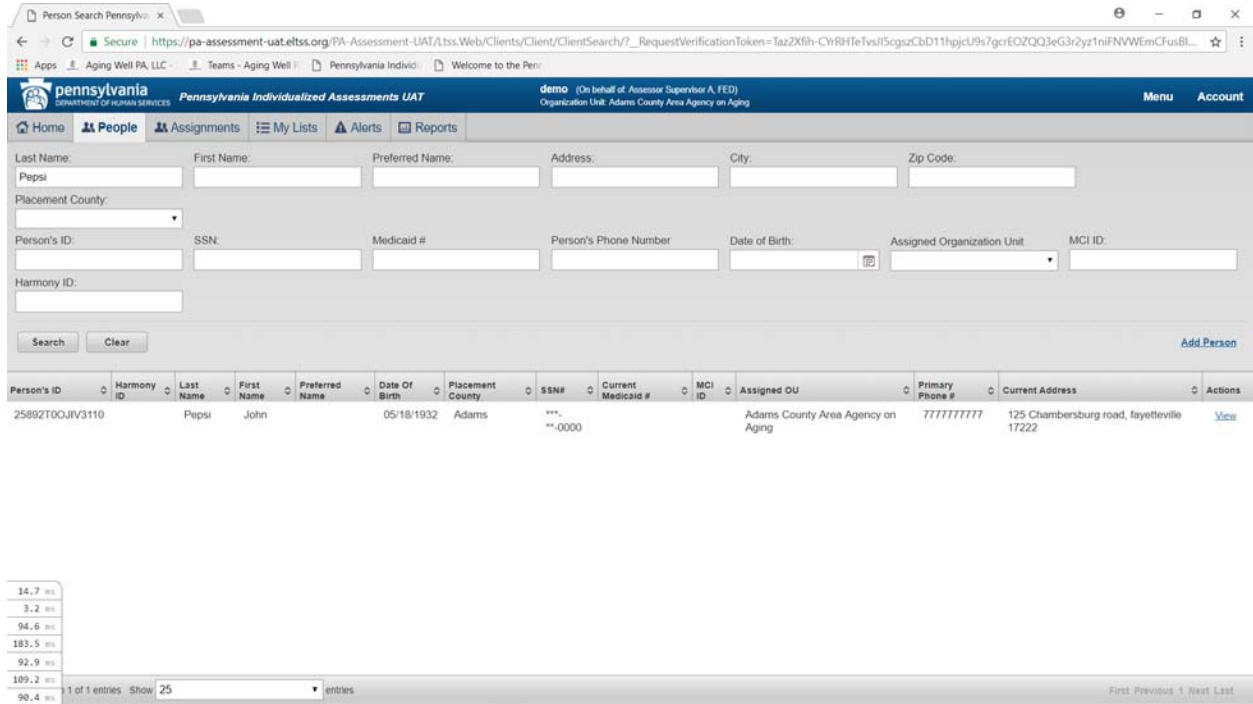


Supervisor Quick Reference Guide

To search for a person



| Person's ID | Harmony ID | Last Name | First Name | Preferred Name | Date Of Birth | Placement County | SSN | Current Medicaid # | MCI ID | Assigned OU | Primary Phone # | Current Address | Actions |
|-----------------|------------|-----------|------------|----------------|---------------|------------------|-------------|--------------------|--------|-----------------------------------|-----------------|-------------------------------------------|----------------------|
| 25892T00JIV3110 | | Pepsi | John | | 05/18/1932 | Adams | ***-**-0000 | | | Adams County Area Agency on Aging | 7777777777 | 125 Chambersburg road, fayetteville 17222 | View |

