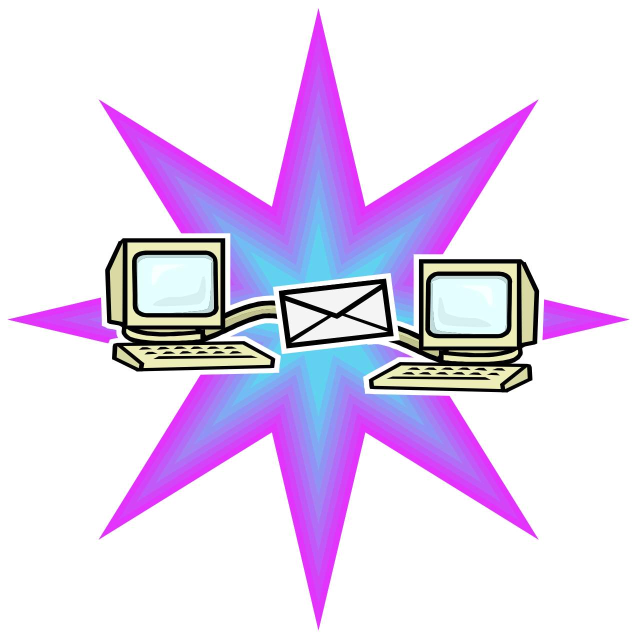
Quality Service Review Data Application
Provider Reference Manual



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Introduction

An effective Quality Service Review (QSR) will capture and assess the personal outcomes and satisfaction of individuals to ensure a quality life for the people we serve through tools and quality indicator measurements. Users of the Quality System Review are held accountable for unachieved or unmet focus areas and congratulated for results achieved.

The purpose of this manual is to provide a reference guide for users of the QSR Application. The step-by-step procedures provide detailed information on performing various tasks within the application.

At the end of this lesson you should be able to:

- View and Understand Review Results
- Send Notifications
- Address Corrective Action Plans
- Understand how User Accounts are set up
- Troubleshoot issues with the application
- Associate Users to a Service Location

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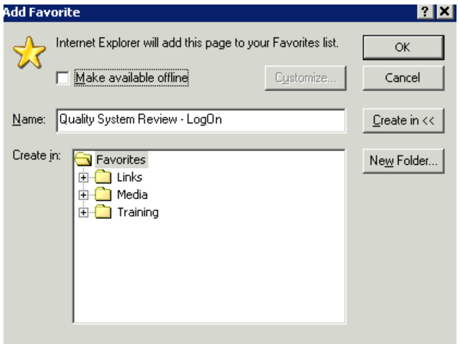
Overview to QSR Application

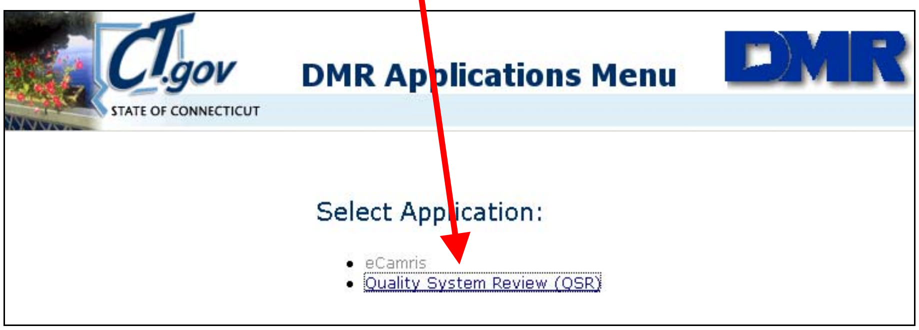
The QSR application is a web-based application accessible through the Internet. Easy navigation allows users to easily view and enter Action Plans for Unmet or Unachievable results.

QSR Application Log On

1. Open Internet Explorer
2. In the Address field, type in the following URL: https://www.dmrapp.ct.gov/
3. Once the QSR Application is loaded, the DMR Applications Menu will display.
4. You may add to your Favorites for quick reference and access
    a. Select **Favorites** from the Menu bar in the Internet Explorer
    b. Choose **Add to Favorites**
    c. You may change the favorite name or keep the default name



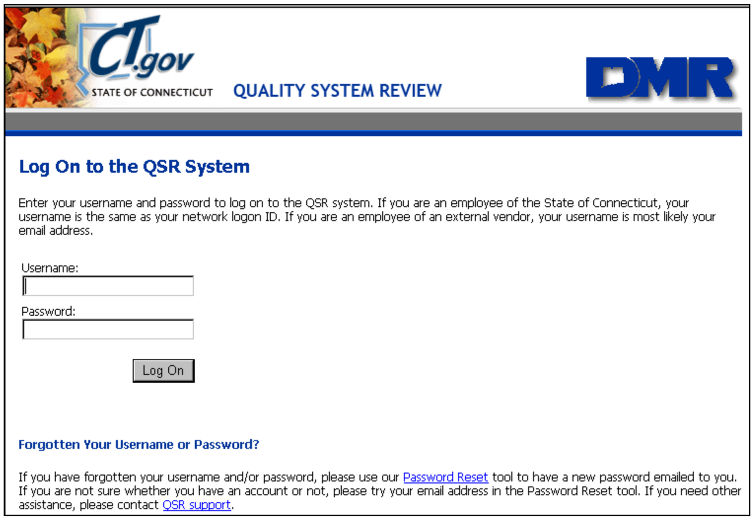
    d. Select the OK button when finished.
    e. You have successfully added the application to your favorites.
5. Click on the **Quality System Review (QSR)** link to bring you to the log on screen.



6. Enter your Username and Password, at the Log On screen
    - Your Username and password are sent in 2 separate emails once you are entered as a user in the system

- If you do not have a Username or Password, contact your Supervisor or Administrator.
- All passwords are case sensitive

7. Select the **Log On** button



8. You have successfully accessed the application.

TIP!

When user accounts are set up in the QSR Application, users will receive two e-mails. The first containing their Username (DMR Users will use their LAN User ID and Providers will use their e-mail address as their User ID) and the second email containing their assigned password, composed of random alpha and numeric characters)

Users are encouraged to change their password in **MY QSR** > **Change Password**. **Users will not automatically be prompted by the system to change their password**.

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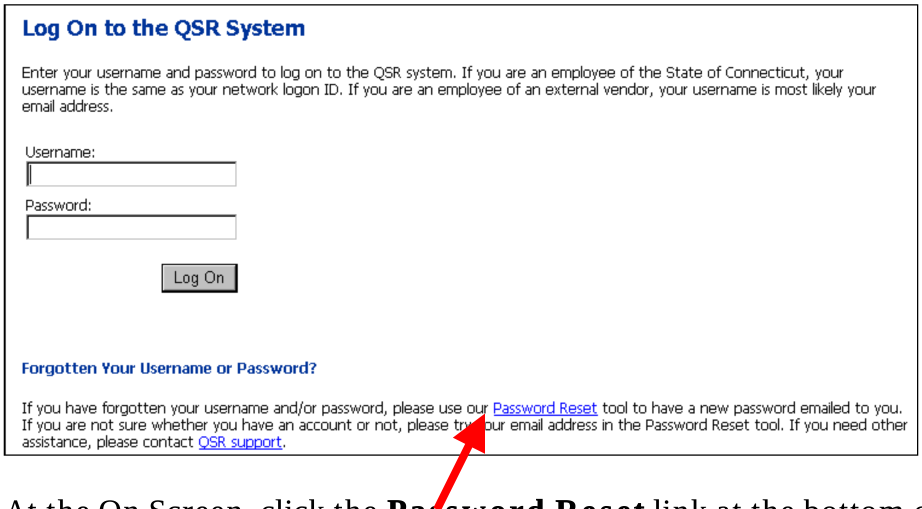
Reset Passwords

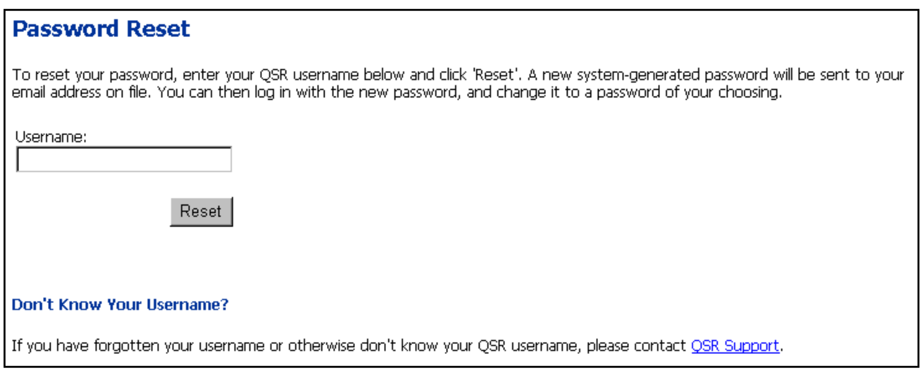
If you forget your password, the Log On Screen allows you to submit a Password Reset request. This will change your current password to a randomly assigned password, which will be e-mailed to you.

To reset your password:

1. Open the QSR application through the Internet Explorer



2. At the On Screen, click the **Password Reset** link at the bottom of the page
3. The Password reset page will display



4. Enter your username (Private Providers will use their e-mail address as their User ID)
5. Select the **Reset** button
6. You have successfully requested you password to be reset
7. You will receive an email with a generic Password.

TIP!

Your reset password will consist of random alpha and numeric characters and will be emailed to you. Users are encouraged to change their password in **MY**

QSR > Change Password. Users will not automatically be prompted by the system to change their password.

