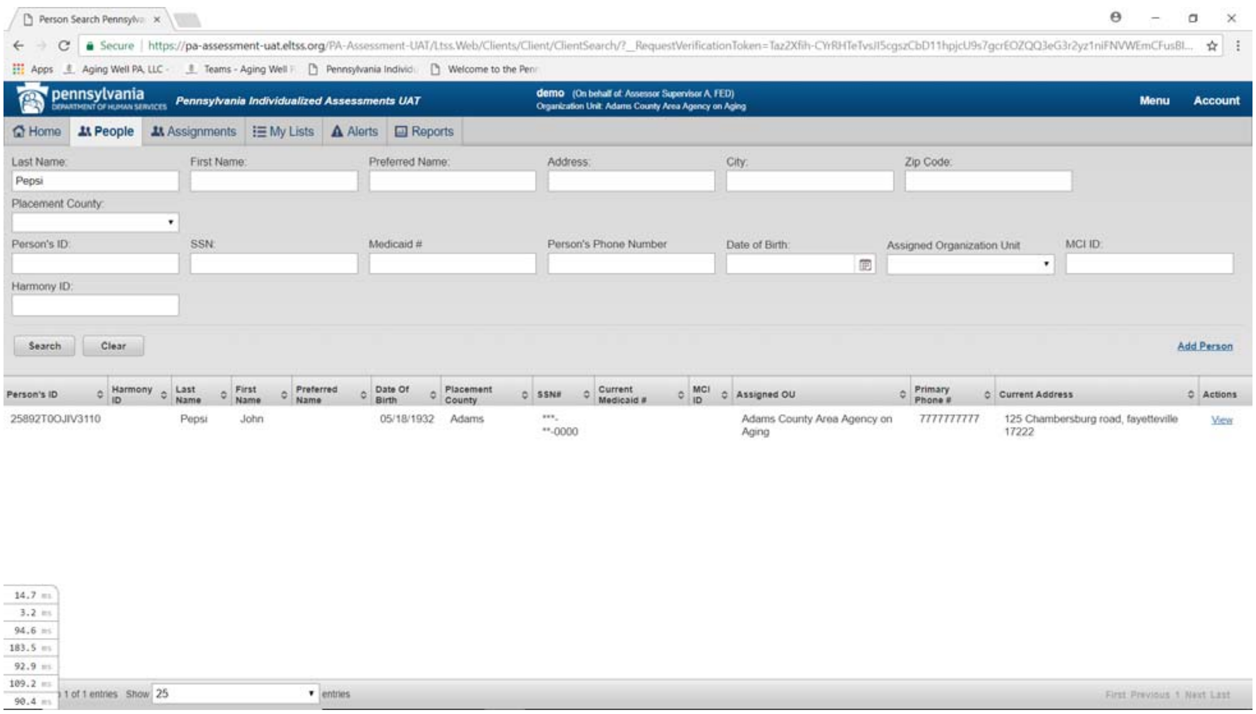
Aging Well PA, LLC

Supervisor Quick Reference Guide

To search for a person



Action Steps

1. Click on the People tab to open the search screen

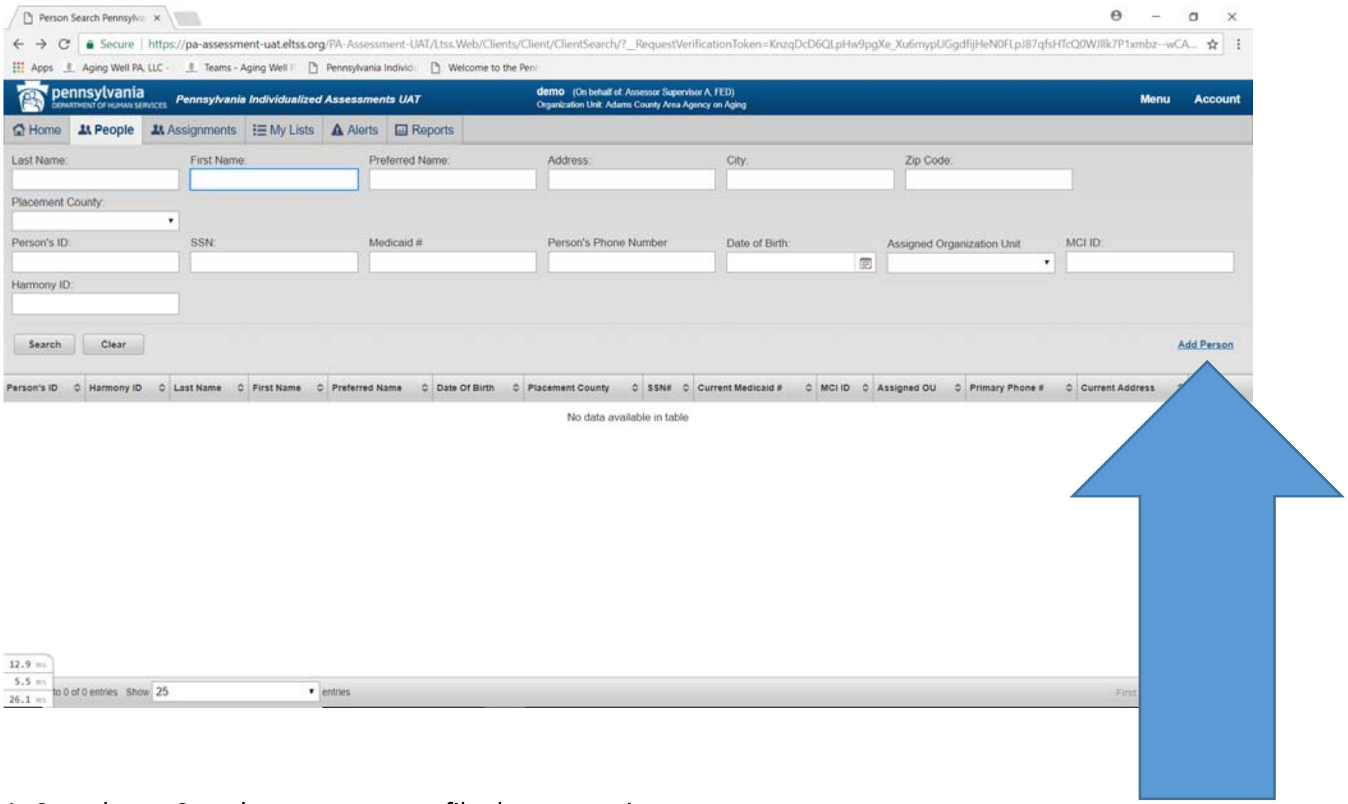
2. Enter at least one criteria and click on the Search button

3. Search results will show in the section below or a pop-up display indicating a profile does not exist

4. Click on the View link to access the Person's Information

Tips: Search results include all people with the same name or a similar name. The View link is only available if a person is assigned to the searcher's organization unit (OU). Persons assigned to different OUs will not have the View link.