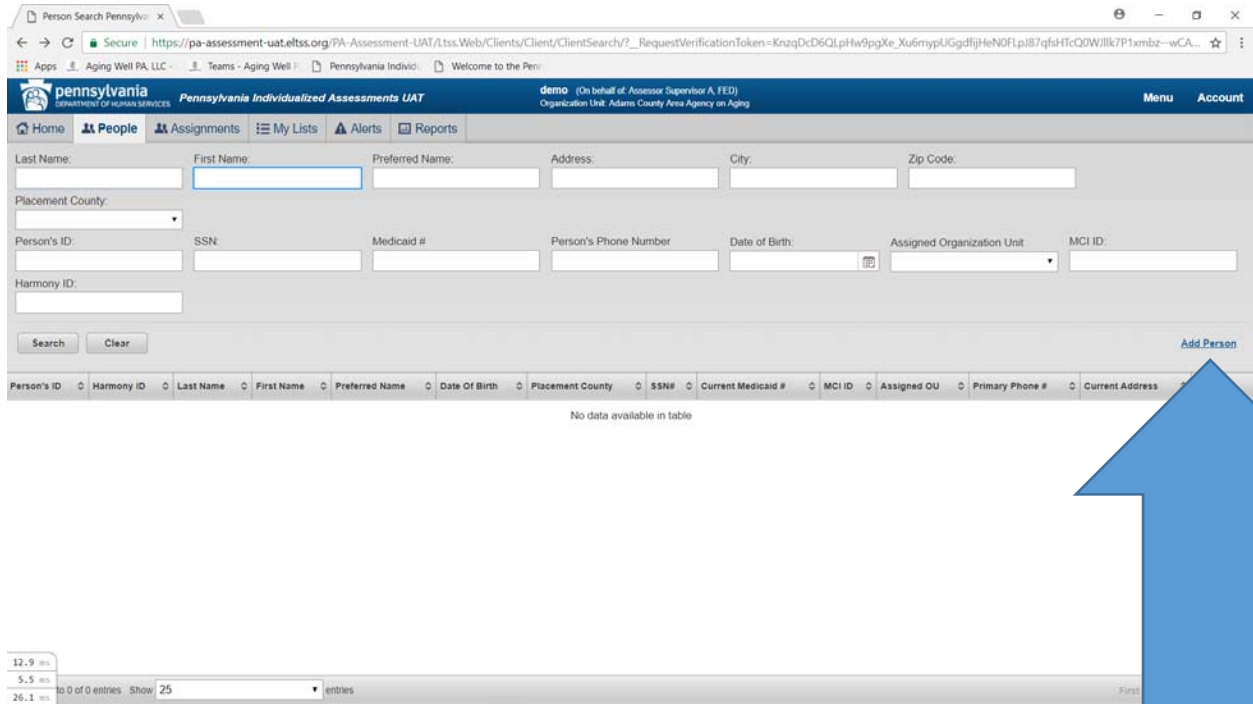
1 of 1 entries Show 25 entries

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



Person Search Pennsylvania

Secure | https://pa-assessment-uat.eltss.org/PA-Assessment-UAT/Ltss.Web/Clients/Client/ClientSearch/?_RequestVerificationToken=KnzqDcD6QLpHw9pgXe_Xu6mrypUGgdfJhN0FLp87qfshTcQOWJlIk7P1xmbz-wCA...

Apps | Aging Well PA, LLC | Teams - Aging Well | Pennsylvania Individualized Assessments UAT | Welcome to the Pennsylvania Individualized Assessments UAT

demo (On behalf of: Assessor Supervisor A, FED)
Organization Unit: Adams County Area Agency on Aging

Menu Account

Home People Assignments My Lists Alerts Reports

Last Name: First Name: Preferred Name: Address: City: Zip Code:

Placement County:

Person's ID: SSN: Medicaid # Person's Phone Number Date of Birth: Assigned Organization Unit MCI ID:

Harmony ID:

Search Clear Add Person

| Person's ID | Harmony ID | Last Name | First Name | Preferred Name | Date Of Birth | Placement County | SSN# | Current Medicaid # | MCI ID | Assigned OU | Primary Phone # | Current Address |
|----------------------------|------------|-----------|------------|----------------|---------------|------------------|------|--------------------|--------|-------------|-----------------|-----------------|
| No data available in table | | | | | | | | | | | | |

