

CMS Net

Respond to Follow Up Request

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This guideline is for training
and internal use only.

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Respond to Follow Up Requests

The *Respond to Follow Up Request* display all requests sent to user to take action and also allow user to post response to the request records. When a request is sent to the user to take action, user can only respond to request in the *Respond to Follow Up Request* but cannot create new request. User can edit request that has been responded to through the *Edit Follow Up Requests and Responses* menu.

Steps to Access Respond to Follow Up Requests

Step	Action
1	Type " F " for Follow Up from the Primary Option
2	Press <Enter>

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PRIMARY OPTION

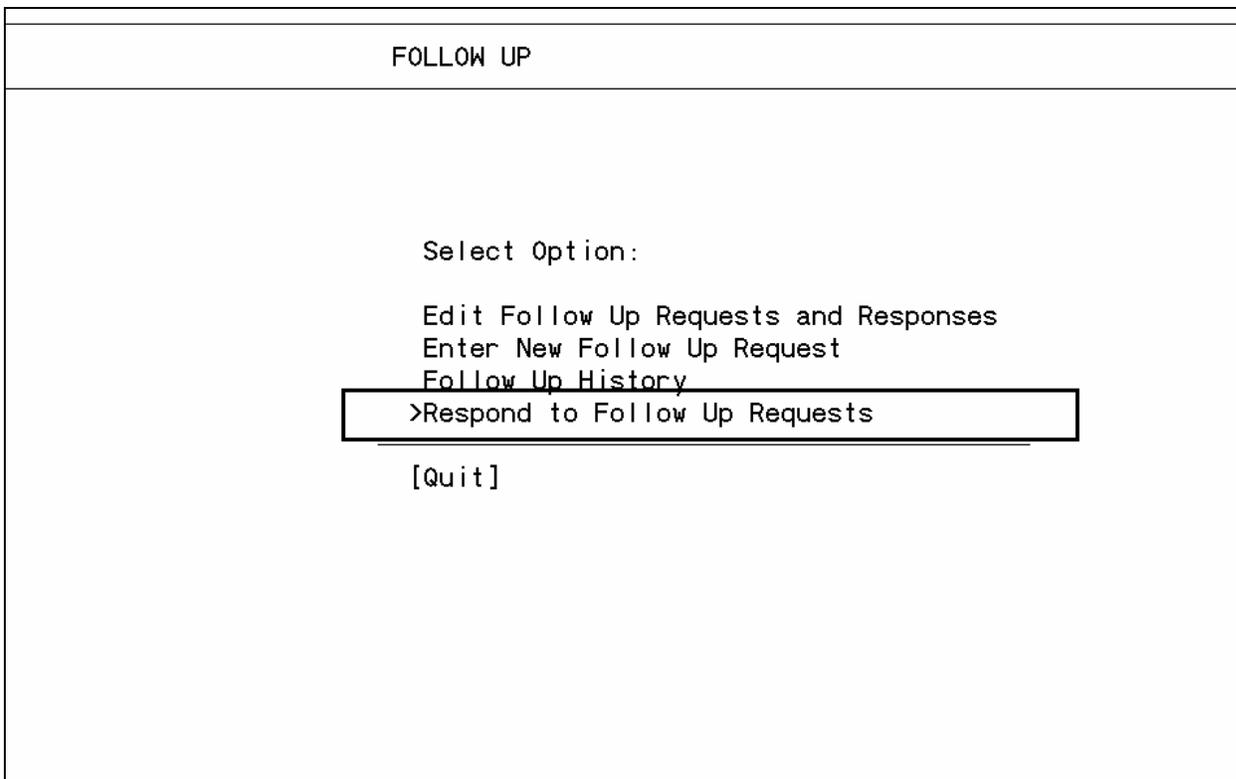
Select Option:

CHANGE ACCESS CODE
DISPLAY ELIGIBILITY LOG
ELECTRONIC POST-IT NOTE
ELIGIBILITY
EVENT TRACKING ...
>FOLLOW UP ...
GENERATE REQUESTS/AUTHORIZATIONS ...
MailMan Menu ...
MEDICAL THERAPY PROGRAM ...
REGISTRATION ...
SYSTEM MAINTENANCE ...

