



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.

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Date of Birth: Medical Rec #	Client ID : Search HMIS
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Advanced Search

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

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Find HS Client Advanced Search Report Portal User Security Search for Healthy Start Client	Exit HMS
[Advanced Search Section]	
Program Component : All Program Component HMC Code : Search HMS	
Care Coordination Site : All Care Coordination Site	
CC Team Member : S	
Classification Level : All Levels	
C Care Plan Opened in Specified Date Range below	
Care Plan Closed in Specified Date Range below	
Start : Clear End : Clear	
O Active Care Plan Only	
O None of the Above	
Closure Reason : Select one Remove from List	1
	-

You can search by any 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:

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	22. Possible Client matche	s have been found		
If correct Client is shown, highlight care plan row and click	to choose to view that Cli	ent's data.		
Name Client ID	DOB	Family ID	Med Rec #	
Program - Service Site Care Coordinator	Open Date	Close Date	Classification	
DIRECT MATCH HAS BEEN FOUND FO	R CRITERIA ENTEREI):		-
BRONTE, EMILY EXB101982	10/19/1982	370042278-01	1111111111111	
27 BBB SERVICE SITE FEELGOOD, FRED F	01/14/2010		HSP LEVEL 3	
CHRISTMAS MERRY MXC122579	12/25/1979	370041856-01	101ABC427	
27 LEON COUNTY HEAL JONES, BRENDAM	10/01/2007	010041000-01	HSP LEVEL P	
27 SEVEN SITE JONES, BRENDAM	09/09/2007	09/30/2007	HSP LEVEL 3	
DUST PIXIE PXD102976	10/29/1976	370042137-01	6578902567	
27 LEON COUNTY HEAL JONES, BRANDY M	11/23/2009	0/00/210/01	HSP LEVEL 1	
27 LEON COUNTY HEAL JONES, BRANDY M	07/14/2009	08/24/2000	HSP LEVEL 2	
	01114/2003	00/24/2009		
	02/10/1959	370041492-02	PENDING	

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.

Services



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

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Services Care Plans Old Assessme	nts Initial Assessments Initial Contact	Progress Notes Outcomes Exit
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	Healthy Start Data Report	Print Print
DUST,PIXIE DOB: 10	/29/1976 Client ID: PXD-10-2976 MRN: 657	8902567 Race: OTHER
Mailing Address:	345 SLEPPY HOLLOW LANE, TALLAHASSEE, FL 3	2308 Phone:
ASSESSMENT Data	between 0//14/2009 and 08/13/2009	Expand/Collapse Sections
□ Assessment Type : HS IA - PRENATAL/W	VOMAN Assessment Date : 07/15/2009 Assess	ed By : JONES,BRANDY M
CATECORY	INDICATOR	DETAIL ANSWER
Contact	01. Method of contact	Face-to-face
Family Concerns	04. Davcare	Yes
Family Resources	01. Father involvement	Yes
Family Resources	02. Access to transportation	Yes
Family Resources	03. Stable employment	Yes
Family Resources	04. Adequate housing	Yes
Family Resources	05. Social support network	Yes
Comments :	Clients husband is very supportive and excited	about the new baby.
Family Resources	08. Access to health care	Yes
Comments :	Client has BCBS through her employeer.	
Done		Succel intranet
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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

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				Hypere	mesis(morni	ng sickness) :	Yes					
					_	Comments :						
					Fo	od Allergies :	Yes					
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					MIG	Comments :	5					-

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

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			INFO	RMED,MISS [Mailing /	OOB: 10/19/19 Address: 4321	82 Client NOWHERE ST	ID: MXI-10-1	982 MRN: 10 ASSEE, FL 32399	1ABC550 Race Phone:	: WHITE	
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		н	Hea ealthy Sta	Ithy Start Care C rt Care Coordina	coordinator : tor Address :	REEVES,AL	ОАМ Ү				
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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

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				Mailing Addr	ess: 345 SLEPPY HOL	LOW LANE, TAL	LAHASSEE, FL 32	308 Phone:	omen	
		Prog C	ram com Observatio	ponent : 27 on date : 09/28//	2009 S PRANDY M					-
	Observed by: JONES,BRANDY M Progress note: Healthy Start coding provides information on types and quantities of services at the county and state levels. In the aggregate, Healthy Start codes can show the numbers of people who are at risk, who are in need of particular intensities of service, and who are receiving services that are Healthy Start funded. The coding of services also provides the opportunity to link									
				the e	ffective impleme	entation and	impact of Hea	lthy Start set	rder to evalu rvices.	
				Coding ident: women	g is critical fo ifies services p and infants end	or monitoring provided whice colled in the	the Healthy h are reimbur Healthy Star	Start program sable by Media t system.	. Coding caid for elig	ible
				The He and t	ealth Management ime data at the	t System (HMS program comp) is used to onent level f	collect public or reporting (c health serv data. At the	rice state-

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

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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:

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	Sea Sea	rch for Healthy	Start Client	
Last Name :		First	Name :	
Date of Birth:	Medical Rec	# : Cli	ent ID :	Search HMS
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After clicking the link you will be brought to the following screen:

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😪 🛠 🔡 🔹 🎉 Health Managemen 🌾 TRAINING17 HMS A 🌾 HMS Report Por 🗙 🔰 🏠 👻 📾 👻 🔂 Page 🔹 🎯	Tools + »						
Cancel Page Report Portal Access							
Enter Report Portal							
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:							
 Dash Board - 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 overall totals. Performance Reports - These may be a combination of data sources dependent on the type of report but do not contain clie specific data. 	ent						

Click the "Enter Report Portal" Button above, and you will be brought to the following screen:



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.