To Add a New person



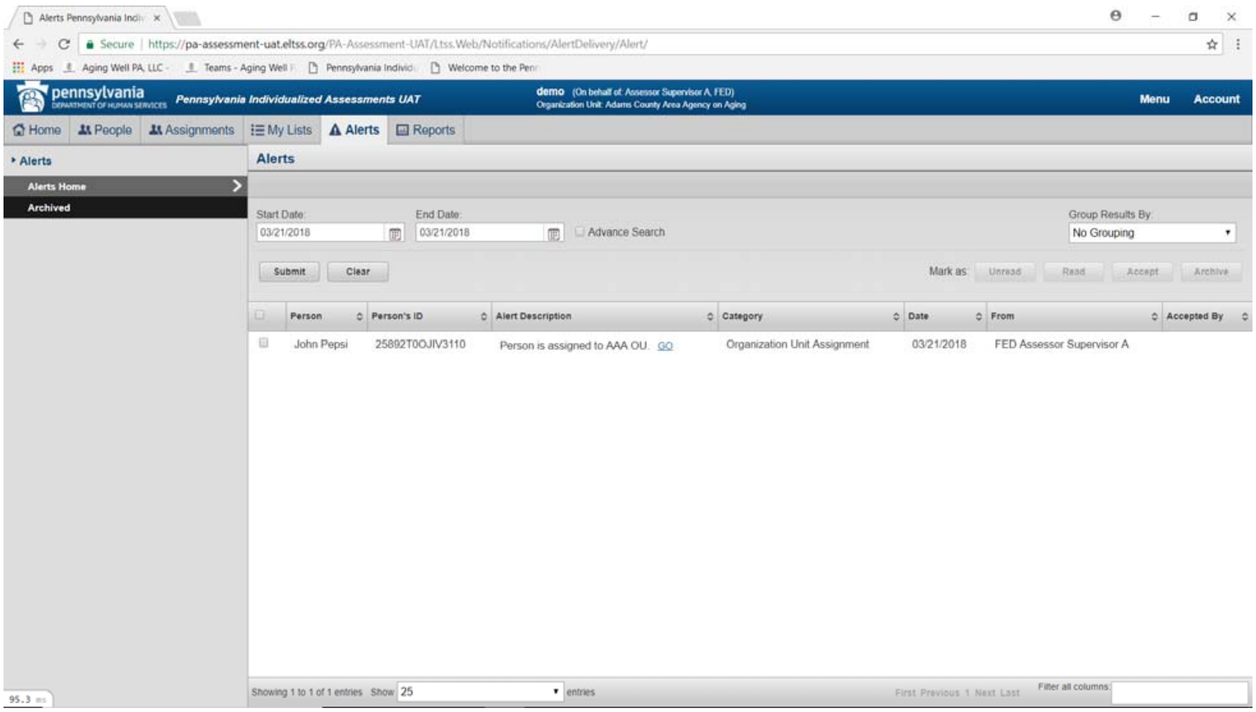
1. Complete a Search to ensure a profile does not exist

2. Click on the Add Person link or OK in the Create Person Notice pop-up

3. After clicking the Add Person link, the upper left of the screen indicates a New Person is being created. Name, ID, and DOB will be populated after completing the Person's Demographic Information
3. Complete required fields (highlighted in yellow with a red asterisk by the field name) in the Person's Demographic Information