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[Quit]
    
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Step	Action
3	Type " R " for Respond to Follow Up Request
4	Press <Enter>

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After pressing <Enter>, the Respond to Follow Up Requests Select Option appears.

1 Respond to Follow Up Request: By Patient

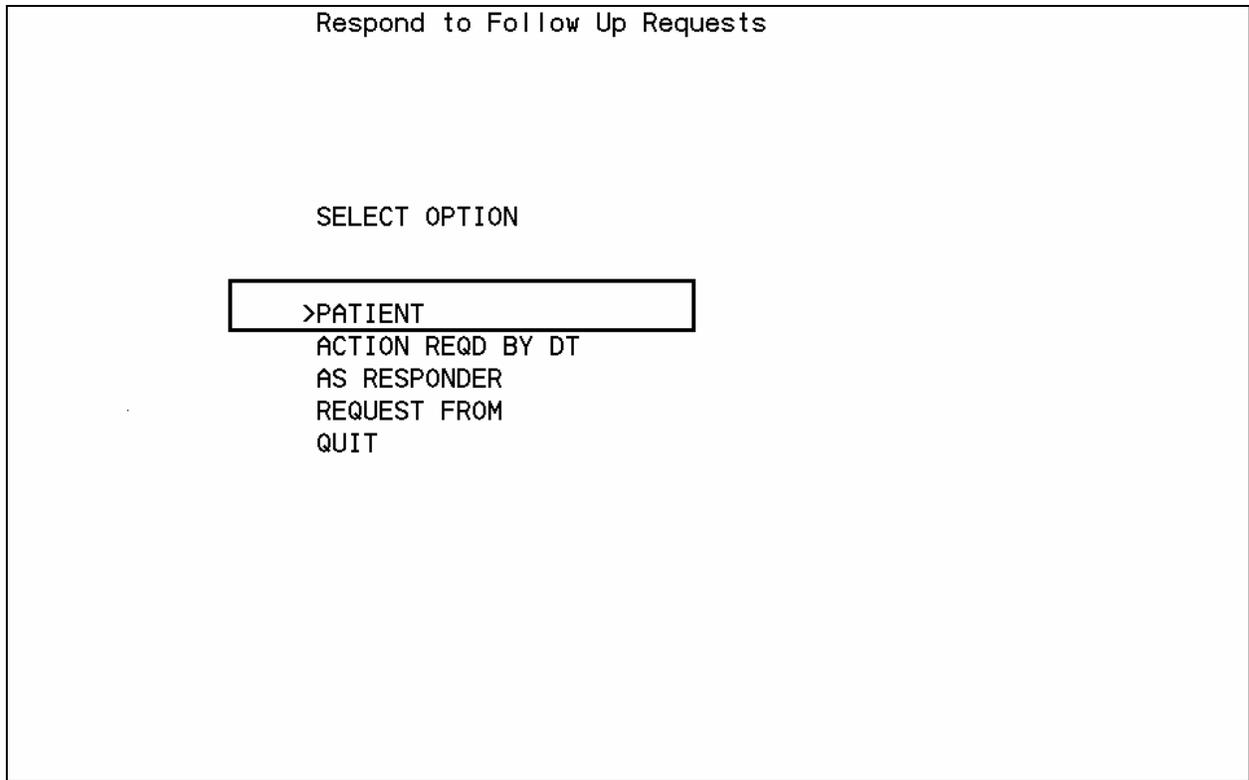
Respond to Follow Up Request: By Patient

If you know the client’s name, you can respond to follow up request by client search.

Steps to Access Respond to Follow Up Requests by Patient

Step	Action
1	Select " Patient " from Respond to Follow Up Requests
2	Press <Enter>

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Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

PATIENT IDENTIFICATION FOR: Respond to Follow Up Requests		
Enter one of the following identifiers:		
CCS Number :		
Pt Name:	<input type="text" value="LIBRE,NACHO"/>	Birthdate :
Current Legal County:		Gender :
Client Index Number :		
Social Security Number :		

For instructions on identifying patient, see the Patient ID section of this manual.

