Release

5.1

GROUPWARE TECHNOLOGIES, INC.

Provide® Enterprise

Provide® Enterprise

User Guide

User Guide

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Chapter

1

Introduction

Provide® Enterprise software is a comprehensive database system designed to facilitate coordinated care management for clients with chronic care needs. This guide is designed to assist care management staffs in the allied health professions learn to use the Provide® Enterprise software.

Chapter 2

Navigating Provide® Enterprise

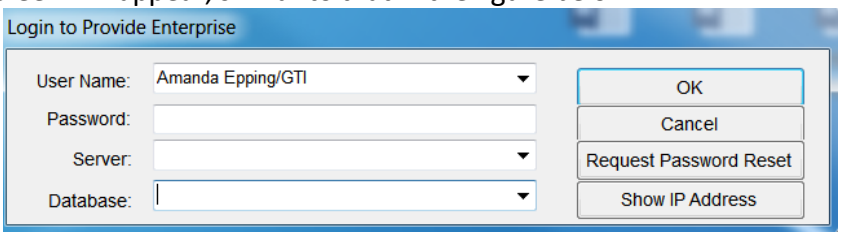
Prior to accessing the Provide® Enterprise database for the first time, the system will need to be installed on your computer. For Installation instructions, please see the Provide® Enterprise Installation Guide.

Logging into Provide® Enterprise

Any time you are going to log into Provide® Enterprise, you will need to make sure that your computer is connected to the Internet. The first time you log in, you will receive messages that you will not see at any other time during your use of the system. These messages are discussed in the Provide® Enterprise Installation Guide.

- To launch Provide® Enterprise, you will want to double click with your mouse on the Provide® Enterprise Client Icon that has been placed on your Desktop during installation (similar to that in the figure below).

- The Log In Screen will appear, similar to that in the figure below:



- Enter the User Name, Password, Server and Database provided to you by the GTI Technical Support Team or your System Administrator. NOTE: After you have logged on for the first time, the User name, Server and Database will be automatically saved in the login dialog box. You will only need to re-enter your password.

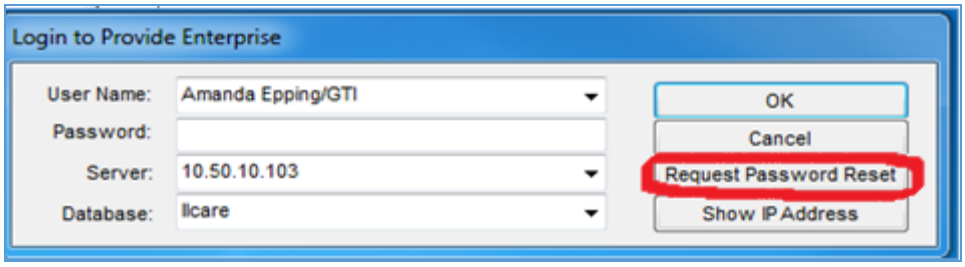
- Click on the OK button to log on to the system.

As Provide® Enterprise is loading you will notice a window similar to the following on your screen:

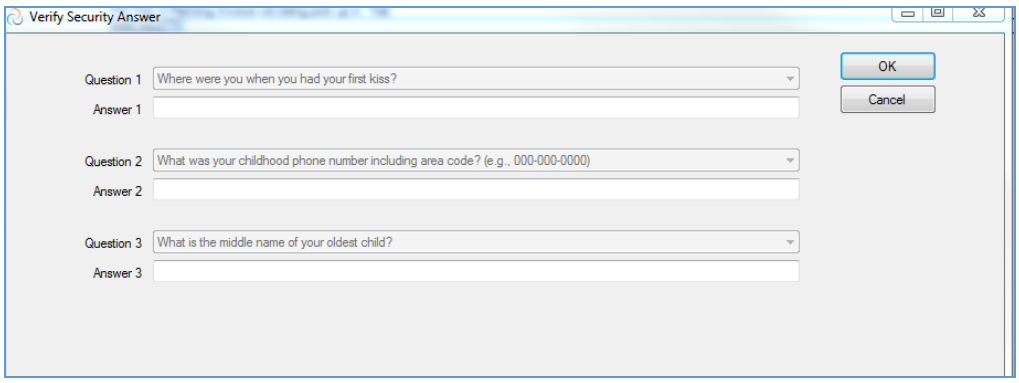
As a security measure, Provide® Enterprise will automatically lock your account after three consecutive failed logins. If this happens, you will need to contact your Provide® Enterprise Administrator to reset your account or you can click on Request Password Reset and answer security questions to re-set your password.

