Diagnoses

AWARDS INSTRUCTION SHEET

The Medical module Diagnoses feature is used to enter, update, and delete consumer diagnosis records as necessary, as well as to view read-only diagnosis reports.

Diagnosis records are saved at the client level and are shared across all programs in which a client is enrolled.

REQUIRED PERMISSIONS

Permissions required to use the Diagnoses feature are:

- CHART ACCESS – You must have chart access to the program associated with the consumer for whom diagnoses information is to be worked with.

- DATA ENTRY / ACCESS – You must have the "Display Any Chart Records Buttons" data entry/access permission along with the "Display Chart Records Medical Button" permission to access diagnosis information from within the Medical module, and the "Display Chart Records Profile Button" permission to access diagnosis information from a client's face sheet located in the Profile module.

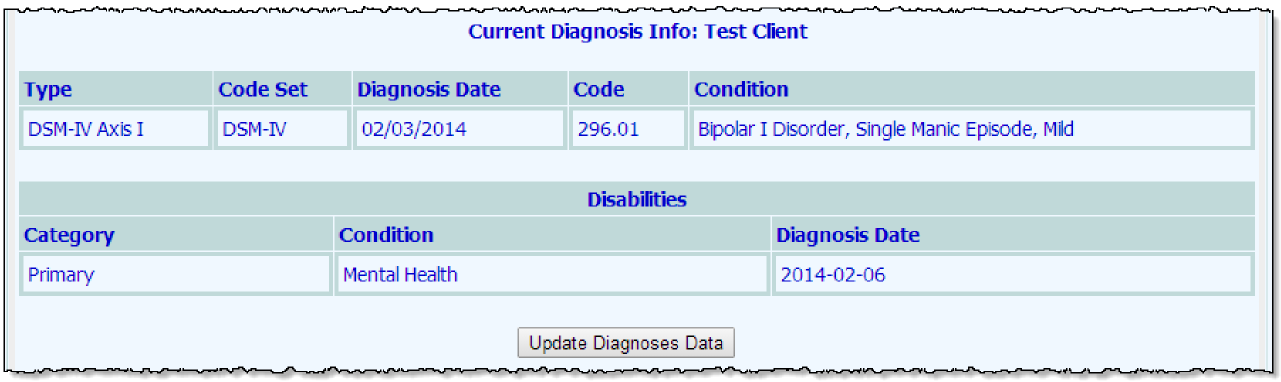
ABOUT THIS DOCUMENT

This document is intended to guide you through the process of working with diagnosis records in data entry and report modes. Specific topics covered are:

ACCESSING DIAGNOSIS RECORDS

Diagnosis records can be viewed and accessed from several places throughout AWARDS, but the two main locations are:

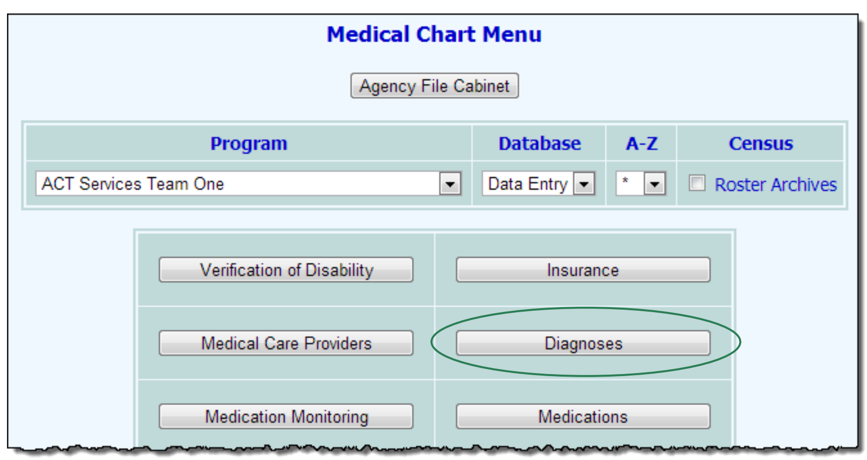
- **The Profile module Face Sheet feature** – Within a client's face sheet, access his or her diagnosis records by scrolling down to the "Current Diagnosis Info" portion of the page.



To update the read-only information displayed on the face sheet, or to add or remove a diagnosis record, click **Update Diagnoses Data** and then proceed with the data entry process.

When working with diagnosis records from the face sheet in data entry mode, only current diagnosis records are available – those with no resolution dates. To work with the client's full diagnosis history, access the Diagnoses feature from within the Medical module, being sure to uncheck the "Current Diagnoses Only" option on the Diagnoses – Client Selection page.

- **The Medical module Diagnoses feature** – Within the Medical module, diagnosis information is accessed using the **Diagnoses** button on the *Medical Chart Menu* page.



Clicking that button opens a settings page from which you can begin the data entry or report viewing process.

The instructions in the document sections that follow each begin with access the Diagnoses feature from within the Medical module. If you are working with diagnosis records from within a client's face sheet, begin with step **9** in the "Working with Diagnosis Records" section. Also keep in mind that unlike data entry, which is consistent regardless of the access point, full report viewing functionality is limited to the Medical module Diagnoses feature.