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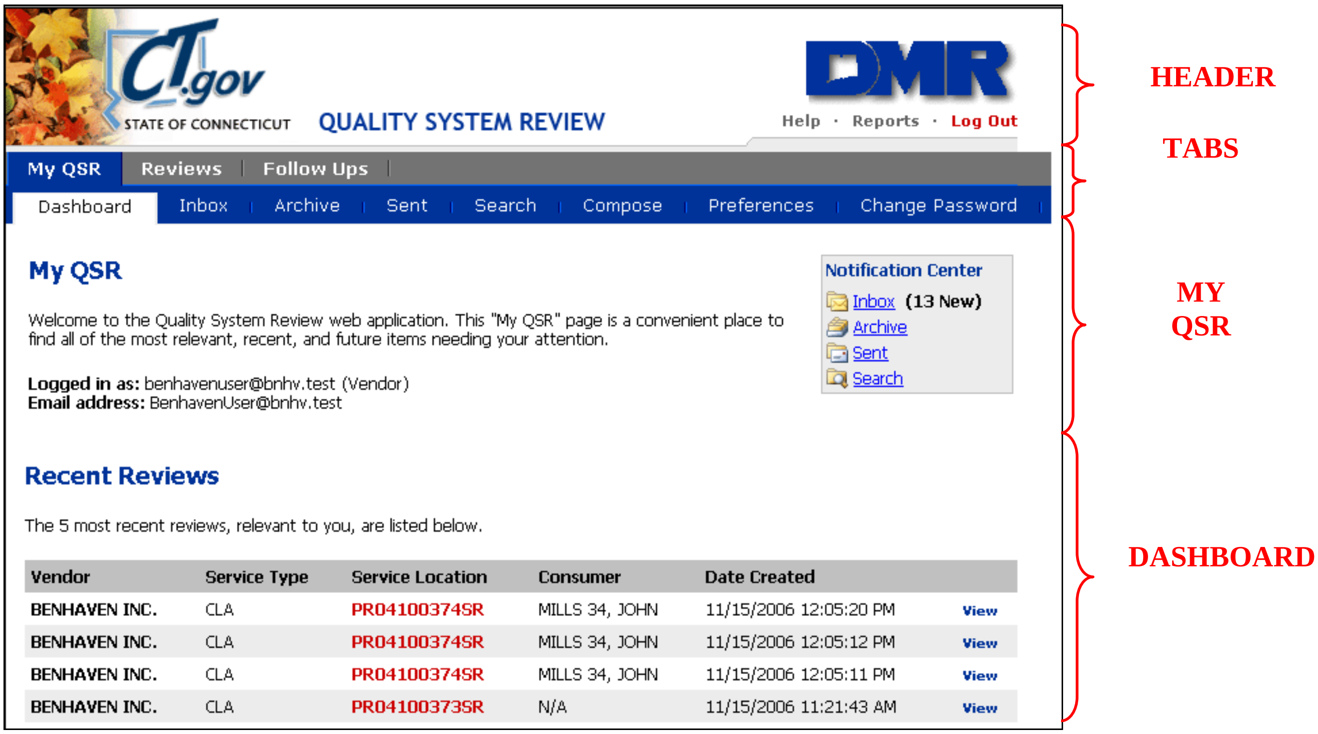
Layout

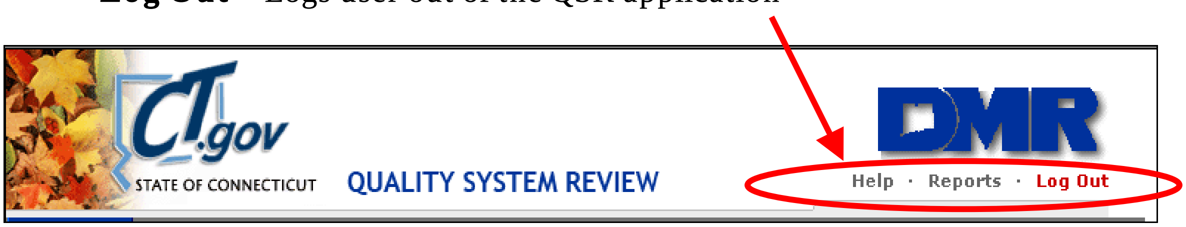
Once you have successfully Logged On to the QSR Application, the following screen will display. This is your roadmap of the QSR application screens. You will notice that there are many ways to navigate through the system.



Header

The Header Section will appear on each screen of the QSR application for navigation ease. In the Header you will find:

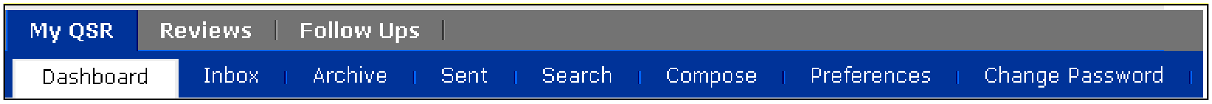
- **Help** – Opens up the Complete On-Line Manual in separate window
- **Reports** – navigates to the Reports tab
- **Log Out** – Logs user out of the QSR application



Tabs

Tabs permit quick navigation through the QSR application and by a glance; show you where you are within the system. There are two levels to the tabs, which reflect a hierarchy – top level and sub tabs (tasks related to the top level tabs).

My QSR – Dashboard, Inbox, Archive, Sent, Search, Compose, Preferences, Change Password
Reviews - Find a Review, My Reviews, View a Review
Follow Ups - Find a Follow Up, My Follow Ups, Create, View or Address a Follow up
Admin - Manage Users (Users with administrative authority primarily consist of supervisory personnel).



We will discuss the sub tab functions and tasks in more detail later.

> **EXAMPLE:** Vendors have access to **My QSR**, **Reviews** and **Follow ups** tabs and will have limited data entry in addressing follow-ups concerns. Vendor Administrators will also have access to the **Admin** tab.

Footer Menu

Provides quick navigation to the main tabs within the QSR application, as well as, areas identified in the Header Menu. Remember: Vendors will only have access to certain tabs and links.

Tabs - My QSR, Reviews, Follow Ups, Admin*
Navigation - Change Roles*, Help, Reports, Log Out, and Logged in as**:** (the blue text shows your user name and the role you are logged in under in parenthesis).

Sorting and Pagination

When there are multiple pages, you will have options of pagination and sorting at the bottom of the screen. This allows users to display the information in a user-friendly format.

Pagination - The QSR application displays the top 10 values found on one page. To navigate from one page to another, click on the number in blue font.
Sort by - The QSR application automatically sorts by defaults depending on your search results options. You may choose to resort the results by clicking on any of the links shown. The value underlined is the current sort format.

PRACTICE: Bring up **MY Reviews** from the **Reviews** tab**.** Use the pagination and sort by option to demonstrate how they work. **See how the Page number and Sort change.**
The example above displays a sort by Date Created on the first page.

Tombstone Data

Most screens contain a shaded box, which contains information relevant to the Review/Visit being displayed. This is a quick way to reference what information you are viewing.

Consumer:	TEMP 12, TEMP	**DMR #:**	66101	**Visit Date:**	3/10/2006
Vendor:	BAROCO INC.	**PIN:**	818		
RDID:	PD20300837NR	**Service:**	DSO		
Service Location:	BAROCO/SOUTH WINDHAM-DSO	**Announced:**	Yes		

PRACTICE: Bring up an existing review (Go to **Reviews > My Reviews**) to display this data at the top of the review. View the information in the Tombstone. We will highlight when the information changes later.

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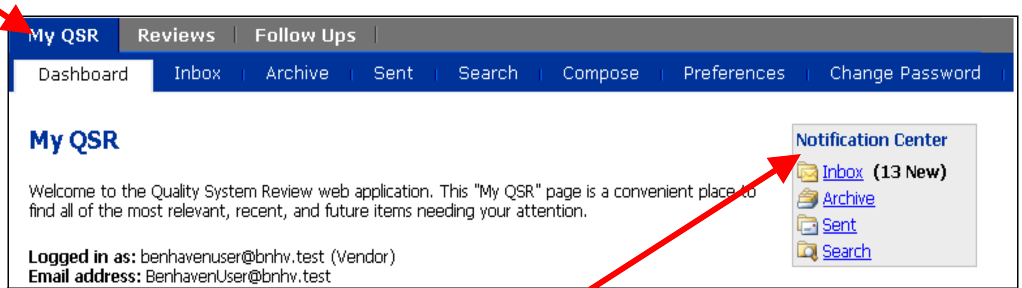
My QSR Tab

My QSR allows for easy navigation and is a convenient way find the most relevant, recent and future items needing your attention.



Notification Center

⇒ **My QSR** > **Dashboard**

The Notification Center housed within the main Dashboard of the QSR application allows the user to create, archive, view and search notifications generated manually or automatically by the QSR application.

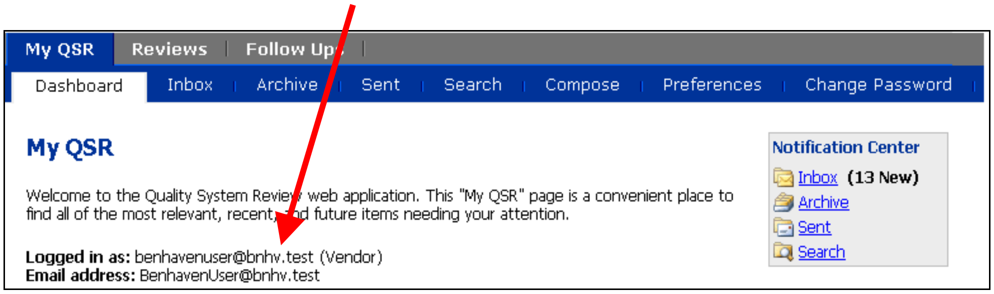
You can navigate using the sub-tabs under the My QSR tab or use the Notification Center box to the right of the screen.