Request Password Reset

After you have your security questions (see "Setting Your Security Question" section below for detailed direction on establishing your security questions) you can request a password reset when logging-in by clicking on "Request Password Reset."

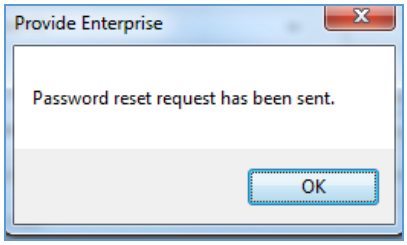


- After clicking on "Request Password Reset," your security questions will appear for you to answer.

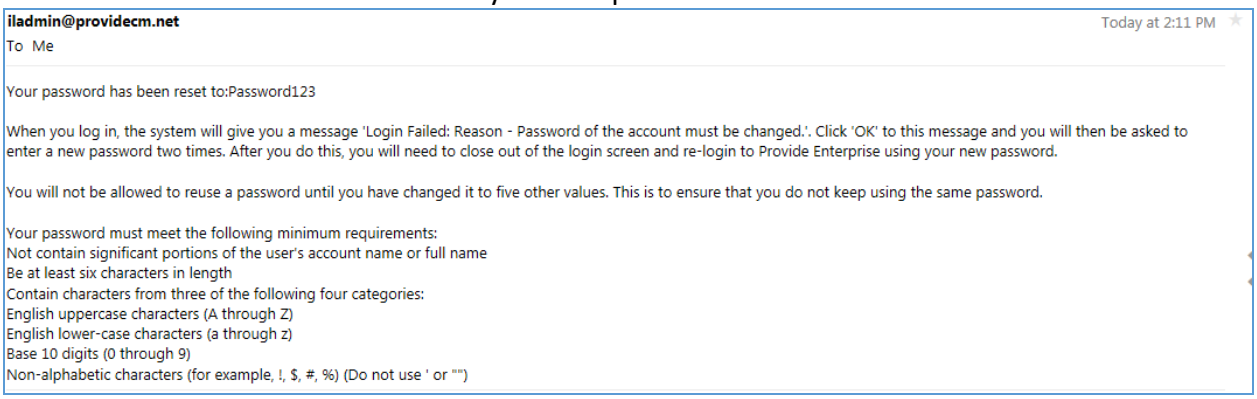


- After you answer the questions, click on "OK."

- After clicking “OK.” You will receive the message below that a password reset request has been sent your email address.

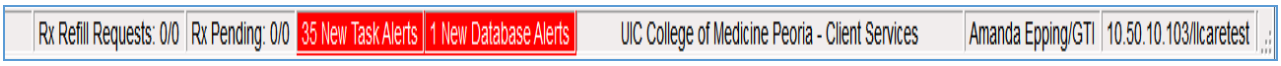


- You will then receive an email with your new password like below:



Status Bar

An example of the Status Bar appears is below. This is variable for each customer and the user’s preferences, security, and the user’s customization.



Rx Refill Request: The number of Prescription Refill Requests you have.

Rx Pending: The number of Prescriptions that are pending your authorization.

New Task Alerts: The number of task alerts that you have. (This is based on your selection in your Task Alert View). This will highlighted red until you view the alerts.

New Database Alerts: The new database alerts for you. This will be highlighted red until you view the database alert.

User Security: This is your current user security. (In the example above: UIC College of Medicine Peoria- Client Services).

User Name: This is your user name when logging into Provide. (In the example above: Amanda Epping/GTI).

Database: This is the database you are currently logged into. (In the example above: 10.50.10.103/ilcaretest).

Windows Toolbar

If you do not have a Start-up Action defined when you log into Provide® Enterprise for the first time, all you will see is the Windows Toolbar, similar to the following. By clicking on each of the menu choices you will have different choices for configuring, navigating or viewing information. Some of the more important menu choices will be discussed below:

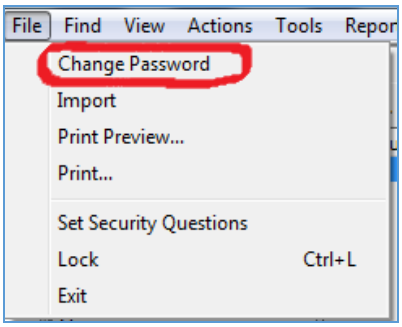
File Menu

The File Menu options are outlined below.

