The Charting Timetable

AWARDS INSTRUCTION SHEET

The AWARDS Charting Timetable, located in the AWARDS Services Module, is used to enter, update, and delete charting timetable records for consumer chart events as necessary. It is also used to view read-only charting timetable records.

REQUIRED PERMISSIONS

Permissions required to enter, update, or delete chart events are as follows:

- Chart Access – Users must have chart access for each program for which charting timetable events are to be worked with.
- Data Entry / Access – Users must have the "Display Any Chart Records Buttons" and the "Display Chart Records Services Button" data entry/access permissions in order to access the Services module in which the Charting Timetable is located.

Additionally, unless you are a supervisor or in a specific user group ("System Administrator," "Executive Officer," "Direct Care Program Director," "Direct Care Admin Support," or "Executive Support Staff"), you will only be able to enter, update, and delete chart event records for those events to which you are assigned.

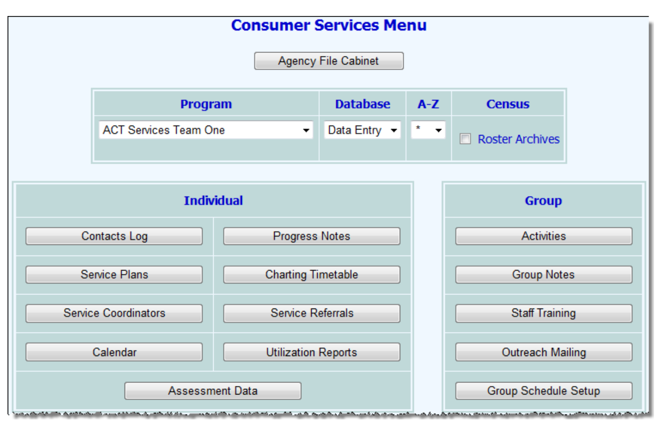
ABOUT THIS DOCUMENT

This document is intended to help you understand and work with the Charting Timetable feature in data entry and report modes. Specific topics covered are:

ENTERING / UPDATING A CHART EVENT

To enter or update a chart event using the charting timetable, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.



2. Click the **Program** drop-down arrow and select the

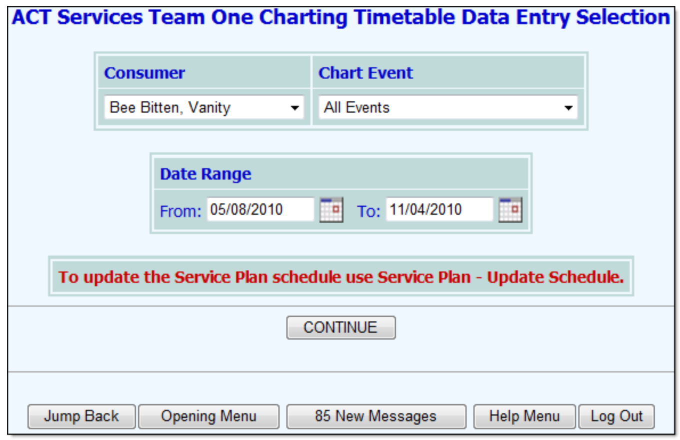
program associated with the consumer for whom the charting timetable event is to be entered or updated.

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

4. To limit consumer selection by name, click the A-Z drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers on the selection process.

5. If the charting timetable record to be entered or updated is for a former (discharged) consumer, click the Roster Archives check box.

6. Click **Charting Timetable**. The *Charting Timetable Data Entry Selection* page is displayed.



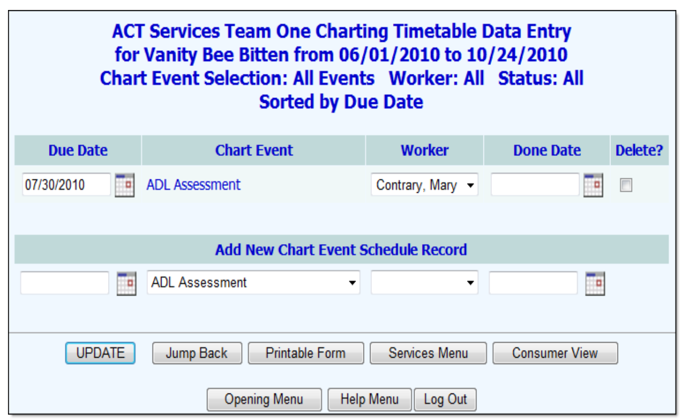
7. Click the **Consumer** drop-down arrow and select the consumer for whom the chart event is to be entered or updated.

8. Click the **Chart Event** drop-down arrow and select the type of event for which the charting timetable record is to be entered or updated. The default value is "All Events."

9. The date of the chart event to be entered or updated must fall within the date range in the **From** and **To** fields on this page. Make changes to the default date range as necessary (using *mm/dd/yyyy* format) so that it includes the date of the event you are working with.

10. Click **CONTINUE**. The *Charting Timetable Data Entry* page is displayed.

    Any existing charting timetable records for the selected consumer, event, and date range are displayed at the top of the page.