Inbox – shows Notifications received
Archive – you are provided the archive option to “clean out” your Inbox, since Notifications cannot be deleted from the QSR application
Sent – shows all Notifications sent – both those automatically generated and those manually created
Search – search Notifications by keywords, searches both received and sent Notifications, including Archive

Dashboard

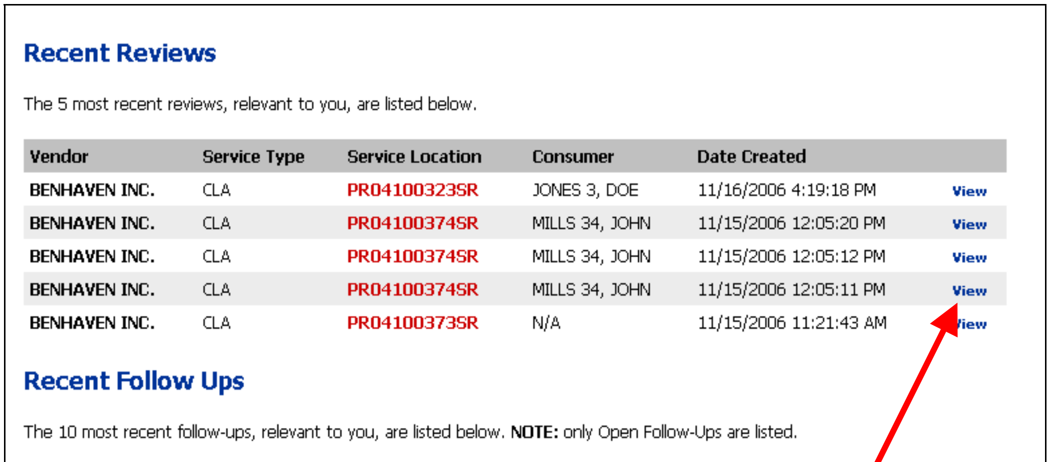
⇒ **My QSR** > **Dashboard**

The Dashboard allows you to quickly view your profile including **Your Username (Role)** and **Your email address.**



Highlights of the Dashboard include records in main categories listed below that may require your attention:

Recent Reviews – the five most recent reviews relevant to the vendor.
Recent Follow Ups- The 10 most recent follow-ups, relevant to the vendor.



Recent Reviews

The 5 most recent reviews, relevant to you, are listed below.

Vendor	Service Type	Service Location	Consumer	Date Created	
BENHAVEN INC.	CLA	PR04100323SR	JONES 3, DOE	11/16/2006 4:19:18 PM	View
BENHAVEN INC.	CLA	PR04100374SR	MILLS 34, JOHN	11/15/2006 12:05:20 PM	View
BENHAVEN INC.	CLA	PR04100374SR	MILLS 34, JOHN	11/15/2006 12:05:12 PM	View
BENHAVEN INC.	CLA	PR04100374SR	MILLS 34, JOHN	11/15/2006 12:05:11 PM	View
BENHAVEN INC.	CLA	PR04100373SR	N/A	11/15/2006 11:21:43 AM	View

Recent Follow Ups

The 10 most recent follow-ups, relevant to you, are listed below. **NOTE:** only Open Follow-Ups are listed.

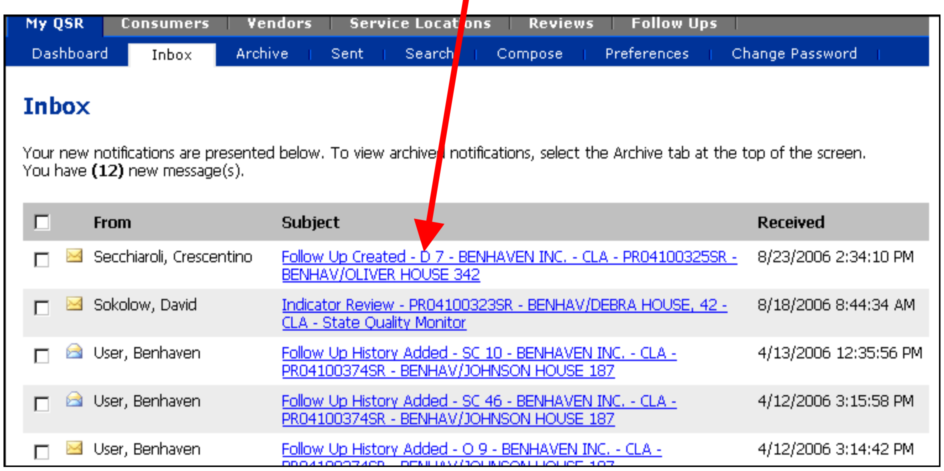
Each record allows the user to quickly navigate to various tasks, which will be discussed in later, by clicking on the hyperlink associated with each record.

Inbox

⇒ **My QSR > Inbox**

Your Notification Center Inbox will display new notifications. You may archive notifications to help manage your workload; however, you may not delete them.

Notification subject lines specify a reason for that notification and review/consumer information (Indicator Review, Follow up Created, Follow up History Added).



My QSR | Consumers | Vendors | Service Locations | Reviews | Follow Ups

Dashboard | Inbox | Archive | Sent | Search | Compose | Preferences | Change Password

Inbox

Your new notifications are presented below. To view archived notifications, select the Archive tab at the top of the screen.
You have **(12)** new message(s).

	From	Subject	Received
	Secchiaroli, Crescentino	Follow Up Created - D 7 - BENHAVEN INC. - CLA - PR04100325SR - BENHAV/OLIVER HOUSE 342	8/23/2006 2:34:10 PM
	Sokolow, David	Indicator Review - PR04100323SR - BENHAV/DEBRA HOUSE, 42 - CLA - State Quality Monitor	8/18/2006 8:44:34 AM
	User, Benhaven	Follow Up History Added - SC 10 - BENHAVEN INC. - CLA - PR04100374SR - BENHAV/JOHNSON HOUSE 187	4/13/2006 12:35:56 PM
	User, Benhaven	Follow Up History Added - SC 46 - BENHAVEN INC. - CLA - PR04100374SR - BENHAV/JOHNSON HOUSE 187	4/12/2006 3:15:58 PM
	User, Benhaven	Follow Up History Added - O 9 - BENHAVEN INC. - CLA -	4/12/2006 3:14:42 PM

To begin the process of archiving notifications:

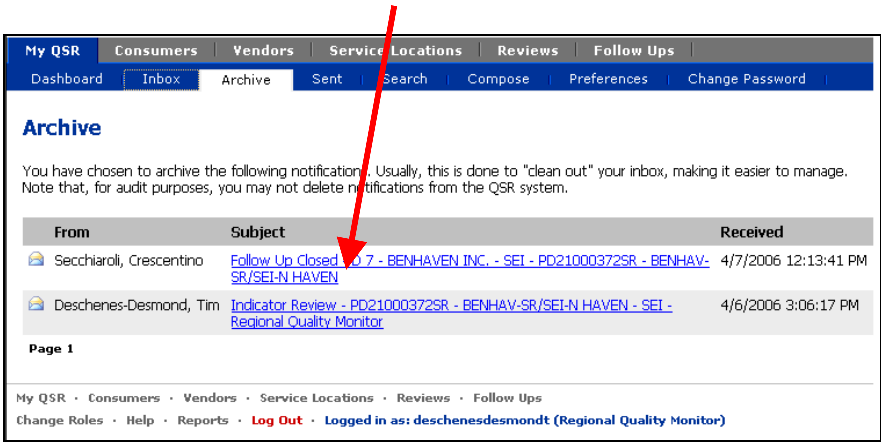
1. Select the check box next to notification you would like to archive
2. Select the **Archive Selected** button at the bottom of the screen.

3. To archive all notifications on the page, select the check box in the grey banner (to the left of the "from" column)
4. Select the **Archive Selected** button at the bottom of the screen.
5. You have successfully archived your notifications. They may be retrieved from the **Archive** tab.

Archive

⇒ **MY QSR > Archive**

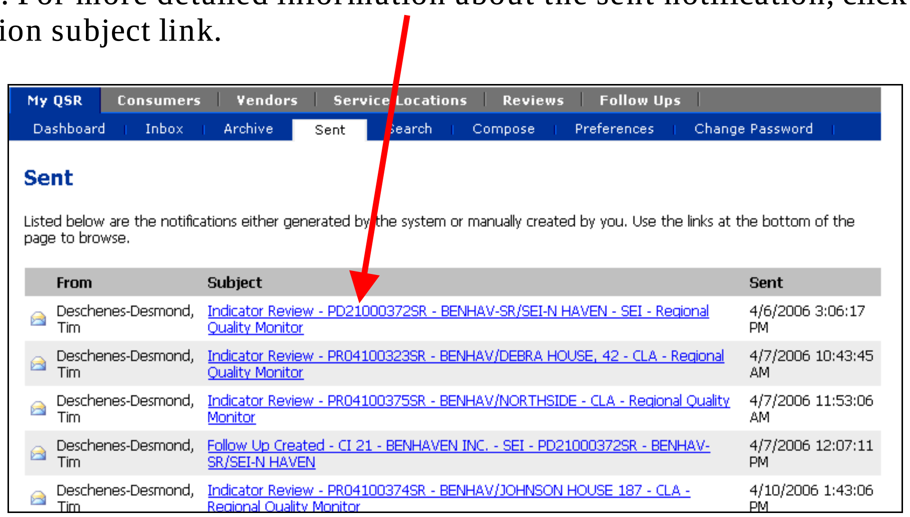
Notifications in this screen have been archived. You may access, read and print Archived notifications. For more detailed information about the archived notification, click on the notification subject link. **Remember notifications may not be deleted**



Sent

⇒ **MY QSR > Sent**

You will be able to view notifications that have been automatically sent by the QSR application in the Sent screen. **Remember notifications may not be deleted**. For more detailed information about the sent notification, click on the notification subject link.