WORKING WITH DIAGNOSIS RECORDS

To enter, update, or delete a diagnosis record, complete the following steps:

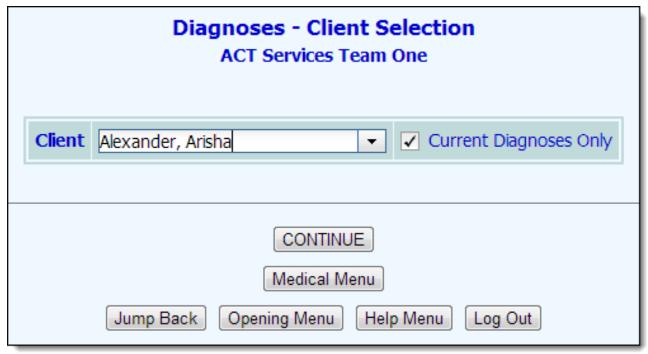
1. From the *AWARDS Opening Menu* page, click **Medical**. The *Medical Chart Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the client for whom the diagnosis records are to be worked with.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. To work with the diagnosis records of a former (discharged) client, click the **Roster Archives** check box.

5. Click **Diagnoses**. The *Diagnoses - Client Selection* page is displayed.

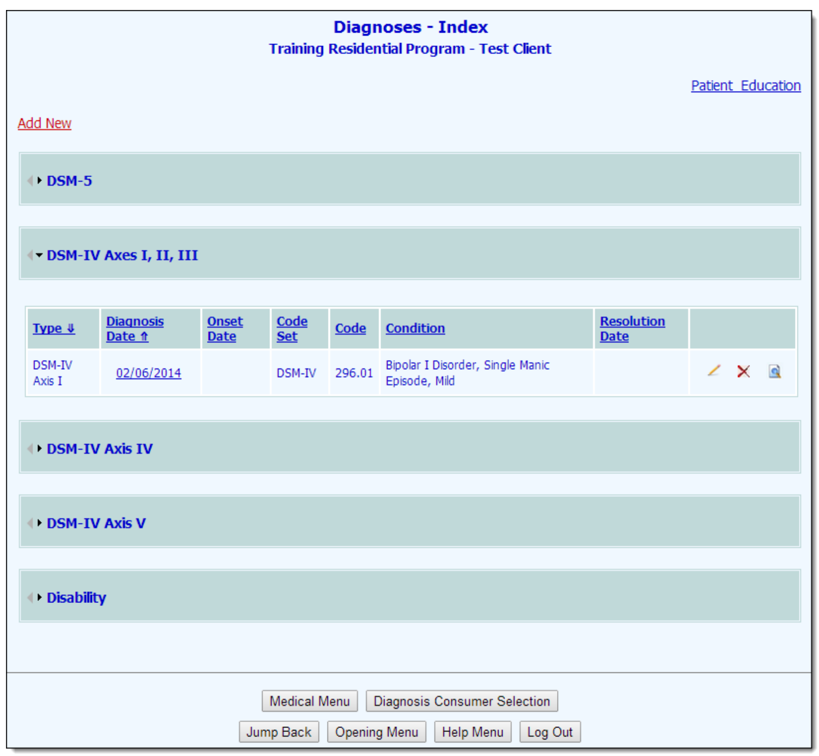


6. Click the **Client** drop-down arrow and select the client for whom the diagnosis records are to be worked with.

7. By default only current diagnosis records are displayed during the data entry process. To instead have the client's full diagnosis history available on the data entry page, uncheck the **Current Diagnoses Only** check box.

   Current diagnosis records are those with no resolution dates.

8. Click **CONTINUE**. The *Diagnoses - Index* page is displayed.



   This page displays five possible sections/index tables, based on the configuration of the agency.

   - **DSM-5** - Only if set to display for the agency.
   - **DSM-IV Axes I, II, III** – These diagnosis types share one index.
   - **DSM-IV Axis IV**
   - **DSM-IV Axis V**
   - **Disability** - Only if set to display for the agency.

   If you would like to turn on the DSM-5 or Disability index for your agency, please contact the Help Desk.

   Index tables are initially expanded only if they contain data, as seen in the screen to the right.

Each index shows 10 records per page, sorted by Diagnosis Date (and Type, if applicable). To access records on subsequent pages of an index, click "View All," "Next" or page numbers at the bottom of the index.

9. At this time, complete one or more of the following data entry tasks:

   - **Add a new diagnosis record –** Click the **Add New** link that appears at the top of the page. A new record is opened and the *Diagnoses – Data Entry* page is displayed. Complete the fields and options on this page as necessary, and then click **CONTINUE**. The diagnosis record is saved and the updated index page is displayed.

     For more information on diagnosis record fields/options, see the "Understanding Diagnosis Record Options" section on page 4.

   - **Update an existing diagnosis record –** Click the edit icon or the "Diagnosis Date" link of the diagnosis record to be updated. The diagnosis record is displayed in data entry mode on the *Diagnoses – Data Entry* page. Complete the fields and options on this page as necessary, and then click **CONTINUE**. The updated diagnosis record is saved and the updated index page is displayed.

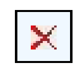
     

     For more information on diagnosis record fields/options, see the "Understanding Diagnosis Record Options" section on page 4.

     The view icon shown on the Diagnosis – Index page to the right of the record is a short cut to a diagnosis record's printable read-only page.