Search Results After identifying a patient, system will display all results by selected client.

Respond to Follow Up Requests	
() LIBRE, NACHO	CCS#: 3860902
Requestor: PHOMSOPHA, MOLLY	Priority: ROUTINE
Subject: SCHEDULE APPT	
Action Required By: 03/02/2007 Request Date: 03/02/2007 Resp#: 0/1	
[Quit]	

Search Results Explanation

The “*Resp#:*” field is the total # of users that have responded to requests. For example: *Resp#:* 3/4 means that three users had responded to request and one user has not responded to request out of a total of four users that needs to take action on request.

SEARCH RESULTS	
() LIBRE,NACHO Requestor: PHOMSOPHA,MOLLY Subject: SCHEDULE APPT Action Required By: 03/02/2007	CCS#: 3860902 Priority: ROUTINE Request Date:03/02/2007 Resp#: 0/1
[Quit]	

Number of user(s) that had responded to request: 0/1 means zero user has responded to request out of one user

**Follow Up
Response
Screen**

Select record, Follow Up Response Screen appears:

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Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		37431741A 4 E F/R= E
[Quit]		NDING
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Provider:		Other Phone: Telephone
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.		
Follow Up By: FOLLOW UP,USER TWO		Action Taken Dt: <input type="text"/>
Notification to: Last Update By: FOLLOW UP,USER ONE		Accepted Dt: <input type="text"/> Date: 03/01/2007

Data entry fields

This message is from the requestor, follow up comments.

Follow Up Response Screen

Field Description

Element Name	Descriptions/Comments
Patient Header	Defaulted from Request Follow Up screen
Request Date	Defaulted from Request Follow Up screen
Follow Up ID	Defaulted from Request Follow Up screen
Follow Up Status	Defaulted from Request Follow Up screen
Requestor	Defaulted from Request Follow Up screen
Action Reqd by	Defaulted from Request Follow Up screen
Priority	Defaulted from Request Follow Up screen
Request Follow Up to	Defaulted from Request Follow Up screen
Primary Addressee	Defaulted from Request Follow Up screen
Patient Contact Phone	Defaulted from Request Follow Up screen
Other Phone	Defaulted from Request Follow Up screen
Provider	Defaulted from Request Follow Up screen
Telephone	Defaulted from Request Follow Up screen
Subject	Defaulted from Request Follow Up screen
Comments	Defaulted from Request Follow Up screen
Follow Up by	List individual taking action on the request and default names from Request Follow Up to field.

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CMSAT FOLLOW UP RESPONSE		Select One: <input type="button" value="0"/>
Pt Nm: PIE,CHERRY CCS#: 386090 Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE		(?) Save () Print () Cancel
Request Date: 03/01/2007 Follow Up ID: 0307-000019 Stat Requestor: FOLLOW UP,USER ONE Action Required By: 03/01/2007 Priority: ROUTINE		[Quit]
Primary Addressee: BERRY Patient Contact Phone: (916) Provider:	Data Entry Fields:	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO RIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH		
Follow Up By: FOLLOW UP,USER THREE	Action Taken Dt:	<input type="text" value="03/01/2007"/>
CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		
Notification to: Last Update By: FOLLOW UP,USER ONE	Accepted Dt: Date: 03/01/2007	

- Note** If action on request is not complete and user would like to return to request at a later time to finish, leave the *Action Taken Dt* field blank.
- Notification To User** If request was sent to user as the *Notification to* person, user cannot only enter in the accepted date, which is date that he/she accepted the request.
- Data Entry as the Notification To User** Once comment box disappear, system will take user to *Notification to* field, at this point user can enter in the accepted date in the *Accepted Dt* field.