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Search

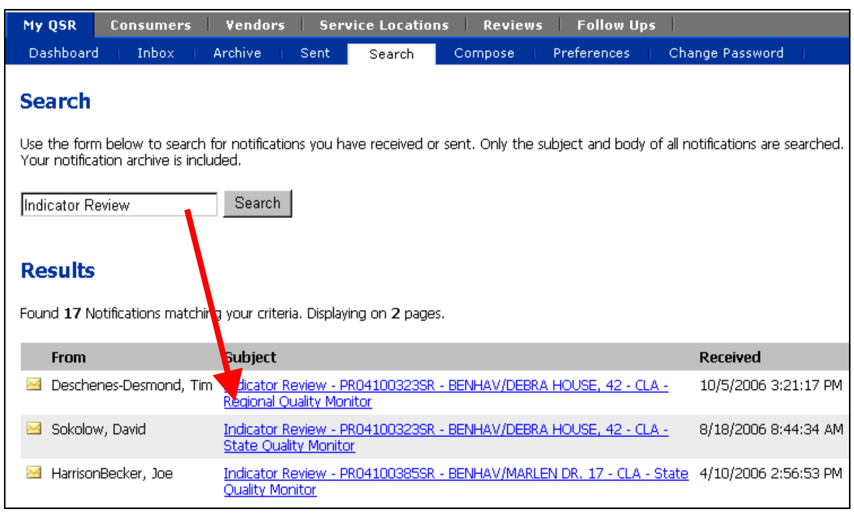
⇒ **MY QSR > Search**

The Search screen allows you to quickly locate notifications, sent or received. Using key words will allow you to retrieve notifications faster. Your search words should match words in the subject line or body of the message.

To perform a quick notification search:

1. Enter the key words related to the notification in text field.
2. Select the **Search** button.
3. Your results from your search criteria will display all notifications stored or saved in the Inbox, Sent and Archive screens.
4. You have successfully used the Search feature.

PRACTICE: Use the key words "Indicator Review" for all notifications related to Indicator Review. Note, Indicator Review is in the subject line), As seen in the examples below.



Compose

⇒ **MY QSR > Compose**

Composing notifications is not a function currently available within the QSR application. Notifications are automatically generated by the Notification Center.

Preferences

⇒ **MY QSR > Preferences**

When an automatic notification is generated from the Notification Center in the QSR application, users assigned to a specific review may automatically receive an email, only if their role is selected for notification, to their state or agency (vendor) email address indicating a notification was sent. See Notification Center for more information.

Preferences allow you to turn notification alerts on or off. Once these alerts are turned off, you will not receive updates from the QSR application. To turn off the notification alerts in the Preferences Screen:

1. Unselect the **Receive email for new notifications** box
2. Select the **Submit** button
3. You have successfully turned off the option to receive notifications.

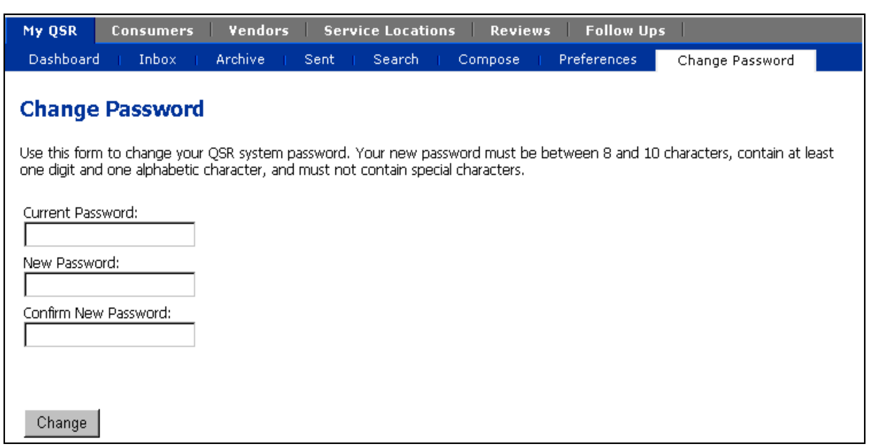
To turn on the notification alerts in the Preferences Screen:

4. Select the **Receive email for new notifications** box
5. Select the **Submit** button
6. You have successfully turned on the notification option

Change Password

⇒ **MY QSR > Change Password**

Users set up in the QSR Application will be assigned a random password composed of various alpha and numeric characters. It is recommended that users change their password to an alphanumeric password they will remember by using the **Change Password** option.



To change your password once you have logged in:

1. Enter your current password in the **Current Password** field
2. Enter a new password in the **New Password** field.
3. Confirm your new password in the **Confirm New Password** field.
4. Select the **Change button** to save your changes.
5. You have successfully changed your password.

To reset forgotten passwords, see Reset Passwords.

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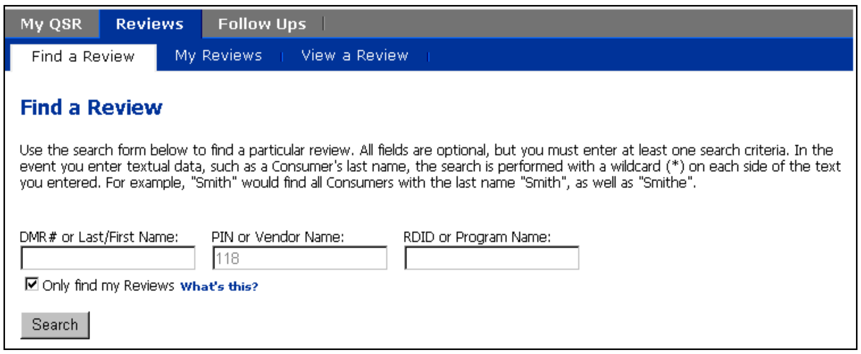
Reviews Tab

In the Reviews tab, you may Find a Review, My Reviews and View a Review. Vendors will be limited to view reviews for their agency.

Find a Review

⇒ **Reviews > Find a Review**



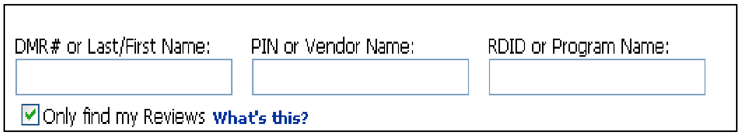
1. Determine your Search Criteria from the two search options available.
   a. **DMR # or Last/First Name** – search for Reviews by complete DMR # or partial Last/First Name
   b. **PIN or Vendor Name** – Vendors will be limited to only their agency and will be unable to change the PIN number displayed in this field.
   c. **RDID or Program Name** – search for Reviews by the Programs being provided by complete RDID or partial Program Name

SEARCH TIPS!
Search by DMR #, remember to enter the **complete value**. The QSR application only accepts complete values for these fields. Search by text (Last/First Name, or Program Name/RDID), the QSR application will default wildcards at both the beginning and end of the text you type in.

EXAMPLE: Type in "Smith" for Last/First Name, you will find both "Smith" and "Smithe" For an RDID example, entering "PR041" will result in Private CLA's information displayed.

IMPORTANT NOTE!
The RDID/SSID is structured as follows: the first five characters denote the Public/Private (First Char D=DMR, P=Pvt), Res/Day/Service (Second Char R=Resid, D=Day, S=Svc) and Program Type (Char 3-5 are numeric codes for Programs and services: 041=CLA, 533=ISR, etc.)

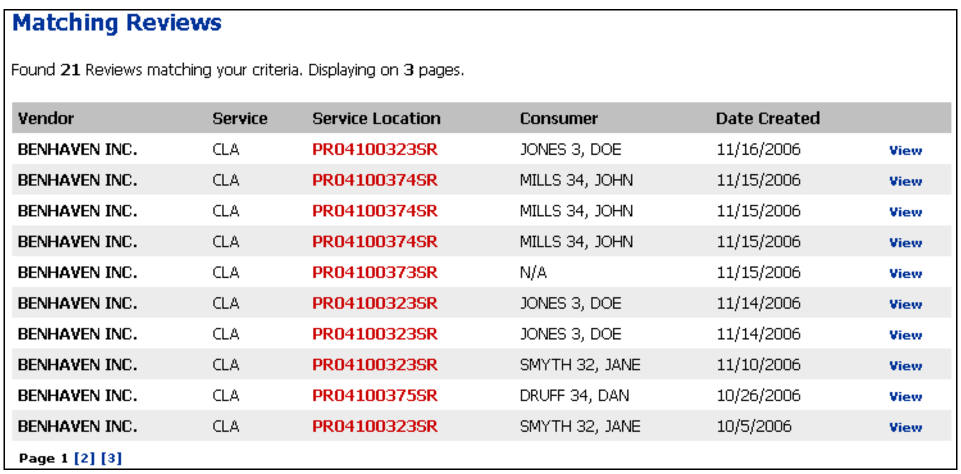
Only find my Reviews



2. Check the **Only find my Reviews** box, to query and return those Reviews assigned to your User Name and Role.
3. Leave the **Only find my Reviews** box unchecked to query all Reviews, assigned to you or others associated with your Vendor agency.

NOTE!
Reviews accessed that do not belong to the User may be able to be viewed but there will be limitations on data entry changes that can be made.

4. Once you determine how to search, enter the appropriate information and click the **Search** button.
5. Once the QSR application completes the search, results will display at the bottom of the page. The top 10 results will display per page.



Matching Reviews

Found **21** Reviews matching your criteria. Displaying on **3** pages.

