

CMS Net

Edit Follow Up Requests and Responses: As Responder

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This guideline is for training
and internal use only.

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1 EDIT FOLLOW UP REQUESTS AND RESPONSES > AS RESPONDER

Edit Follow Up Requests and Responses: As Responder

The *Edit Follow Up Requests and Responses* will allow user to edit follow up requests and responses. User can edit request as the As Responder, As Requestor, By Patient, and By Action Req'd by Dt. This section will focus on editing follow up request as the responder.

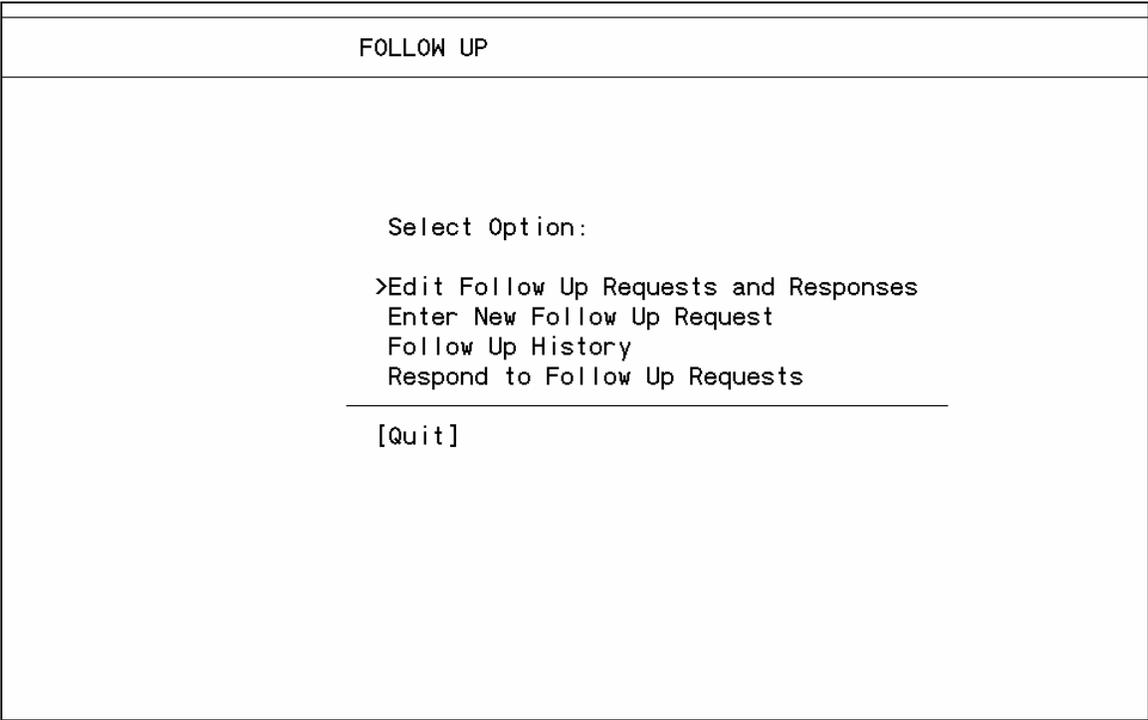
Steps to Access Edit Follow Up Requests and Responses: As Responder

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

PRIMARY OPTION
<p>Select Option:</p> <p>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 ...</p> <hr/> <p>[Quit]</p>

Step	Action
3	Type " ED " for Edit Follow Up Requests and Responses from the Follow Up option
4	Press <Enter>

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Edit Follow Up Requests and Responses Select Option

After pressing <Enter>, the Edit Follow Up Requests and Responses Select Option appears:

Step	Action
1	Type "AS" for As Responder or use the up arrow
2	Press <Enter>
3	Search Results display

Edit Follow Up Requests and Responses

SELECT OPTION:

AS REQUESTOR
>AS RESPONDER
BY PATIENT >
BY ACTION REQD BY DT>
QUIT

Step	Action
3	Search Results display

```

Edit Follow Up Requests and Responses
( ) PIE,CHERRY                CCS#: 3860903
  Requestor: PHOMSOPHA,MOLLY   Priority: ROUTINE
  Subject: SENT OUT PSA TO CLIENT
  Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 1/1

[Quit]
AS REQUESTOR
*AS RESPONDER
BY PATIENT >
BY ACTION REQD BY DT>
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.

Step	Action
4	Select Client's record
5	Press <Enter>

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.
Action Taken Dt	Date that user took action on request. Fill in the action taken date when done with request to send request to Edit Follow Up Requests and Responses.
Follow Up Response	The follow up Response taken on a case. This is a free text field and automatically saves to narrative for Follow Up.
Notification To	Only serves as a notification. The only action required, is the entry of the Notification Date indicating user are aware of the request.
Notification Date	Populated by the user listed in the Notification to field when they have viewed the necessary follow up actions required.

2 EDIT FOLLOW UP REQUESTS AND RESPONSES: BY PATIENT

Edit Follow Up Requests and Responses: By Patient If user knows the client’s name, user can edit follow up requests that he/she took action by doing a client search.

Steps to Edit Follow Up Requests and Responses: By Patient > As Responder

Step	Action
1	Select By Patient
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select As Responder
5	Press <Enter>