   - **Delete an existing diagnosis record –** Locate the diagnosis record to be deleted and click the corresponding delete icon on the right of the record. A confirmation pop-up is displayed. To confirm the deletion, click **OK**. The diagnosis record is deleted and the updated *Diagnoses - Index* page is displayed, no longer showing the deleted diagnosis.

     *Once a diagnosis record has been deleted, it cannot be recovered. To close out a diagnosis record rather than delete it, enter a value in that record's **Resolution Date** field. Doing so indicates that the diagnosis is no longer in effect while preserving the client's diagnosis history.*

The process of working with diagnosis records is now complete.

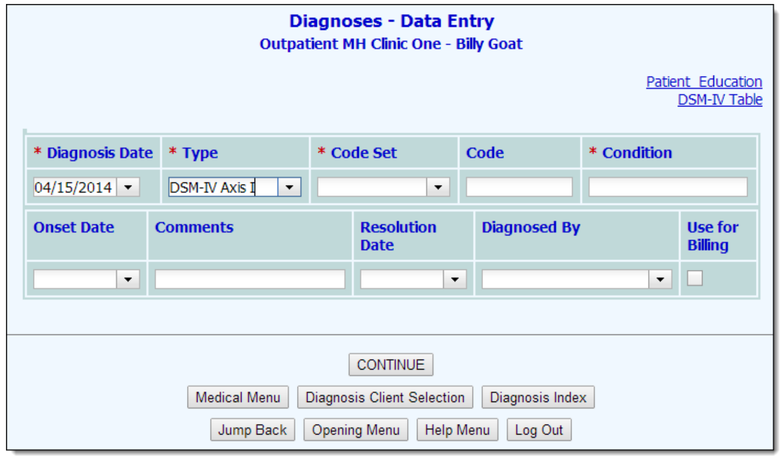
UNDERSTANDING DIAGNOSIS RECORD OPTIONS

Diagnosis records contain several fields and vary by the "Type" of diagnosis selected. The fields and options contained in these records are described in this section.

Some fields are optional fields that can be turned on behind-the-scenes by the Foothold Help Desk or your Foothold Senior Project Manager (SPM). As a result, the fields/options may vary from one type of program to another. If you are interested in learning more about configuring the form, please contact the Foothold Help Desk or your SPM for assistance.

DSM-IV AXES I, II, III & DSM-5

The following is a list of fields and options available on diagnosis records that have either “DSM-IV Axis I,” “DSM-IV Axis II,” “DSM-IV Axis III,” or “DSM-5” selected in the **Type** field.



DIAGNOSIS DATE

In the **Diagnosis Date** field, enter the date of the diagnosis. The field contains today’s date as the default.

TYPE

Click this drop-down arrow and select the type of diagnosis being entered. The page will refresh based the type selected, and different fields will appear for different types as outlined in this section. To work with the fields described in this section, select one of the following types:

- **DSM-IV Axis I**
- **DSM-IV Axis II**
- **DSM-IV Axis III**
- **DSM-5** - Only if set to display for the agency.

If DSM-5 is not currently available for selection in your AWARDS database and you would like it to be, please contact the Help Desk for assistance.

CODE SET

For records with either “DSM-IV Axis I” or “DSM-IV Axis II” selected in the Type field - Click this drop-down arrow and select “DSM-IV” to indicate the type of code set being entered.

For records with “DSM-IV Axis III” selected in the Type field - Click this drop-down arrow and select “ICD-9” to indicate the type of code set being entered.

For records with “DSM-5” selected in the Type field - Click this drop-down arrow and select “DSM-5/ICD-9” or “ICD-10” to indicate the type of code set being entered

CODE

In the **Code** field, type or make changes to the code of the diagnosis.

Alphanumeric characters and underscores are the only characters allowed.

CONDITION

In the **Condition** field, type or make changes to the condition or description of the diagnosis.

ONSET DATE

In the **Onset Date** field, enter the date on which the condition began. This date must be before or on the Diagnoses Date.

COMMENTS

In the **Comments** field, enter any comments pertaining to the diagnosis.

RESOLUTION DATE

In the **Resolution Date** field, enter the date on which the diagnosis condition was resolved. Future dates are not available for selection.

DIAGNOSED BY

Click this drop-down arrow and select the name of the physician who diagnosed the client.

The names displayed in this drop-down list are staff members who have been assigned the "List as Prescribing/Diagnosing Physician" data entry access permission (and users marked with an Eligible Provider credential during Meaningful Use set-up).

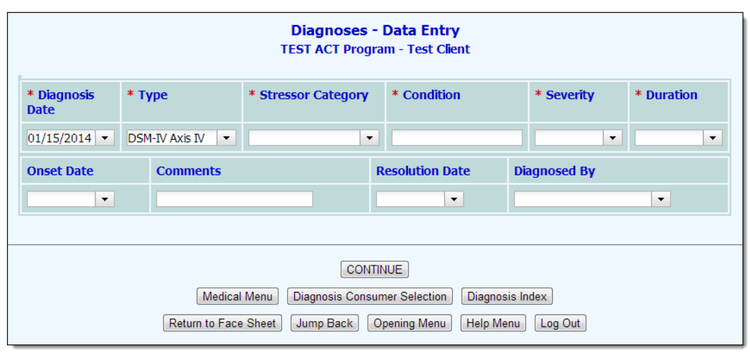
USE FOR BILLING

For agencies set-up to use the AWARDS BillingBuilder feature, records with either "DSM-IV Axis I," "DSM-IV Axis II" or "DSM-5" selected in the **Type** field will also have the **Use for Billing** check box display. This check box must be selected to allow the diagnosis code to be used for billing.