11. At this time, one or more of the following tasks can be completed:

    - **Add a new chart event** – Configure the blank **Add New Chart Event Schedule Record** fields and options as necessary.

    - **Update an existing chart event** – Make changes to the information for any existing chart events as necessary.

    For more information on the chart event record fields/options, see AWARDS Online Help.

12. Click **UPDATE**. The charting timetable records are saved and the updated *Charting Timetable Data Entry* page is displayed.

The process of entering or updating a charting timetable record is now complete.

DELETING A CHART EVENT

To delete a chart event record, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The Consumer Services Menu page is displayed.

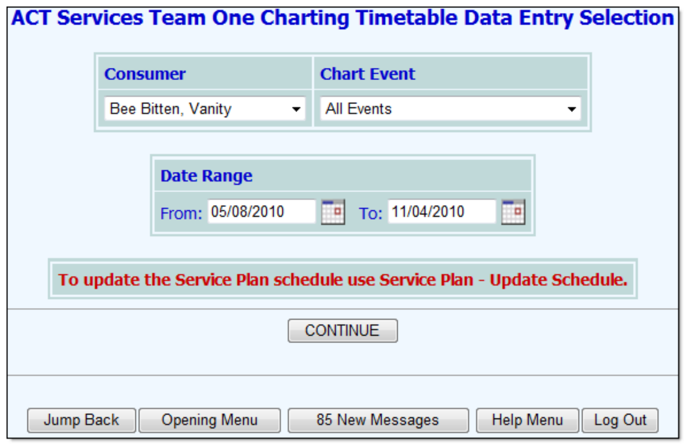
2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the chart event is to be deleted.

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

4. To limit consumer selection by name, click the A-Z drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers on the selection process.

5. If the charting timetable record to be deleted is for a former (discharged) consumer, click the Roster Archives check box.

6. Click **Charting Timetable**. The *Charting Timetable Data Entry Selection* page is displayed.



7. Click the **Consumer** drop-down arrow and select the consumer for whom the chart event is to be deleted.

8. Click the **Chart Event** drop-down arrow and select the type of event for which the charting timetable record is to be entered or updated. The default value is "All Events."

9. The date of the chart event to be entered or updated must fall within the date range in the **From** and **To** fields on this page. Make changes to the default date range as necessary (using *mm/dd/yyyy* format) so that it includes the date of the event you are working with.

10. Click **CONTINUE**. The *Charting Timetable Data Entry* page is displayed. Any existing charting timetable records for the selected consumer, event, and date range are displayed at the top of the page.

11. Click the **Delete?** check box next to each record to be deleted.

    Records with done dates cannot be deleted. The done date must first be removed.

12. Click **UPDATE**. The selected records are deleted and the updated Charting Timetable Data Entry page is displayed.

    The process of deleting a chart event is now complete.

VIEWING A CHARTING TIMETABLE REPORT

To view a read-only charting timetable report, complete the following steps:

1. From the AWARDS Opening Menu page, click **Services**. The *Consumer Services Menu* page is displayed.

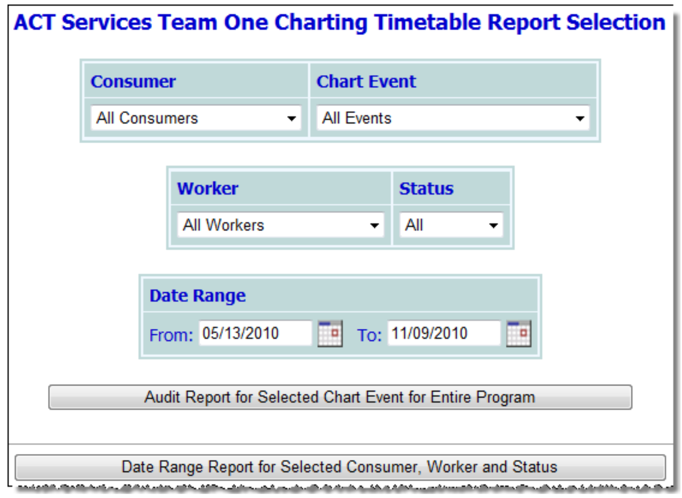
2. Click the **Program** drop-down arrow and select the program for which the report is to be viewed.

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

4. To limit report selection by consumer, click the **A-Z** drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers in the selection process.

5. If the report is to be viewed for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Charting Timetable**. The *Charting Timetable Report Selection* page is displayed.



7. Click the **Consumer** drop-down arrow and select the consumer for whom the report is to be viewed. The default value is "All Consumers."

8. To limit the report contents to records for a specific event type, click the **Chart Event** drop-down arrow and select that event. The default value is "All Events."

9. To limit the report contents to records assigned to a specific worker, click the **Worker** drop-down arrow and select the correct staff person. To limit the report to unassigned events, select "Unassigned." The default value is "All Workers."

   When "Unassigned" is selected, records assigned to former employees are included in the report along with unassigned records.