```

CMSST                               Edit Follow Up Requests and Responses                               CMSFU-20

                                     SELECT OPTION:

                                     AS REQUESTOR
                                     AS RESPONDER
                                     *BY PATIENT
                                     BY ACTION REQD BY DT >AS REQUESTOR
                                     >AS RESPONDER
                                     QUIT
    
```

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

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CMSNET                               PATIENT IDENTIFICATION FOR:                               CMSPI-10
                                     Enter New Follow Up Request

Enter one of the following identifiers:

CCS Number :

Pt Name :                               Birthdate :

Current Legal County :                   Gender :

Client Index Number :

Social Security Number :
    
```

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CMS Net User Guide and Reference

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

System will search for all requests by client's name.

Edit Follow Up Requests and Responses	
() PIE,CHERRY	CCS#: 3860903
Requestor: PHOMSOPHA,MOLLY	Priority: ROUTINE
Subject: SENT OUT PSA TO CLIENT	
Action Required By: 03/02/2007	Request Date:03/02/2007 Resp#: 1/1
() 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
() LIBRE,NACHO	CCS#: 3860902
Requestor: PHOMSOPHA,MOLLY	Priority: ROUTINE
Subject: SS# MATCH WITH ANOTHER CLIENT	
Action Required By: 03/02/2007	Request Date:03/02/2007 Resp#: 0/1
[Quit]	

Follow Up Response Screen

Select request record and press <Enter>. After pressing <Enter>, the Follow Up Response Screen appears:

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CMSAT	FOLLOW UP RESPONSE	Select One: <input type="checkbox"/> Save <input type="checkbox"/> Print <input type="checkbox"/> Cancel <input type="checkbox"/> [Quit]
Pt Nm: PIE,CHERRY CCS#: 386090 Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE		
Request Date: 03/01/2007 Follow Up ID: 0307-000019 Stat Requestor: FOLLOW UP,USER ONE Action Required By: 03/01/2007 Priority: ROUTINE		
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: 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 THREE Action Taken Dt: 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 THREE		Accepted Dt: Date: 03/01/2007

3 EDIT FOLLOW UP REQUESTS AND RESPONSES: BY ACTION REQD BY DT AS REQUESTOR

Edit Follow Up Requests and Responses: By Action Reqd by Dt as Requestor User can also edit follow up request by Action Required By date.

Steps to Edit Follow Up Requests and Responses: By Action Reqd By Dt > As Requestor

Step	Action
1	Select By Action Reqd by Dt
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select As Responder
5	Press <Enter>

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Edit Follow Up Requests and Responses

SELECT OPTION:

AS REQUESTOR
AS RESPONDER
BY PATIENT
*BY ACTION REQD BY DT AS REQUESTOR
QUIT >AS RESPONDER

```

After selecting the *By Action Reqd by Dt as As Responder*, the *Follow Up-Dates* menu will display for user to enter in date range.

Follow Up-Dates Screen

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

FOLLOW UP - DATES	
View follow up records within the following date range:	
Date Range - From: 03/02/2007 To: 03/02/2007	
<div style="border: 1px solid black; padding: 5px; float: right;">Select One: (?) Search () Cancel [Quit]</div>	

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

System will search for all requests base on the date entered.

```

Edit Follow Up Requests and Responses
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  Requestor: PHOMSOPHA,MOLLY      Priority: ROUTINE
  Subject: SENT OUT PSA TO CLIENT
  Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 1/1
( ) 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
( ) LIBRE,NACHO              CCS#: 3860902
  Requestor: PHOMSOPHA,MOLLY      Priority: ROUTINE
  Subject: SS# MATCH WITH ANOTHER CLIENT
  Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1

[Quit]
    
```

Step	Action
4	Press <Enter>
5	Select Client's record
6	Press <Enter>

After pressing <Enter>, the Follow Up Response screen appears:

CMSAT	FOLLOW UP RESPONSE	Select One: <input type="checkbox"/> Save <input type="checkbox"/> Print <input type="checkbox"/> Cancel <input type="checkbox"/> [Quit]
Pt Nm: PIE,CHERRY CCS#: 386090 Gender: F DOB: 03/01/2002 Lgl Co: SACRAMENTO REG= ACTIVE		
Request Date: 03/01/2007 Follow Up ID: 0307-000019 Stat Requestor: FOLLOW UP,USER ONE Action Required By: 03/01/2007 Priority: ROUTINE		
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: 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 THREE CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.		Action Taken Dt: 03/01/2007
Notification to: Last Update By: FOLLOW UP,USER THREE		Accepted Dt: Date: 03/01/2007

**Follow Up
Response
Branch Menu**

When done, <F2> will bring up the action menu. Select "Save" and system will take user to the Follow Up Response Branch Menu.