Tips: After Creating a New Person they will appear under the Alerts Tab

Alert Tab



Action Steps

1. Click on the Alerts tab a. If given a choice, click on the Assessment type

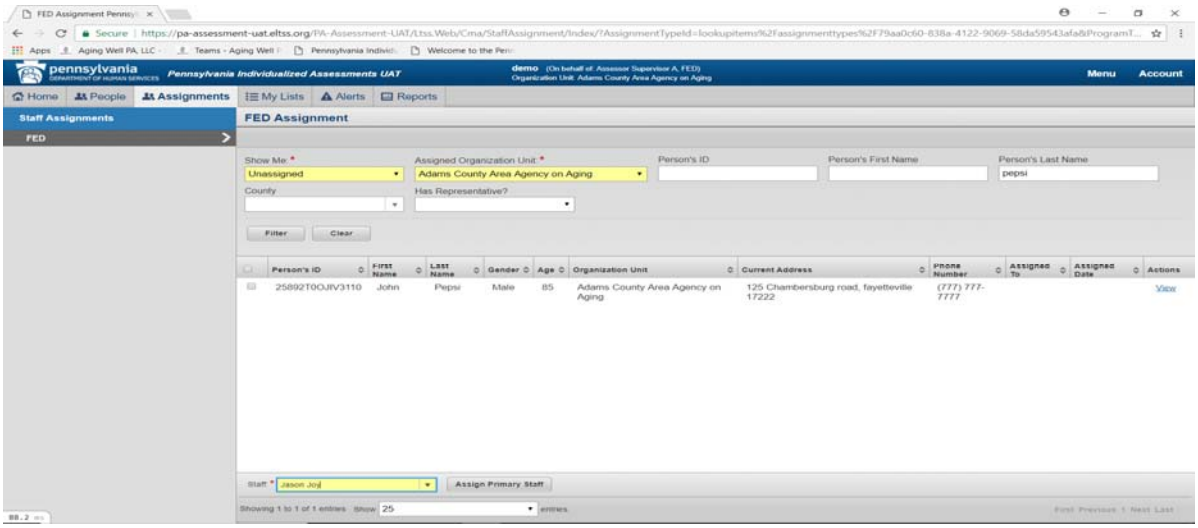
    b. Alerts in bold font are new

    c. The most recent alerts are at the top of the screen

2. Click on the Go link at the end of the alert.

Tips: All FEDs that are assigned to OU will be found in this tab

To Assign a FED to an Assessor



Action Steps

1. Click on the Assignments tab

2. Click on Staff Assignments in the left side menu

3. Click on FED Assessor or interRAI Assessor

4. Complete the required fields using the drop-downs:

    a. Show Me – click on Unassigned

    b. Organization Unit – click on the applicable OU

5. Input optional information to narrow search results

6. Click on the Filter button

7. Click on the checkbox to the left of the person's information

8. Click on the Staff drop down and click on the staff member's name

9. Click on the Assign Primary Staff button

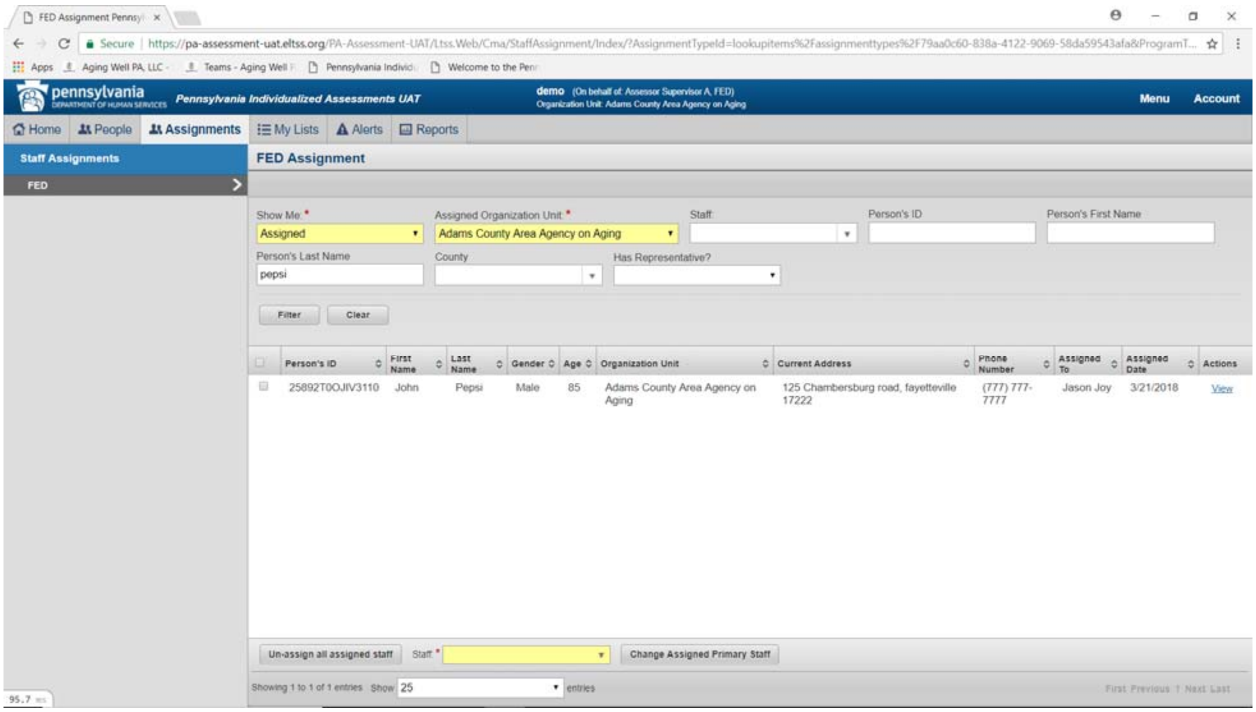
    a. This triggers an alert to the staff member conveying the assignment

10. Receive a message the staff member has been successfully assigned to a person

Tip / Best Practice: View assignments by a staff member prior to assigning staff. This will ensure assignments are distributed as they should, rather than to select staff members.