This option can be selected for more than one diagnosis code, since different programs may bill based on different diagnoses. A "Use for Billing" column also displays on the Diagnoses – Index page when this check box is present.

DSM-IV AXIS IV

The following is a list of fields and options available on diagnosis records that have "DSM-IV Axis IV" selected in the **Type** field.



DIAGNOSIS DATE

In the **Diagnosis Date** field, enter the date of the diagnosis. The field contains today's date as the default.

TYPE

Click this drop-down arrow and select the type of diagnosis being entered. The page will refresh based the type selected, and different fields will appear for different types as outlined in this section. To work with the fields described in this section, select "DSM-IV Axis IV."

STRESSOR CATEGORY

Click this drop-down arrow and select the appropriate category of diagnosis being entered. Selection options include:

Economic problems	Educational problems	Housing problems
Occupational problems	Other psychosocial and environmental problems	Problems related to interaction with the legal system/crime
Problems related to the social environment	Problems with access to health care services	Problems with primary support group

CONDITION

In the **Condition** field, type or make changes to the condition or description of the diagnosis.

SEVERITY

Click this drop-down arrow and select the severity of diagnosis being entered. Selection options include:

None	Mild	Moderate
Severe	Extreme	Catastrophic
Inadequate Info/No Change		

DURATION

Click this drop-down arrow and select "Predominately Acute Event" or "Predominantly Enduring Circumstances" to indicate the duration of the diagnosis being entered.

ONSET DATE

In the **Onset Date** field, enter the date on which the diagnosis condition began. This date must be before or on the Diagnoses Date.

COMMENTS

In the **Comments** field, enter any comments pertaining to the diagnosis.

RESOLUTION DATE

In the **Resolution Date** field, enter the date on which the diagnosis condition was resolved. Future dates are not available for selection.

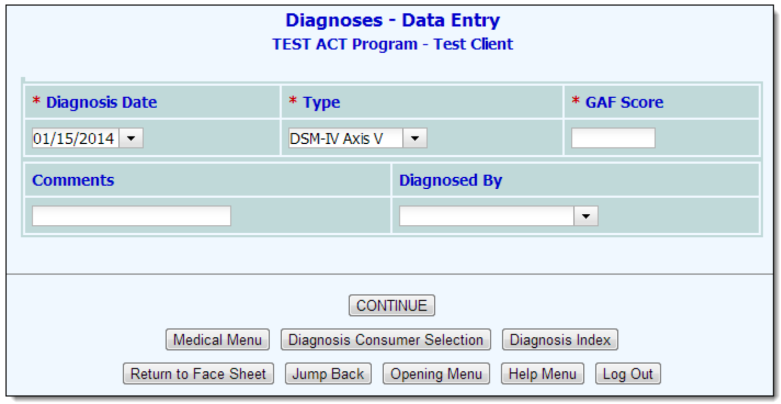
DIAGNOSED BY

Click this drop-down arrow and select the name of the physician who diagnosed the client.

The names displayed in this drop-down list are staff members who have been assigned the "List as Prescribing/Diagnosing Physician" data entry access permission (and users marked with an Eligible Provider credential during Meaningful Use set-up).

DSM-IV AXIS V

The following is a list of fields and options available on diagnosis records that have "DSM-IV Axis V" selected in the **Type** field.



DIAGNOSIS DATE

In the **Diagnosis Date** field, enter the date of the diagnosis. The field contains today's date as the default.

TYPE

Click this drop-down arrow and select the type of diagnosis being entered. The page will refresh based the type selected, and different fields will appear for different types as outlined in this section. To work with the fields described in this section, select "DSM-IV Axis V."

GAF SCORE

In the **GAF Score** field, enter the GAF score for the client. This must be a number between 0 and 100.

COMMENTS

In the **Comments** field, enter any comments pertaining to the diagnosis.

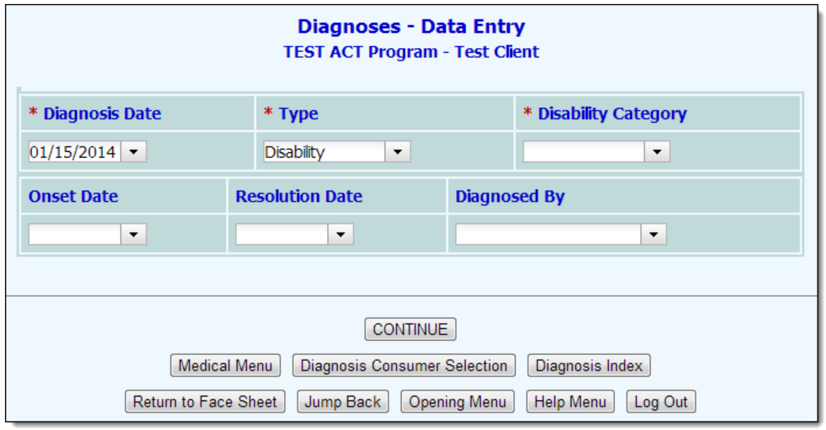
DIAGNOSED BY

Click this drop-down arrow and select the name of the physician who diagnosed the client.

