

CMS Net

Follow Up History

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1

This guideline is for training
and internal use only.

Table of Contents

Table of Contents	2
Follow Up History	3
Notes	3
Steps to Access Follow Up History: As Requestor	3
Follow Up History Select Option	4
1 Steps to Access Follow Up History: As Requestor	5
Steps to Access Follow Up History : As Requestor	5
Search Results Explanation.....	7
Follow Up Comments Box	8
Follow Up Response Comments Box	8
2 Steps to Access Follow Up History: As Responder.....	10
Steps to Access Follow Up History: As Responder.....	10
Follow Up Comments Box	13
Follow Up Response Comments Box	13
3 Steps to Access Follow Up History: By Patient > As Requestor	14
Steps to Access Follow Up History: By Patient > As Requestor	14
Steps to Access Follow Up History: By Patient > As Responder	15
Identify Patient.....	15
Follow Up Comments Box	17
Follow Up Response Comments Box	17
4 Steps to Access Follow Up History: By Action Req'd By Dt > As Requestor	18
Steps to Access Follow Up History: By Action Req'd By Dt > As Requestor	18
Steps to Access Follow Up History: By Action Req'd By Dt > As Responder.....	19
Follow Up-Dates Screen	20
Follow Up Comments Box	22
Follow Up Response Comments Box	22
Action Menu	24
Follow Up History Branch Menu	24

Revised 3/1/2007

CMS Net User Guide and Reference

Follow Up History

User can view history of follow up requests in the Follow Up History. User will have the options to search for requests that are in *Complete*, *Deleted* or in *No Action* status by the following options: *As Requestor*, *As Responder*, *By Patient*, or *By Action Reqd by Dt*.

Notes

User can only view request in the Follow Up History

Steps to Access Follow Up History: As Requestor

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

Step	Action
3	Type " F " for Follow Up History from Follow Up Menu
4	Press <Enter>

```
Core Applications

Select Option:

CHANGE ACCESS CODE
DISPLAY ELIGIBILITY LOG
DOWNLOAD DATA ...
ELECTRONIC POST-IT NOTE
ELIGIBILITY
EVENT TRACKING ...
>FOLLOW UP ...
GENERATE REQUESTS/AUTHS/CLAIMS ...
MailMan Menu ...
REGISTRATION ...
SYSTEMS MAINTENANCE ...
THERAPY UNIT ...

[Quit]
```

Step	Action
3	Type " F " for Follow Up History from Follow Up Menu
4	Press <Enter>

Revised 3/1/2007

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FOLLOW UP	CMSMP-10
<p data-bbox="716 405 919 432">Select Option:</p> <p data-bbox="716 464 1250 491">Edit Follow Up Requests and Responses</p> <p data-bbox="716 493 1104 520">Enter New Follow Up Request</p> <p data-bbox="672 522 1200 550">>Follow Up History</p> <p data-bbox="716 552 1135 579">Respond to Follow Up Requests</p> <hr data-bbox="672 594 1278 598"/> <p data-bbox="708 611 789 638">[Quit]</p>	

Follow Up History Select Option

After pressing <Enter>, the Follow Up History Select Option appears:

Revised 3/1/2007

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Follow Up History

SELECT OPTION:

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

1 Steps to Access Follow Up History: As Requestor

Steps to Access Follow Up History : As Requestor

User can view follow up request history by selecting <As Requestor>. The system will search and list all follow up requests that user generated.

Step	Action
1	Type " AS " for As Requestor or use the up arrow
2	Press <Enter>

Revised 3/1/2007

CMS Net User Guide and Reference

CMSAT	Follow Up History	CMSFU-20
SELECT OPTION:		
<div style="border: 1px solid black; display: inline-block; padding: 2px;">>AS REQUESTOR</div> AS RESPONDER BY PATIENT > BY ACTION REQD BY DT> QUIT		

Step	Action
3	Search Results display
4	Select Client's record
5	Press <Enter>

Revised 3/1/2007

CMS Net User Guide and Reference

Follow Up History		-20
() PIE,CHERRY	CCS#: 3860903	
Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE	
Subject: CALL CLIENT TO SCHEDULE APPT		
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2		
() PIE,CHERRY	CCS#: 3860903	
Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE	
Subject: SCHEDULE APPT		
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2		
[Quit]		
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.

After pressing <Enter>, the Follow Up History Screen appears:

Revised 3/1/2007

CMS Net User Guide and Reference

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 Req'd 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.
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 Steps to Access Follow Up History: As Responder

Steps to Access Follow Up History: As Responder User can view follow up request history by selecting <As Responder>. The system will search and list all results for follow up requests that user took action.