Selection Pages - Florida Department of Health							
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FLORIDA DEPARTMENT OF HEALTH							
Services County : Leo	by Provider						
Service Start Date							
Service End Date							
Select Program Component	22: HEALTHY START INTERCONCEPTION (NON CHD) 26: HEALTHY START PRENATAL (NON-CHD) 27: HEALTHY START PRENATAL (CHD)						
Select HMCCode	Select All O000: DIRECT SERV TIME 01A1: DTP 1ST DOSE 01A2: DTP 2ND DOSE						
GetF	Report	•					

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:

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							Selected Program	Codes : 27,31		
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	BAKE	ER,BC	DBB	YB						
				3314				1		
				3320				4		
	Total Services by Provider - BAKER,BOBBY B 5									
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				3102				1		
				3103				2		
				3111				7		
				3113				10		
				3202				1		
				3215				1		
				6620				2		
				8004				1		
				8008				1		
				8024				1		
				Total Ser	vices by Provider -	BARNES, SANDY M		28	-	

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.

		\frown		
Find HS Client Advanced Search	Report Portal	User Security		Exit HMS
		\smile		
	Search for Healthy Start Client			
Last Name :	First Name :			
Date of Birth:	Medical Rec # : Client ID :		Search HMS	

2. These questions will be given when the users attempts 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.

Find Client	Client Info	Scheduling	Services	Billing	Choose a HMS module 💌	Exit HMS
			* * * NO ACTIV	E CLIENT * * *		
			** Please C	Contact your Local Sys	tem Administrator for HMS Questions and Comments. **	
User Secu	irity					
E Hear Sacurity						
→ Update Verify C	ode					
Maintain Securi	ty Questions 🛛 🖛 🚽 🚽					

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.

Cancel Page	Authentication
	To authenticate enter your login Access and Verify codes and press 'Authenticate':
	Access *
	Verify *
	Authenticate

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.

Cancel Updat	Update Security Questions/Answers						
Instructions : You are required to choose and answer a minimum of 6 questions.							
	Security Questions/Answers						
Question		Answer					
Choose Question							
Choose Question							
IN WHAT YEAR DID YOU BUY YOUR FIRST CAR	1						
WHAT CITY WERE YOU BORN IN							
WHAT IS THE NAME OF YOUR GRADUATION HIGH SCHOOL							
WHAT IS YOUR CURRENT PETS NAME		-					
WHAT IS YOUR DATE OF BIRTH							
WHAT IS YOUR FATHERS FIRST NAME							
WHAT IS YOUR FAVORITE NUMBER							
WHAT IS YOUR HOME ADDRESS ZIP CODE							
WHAT IS YOUR MOST FAVORITE BOOK							
WHAT IS YOUR MOST FAVORITE MOVIE							
WHAT IS YOUR MOST FAVORITE SONG							
WHAT IS YOUR MOTHERS FIRST NAME							
WHAT KIND OF ANIMAL WAS YOUR FIRST PET (DOG, CAT, FISH, LIZARD FTC)	Your Questions/Answers						
WHAT WAS THE COLOR OF YOU'R EIRST CAR							
Create Your Own Question Below	1	Answer Your Question					

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.

Cancel U U	Answers	Save Page		
Instructions :				
You are required to choose and answer a minimum of 6 questions. The 6 questions may include 2 of your own.				
t				
		Security Questions/Answers		
Question		Security questions/Answers	Answer	
IN WHAT YEAR DID YOU BUY YOUR FIRST CAR	•		1970	
WHAT CITY WERE YOU BORN IN	•		JACKSONVILLE	
WHAT IS YOUR CURRENT PETS NAME	•		LUCY	
WHAT IS THE NAME OF YOUR GRADUATION HIGH SCHOOL	•	<u> </u>	PAXON	
WHAT IS YOUR FATHERS FIRST NAME	•		JACK	
WHAT IS YOUR FAVORITE COLOR	•		BLUE	
Choose Question	•			
Choose Question	•			
Choose Question	•			
Choose Question	•			
		Your Questions/Answers		
Create Your Own Question Below			Answer Your Question	
WHAT YEAR DID HPE MOVE TO SOUTHWOOD			1999	
WHAT IS YOUR FAVORITE ICE CREAM]		VANILLA	

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.

DEPARTMENT OF HEALTH									
	HMS Health Management Syste	m		Log On Access * Verify *					
Contact your CHD Sys Admin for access. Application is best viewed with 800 X 600 screen resolution.									
My Florida	Florida SHOTS	FWVSS Food, Water, and Vector-borne Disease Survellance System FWVSS	HMS Information						

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 <u>dlhmssupport@doh.state.fl.us</u>.



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.

Identifiaction Verification
For identification verification please answer the 3 questions below:
WHAT IS YOUR CURRENT PETS NAME : LUCY
WHAT IS THE NAME OF YOUR GRADUATION HIGH SCHOOL : PAXON
WHAT YEAR DID HPE MOVE TO SOUTHWOOD :1999
Cancel Done

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.

Or click No Thanks to return to sign on page.	ſ								
Change Verify (Password)									
New Verify *	1								
Confirm New Verify *									
Cancel Done									

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 <u>dlhmssupport@doh.state.fl.us</u>.

Your user account has been locked due to excess login attempts. You do not have privileges to unlock your account or to reset password. Please Contact your System Admin. Press any key to continue.

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 <u>DLHMSSupport@doh.state.fl.us</u>.

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