The names displayed in this drop-down list are staff members who have been assigned the "List as Prescribing/Diagnosing Physician" data entry access permission (and users marked with an Eligible Provider credential during Meaningful Use set-up).

DISABILITY

The following is a list of fields and options available on diagnosis records that have "Disability" selected in the **Type** field.



DIAGNOSIS DATE

In the **Diagnosis Date** field, enter the date of the disability. The field contains today's date as the default.

TYPE

Click this drop-down arrow and select the type of diagnosis being entered. The page will refresh based the type selected, and different fields will appear for different types as outlined in this section. To work with the fields described in this section, select "Disability."

DISABILITY CATEGORY

Click this drop-down arrow and select "Primary," "Secondary" or "Physical" to indicate the category of the disability being entered.

DISABILITY

Click this drop-down arrow and select the disability being entered.

ONSET DATE

In the **Onset Date** field, enter the date on which the diagnosis condition began. This date must be before or on the Diagnoses Date.

RESOLUTION DATE

In the **Resolution Date** field, enter the date on which the diagnosis condition was resolved. Future dates are not available for selection.

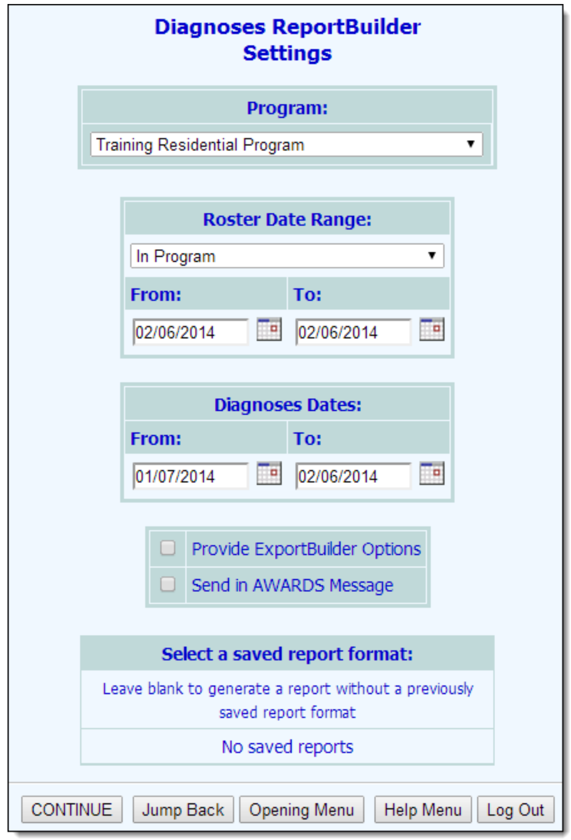
DIAGNOSED BY

Click this drop-down arrow and select the name of the physician who diagnosed the client.

The names displayed in this drop-down list are staff members who have been assigned the "List as Prescribing/Diagnosing Physician" data entry access permission (and users marked with an Eligible Provider credential during Meaningful Use set-up).

DIAGNOSES REPORTBUILDER

The Diagnoses ReportBuilder is used to generate customized reports of client demographics and diagnosis information. To generate and save a Diagnoses ReportBuilder report that can be re-run in the future, to generate a single-use report, or to use and/or update an existing report format to generate a report, complete the following steps:



1. From the *AWARDS Opening Menu* page, click **Medical**. The *Medical Chart Menu* page is displayed.

2. Click the **Database** drop-down arrow and select "Reports."

3. Click **Diagnoses**. The *Diagnoses ReportBuilder Settings* page is displayed.

4. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.

5. Report contents are limited to records for clients who were on the roster of the selected program at some point during the date range specified using the **Roster Date Range** fields on this page.

   By default both Date Range fields contain today's date to include in the report only those clients on the current roster. If necessary, make changes to that default range using the available **From** and **To** fields/date pickers.

6. For the clients included in the report, contents are limited to diagnosis records effective during the date range specified using the **Diagnoses Dates** fields on this page.

   By default, the diagnoses date range is set to report diagnoses in effect for the past month. If necessary, make changes to that default date range using the available **From** and **To** fields/date pickers.

   In the event that you are creating a new diagnosis report that will be saved, please be aware that the date ranges specified here and in step 5 are not saved with the report. They must be set each time the report is run.

7. Leave the **Provide ExportBuilder Options** check box *unchecked*. It is NOT relevant to report generation.

   In order to see this option you must have the ExportBuilder permission. It is used to provide access to an ExportBuilder corresponding to the ReportBuilder with which you are working. AWARDS ExportBuilders – which are designed for use by individuals who are familiar with export files and formats, their design, and setup – harness the power of ReportBuilder functionality and take it a step further to meet a variety of outside reporting needs. With ExportBuilders, users can create customized data reports as they would with the ReportBuilder itself, and from those reports generate export files of a number of different types – CSV, TXT, XLS, or XML. Exported files can be saved to your computer, then uploaded into other data collection systems and/or worked with in other applications as needed. Additionally, as can be done with ReportBuilders, ExportBuilder formats can be saved and shared for future use.

   The instructions provided in this document detail use of the DIagnoses ReportBuilder only, not the corresponding ExportBuilder. For more information on using ExportBuilders, please refer to AWARDS Online Help and/or the ExportBuilder Basics instruction sheet.