CMSAT FOLLOW UP RESPONSE		Select One: (?) Save () Print () Cancel
Pt Nm: LIBRE,NACHO Gender: M DOB: 01/01/2007 Lgl Co: ORANGE	CCS#: 386090 REG= ACTIVE	[Quit]
Request Date: 03/02/2007 Follow Up ID: 0307-000027 Requestor: PHOMSOPHA,MOLLY Action Required By: 03/02/2007 Priority: ROUTINE		
Primary Addressee: MOMMA LIBRE Patient Contact Phone: (213) 987-452 Provider:	Data Entry field for Notification to	
Subject: SS# MATCH WITH ANOTHER CLIEI Comments: CALL CLIENT TO VERIFY SS#.		
Follow Up By:	Action Taken Dt:	
Notification to: FOLLOW UP,USER TWO Last Update By: PHOMSOPHA,MOLLY	Accepted Dt: 03/02/2007 Date: 03/02/2007	

2 Respond to Follow Up Request: Action Reqd by Dt

Respond to Follow Up Request: Action Reqd by Dt

User can also respond to follow up request by action required by date.

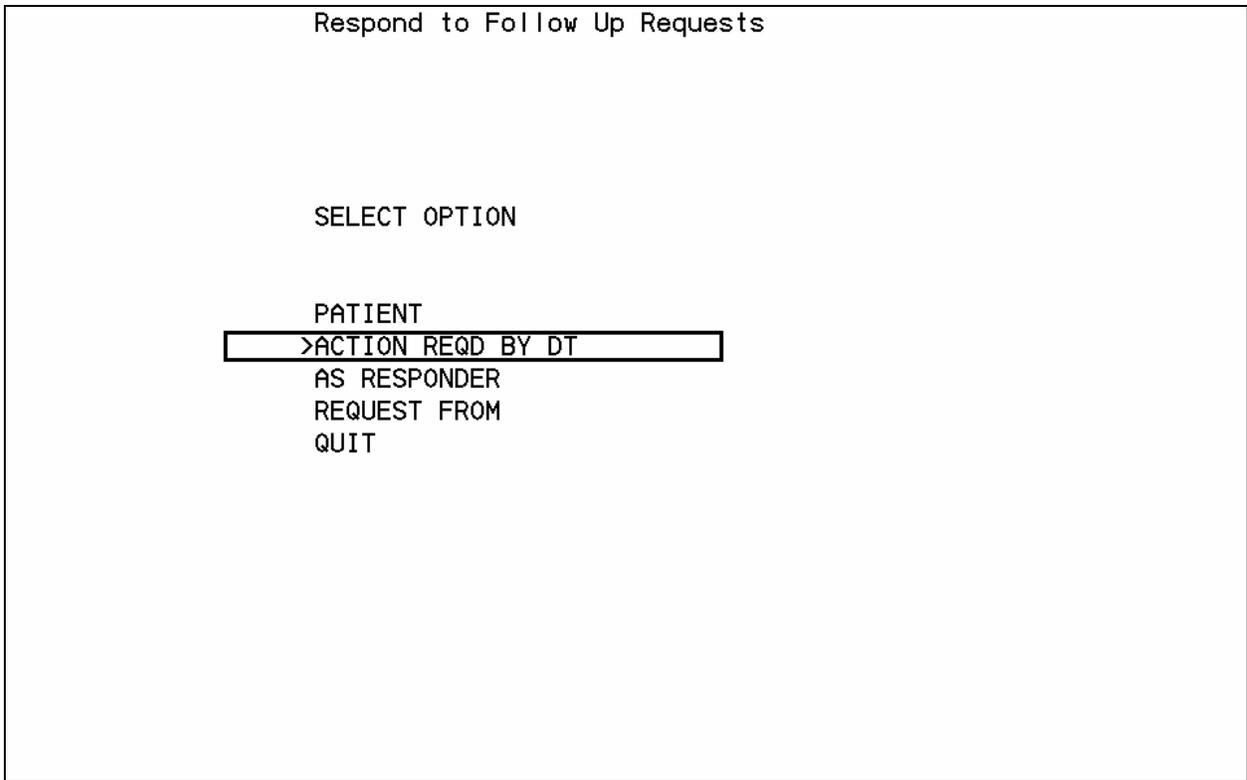
Steps to Access Respond to Follow Up Request: Action Reqd by Dt