Vendor	Service	Service Location	Consumer	Date Created	
BENHAVEN INC.	CLA	PR04100323SR	JONES 3, DOE	11/16/2006	View
BENHAVEN INC.	CLA	PR04100374SR	MILLS 34, JOHN	11/15/2006	View
BENHAVEN INC.	CLA	PR04100374SR	MILLS 34, JOHN	11/15/2006	View
BENHAVEN INC.	CLA	PR04100374SR	MILLS 34, JOHN	11/15/2006	View
BENHAVEN INC.	CLA	PR04100373SR	N/A	11/15/2006	View
BENHAVEN INC.	CLA	PR04100323SR	JONES 3, DOE	11/14/2006	View
BENHAVEN INC.	CLA	PR04100323SR	JONES 3, DOE	11/14/2006	View
BENHAVEN INC.	CLA	PR04100323SR	SMYTH 32, JANE	11/10/2006	View
BENHAVEN INC.	CLA	PR04100375SR	DRUFF 34, DAN	10/26/2006	View
BENHAVEN INC.	CLA	PR04100323SR	SMYTH 32, JANE	10/5/2006	View

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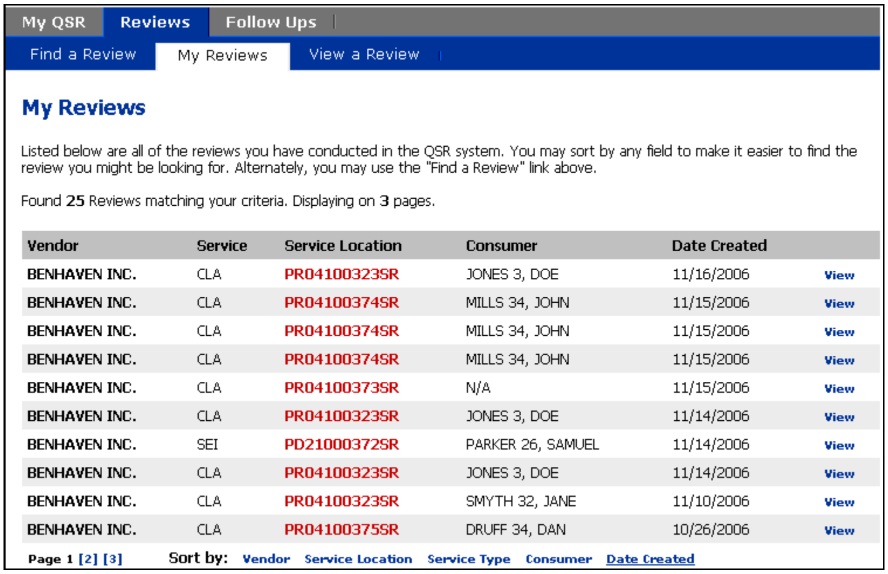
6. Click on View to display the Review results. The response section for questions is not available since the review is complete. Action plans can still be created for completed reviews.

My Reviews

⇒ **Reviews > My Reviews**

My Reviews tab displays all reviews conducted relevant the Vendor User. Each of these completed reviews can be viewed by clicking the blue text next to the review name.

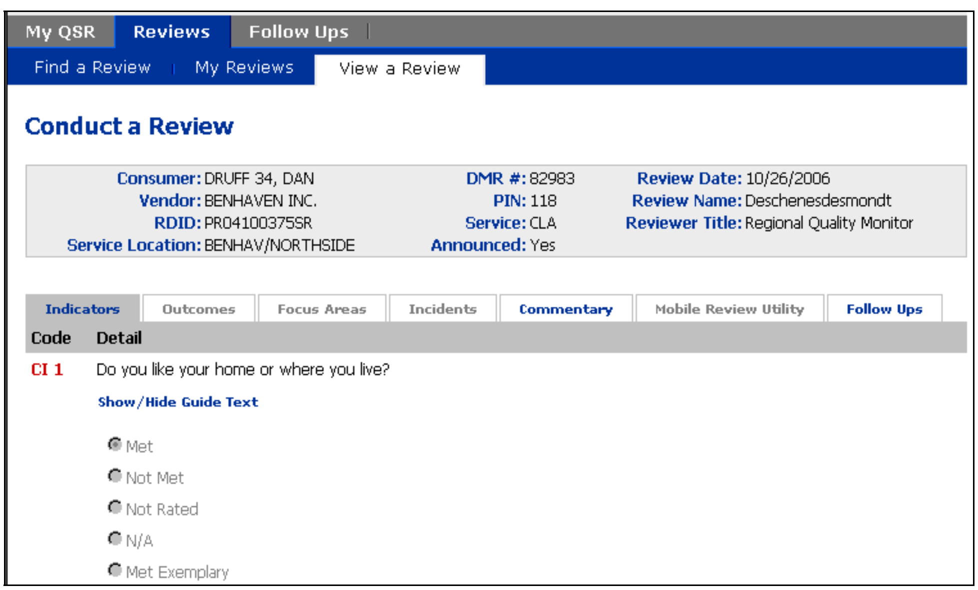


View a Review Reviews

⇒ Reviews > View a Review

View a Review tab displays the ratings at Indicator, Outcome or Focus area, depending on the specific review conducted. Each review has various tabs, which display different information. If a tab is not available for viewing it will be greyed out.

In the example below, the Indicator, Commentary and Follow Up tabs are the only tabs available. This tab will only be utilized when a Vendor selects to View a review using the My Reviews tab and clicking the blue View hyperlink next to the selected review. Clicking on the View a Review tab will not display a review.



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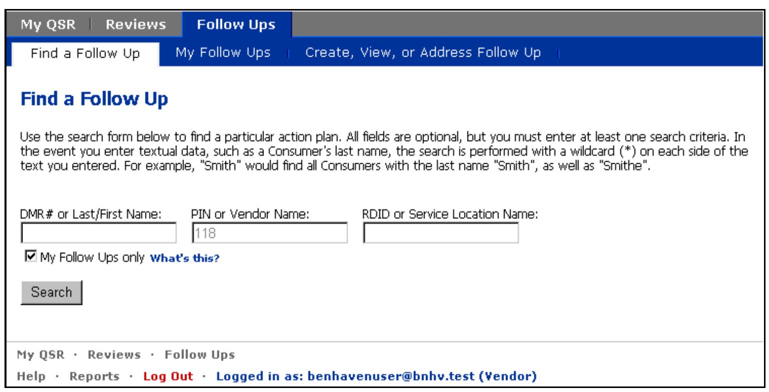
Follow Ups Tab

Follow ups are action plans created to address rated Indicators, Outcomes, Focus Areas and Incidents entered into a QSR Review. These action plans are created automatically for any Indicator rated "Not Met (Requires Follow Up) and can be created for any other Indicator, Outcome, Focus Area or Incident regardless of it's rating.

The purpose of a follow up action plan is to track issues, Plans of Correction (POC) submitted from the Vendor and the verify that POCs have been successfully implemented, which in turn will "close" the follow up action plan. Vendors have data entry access to the QSR system for the sole purpose of submitting POC's for review by DMR. Vendors also have "read only" access to all reviews created for consumers, service locations and Vendor/Service reviews relating to their Provider Agency when they are submitted to the vendor in the notification process. Any Vendor user with access to the Find a Review or My Reviews may access reviews, create and implement POC.

Find a Follow Up

⇒ **Follow Ups > Find a Follow Up**



1. Determine the search criteria from the search options
   a. **DMR # or Last/First Name** – search for Action Plans by complete DMR # or partial Last/First Name
   b. **PIN or Vendor Name** – Vendors will be limited to only their agency and will be unable to change the PIN number displayed in this field.
   c. **RDID or Program Name** – search for Action Plans by the Programs provided by complete RDID or partial Program Name

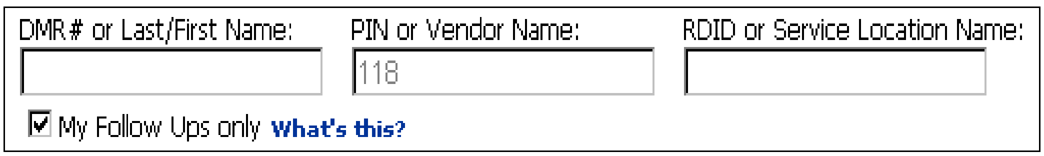
SEARCH TIPS!
Search by DMR #, or PIN #. Remember to enter on the **complete values**. The QSR only accepts complete values for these fields. Search text for Last/First Name, or Program Name/RDID. QSR application will default wildcards at both the beginning and end of the text you type in.

PRACTICE: Type in “Smith” for Last/First Name, you will find both “Smith” and “Smithe” For an RDID example, entering “PR041” will result in Private CLA’s being pulled up.

IMPORTANT NOTE:

The RDID/SSID is structured as follows: the first five characters denote the Public/Private (First Char D=DMR, P=Pvt), Res/Day/Service (Second Char R=Resid, D=Day, S=Svc) and Program Type (Char 3-5 are numeric codes for Programs and services: 041=CLA, 533=ISR, etc.).

