HMS User Guide
Healthy Start QA/QI
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Overview

Healthy Start coalition staff has the ability to view records and information inputted into HMS by their service providers for Quality Assurance/Quality Improvement purposes. There are a wide variety of search criteria that can be inputted to obtain the desired information, or to randomize the search as much as possible. Staff has the ability to view the following data:

- All coded services for a client
- Care plan details
- Initial Assessments
- Initial Contacts
- Progress Notes
- Outcomes
- Old Assessments (Old Initial Contact, Initial Assessment and Outcomes)
- Selected Reports from the Report Portal

The above information can be a very helpful monitoring tool to ensure service providers are correctly coding services, updating care plans, entering outcomes and performing initial contacts and assessments properly. This guide will help navigate you through the system and process of accessing this data.

Note: The records that are available to the coalition in this view are those which have a "HIPAA = Yes" on the client demographics page of HMS. If it is noted that clients that received services are not showing up, it is important for the care coordination staff to indicate if the client indicated ‘Yes’, ‘No’ or ‘Revoked’ in the HIPAA box, or else you will not be able to view the information.
Searching the System

After logging in to the system, you will be brought to the Default Search Screen seen below. If you want to view a specific client’s record, use this search by entering either name, DOB, Medical Record # or Client ID. To perform a more complex search, click on the blue “Advanced Search” button at the top of the screen.
Advanced Search

You will now be brought to the advanced search screen seen here:

You can search by any of the following, combining criteria when desired:

- Program Component
- HMC Code
- Care Coordination Site
- Care Coordination Team Member (enter last name first)
- Classification Level
- Care Plan Opened/Closed in Specific Date Range
- Active Care Plan Only
- Closure Reason (multiples can be selected)
- Zip Code

After you have entered your search criteria, click the blue “Search HMS” button at the top right. You will then be brought to the populated search screen seen below:
Here you are given a list of all clients along with the care plans that fit your search criteria, giving the name, Client ID, DOB, Family ID, Medical Record Number, Program Component, Service Site, Care Coordinator, Open Date, Close Date, and Classification Level. If a client has multiple care plans, you will see multiple entries under the client’s name and should select the care plan you want to review. If doing as a randomized search for QA/QI, select the client whose information you wish to view by clicking on the line below the client’s name that starts with the program component number. This will bring up the following screen, displaying all of the information inputted for that client.
QA/QI Data

This screen contains tabs that hold all of the client’s information inputted into HMS. Tabs include:

- Services (all HMC codes entered for the client)
- Care Plans
- Old Assessments (Old Initial Contact, Initial Assessment and Outcomes)
- Initial Assessment
- Initial Contact
- Progress Notes
- Outcomes

The desired information can be brought up by clicking any of the tabs above.
The services screen lists any HMC code entered by a service provider and gives the following level of detail:

- Program component
- Service Code (number)
- Service Description (name)
- Service Site
- Date of Service
- Service Provider
- Units of Service
- Service Status
- Comments

This can help give an excellent snapshot of the services provided, attempts to contact, referrals made, education provided, etc., and how much time the service provider is spending on each activity. This is a great tool for monitoring and helping to determine problem areas. The comments section and progress notes tab can give additional insight into the logic behind the care coordinator’s coding.
Care Plans

The next tab contains the care plan information for the client, seen below:

The care plan includes the following information:

- Start Date
- End Date
- Reason Stopped
- Program Component
- Care Coordinator
- Additional Worker
- Managing Practitioner
- Comments
- Classify Level
- Classify Start Date (date a classification level was initially entered)
- Classify End Date (date a classification level ended)
- Classify History (all changes to a classification level)

This gives a nice picture of the current status of the client, as well as the history associated with their level of care. This can be used to help determine if care coordinators are leveling appropriately.
Old Assessments

This section includes all assessments completed prior to the most current updates. It displays all of the information from the old templates for the Initial Assessment, as well as old Initial Contacts and Outcomes. Though these templates are now obsolete, they can still give a good insight into the level of service and documentation the care coordinator has been providing historically.
Initial Assessment

This section includes all of the information that has been inputted into the most current initial assessment (released December 2009). Every piece of the IA is here and you will see exactly what the care coordinator has entered into HMS for this section (as well as anything not addressed). This is a great way to see the level of detail captured by the care coordinator, and what issues have been addressed or need to be addressed in the future.
Initial Contact

This section includes all of the information that has been inputted into the most current initial contact. Every piece of the IC is here and you will see exactly what the care coordinator has entered into HMS for this section. This is a great way to see the level of detail captured by the care coordinator, and what issues have been addressed or need to be addressed in the future.
Progress Notes

This section provides any progress notes the care coordinator has inputted during the course of their contact with the client. These notes can serve as a great supplemental tool to the information inputted into the other modules, and can help clear up areas of confusion for the person reviewing the electronic record.
Outcomes

This section contains all of the information included in the most current outcomes module of HMS. Every piece of the outcomes section is here and you will see exactly what the care coordinator has entered into HMS. This is a great way to see the level of detail captured by the care coordinator.
Report Portal

The report portal section gives the user the ability to create and view reports on a variety of factors to give a statistical analysis of the data in your area, and is a good place to start for identifying potential problems in your area and/or with care coordinators.