- *Show Me: Assigned*
- *Assigned Organization Unit: applicable OU*
- *Staff: use the drop down to identify the staff member*
- *Click on the Filter button*

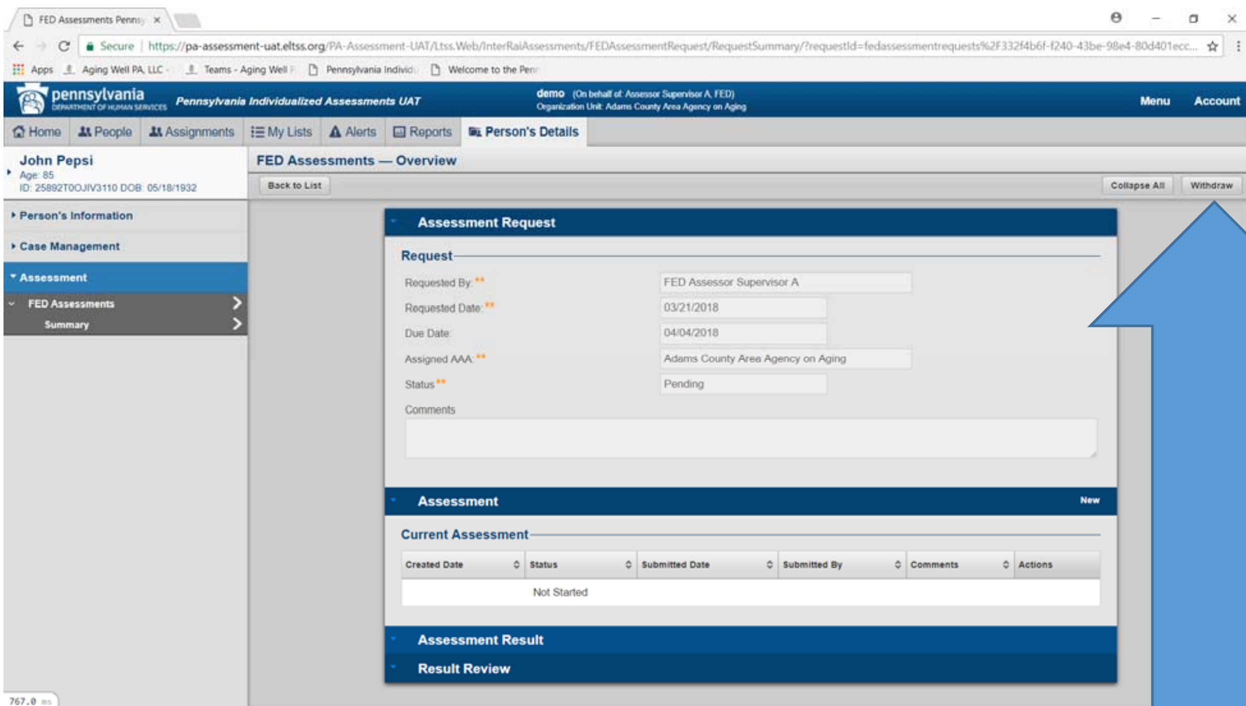
To Un-Assign



Action Steps

1. Click on the Assignments tab
2. Click on Staff Assignments in the left side menu
3. Click on FED Assessor or interRAI Assessor
   a. Available option is based on role
4. Complete the required fields using the drop-downs:
   a. Show Me – click on Assigned
   b. Organization Unit – click on the applicable OU
5. Input optional information to narrow search results
6. Click on the Filter button
7. Click on the checkbox to the left of the person’s information
8. Click on the Un-assign all assigned staff button
9. Click on the Continue button in the pop-up asking if the staff member is to be un-assigned
10. Receive a message the person has been successfully un-assigned from the staff

Withdraw a FED



Action Steps

1. Access the Person's Information, Overview screen
2. Click on Assessment in the left menu
3. Click on the Assessment type in the submenu
4. Click on the Summary link to the right of the assessment, located in the Assessment section of the screen
5. Click the Withdraw button