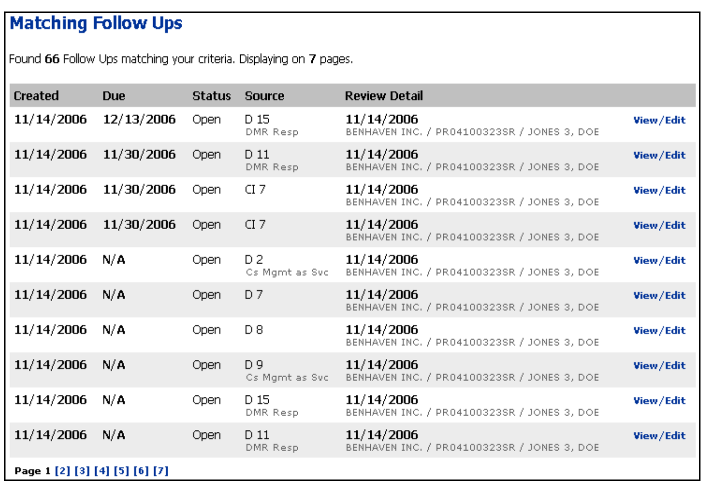
Only find my Follow Ups



2. Select **My Follow Ups only** box to query those Action Plans assigned to your User Name and Role, action plans created by you.

OR

3. Leave the **My Follow Ups only** box unchecked to query all Action Plans, assigned to you or others.
4. Once you determine and have entered your search criteria, select the **Search** button
5. Your results will display at the bottom of the page



Matching Follow Ups

Found **66** Follow Ups matching your criteria. Displaying on **7** pages.

Created	Due	Status	Source	Review Detail	
11/14/2006	12/13/2006	Open	D 15 DMR Resp	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	11/30/2006	Open	D 11 DMR Resp	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	11/30/2006	Open	CI 7	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	11/30/2006	Open	CI 7	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	N/A	Open	D 2 Cs Mgmt as Svc	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	N/A	Open	D 7	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	N/A	Open	D 8	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	N/A	Open	D 9 Cs Mgmt as Svc	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	N/A	Open	D 15 DMR Resp	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit
11/14/2006	N/A	Open	D 11 DMR Resp	11/14/2006 BENHAVEN INC. / PR04100323SR / JONES 3, DOE	View/Edit

Page 1 [2] [3] [4] [5] [6] [7]

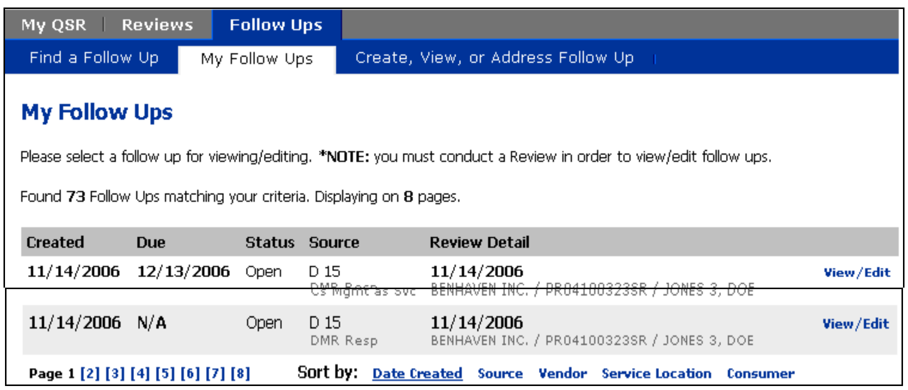
- The top 10 results will display per page.
- Actions Plans information is arranged in several columns:

Created is in the first column. All Action Plans are sorted by the date they were created
Due displays the due date the Action Plan is to be resolved
Status is the status of the Action Plan (Open/Closed)
Source: this is the specific Indicator code.
Review Detail column displays the **date** it was reviewed in red, the Vendor Name, RDID, and Consumer Name associated with the Action Plan are displayed in grey font
View/Edit links displayed in blue and will allow you to View or Edit the Action Plan.

My Follow Ups

⇒ **Follow Ups > My Follow Ups**

Displays a list of follow ups you created, which will assist you in managing your case load and provide a quick link to View or Edit any Follow up.

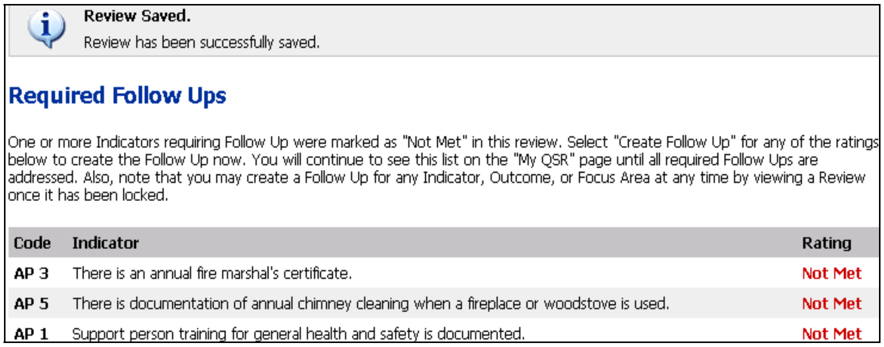


Create, View or Address a Follow Up

⇒ **Follow Ups > My Follow Ups**

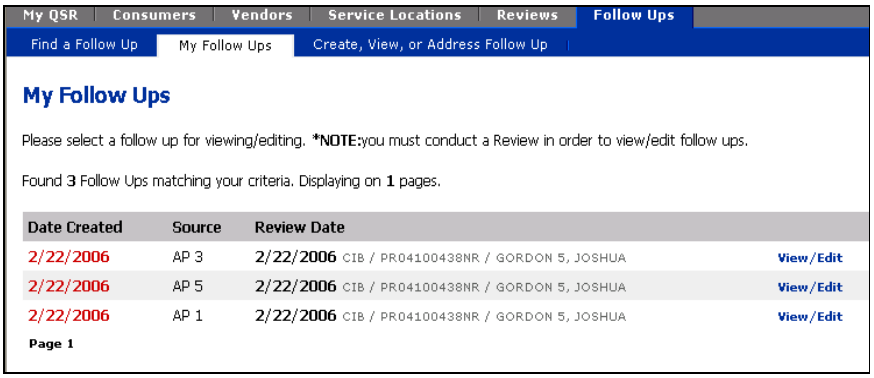
Initial Creation of Action Plans

<u>Created from Not Met (Requires Follow Up) Indicators.</u> As previously mentioned, Indicators answered **Not Met** require Follow Up and will generate an Action Plan. The Vendor will be sent a Notification on all **Not Met** Indicators. To confirm which Indicators generated an Action Plans, the following screen displays in sent within the application.



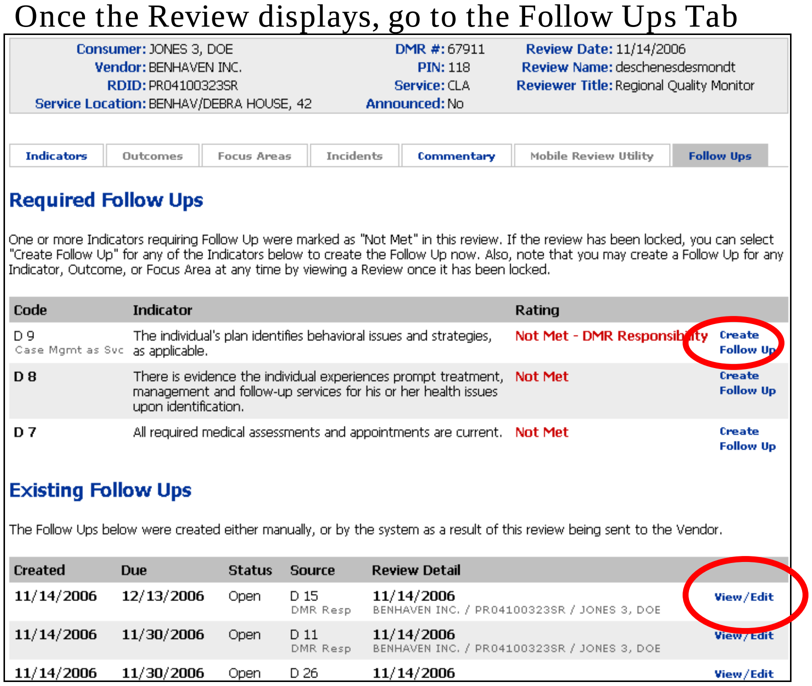
To view the new Action Plan:

1. Select the Indicator you wish to view or Edit.

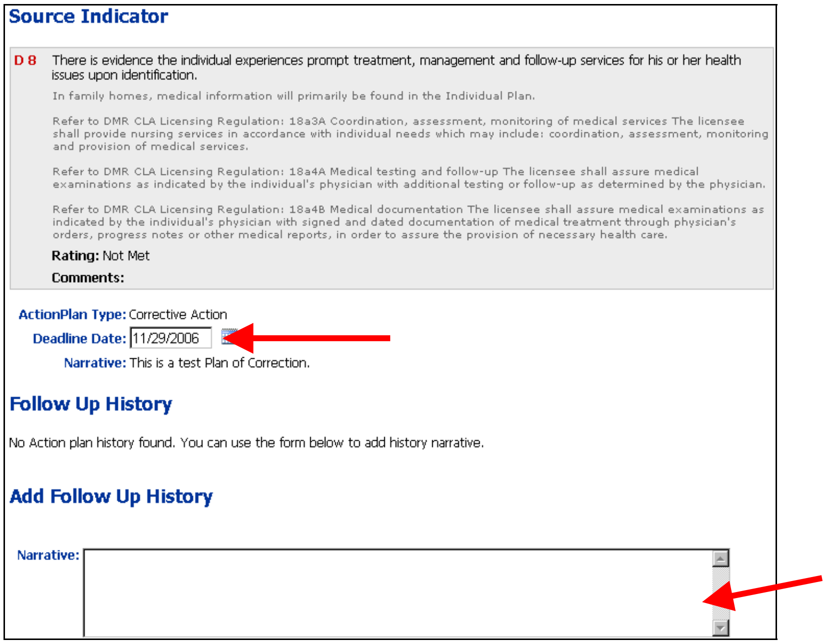


OR

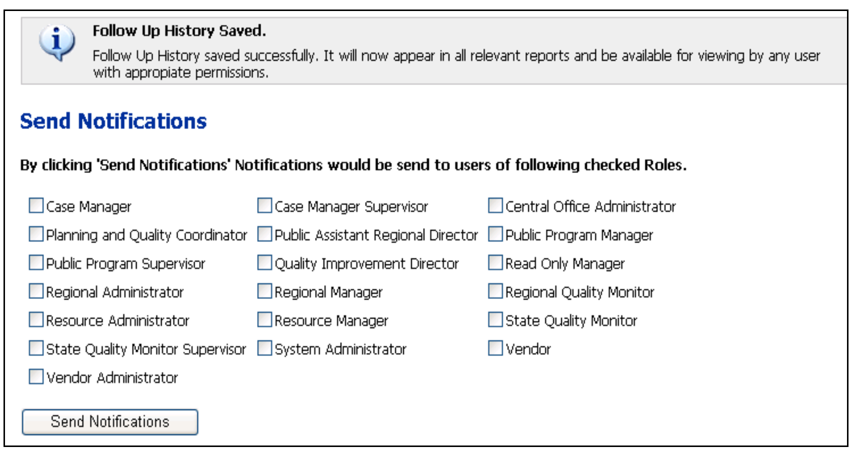
2. Go to Reviews > **My Reviews**
   a. Locate the desired review.
   b. Click on **View**
   c. Once the Review displays, go to the Follow Ups Tab



3. Locate the desired Action Plan and click on either **View/Edit** or **Create Action Plan.** Either option will display the Action Plan below
4. In the narrative box, enter a Proposed Deadline Date and Proposed Plan of Correction



5. Click on **Save History** to successfully follow up on a **Not Met** Review.
6. The Send Notifications screen will display below.
7. Select the appropriate recipients to receive the notification that the POC has been made.



NOTE!

At a minimum, the Resource Manager (Private) or Planning and Quality Coordinator (Public) should be notified so they may Log On to the QSR application and view the Action Plan when the Plan of Correction has been submitted. These notifications will be sent to an external email identified in the QSR Application for that user.

Process for replying to POC and Deadline Dates:

1. The recipients of the email may Log On to determine if the Proposed Deadline Date is acceptable. They will have the opportunity to revise the Deadline Date and narrative to explain why.
2. If Vendor agrees with the Proposed Deadline Date, a Notification will be sent to confirm.
3. If the date is acceptable, the DMR user will check the **Is Acceptable** box (only accessible to DMR users), locking the Deadline Date.
4. DMR may continue to modify the Deadline Date until the Action Plan is closed.
5. Now, the **Is Accepted** box is checked and the **Vendor cannot modify the Deadline Date** box.
6. The vendor and DMR have successfully agreed upon the date and terms of the POC.

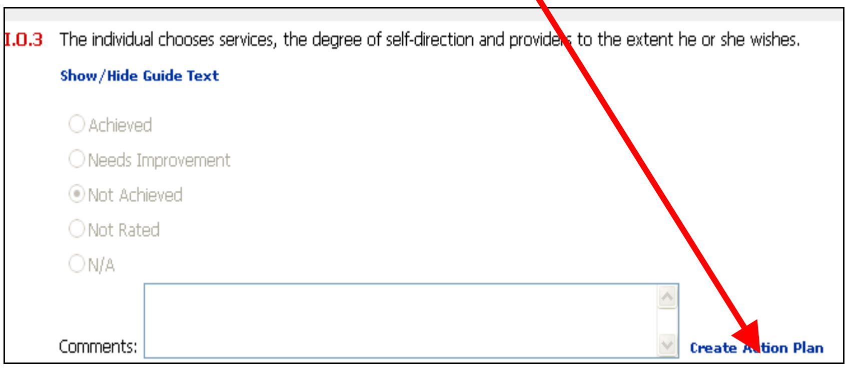
Manual Create an Action Plan

While Indicators with a Rating of Not Met automatically creates Action Plans and require follow ups, there are times when you may wish to create an Action Plan from an Indicator with a different rating, an Outcome or Focus Area.

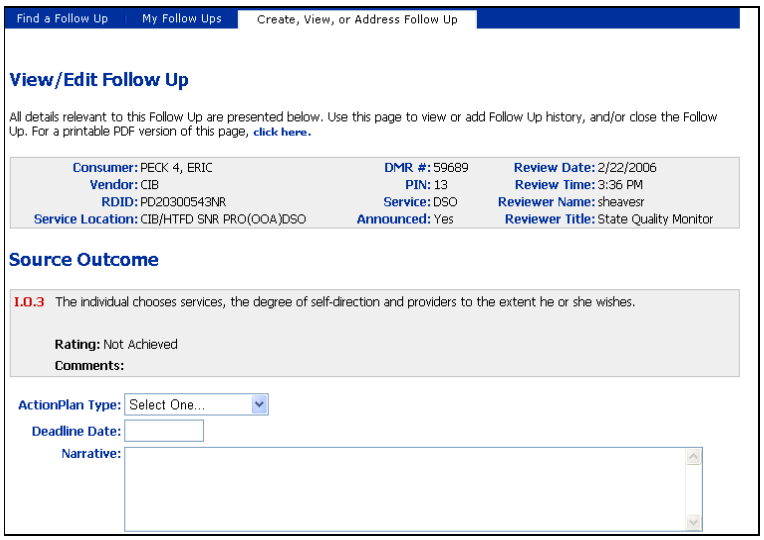
1. Search for the completed Review.
2. Click on the **View** link to view the results.

NOTE!
The Indicator ratings in grey font demonstrate the Review has been completed and sent to the Vendor.

3. Identify the question that needs improvement, not achieved or not rated and click on the **Create Action Plan** link.



4. Create Action Plan screen will display.
5.



6. Select an Action Plan Type, **Corrective Action** or **Quality Improvement**.
7. Select the Deadline Date in which the action will be completed.
8. Enter a Explanation in the Narrative field box, this is a free form text box.
9. Once complete, click on **Save Action Plan** button. The Send Notification screen will display.
8. Select the appropriate recipients to receive the notification.
9. You have successfully created an Action plan manually.

Complete an Action Plan

⇒ **My QSR > Inbox**

Once an Action Plan has been fulfilled, it is the responsibility of DMR users to close the Action Plan and notify the Vendor they have closed the Action Plan. The Vendor will receive a notification that the Action Plan has been closed.

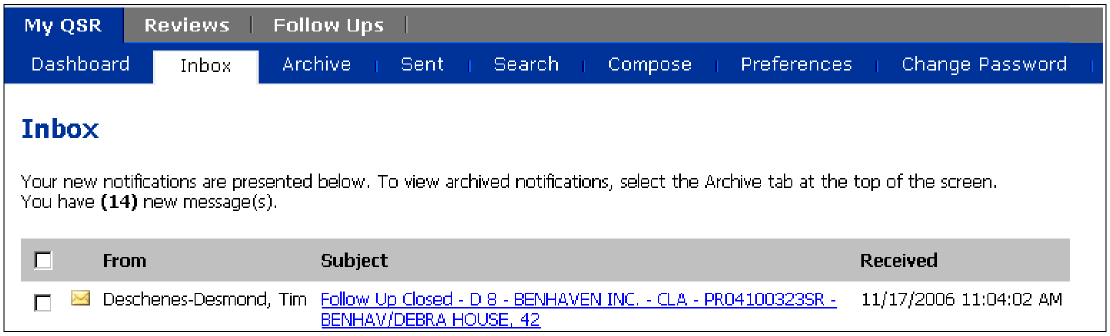

My QSR
Reviews
Follow Ups
Dashboard
Inbox
Archive
Sent
Search
Compose
Preferences
Change Password
Inbox
Your new notifications are presented below. To view archived notifications, select the Archive tab at the top of the screen.
You have (14) new message(s).
From
Subject
Received
Deschenes-Desmond, Tim
Follow Up Closed - D 8 - BENHAVEN INC. - CLA - PR04100323SR - BENHAV/DEBRA HOUSE, 42
11/17/2006 11:04:02 AM

Table of Contents

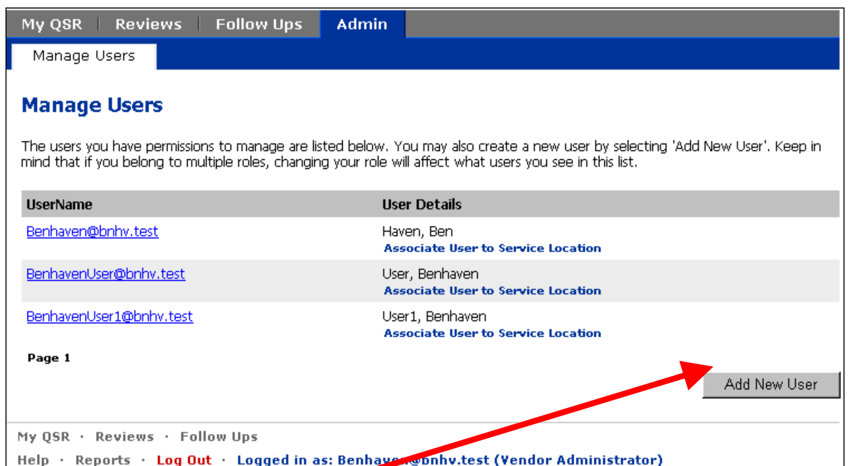
Admin Tab

This tab will only be accessible to those with administrator rights. Each Vendor must designate at least on person who will be able to perform administrative functions which include managing users, editing user information, associate users to service locations.

User Accounts

⇒ **Admin Tab > Manage Users**

This screen allows the administrator add a new users and manger current users.