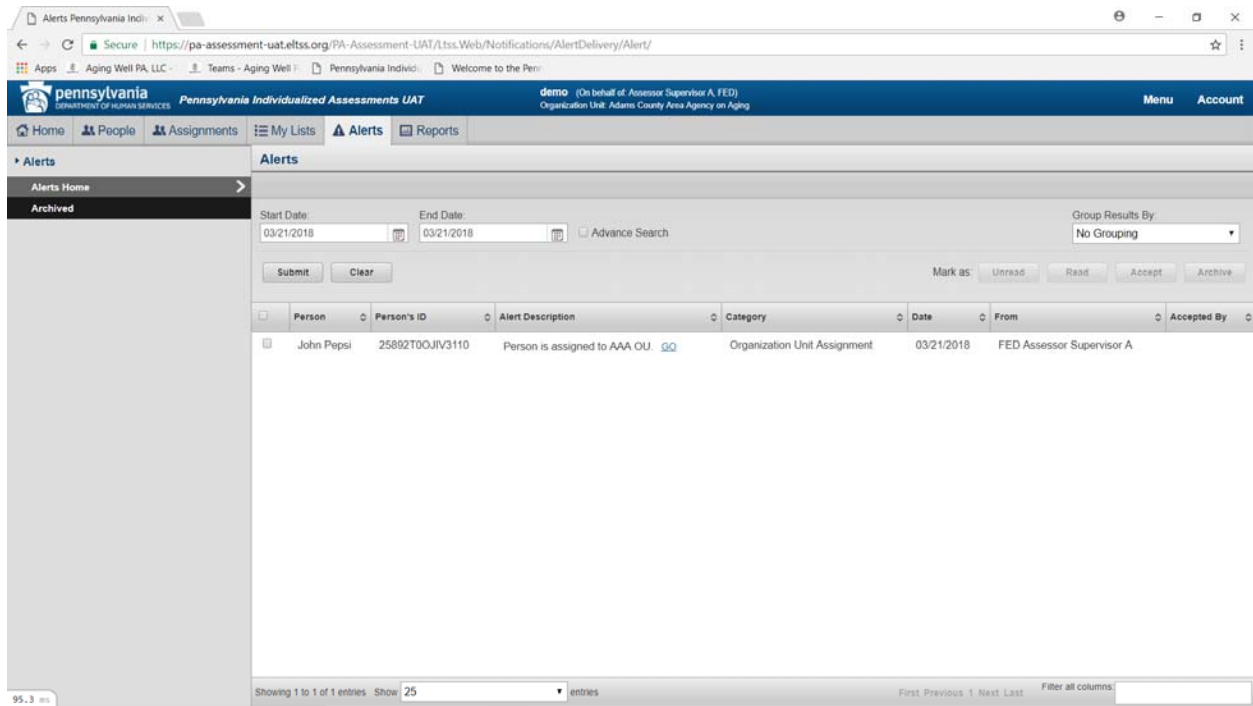
12.9 ms
5.5 ms
26.1 ms

to 0 of 0 entries Show 25 entries

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



Alerts Pennsylvania Indi

Secure | https://pa-assessment-uat.eltss.org/PA-Assessment-UAT/Ltss.Web/Notifications/AlertDelivery/Alert/

Apps | Aging Well PA, LLC | Teams - Aging Well | Pennsylvania Individual | Welcome to the Pen

pennsylvania DEPARTMENT OF HUMAN SERVICES | **Pennsylvania Individualized Assessments UAT** | demo (On behalf of: Assessor Supervisor A, FED) | Organization Unit: Adams County Area Agency on Aging | Menu | Account