Step	Action
1	Type "R" for Respond to Follow Up Request from Follow Up
2	Press <Enter>

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FOLLOW UP
<p>Select Option:</p> <p>Edit Follow Up Requests and Responses</p> <p>Enter New Follow Up Request</p> <p>Follow Up History</p> <p>>Respond to Follow Up Requests</p> <hr/> <p>[Quit]</p>

Step	Action
3	Type " AC " for Action Reqd by Dt.
4	Press <Enter>



**Follow Up-
Dates Screen**

After pressing <Enter>, the Follow Up- Dates Screen will appear:

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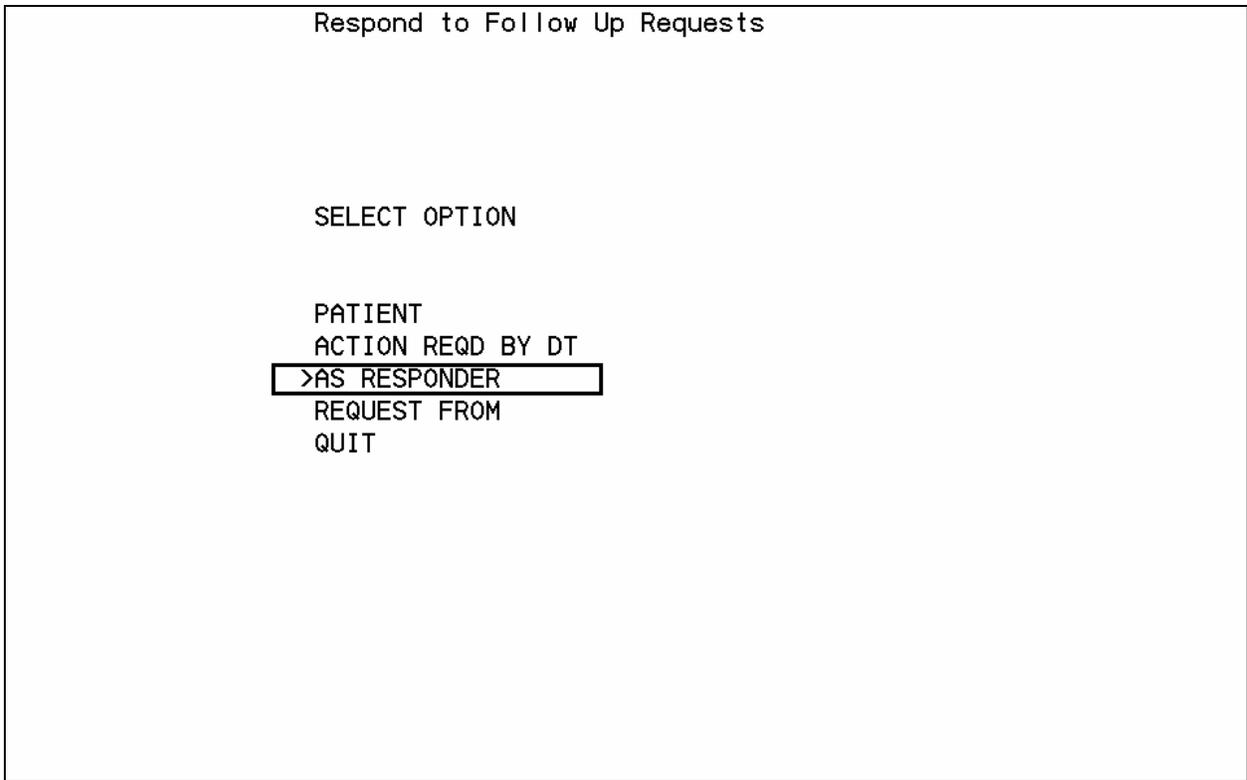
FOLLOW UP - DATES	
View follow up records within the following date range:	Select One: 0 (?) Search () Cancel <hr/> [Quit]
Date Range - From: 03/01/2007 To: 03/01/2007	

Step	Action
1	Enter the date range " From " and " To " date.
2	Press <Enter>
3	Select " Search " from the Action Menu
4	Search Results display

Search Results After pressing <Enter>, system will display all results by date range.