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

Revised 3/1/2007

CMS Net User Guide and Reference

Follow Up History

SELECT OPTION:

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

Step	Action
3	Search Results display
4	Select Client's record
5	Press <Enter>

Revised 3/1/2007

CMS Net User Guide and Reference

Follow Up History		-20
()	PIE,CHERRY Requestor: FOLLOW UP,USER ONE Subject: CALL CLIENT TO SCHEDULE APPT Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	CCS#: 3860903 Priority: ROUTINE
()	PIE,CHERRY Requestor: FOLLOW UP,USER ONE Subject: SCHEDULE APPT Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	CCS#: 3860903 Priority: ROUTINE
[Quit]		
QUIT		

After pressing <Enter>, the Follow Up History Screen appears:

		CMSFU-40
<p>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.</p>		37431741A 4 E F/R= E
[Quit]		MPLETE
<p>Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Provider:</p>		
<div style="border: 2px solid black; padding: 5px; display: inline-block;"> Requestor's Comment </div>		
<p>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.</p>		
<p>Follow Up By: FOLLOW UP,USER THREE CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.</p>		<p>Action Taken Dt: 03/01/2007</p>
<p>Notification to: Last Update By: FOLLOW UP,USER ONE</p>		<p>Accepted Dt: Date: 03/01/2007</p>

Revised 3/1/2007

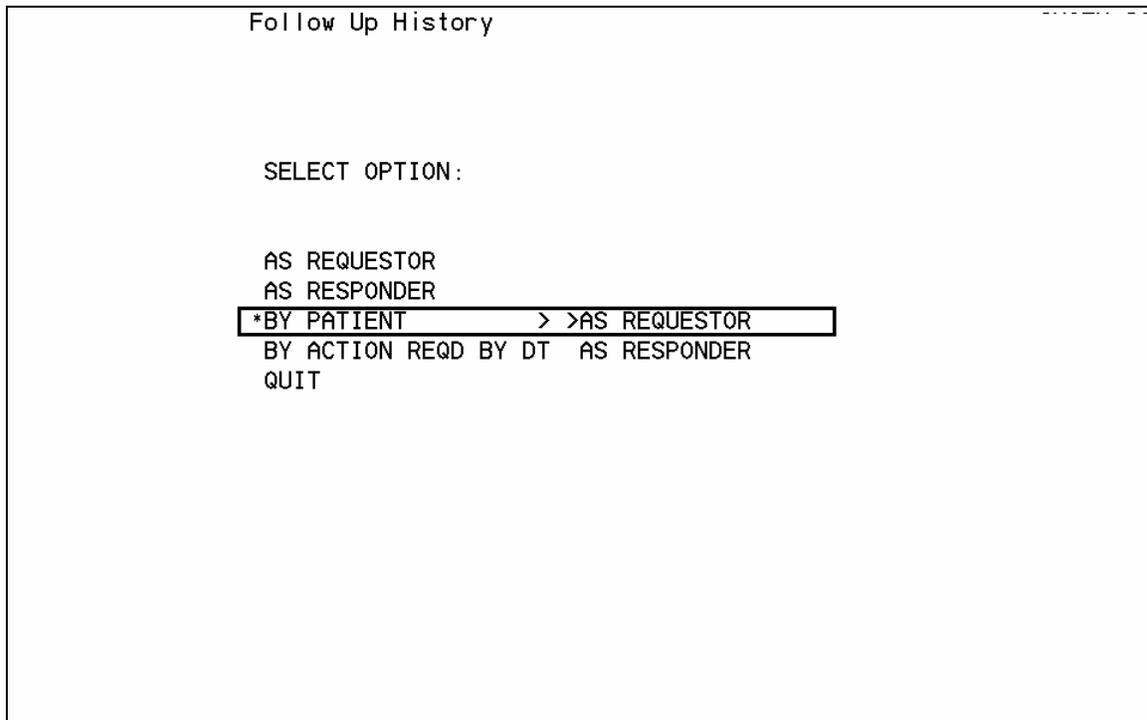
When finish viewing request, tab to the end or <F2> to bring up action menu.
This will allow user to *Print, Cancel, or Quit*

3 Steps to Access Follow Up History: By Patient > As Requestor

Steps to Access Follow Up History: By Patient > As Requestor

User can also view request history by client search. To view request history of a request that user generated, select <As Requestor>.