8. If you would like the report (both its content and an Excel file version) to be sent to your AWARDS Messages module upon its completion, click the **Send in AWARDS Message** check box. When this option is selected, you will be able to continue working in AWARDS if you so choose, rather than waiting for the report to generate. You will also be able to retain the report in your messages for reference at a later time without having to re-generate it.

9. Use the **Select a saved report format** drop-down options at the bottom of the page to specify whether you will be generating the report from scratch or using a previously saved format. Available choices are to:

   - **Use a previously saved report format –** To generate the report using a previously created and saved format, select that format from this drop-down. When using this method, you can immediately generate the report without changing any settings. Alternately, you can first review and modify the settings of the format by checking off the available **Provide option to modify settings of saved report format** check box.

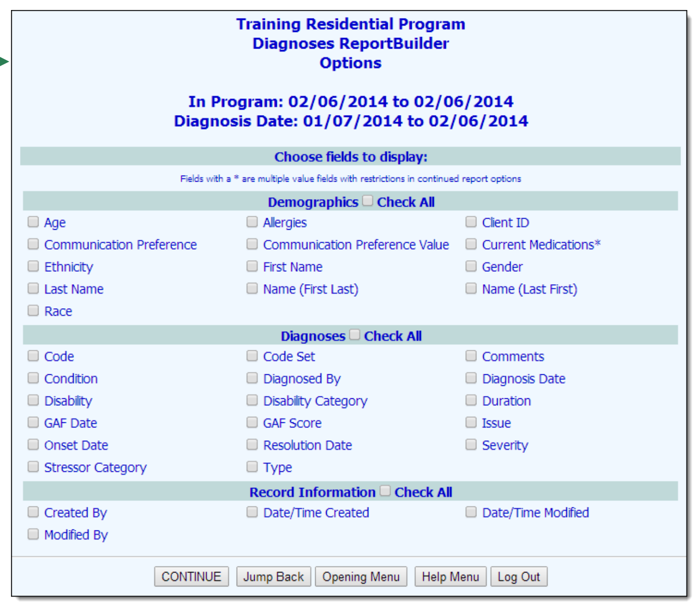
   - **Start from scratch, without using a previously saved report format –** To create your own report format for single-time use or for saving and later re-use, leave the saved report format drop-down blank.

10. Click **CONTINUE**.

    If you are using an existing report format and have NOT chosen to view/modify the settings of that format, you are now taken directly to the report page. Continue with step **20**.

    *If you chose to send the report to yourself via the Messages module (in step 8), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete, and then proceed with step **20**.*

    In all other instances, the *Diagnoses ReportBuilder Options* page is displayed. Continue with step **11**.



11. This page contains a list of demographic and diagnoses-related variables, grouped by information type. These variables represent data collected on client face sheet, intake forms and diagnosis records. Click the check box next to each characteristic for which data is to be included in the report, and/or use the available **Check All** option for each type of data as needed.

12. Click **CONTINUE**. The *Options – Continued* page is displayed.

13. Configure or make changes to the options in the "Filter Options" portion of the page as necessary to adjust the scope of the report contents. Set the "Show Individual Detail" and/or "Summary Tables" options to adjust the way in which the contents are displayed.

    Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various report options, please refer to the ReportBuilder Basics instruction sheet, or AWARDS Online Help.

14. To save the report settings so that this diagnoses report can easily be re-run in the future, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed.

    If it is not necessary to save the report format and you only wish to view the report contents, please skip to step **19**.

15. When saving a new report, in the **Report Format Title** field, type the name of the format.

    We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

    When working with a previously saved format, the title defaults to the name of the selected report format. To save the modified report format as a new format and to leave the original format unchanged, enter a new title in this field. If the default title is not changed, the modifications being saved will be applied to the original format.

    Please keep in mind that only the user who originally saved a format and individuals who can save formats for all users can modify that format. Others can save modified report formats under a new name, but cannot apply the modifications to the original format.

16. Click one of the available **Save Report Format for** radio buttons to determine who the report should be accessible by. Available options are:

    - **Yourself –** When this option is selected, only the user saving the report format has the ability to use or modify that format.

    - **All Staff –** When this option is selected, all staff in the program(s) selected in step 4 have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

      In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

17. Click one of the available **Allow Report Format for** radio buttons to determine which programs this report format can be used for. Available options are:

    - **This Program –** When this option is selected, the report format being saved is available for use only by the program selected in step 4.

    - **All Programs –** When this option is selected, the report format being saved is available for use by all programs, regardless of which program was selected in step 4.

    The Allow Report Format for options are only available when a single program was selected in step 4; otherwise, the format is saved for all programs by default.

18. Click **Save Report Format**. The report format is saved and the *Options – Continued* page is re-displayed.

19. Click **DISPLAY REPORT**. The report is generated and displayed on the *Diagnoses ReportBuilder* page.

    When working with the report data, please keep in mind that when a report is long enough to require you to scroll down the page to view all of its content, the header row of the data table (individual detail and/or summary) "freezes" at the top of the page, while the rest of the report detail is viewed. This enables you to view the column labels, even when scrolling down the page. Similarly, when printing a report that covers more than one page, the header row of any tables split between pages is shown at the top of each page.

