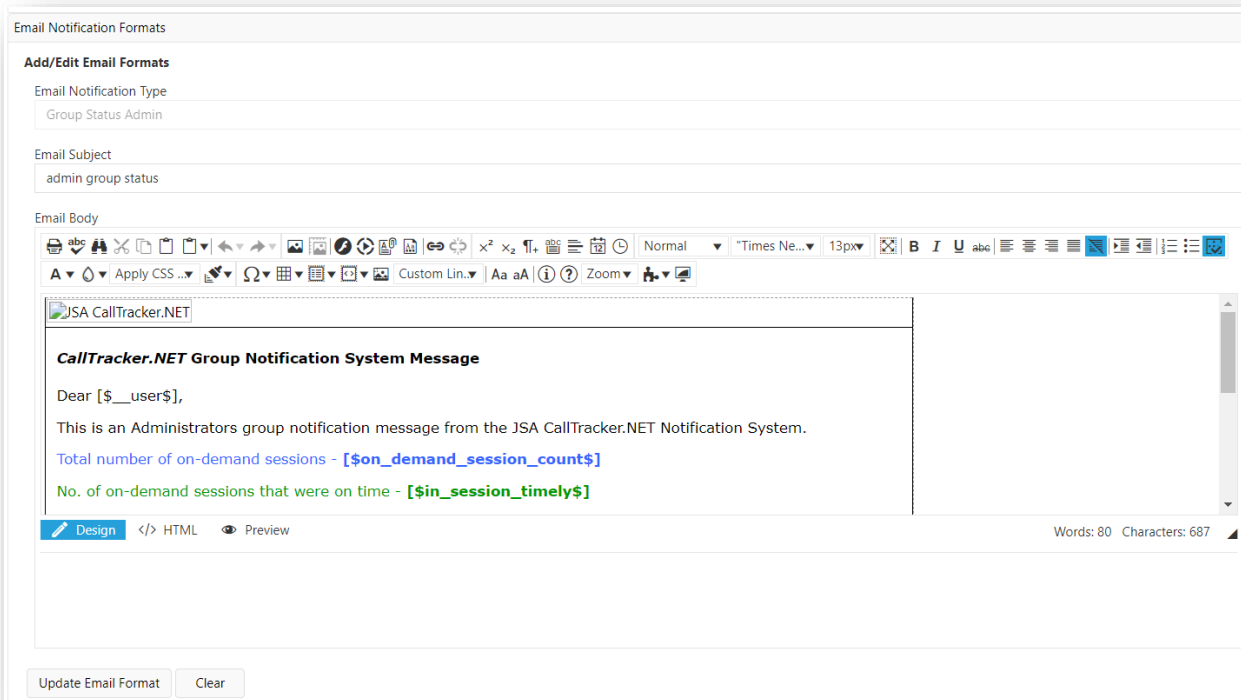


Figure 8:16 Email Notification Format - Design View

The client can use the “</> HTML” tab to use HTML styling options. The figure below shows the HTML code for the image above.