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

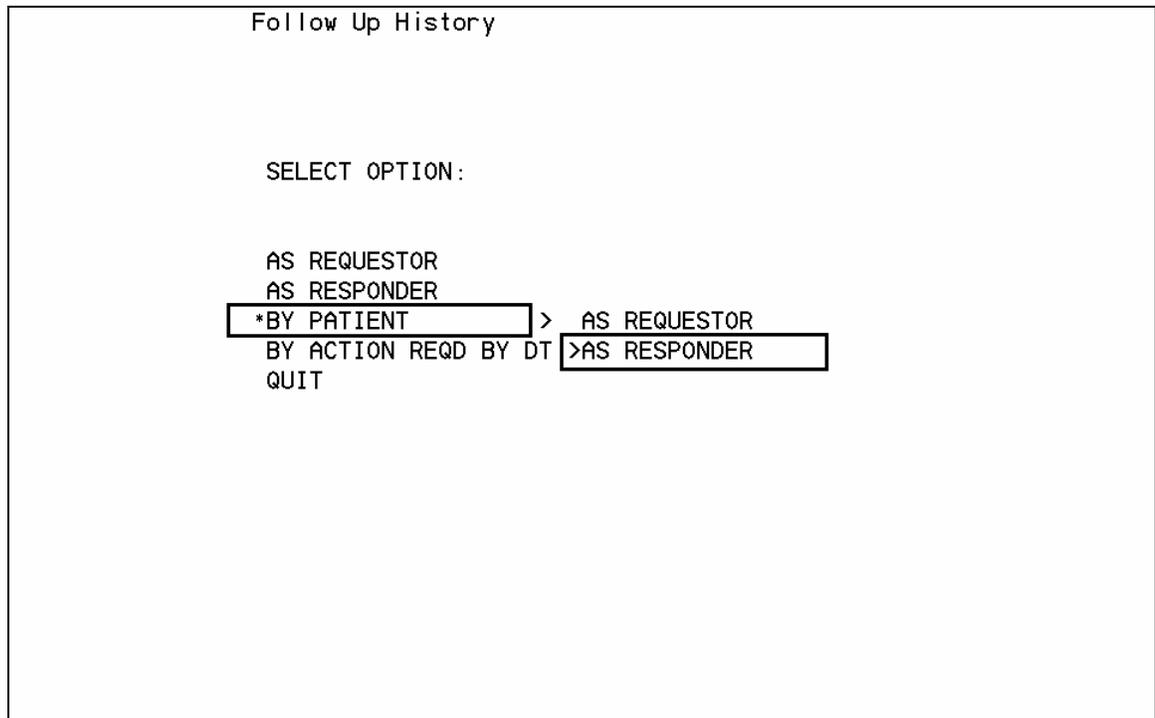


CMS Net User Guide and Reference

Steps to Access Follow Up History: By Patient > As Responder

User can also view request history by client search. To view request history of a request that user took action, select <As Responder>.

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



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

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CMS Net User Guide and Reference

CMSAT	PATIENT IDENTIFICATION FOR: Follow Up History	CMSPI-20
Enter one of the following identifiers:		
CCS Number :		
Pt Name:	<input type="text" value="PIE,CHERRY"/>	Birthdate:
Current Legal County:		Gender :
Client Index Number :		
Social Security Number :		

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

Follow Up History		-20
<input type="checkbox"/>	PIE,CHERRY	CCS#: 3860903
	Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
	Subject: CALL CLIENT TO SCHEDULE APPT	
	Action Required By: 03/01/2007	Request Date:03/01/2007 Resp#: 2/2
<input type="checkbox"/>	PIE,CHERRY	CCS#: 3860903
	Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
	Subject: SCHEDULE APPT	
	Action Required By: 03/01/2007	Request Date:03/01/2007 Resp#: 2/2
[Quit]		
QUIT		

Revised 3/1/2007

Response#: 2 Follow Up By: FOLLOW UP,USER TWO Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. [Quit]		CMSFU-40 1741A 4 F/R= E E
Primary Addressee: E Patient Contact Phone: Provider:	<div style="border: 2px solid black; padding: 10px; width: fit-content; margin: auto;"> <p>Follow Up Response Comments Box</p> </div>	
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 CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER.		Action Taken Dt: 03/01/2007
Notification to: Last Update By: FOLLOW UP,USER ONE		Accepted Dt: Date: 03/01/2007