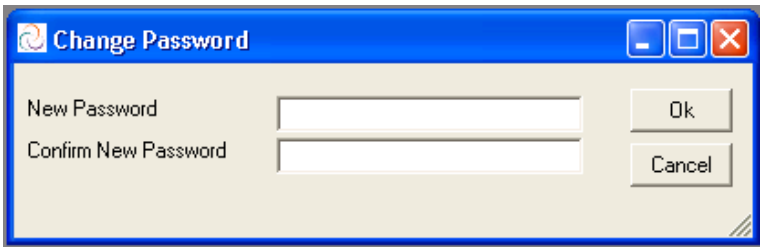
Change Password

You can change your password in Provide® Enterprise by completing the following steps.

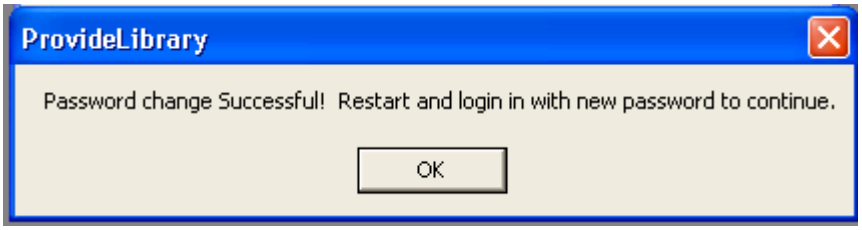
- From your Windows menu choose "File" and then "Change Password" as shown below.



- The following window will appear:



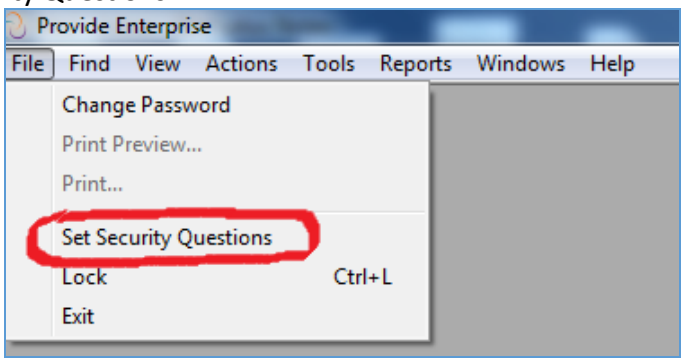
- Type your new password two times.
- Next, click on the button. A message similar to the one in the figure below will appear:



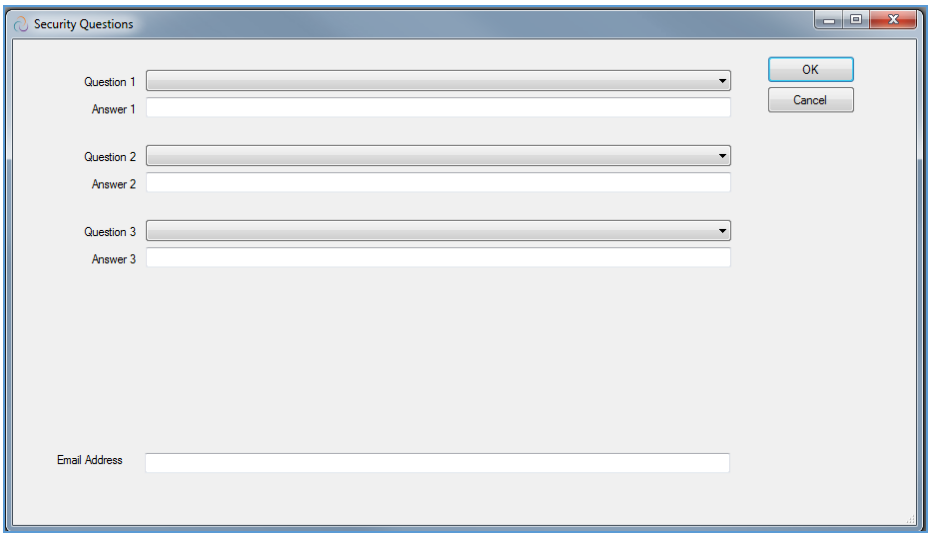
- Next, click on the button. Your Provide® Enterprise software will automatically be closed and you will need to log back in using the new password.

Setting Your Security Question

- To set your security questions in Provide, when you are in the system, click on File – Set-Security Questions.