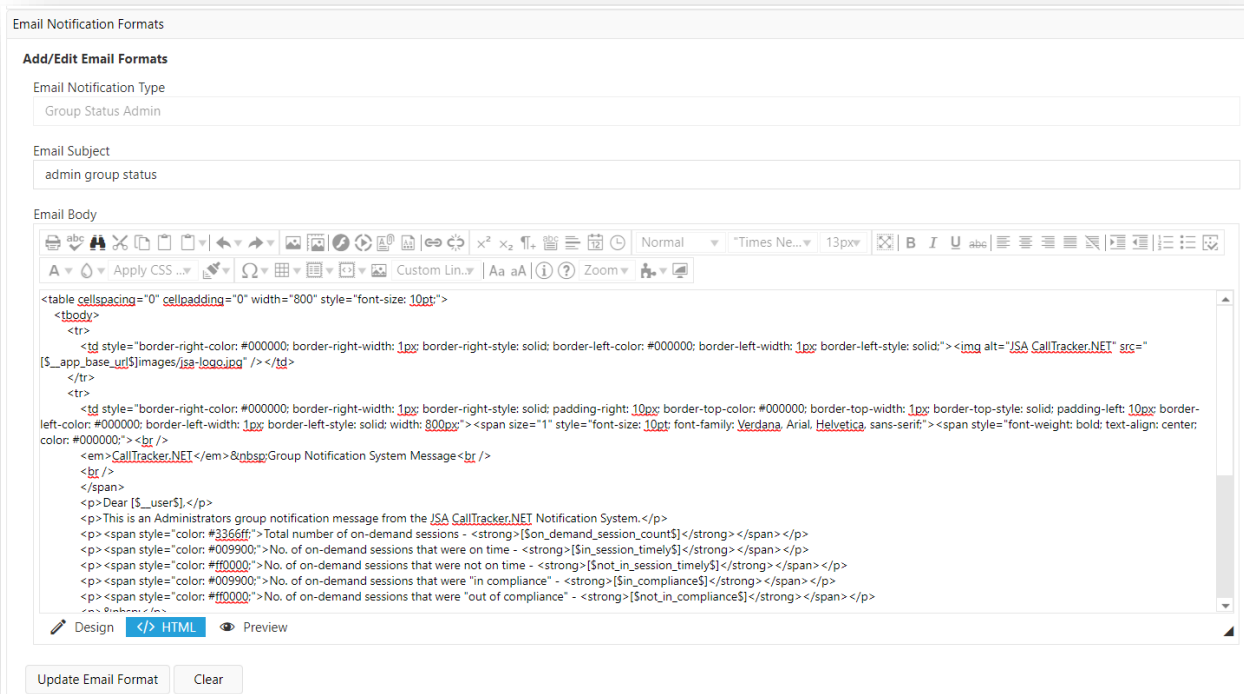


Figure 8:17 Email Notification Format - HTML View

The preview tab helps the user in viewing the effect of changes made to the HTML code. Once the user is sure of the style and content of the body, the user can click on the “Update Email Format” button to save it. The “Clear” button will reset both the subject and body fields to blank.

## 8.6.2 SMS NOTIFICATIONS FORMATS

This setting is accessible only to System Administrator and Admin roles.

The maximum text allowed in a text message content is 160 characters. If the message content is more than 160, it will be broken down into messages of 160 each and sent to the user.

For example, if the content is 200 characters, the first message will consist of 160 characters and second message will consist of 40 characters.

All the tokens will be replaced with their actual values from the database. So, when the sysadmin or the admin creates the templates using the tokens, please note that token length does not actually correspond to the data length. For example, `[$__user$]` (10 characters) may reflect as “Dr. Marie Pierre Curie” (22 characters).

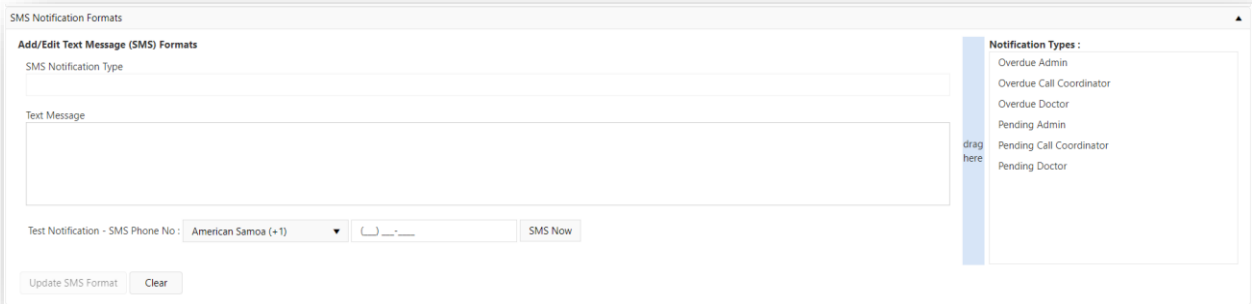


Figure 8:18 Phone Notification Formats

To edit a notification type, select and drag one from the “Notification Type” list on to the “drag here” panel. The format will be loaded as shown in Figure 7.17.

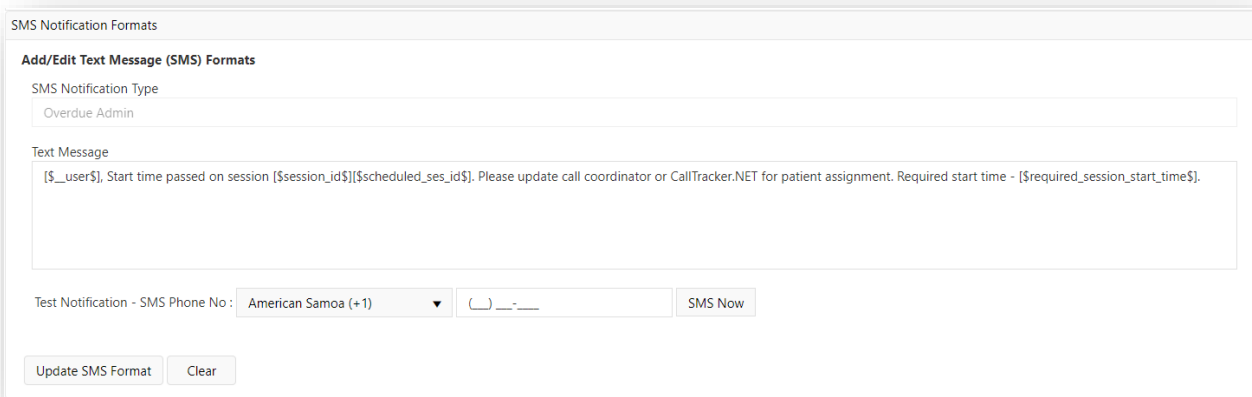


Figure 8:19 Edit Phone Notification message format

The user can edit the message format as seen fit and click on the “Update SMS Format” button. The new format will be used, tokens will be replaced, and the SMS will be sent to all users.