FOLLOW UP
Select Option: Edit Follow Up Requests and Responses Enter New Follow Up Request Follow Up History >Respond to Follow Up Requests [Quit]

Step	Action
3	Type "AS" for As Responder
4	Press <Enter>



After selecting “*As Responder*” the search result displays all requests that user needs to respond to.

FOLLOW UP	
Select Option:	
Edit Follow Up Requests and Responses	
Enter New Follow Up Request	
Follow Up History	
>Respond to Follow Up Requests	
[Quit]	

Step	Action
3	Type "R" for Request From
4	Press <Enter>

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Respond to Follow Up Requests

SELECT OPTION

PATIENT
ACTION REQD BY DT
AS RESPONDER
>REQUEST FROM
QUIT
    
```

**User
Identification
Screen**

After pressing <Enter>, the User Identification Screen appears:

Step	Action
1	In the name field, enter the user's last name and first name
2	Press <Enter>
3	Action menu displays.
4	Select "Search".
5	Press <Enter>

CMSAT		USER IDENTIFICATION		Select One:	
				(?) Search	
				() Cancel	
				[Quit]	
Enter one or more of the following identifiers:					
Name:	FOLLOW UP,USER		User Status:		
County:					
Regional Office:					
Security Group:					
Unique Id:					

Note The system will pull all follow up request records sent to user by the selected user.

FOLLOW UP RESPONSE		Select One:
Pt Nm: LIBRE,NACHO Gender: M DOB: 01/01/2007 Lgl Co: ORANGE	CCS#: 386090 REG= ACTIVE	<input type="checkbox"/> Save <input type="checkbox"/> Print <input type="checkbox"/> Cancel
Request Date: 03/02/2007 Follow Up ID: 0307-000032 Requestor: FOLLOW UP,USER TWO Action Required By: 03/02/2007 Priority: ROUTINE	Stat	[Quit]
Primary Addressee: MOMMA LIBRE Patient Contact Phone: (213) 987-4521 Other Phone: Provider: Telephone:		
Subject: CONFIRM SPELLING OF NAME Comments: IS THE CLIENT'S NAME CORRECT, IF NOT GET THE CORRECT SPELLING OF NAME.		
Follow Up By: FOLLOW UP,USER ONE NAME IS SPELLED CORRECT.		Action Taken Dt: 03/02/2007
Notification to: Last Update By: FOLLOW UP,USER TWO		Accepted Dt: Date: 03/02/2007

Action Menu The Follow Up Response Screen has four commands:

Command	Action
Save	Select <i>Save</i> from action menu to save data entered. Save will save the record and bring user to the <i>Follow Up Response Branch Menu</i> .
Print	Select <i>Print</i> will take user to the <i>Print Device</i> page to print and then to the <i>Follow Up Response Branch Menu</i> .
Cancel	Select <i>Cancel</i> will take user back to previous page. <i>Cancel</i> will not save the request but bring user back to the <i>Respond to Follow Up menu</i> .
Quit	Select <i>Quit</i> will take user back to screen. <i>Quit</i> will bring user back to the <i>Follow Up Response</i> screen to continue with data entry.

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Select One: <input type="radio"/> Save <input type="radio"/> Print <input type="radio"/> Cancel
[Quit]

Branch Menu

The system shall send the user to the Follow Up Request Branch Menu under the following condition:

- Save is selected
- Print is selected

FOLLOW UP RESPONSE BRANCH MENU	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 37431741A 4
Gender: F DOB: 03/01/2002 LGL CO: SACRAMENTO REG= ACTIVE	MED= E F/R= E
 <input type="radio"/> Narrative for Follow Up Response <input type="radio"/> Mail Message for Follow Up Response <input type="radio"/> Select Option Menu <input type="radio"/> Follow Up Menu	

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