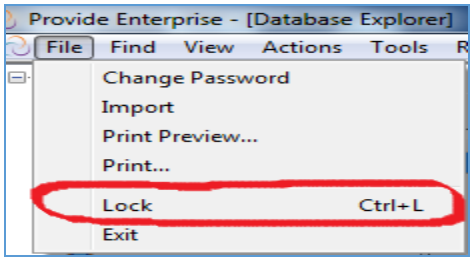
- Select security questions and corresponding answers. You also will need to enter your email address.



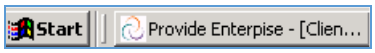
- After the information, click "OK." You may set or re-set your security questions at any time.

Lock

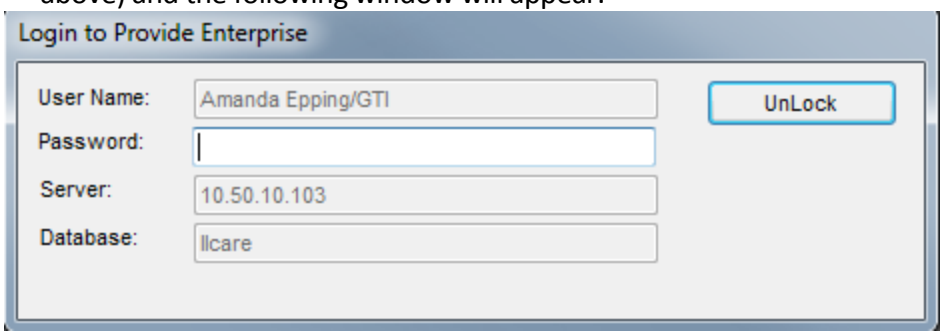
- If you wish to lock Provide® Enterprise in order to prevent anyone else from accessing your data when you are away from your computer, please follow these steps:
- From your Windows menu choose "File" and then "Lock" as shown below.



- You will notice that Provide® Enterprise will immediately be minimized.



- Click on the Provide® Enterprise Window on your Windows Taskbar (example shown above) and the following window will appear:



- Type in your password, and then click on the

button. You will be brought back to the same screen you were on at the time that you locked Provide® Enterprise.

Print

- Using the File-Print command will print the document you are viewing or the view you have open. You may also select File – Print Preview to view a preview of what has been selected to be printed before actually printing the document.

Exit

- Using the File – Exit command will close Provide® Enterprise and take you back to your Windows Desktop.

- When you click on the File – Exit command you will see the following window appear on your screen:

- Select

to exit or

to continue working in Provide® Enterprise.

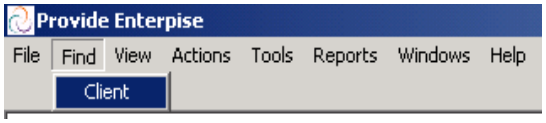
Find Menu

The Find Menu in Provide® Enterprise is customized for every Provide® Enterprise implementation and the list of options can be variable based on the user rights. The "Find Client" below is one example of how a "Find" sort works.

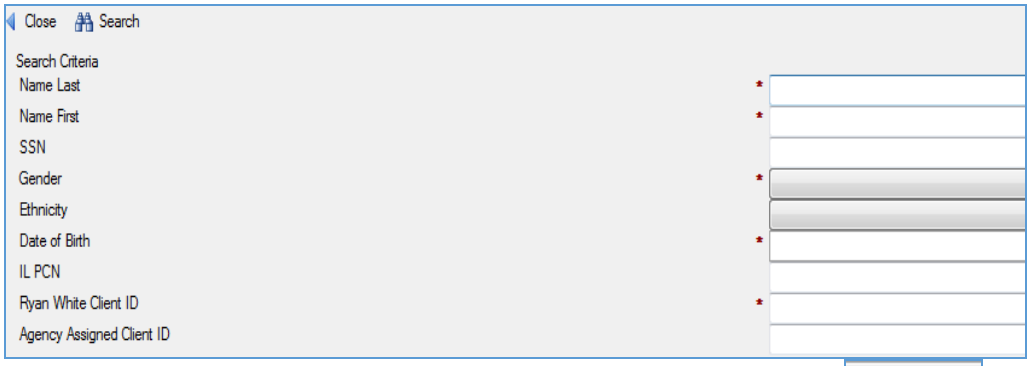
Find Client

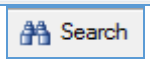
- You can bring up the Find - Client tool in Provide® Enterprise by completing the following steps.

- From your Windows menu choose "Find" and then "Client" as the following shows.