10. Click the **Status** drop-down arrow and make a selection to indicate the status of the events to be included in the report. Available selections are:

    - **All** - When this option is selected, the report will include all charting timetable records, regardless of their status.
    - **On Time** - When this option is selected, the report will only include those charting timetable records whose done date proceeded, or was the same as, the due date.
    - **Done Late** - When this option is selected, the report will only include those charting timetable records whose done date was after the due date.
    - **Overdue** - When this option is selected, the report will only include those charting timetable records whose due date has passed without completion of the event (without a done date being entered).

    The default value is "All."

11. Make changes to the default date range as necessary (using mm/dd/yyyy format).

    *Only those charting timetable records with due dates falling within the date range in the **from** and **to** fields on this page will be included in the report.*

12. Click one of the following available buttons to generate the appropriate charting timetable report:

    - **Audit Report for Selected Chart Event for Entire Program** – When this button is clicked, the report generated will be a last event audit report for the selected program and chart event. This report will include consumer, last due, last done, days since last due, next due, and next done information.

In order to view this type of charting timetable report, a single chart event must be selected.

- **Date Range Report for Selected Consumer, Worker, and Status** – When this button is clicked, the report generated will be a charting timetable report for the selected consumer, worker, status, and date range. This report will include due date, chart event, consumer, worker, and done date information, as well as the total number of charting timetable records meeting the selection criteria.

The appropriate charting timetable report is displayed on the *Charting Timetable Report* page. The contents of this read-only report are based on the selections made on previous pages.

The process of viewing a charting timetable report is now complete.

FREQUENTLY ASKED QUESTIONS

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

ARE CHART EVENTS AUTOMATICALLY RE-ASSIGNED IF A CLIENT'S SERVICE COORDINATOR CHANGES?

No. In the event that a client's service coordinator is set as the individual to whom one or more of the client's chart events is assigned, that assignment will not change if the client is switched to a different service coordinator. Any changes to charting timetable records must be completed manually in these instances. For more information on updating charting timetable records, see Entering/Updating a Chart Event.

CAN FORMBUILDER FORMS LISTED AS CHART EVENTS BE SCHEDULED AUTOMATICALLY?

No. Form events must be scheduled manually.

HOW CAN I TELL WHICH EVENTS IN THE CHARTING TIMETABLE HAVE FORMBUILDER FORMS ASSOCIATED WITH THEM?

At present there is no built-in way to distinguish between chart event types associated with forms and those for which no form exists. If this is a concern, your agency may want to consider including "Form" in the names of FormBuilder forms - for example, "Daily Activities Form."

WHEN ARE REMINDERS SENT ABOUT SCHEDULED CHART EVENTS?

Reminders for authorization events are sent at 6 weeks/42 days prior to the event's due date. Reminders for all other types of events (including authorizations) are sent at 3 weeks/21 days, 2 weeks/14 days, and 1 week/7 days prior to an event's due date. Once the due date of an event has passed, a reminder is sent every third day. The past due reminders stop once an event is 120 days overdue.

WHY AM I STILL RECEIVING REMINDERS FOR AN EVENT THAT HAS A DONE DATE ENTERED FOR IT?

In some instances events will be recorded in two places:

- Within the **Services** module Charting Timetable feature. If a done date for an event recorded here is not entered, CHART REVIEW REMINDER notification messages are sent out.
- Within the **Medical** module Medical Appointments feature. If the status of an appointment recorded here is not entered, MEDICAL APPOINTMENT REMINDER notification messages are sent out.

In the event that you receive a reminder for an event you feel you have completed the data entry for, it may be that the reminder is regarding the second of the two data entry points. To see whether that is the case, check the subject line of the message to determine where in the application the reminder is being generated from. Once you have made that determination, go to the corresponding feature in AWARDS and check the record in question to check on whether it is complete and make updates as necessary.

WHY AM I UNABLE TO ASSIGN A CHART EVENT TO SOMEONE ELSE?

You can only add (and edit) chart events for yourself unless you are either:

a) a member of the "Executive Officer," "Direct Care Program Director," "Direct Care Admin Support," or "Executive Support Staff" user groups,

or

b) are assigned as a supervisor in the Human Resources module Staff Information feature.

WHY DID MY ASSESSMENT DATA DISAPPEAR AFTER I CHANGED THE DUE DATE TO THE CHART EVENT IN THE CHARTING TIMETABLE?

The due date for an assessment should only be changed before data is entered in that assessment. If the due date is changed after data entry has been done, whatever data was entered will no longer be displayed in the Outcomes module Assessment Data feature. In order for the data to be restored in this situation, the due date must be returned to the originally used date using the Services module Charting Timetable feature

WHY DOES A CHART EVENTS AUDIT HAVE "NOT FOUND" FOR "LAST DUE/LAST DONE" WHEN THE CLIENT HAS MORE THAN ONE RECORD FOR THAT EVENT TYPE?

When the charting timetable audit report is run for a specific event, for example the "service plan review" event, it finds the most recent record before today and records it under "last due/last done." It also finds the next record after today and records that under "next due/next done." In the example of service plan reviews, if the client has multiple reviews scheduled but none with a due date prior to today, it results in "not found" being shown under last due/last done, and the first review with a date after today's date is listed under next due/next done.