Note: The portal is still being worked on, and it is not uncommon for an error message to come up, or for the system to time out. Keep trying and eventually you will be successful. If you keep getting an error, try at a different time of day (early morning or late afternoon seem to work best as server traffic is more minimal).

Available reports include the following:

- Case Client Directory by Emergency Contact
- Client Visits Service by Service Provider
- Client Visits Services by Service Provider and by Site
- Prenatal Screens by Age
- Services by Provider
- Substance Exposed Clients

The following reports are based on the obsolete versions of the Initial Contact, Initial Assessment and Outcomes and contain historical information only (No data after 2008).

- Healthy Start Clients Who Smoke
- Prenatal Screens by Question 12 (Mental Health Counseling)
- Healthy Start Clients Who Smoke by Outcome
- Prenatal Screens by Trimester
- Prenatal Outcomes
- Prenatal Screens by Question 14 (Previous Poor Outcome)
- Healthy Start Clients who Drink Alcohol
- Healthy Start Clients who Drink Alcohol by Outcome
- Prenatal Screens by Question 11 (Depression)

At the bottom of the report portal screen you will also see links to an Ad Hoc report user help document, as well as a report portal help document if you have any questions.

The report portal is accessed from the default search screen seen below:
After clicking the link you will be brought to the following screen:

![Screen showing search for Healthy Start Client](image)

After clicking the link you will be brought to the following screen:

![Report Portal](image)

This portal will provide you with access to four different categories of reports. Within the categories, the ability to see client identifying data is limited based on the reporting level that has been assigned to you.

Categories:
- **Dashboard** - High level reports aimed towards management overviews.
- **Local Reports** - "Nitty Gritty" Reports that are dynamically produced directly from your live and current HMS data.
- **County/State Reports** - Aggregate data is used from various sources at the state level where you may choose your CHD or others or in some cases state over totals.
- **Performance Reports** - These may be a combination of data sources depending on the type of report but do not contain client specific data.
Click the “Enter Report Portal” Button above, and you will be brought to the following screen:

![Image of HMS Report Portal](image-url)

This gives you the list of all available reports as well as links to the help documents. Say you want to get a report on all services coded by your area service providers for QA/QI. You’d click the appropriate radio button above, and be brought to the screen below.
Here you would enter the date range you’re looking for, and either the program component, specific HMC Code, both, or neither. Results will look like the following, based on your search criteria:
Here we are shown all the services provided by a specific individual, broken out by codes. This can be helpful in determining how much or little a service provider is coding a certain action.

You can play around with the other reports to see what kind of data will be most useful to you in your monitoring of service providers.

**User Security**

**SETTING UP SECURITY QUESTIONS IN HMS**

You can set up security questions in HMS. By doing this you can unlock your HMS account if it is locked. Follow the instructions below to set up your security questions.

1. Click on User Security.

2. These questions will be given when the users attempt to change the verify code, update the security questions or unlock their account after a failed login. If there are no entries in the security questions the account will be locked.

3. The user must enter the current access and verify codes before they can enter or edit the security questions. Choose the blue button labeled “Authenticate” to continue.
4. There are 16 questions to choose from. The user is required to enter a minimum of 6 questions and answers. At the bottom of the screen the user can enter questions. The field is free text.

5. If a question is selected or entered an answer must be entered. The user is not required to enter the extra questions. Once completed choose save page to continue.

6. When the user attempts to access HMS and fails four times. The user will be given the opportunity to unlock the account or change the verify.
If there are no entries in the security questions the account will be locked. The user will receive the following screen. The user must then contact the HMS help desk at dhmssupport@doh.state.fl.us.

7. After four attempts the user will receive three options. The first is to unlock the account. The second is to change the verify and unlock the account. The third option is to return to the log on page and make no changes.

8. When the user chooses to unlock the account, the user is given three questions from the previously entered security questions. If all the answers are correct the user will be returned to the HMS login screen. The account will be unlocked.
9. If one of the three questions is incorrect the user will be locked out of HMS and must contact the System Administrator to release the lock.

10. When the user chooses to change the verify code and unlock the account, the user is given three questions from the previously entered security questions. If all the answers are correct the user will be returned to the HMS login screen. The user will be given the Change Verify screen.

11. Enter the verify two times and choose Done when complete. The user also has the option to return to the "Sign On" page. However, the account is still locked.
12. The account is locked after three failed attempts to login or if the security questions are not answered correctly. If your account is locked, contact the HMS help desk at dlhmssupport@doh.state.fl.us.

This comprises the Read-Only QA/QI system for Healthy Start staff. If you have any questions related to the system or login access, please email DLHMSSupport@doh.state.fl.us.