The application also gives the user an option to test the SMS format, to view the message on the phone. The user has to select the desired country code from the drop down as in Figure 7.18.

Figure 8:20 Select ISD/Country Code

Then enter the phone number and click “SMS Now”. Refer Figure 7.19.

Figure 8:21 Enter the Phone Number to receive SMS

### 8.6.3 PHONE NOTIFICATION FORMATS

This setting is accessible only to System Administrator and Admin roles. When the format is set, the user will receive a voice call based on their session specific phone notification settings. The voice call will read content in the format.

As in the other notification formats, the tokens will be replaced with their respective data values.

The user will be shown the user interface as shown in Figure 7.20.

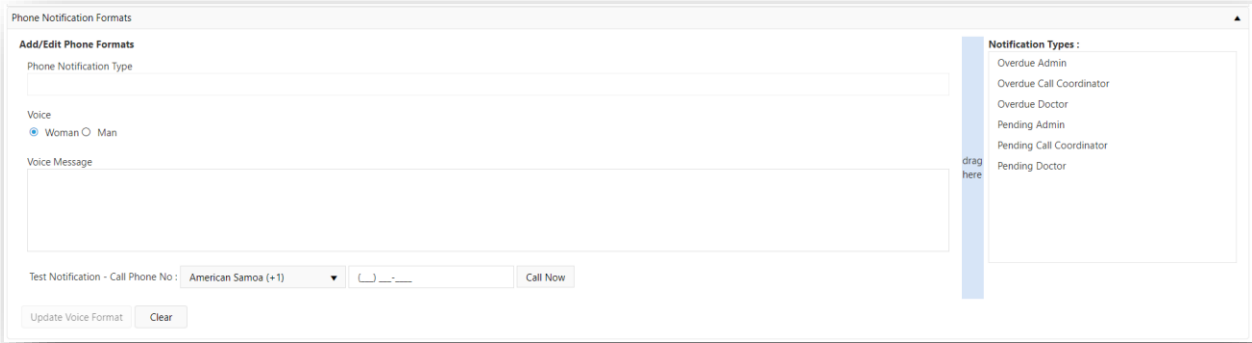


Figure 8:22 Phone Notifications Formats

The user editing the format has the option to change the voice used in the phone call to either Man or Woman. The default setting used in the application is Woman.

To edit a format, please drag one of the “Notification Types” on to the “drag here” column. This action will load the format on the User Interface (UI) as shown in Figure 7.21.

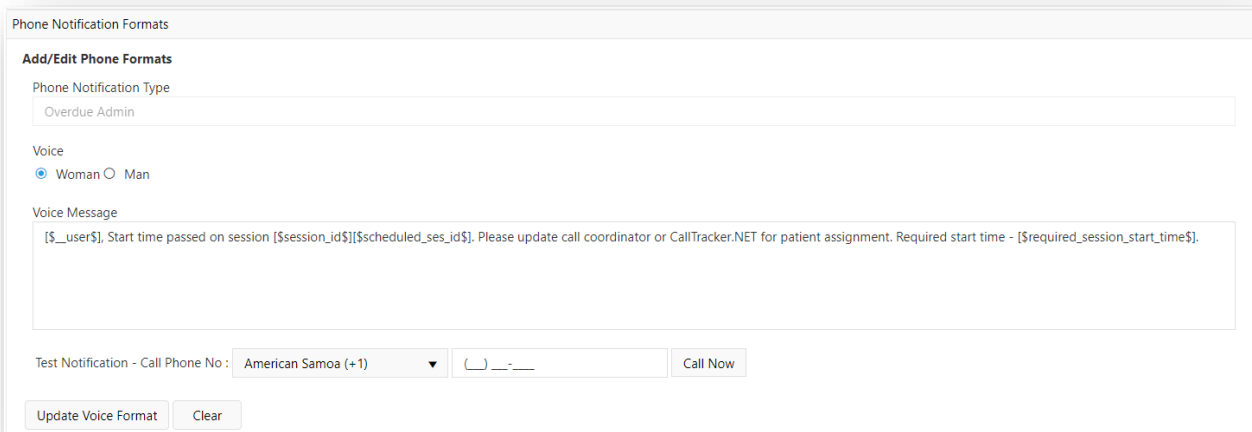


Figure 8:23 Edit Phone Notification Format

The user can now edit the text of the Voice Message as required and click “Update Voice Format” to set it to be used across all users.

To test the format, the user can select the required ISD/Country code, enter the phone number and click “Call Now”. The user will receive a call, which will read out the text, **as is**, from the message template.