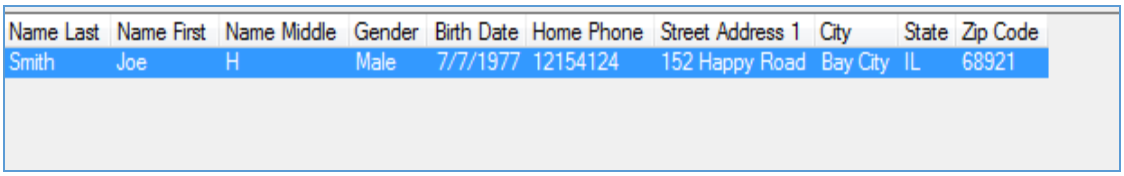


- A window similar to the one below will appear:

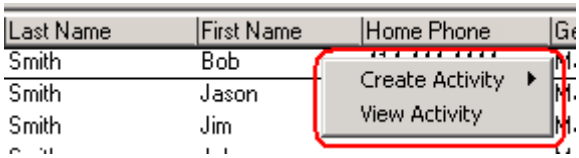


- Type in one or more of the search fields and then click on the 

button. You can enter an asterisk (*) as a wild card to do more general searches. If multiple fields are entered, only those client records that match all of the values will be found.
- After the search is completed, the Client records that match the search criteria are listed and displayed below the search dialog in a view like the one below:



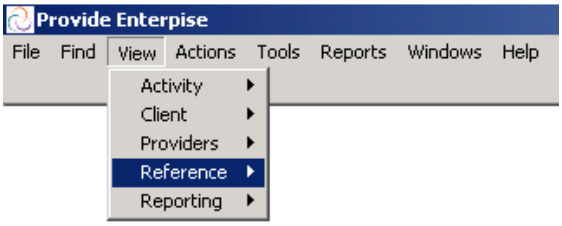
- Simply double click on the record that you wish to view in order to open the desired Client Profile.
- You can also right mouse click on the client and either "Create Activity" or "View Activity" from the view. You will see a box appear similar to the one below:



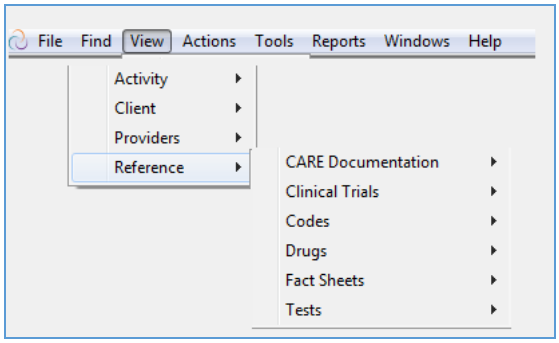
View Menu

The View Menu allows you to select a view of records to be displayed. Each Provide® Enterprise customer has the ability to define their own views. Any time there is a in a view, you can expand the sub categories that are defined as a part of that particular view.

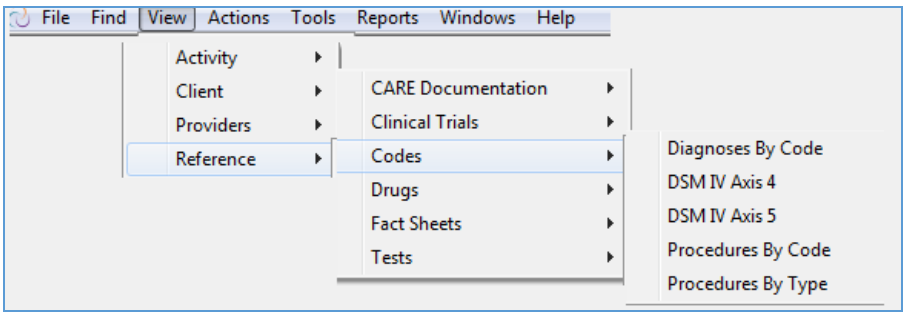
Notice what happens in the example below when picking the "Reference" view:



The view expands to include a further break down of the Reference category.



When you click on "Codes" the view expands to include a further break down of the "Codes" category.

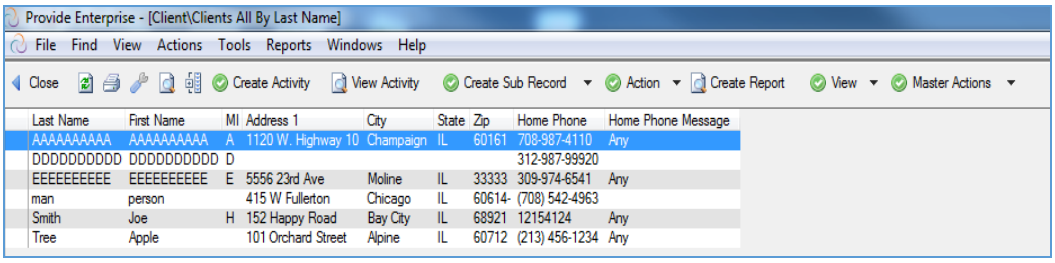


You now can see that there are five different "Codes" views to choose from. Click on the one that you wish to display. Once the view has opened, you can double click on any record that you wish to open.