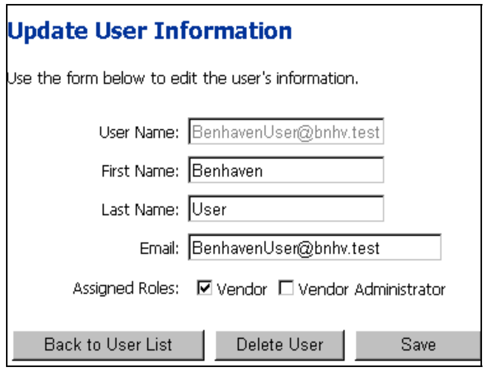
Add New User

This screen allows the Vendor Administrator to add new users to the QSR data application. The information is critical and all fields are required for a new user to be added.

1. Enter the **User Name** that will be used to Log On to the QSR Data Application. Vendor Users will use their e-mail address.
2. **First Name** field
3. **Last Name** field
4. **E-mail address** field will indicate where notifications should be sent
5. Assigned Roles check box.
   - Vendor Administrators will only be able to add either Vendor Users or another Vendor Administrator.

IMPORTANT NOTE!
Vendor Administrators will only be able to add either Vendor Users or another Vendor Administrator.

6. Once all the information is add, select the **Save** button to add the new user.
7. The user has been successfully added!

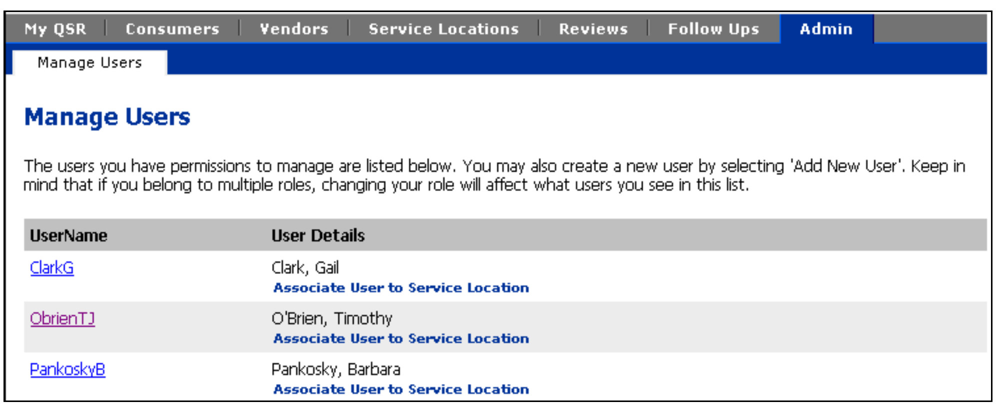


IMPORTANT NOTE!

Each Vendor must develop a process for managing users who have access to the QSR Application. This includes adding, deleting and assigning users to the Vendor's Service Locations.

Manage Current Users

1. Click the link of the User Name to bring up the Update User Information screen.
2. Click the **Associate User to Service Location** link to associate that user to a variety of service locations (assigned to the Vendor) they are responsible for reviewing. More information is provided below.



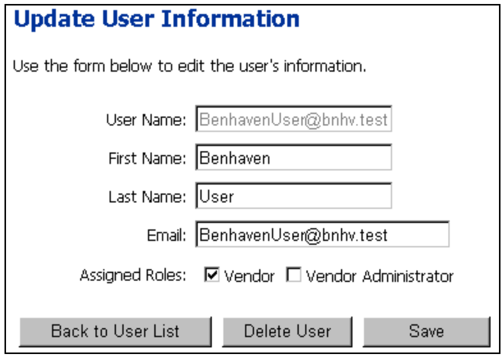
Edit User Information

This screen allows the administrative user to edit and update selected user profiles. Fields in grey may not be changed. Vendor Administrators are only able to assign roles of Vendor User or Vendor Administrator.

1. Click on the Username from the Manage User Screen.
2. Update the User information and select the **Save** button.

OR

3. Select the **Delete** button to delete this user.
4. You may return to the list of users by selecting **Back to User List** button.



Update User Information

Use the form below to edit the user's information.

User Name: BenhavenUser@bnhv.test

First Name: Benhaven

Last Name: User

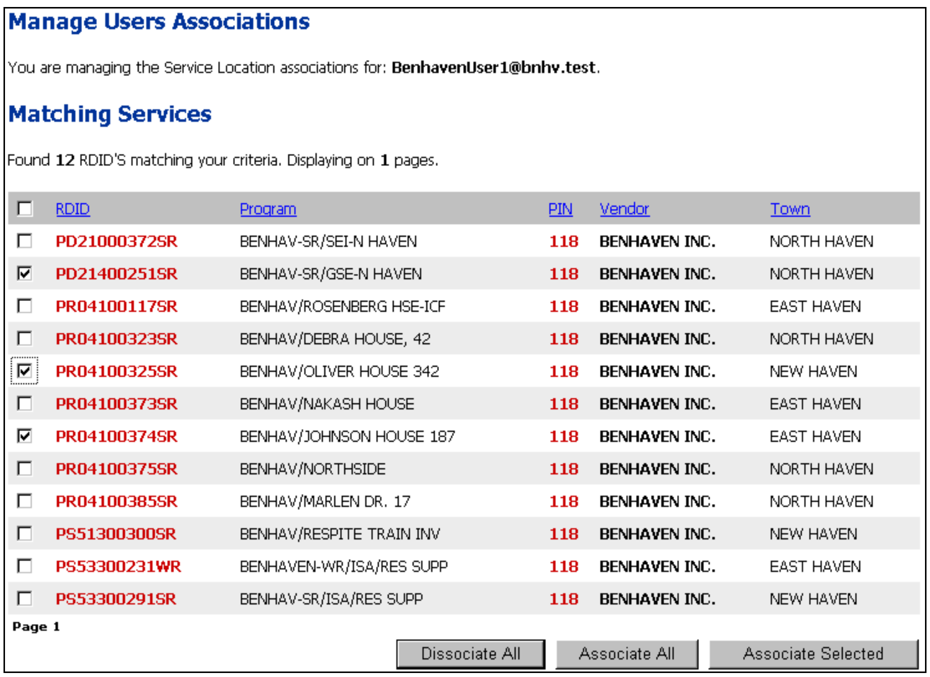
Email: BenhavenUser@bnhv.test

Assigned Roles: ☑ Vendor ☐ Vendor Administrator

Back to User List | Delete User | Save

Associate Users to Service Locations

This screen is available from the Manage User screen and allows the administrators to assign any service locations associated with the Vendor agency.



Manage Users Associations

You are managing the Service Location associations for: **BenhavenUser1@bnhv.test**.

Matching Services

Found **12** RDID'S matching your criteria. Displaying on **1** pages.

☐	RDID	Program	PIN	Vendor	Town
☐	PD21000372SR	BENHAV-SR/SEI-N HAVEN	118	BENHAVEN INC.	NORTH HAVEN
☑	PD21400251SR	BENHAV-SR/GSE-N HAVEN	118	BENHAVEN INC.	NORTH HAVEN
☐	PR04100117SR	BENHAV/ROSENBERG HSE-ICF	118	BENHAVEN INC.	EAST HAVEN
☐	PR04100323SR	BENHAV/DEBRA HOUSE, 42	118	BENHAVEN INC.	NORTH HAVEN
☑	PR04100325SR	BENHAV/OLIVER HOUSE 342	118	BENHAVEN INC.	NEW HAVEN
☐	PR04100373SR	BENHAV/NAKASH HOUSE	118	BENHAVEN INC.	EAST HAVEN
☑	PR04100374SR	BENHAV/JOHNSON HOUSE 187	118	BENHAVEN INC.	EAST HAVEN
☐	PR04100375SR	BENHAV/NORTHSIDE	118	BENHAVEN INC.	NORTH HAVEN
☐	PR04100385SR	BENHAV/MARLEN DR. 17	118	BENHAVEN INC.	NORTH HAVEN
☐	PS51300300SR	BENHAV/RESPITE TRAIN INV	118	BENHAVEN INC.	NEW HAVEN
☐	PS53300231WR	BENHAVEN-WR/ISA/RES SUPP	118	BENHAVEN INC.	EAST HAVEN
☐	PS53300291SR	BENHAV-SR/ISA/RES SUPP	118	BENHAVEN INC.	NEW HAVEN

Page 1

Dissociate All | Associate All | Associate Selected

Administrators may select Service Locations to associate those Service locations with the user profile they have previously selected.

To select specific service locations:
1. Select the Associate User to Service Location link below their Name
2. When the service locations screen displays (see above), select the check box next to that service location name
3. Click **Associate Selected** button.

To select all service locations on the page:

1. Select the check box in the grey banner; all check boxes under will be selected.
2. Click the **Associate Selected** button.
3. Click the **Associates All** button to associate all service locations to that user on all pages.

OR

4. To remove selected Service Locations from the user *uncheck* the checkbox next to the desired service location and click the **Associate Selected** button.
5. To remove all Service Locations from the user click the **Disassociate All** button which will remove associations from all of the Service Locations even if on multiple pages.

NOTE!

The user will now lose those service locations from their associations. The search result is sorted by the RDID by default. Clicking on the column headings in the grey banner will sort the search result by that field.

By associating service locations to a user those Service Locations and Consumers placed in those service locations the Vendor will receive notifications on Follow Ups for any service location they are associated with and for consumers associated with those service locations.

IMPORTANT NOTE!

The service locations can be re-sorted by clicking on the blue underlined headings at the top of each column. The default sort is by RDID. Other sorts can be done on Program Name or Town. For Vendors the PIN And Vendor name field will always contain the same information.