    *If you chose to send the report to yourself via the Messages module (in step 8), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete and then proceed with step **20**.*

20. At this time individual detail and/or summary table content can be hidden or sorted as needed. The report can also be printed or exported to Microsoft Excel. For more information on working with ReportBuilder report contents, please refer to the ReportBuilder Basics instruction sheet, or AWARDS Online Help.

The process of generating a Diagnoses ReportBuilder report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the Diagnoses feature can be a useful reference when you have your own questions about the functionality.

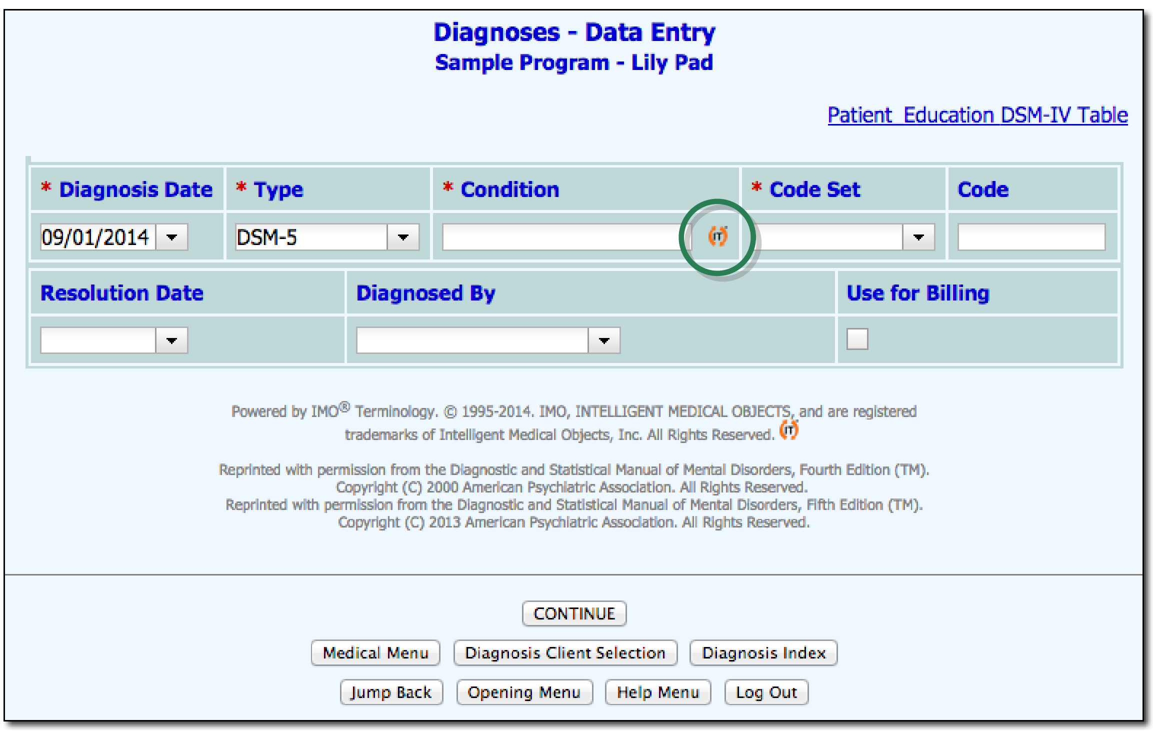
CAN I UPDATE DIAGNOSIS INFORMATION FOR A DISCHARGED CONSUMER?

Yes. To update the diagnosis information for a discharged client, click the "Roster Archives" check box on the *Medical Chart Menu* page before going into the Diagnoses feature.

HOW DO I COMPLETE AN IMO® SEARCH FOR A CONDITION AND ITS CODE?

The IMO® (Intelligent Medical Objects) search tool enables users to search for a diagnosis condition and automatically pull the full condition text and code into AWARDS.

This search is optional functionality that is only available by subscription as a licensed integrated service within AWARDS. If it is currently turned on in your AWARDS database, you will see an "IT" icon to the right of the condition field during diagnoses data entry.



If you do not see this icon and are interested in learning more about having the IMO search tool added to your AWARDS database, please click here.

The process of using the IMO search tool varies based on whether you are starting a search from scratch, or replacing a previously selected value. Instructions for both are provided here.