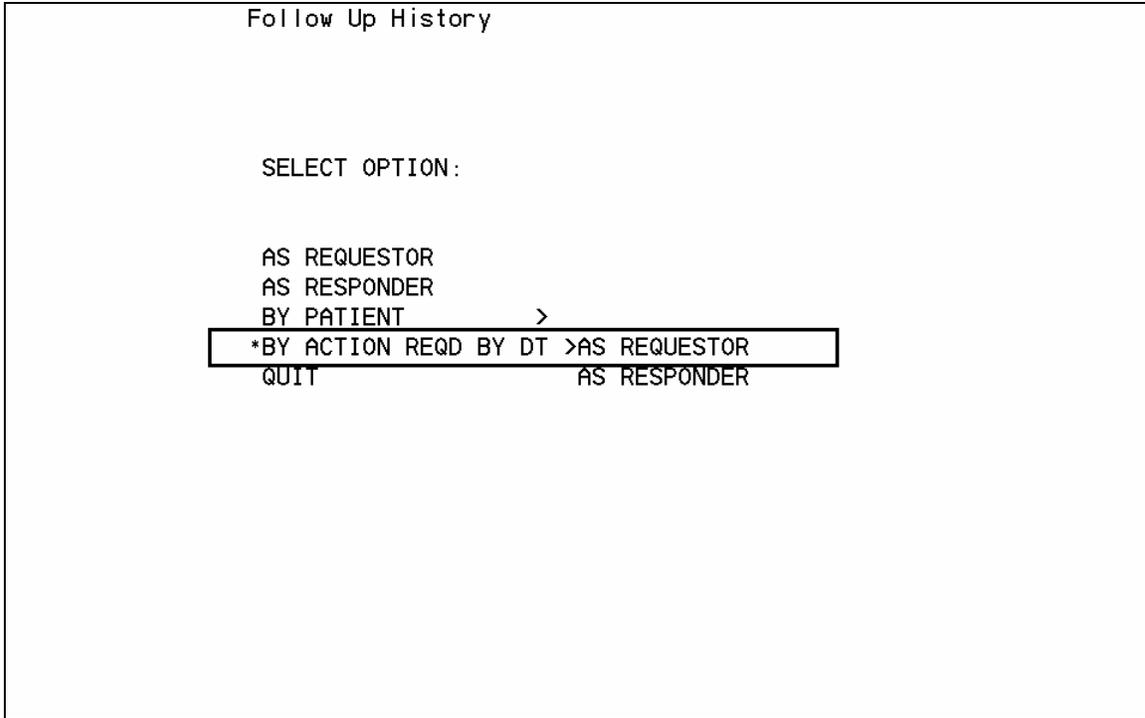
4 Steps to Access Follow Up History: By Action Req'd By Dt > As Requestor

Steps to Access Follow Up History: By Action Req'd By Dt > As Requestor

User can also view request history by action required by date search. To view request history of a request that user generated, select <As Requestor>.

Step	Action
1	Select <By Action Req'd by Dt> from Follow Up History Select Option
2	Press <Enter>
3	Auto pop-up will display two more options: As Requestor/ As Responder
4	Select <As Requestor>
5	Press <Enter>

Revised 3/1/2007



**Steps to Access Follow Up History:
By Action Reqd By Dt > As Responder**

User can also view request history by action required by date search. To view request history of a request that user took action, select <As Responder>.

Step	Action
1	Select <By Action Reqd by Dt> from Follow Up History Select Option
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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Follow Up History

SELECT OPTION:

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

Follow Up- Dates Screen

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

FOLLOW UP - DATES

Select One: 0
(?) Search
() Cancel
[Quit]

View follow up records within the following date range:

Date Range - From: 03/01/2007 To: 03/02/2007

Revised 3/1/2007

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Step	Action
1	Enter the date range in the following fields: " From " and " To ".
2	Press <Enter>
3	Select < Search > from Action Menu
4	Press <Enter>
5	Select Record
6	Press <Enter>

Follow Up History

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( ) PIE,CHERRY          CCS#: 3860903
  Requestor: FOLLOW UP,USER ONE          Priority: ROUTINE
  Subject: CALL CLIENT TO SCHEDULE APPT
  Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2
( ) PIE,CHERRY          CCS#: 3860903
  Requestor: FOLLOW UP,USER ONE          Priority: ROUTINE
  Subject: SCHEDULE APPT
  Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2
    
```

[Quit]

After pressing <Enter>, the Follow Up History Screen appears:

Revised 3/1/2007

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Action Menu After viewing request, <F2> will bring up Action Menu.

Select One : () Print () Cancel
[Quit]

Command	Action
Print	Select <Print> will take user to the <i>Print Device</i> page to print and then to the <i>Follow Up History Branch Menu</i> .
Cancel	Select <Cancel> will take user back to previous page. <i>Cancel</i> will not save the request but bring user back to the <i>Follow Up History Menu</i>
Quit	Select <Quit> will take user back to screen.

Follow Up History Branch Menu

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

- Print is selected

Revised 3/1/2007