Home | People | Assignments | My Lists | **Alerts** | Reports

Alerts

Alerts Home | Archived

Start Date: 03/21/2018 | End Date: 03/21/2018 | Advance Search | Group Results By: No Grouping

Submit | Clear | Mark as: Unread | Read | Accept | Archive

| Person | Person's ID | Alert Description | Category | Date | From | Accepted By |
|------------|-----------------|------------------------------|------------------------------|------------|---------------------------|-------------|
| John Pepsi | 25892T00JIV3110 | Person is assigned to AAA OU | Organization Unit Assignment | 03/21/2018 | FED Assessor Supervisor A | |

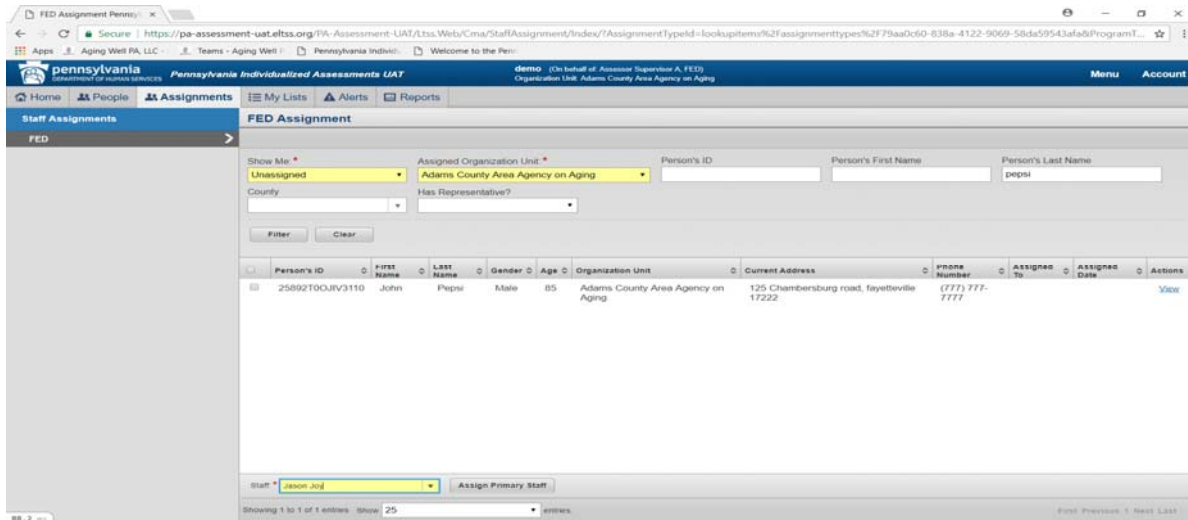
Showing 1 to 1 of 1 entries | Show 25 entries | First Previous 1 Next Last | Filter all columns

Action Steps

- Click on the Alerts tab a. If given a choice, click on the Assessment type
 - Alerts in bold font are new
 - The most recent alerts are at the top of the screen
- 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.



Aging Well PA, LLC

- *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

The screenshot displays the 'FED Assignment' page in the PA-Assignment system. The left sidebar shows the 'Assignments' tab selected. The main content area has a search form with the following fields:

- Show Me:** Assigned (dropdown)
- Assigned Organization Unit:** Adams County Area Agency on Aging (dropdown)
- Staff:** (dropdown)
- Person's ID:** (text field)
- Person's First Name:** (text field)
- Person's Last Name:** pepsi (text field)
- County:** (dropdown)
- Has Representative?:** (dropdown)

Below the search form is a table of results:

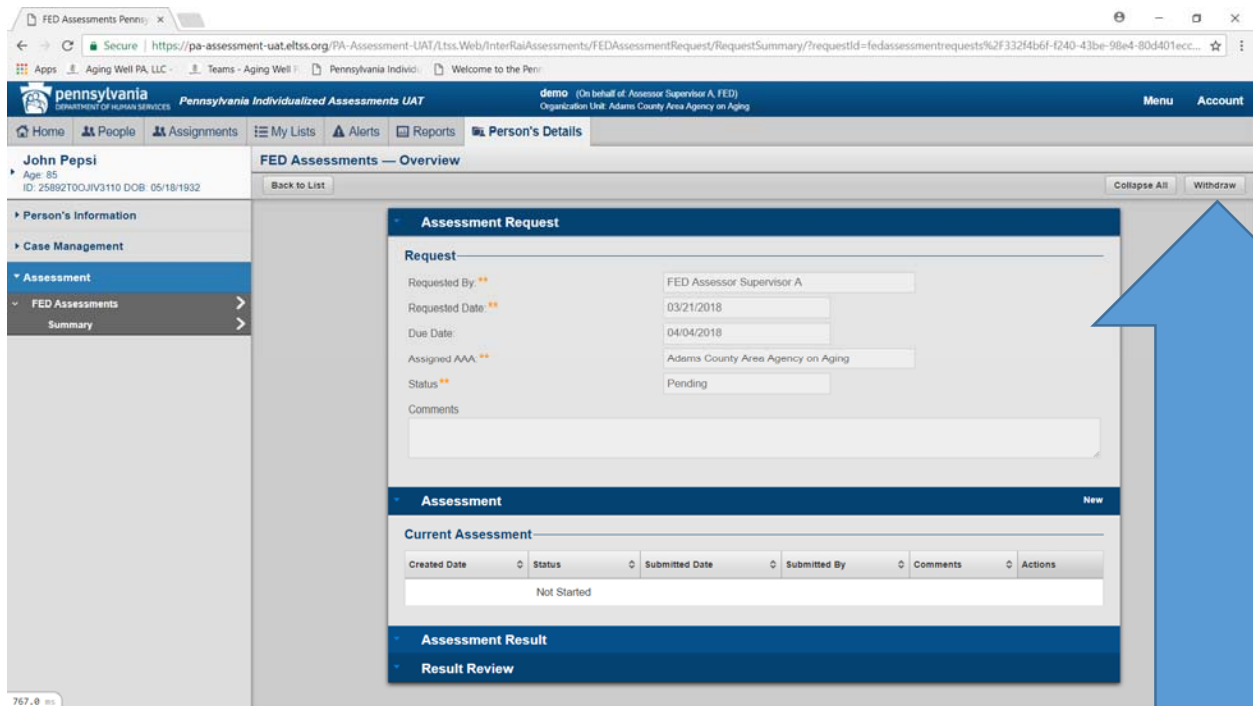
| Person's ID | First Name | Last Name | Gender | Age | Organization Unit | Current Address | Phone Number | Assigned To | Assigned Date | Actions |
|-----------------|------------|-----------|--------|-----|-----------------------------------|-------------------------------------------|----------------|-------------|---------------|----------------------|
| 25892700JIV3110 | John | Pepsi | Male | 85 | Adams County Area Agency on Aging | 125 Chambersburg road, fayetteville 17222 | (777) 777-7777 | Jason Joy | 3/21/2018 | View |

At the bottom of the page, there is a button labeled 'Un-assign all assigned staff' and a 'Showing 1 to 1 of 1 entries' message.

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



The screenshot shows the 'FED Assessments — Overview' screen for a person named John Pepsi. The interface includes a left sidebar with navigation links: Home, People, Assignments, My Lists, Alerts, Reports, and Person's Details. The main content area displays the 'FED Assessments — Overview' for John Pepsi, with a 'Back to List' button and 'Collapse All' and 'Withdraw' buttons. The 'Assessment Request' section shows details for a request by 'FED Assessor Supervisor A' on '03/21/2018', with a due date of '04/04/2018' and a status of 'Pending'. The 'Assessment' section shows a 'Current Assessment' table with columns for Created Date, Status, Submitted Date, Submitted By, Comments, and Actions. The 'Assessment Result' and 'Result Review' sections are also visible.

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