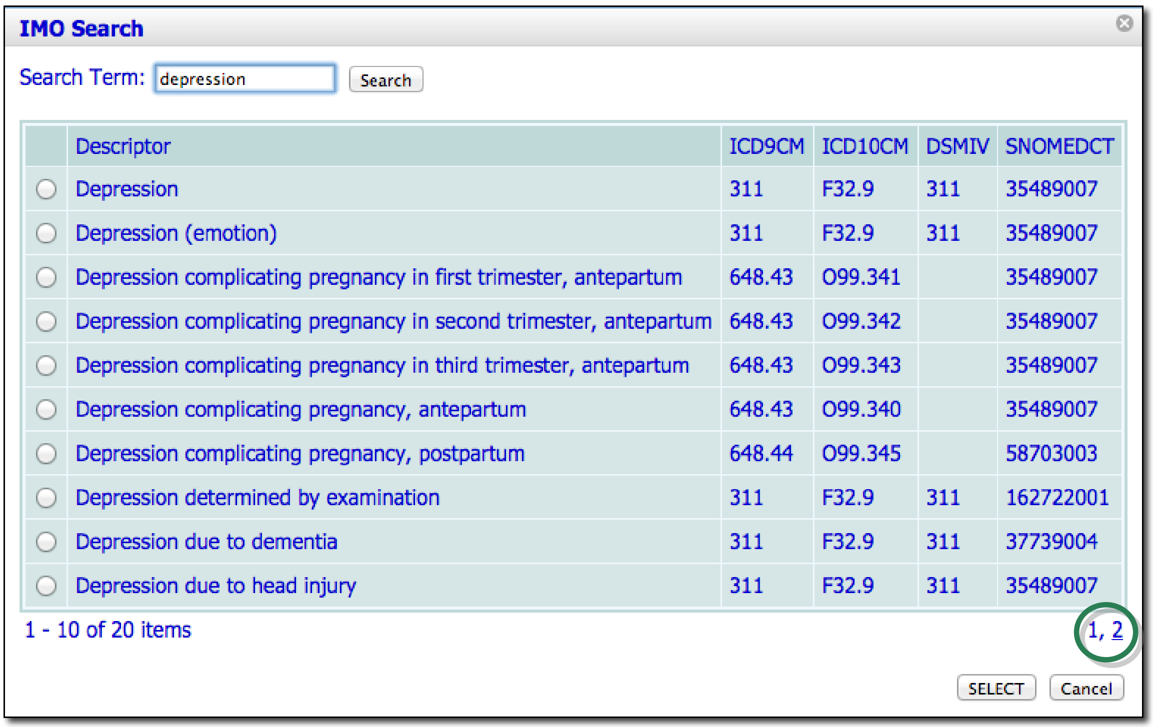
COMPLETING A NEW SEARCH

To complete an IMO search and pull diagnosis condition and code information into AWARDS, complete the following steps from the *Diagnoses – Data Entry* page:

1. Click your mouse cursor in the **Condition** field and type the client's diagnosis condition.

   A full condition name does not need to be entered; however, the IMO search requires at least the first three letters of a condition to find matches. Keep in mind though, that only 20 search matches are displayed in the search results, so the more of the condition description you enter, the more likely you are to find what you're looking for in those 20 matches.

2. Click the **IT** icon. The search is initiated and the *IMO Search* dialog box is displayed.



IMO Search

Search Term: depression Search

	Descriptor	ICD9CM	ICD10CM	DSMIV	SNOMEDCT
○	Depression	311	F32.9	311	35489007
○	Depression (emotion)	311	F32.9	311	35489007
○	Depression complicating pregnancy in first trimester, antepartum	648.43	O99.341		35489007
○	Depression complicating pregnancy in second trimester, antepartum	648.43	O99.342		35489007
○	Depression complicating pregnancy in third trimester, antepartum	648.43	O99.343		35489007
○	Depression complicating pregnancy, antepartum	648.43	O99.340		35489007
○	Depression complicating pregnancy, postpartum	648.44	O99.345		58703003
○	Depression determined by examination	311	F32.9	311	162722001
○	Depression due to dementia	311	F32.9	311	37739004
○	Depression due to head injury	311	F32.9	311	35489007

1 - 10 of 20 items 1, 2

SELECT Cancel

   This dialog box displays up to 20 matches for the search criteria you entered, with 10 results displayed on each page. To navigate between the search match pages, if applicable, use the navigation links in the bottom right corner of the dialog box (circled in the image above).

3. Click the radio button to the left of the correct diagnosis descriptor and associated codes.

   *If the necessary diagnosis is not listed, clear the **Search Term** field in the upper-left corner of the dialog box, enter an adjusted search phrase, and then click **Search** to try again.*

4. Click **SELECT**. The IMO Search's diagnosis "descriptor" is pulled into the AWARDS **Condition** field, and the proper code is pulled into the AWARDS **Code** field, based on the diagnoses "Type" you selected during the data entry process. These values will be read-only, but can be adjusted as necessary using the instructions below for redoing a search.

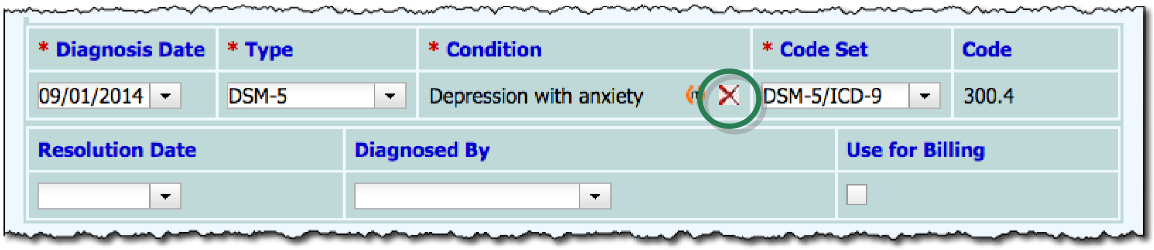
5. If necessary, click the **Code Set** drop-down arrow and select a different code set. The diagnosis Code is automatically adjusted accordingly.

The process of completing a new IMO search is now complete.

REDOING A SEARCH

To make a change to an existing diagnosis condition and code from the *Diagnoses – Data Entry* page, complete the following steps:

1. Click the red **X** icon to the right of the **Condition** value to remove the existing diagnosis condition information and the corresponding code.



2. Repeat the IMO search by following all of the steps under "Completing a New Search" in this same frequently asked question.

The process of redoing a search is now complete.