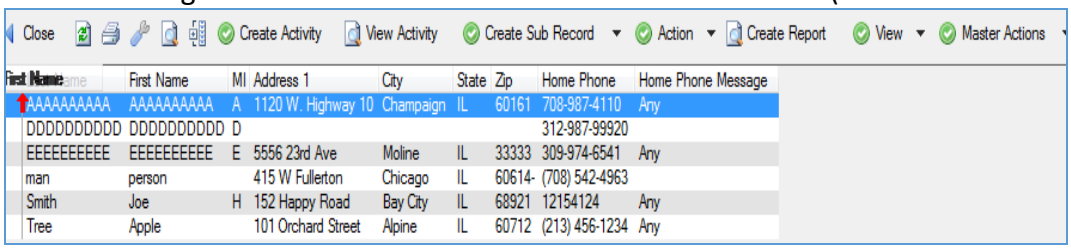
Changing/Sorting Views

- In Provide® Enterprise, you can change the how views are displayed to you. You can sort any views by simply dragging columns depending if you want to view columns in a specific order.

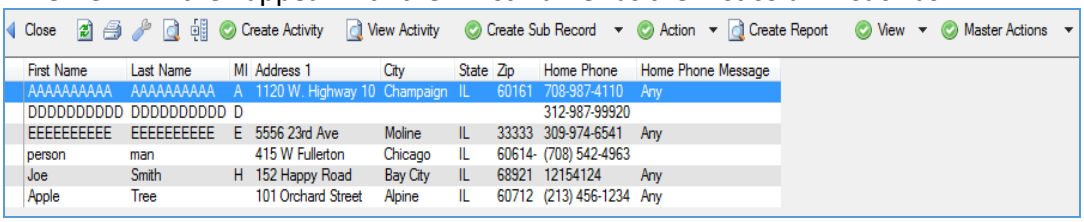
- For example, if you want to display a client list by last name it would appear:



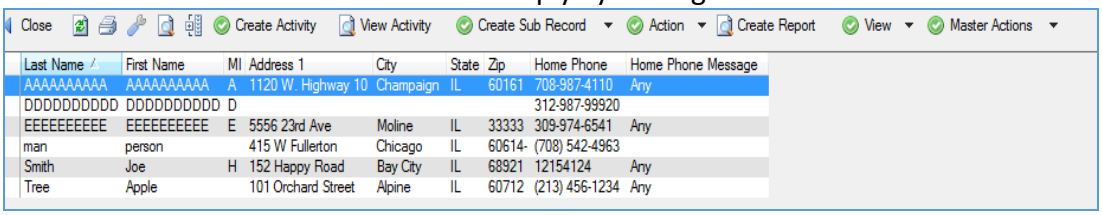
- However, if you want to display your client list by first name, you would click on the first name and drag it in front of the last name column. As seen below: (notice the red arrow)



- The view will then appear with the "First Name" as the first column such as:

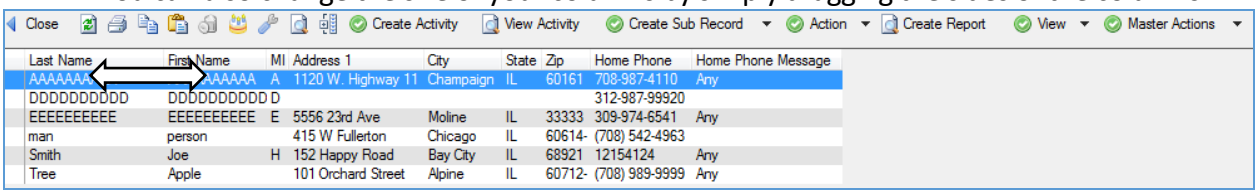


- You are also able to sort each column simply by clicking on the column:

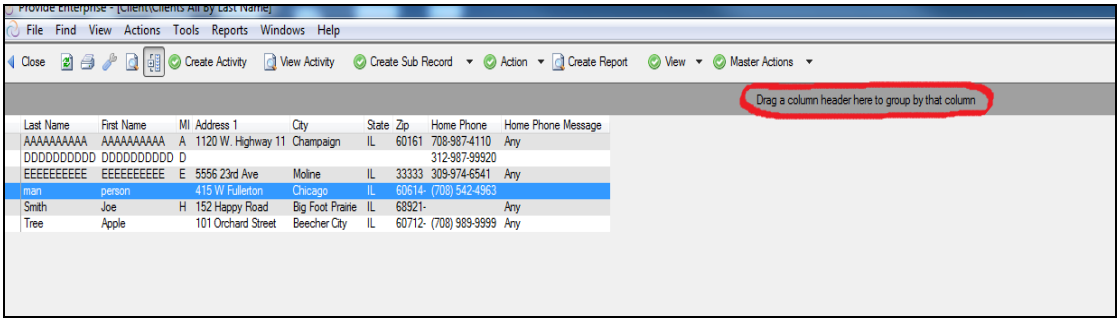


- A will be displayed in the column indicating the direction of the sort. In the example above, the last name is sorted by descending alphabetical order (sort A→Z). A would indicate ascending order (sort Z→A). Clicking one time will give you descending order and clicking twice will give you ascending order.

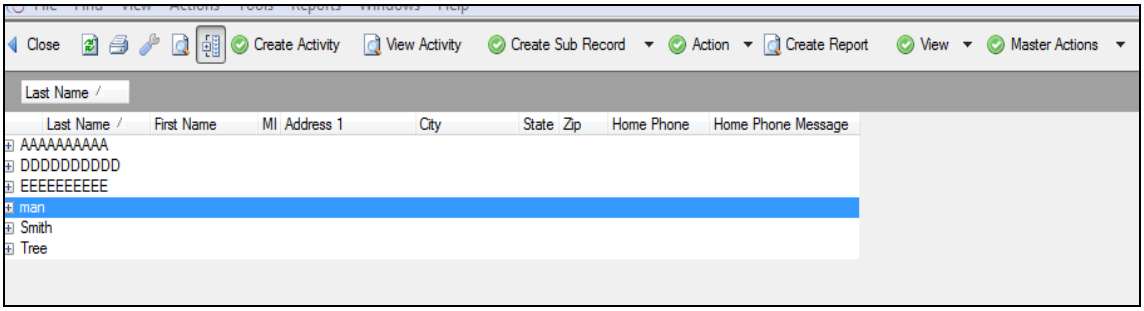
- You can also change the size of your columns by simply dragging the sides of the columns.



- In any view that you are attempting to search, you can also group the view by clicking on on top of the page. After you click on the icon, your screen will appear like the one below. You will see the screen below and "Drag a column header here to group by that column."



- Drag the column header to the designated area to group by that view. For example, if you want to group your view by last name, you can drag the column "Last Name" into the box as seen below:

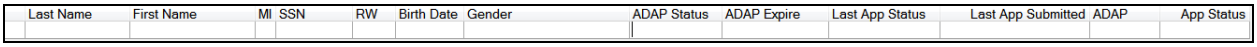


- To "Un-Group" your view, drag the column out of the designated area. You can then click on the on the button again to remove the filtering column header gray box from your view.

- These sorting/grouping options are available is all views. When you log-off of Provide, the views will return to their default; therefore; you will need to re-sort your views.

Filtering Views

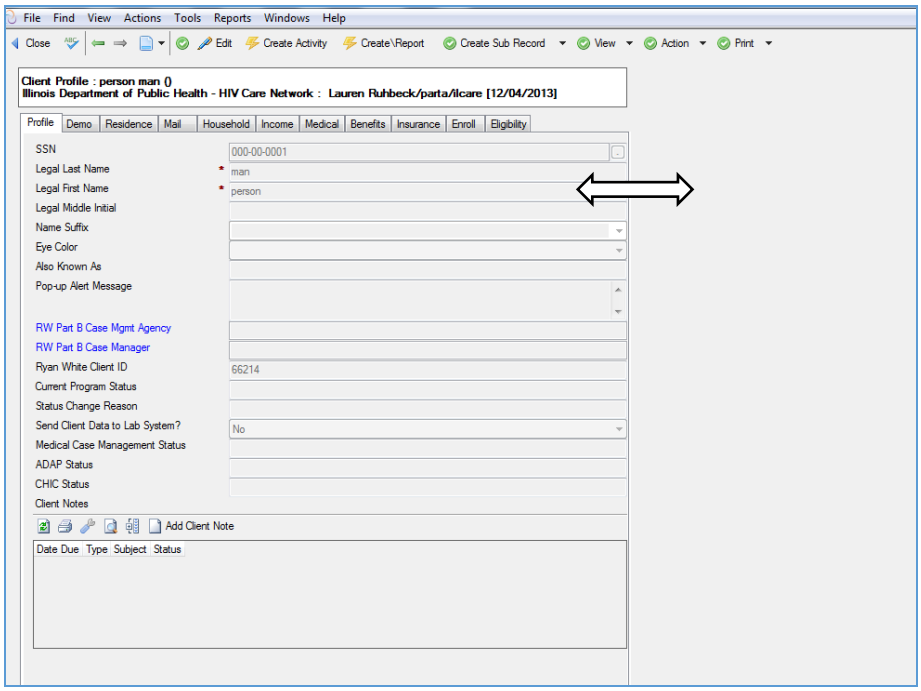
- To filter a view, click on to show the filter bar. A bar will appear on top of your screen similar to the one below depending on the view you are currently viewing:



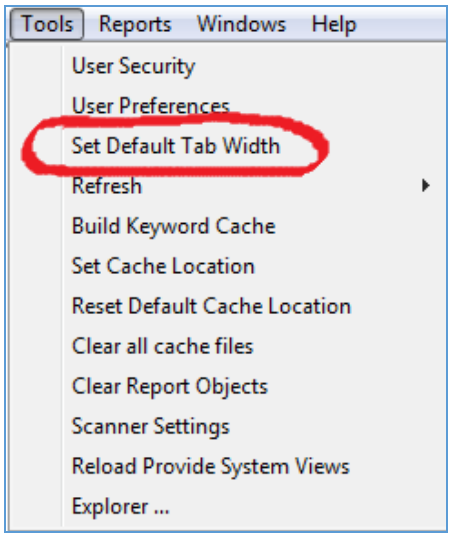
- In any of the boxes, you may filter your view. For example, if you would like to view all of your clients that are "Open" to ADAP, you can simply enter "O" in the ADAP Status box. This will filter your view to only see your clients that are open to ADAP. To remove the view filter, simply delete the text you entered (in the example above, delete the "O"). If you do not want to see the filter bar, click on to remove the filtering bar from your view.

Adjusting Tab Sizes

- You can also change the size of your tabs by simply dragging the side the tab.

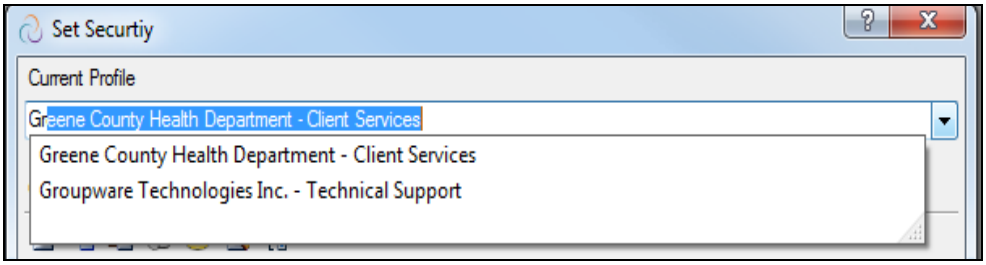


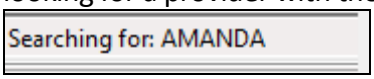
- Once you have the tabs the size you would like, you can set the size as your default tab size by clicking on Tools – Set Default Tab Width. This will save your default tab width.



Type Ahead in Views

- In any view that you are attempting to search, you can "Type Ahead" to help increase the speed of your searching. These filtering options are available in all views. When you log-off of Provide, the views will return to their default; therefore; you will need to re-sort your views. In the example below, if you were searching for Groupware Technologies, you could start typing "GR" and the choices will start to load for you.



- In any field, you may type ahead to assist in your search. When you are typing ahead on the bottom of the screen you will see what you are typing/searching for example if you were looking for a provider with the first name of Amanda, and typed "Amanda" it will show: 

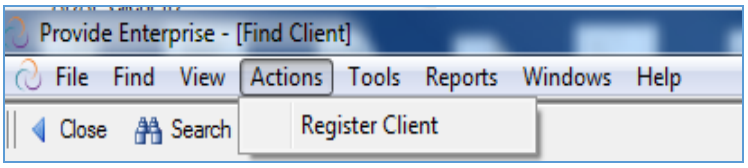
on the bottom of the screen and jump to "Amanda" on the provider list.

Actions Menu

There is one available action here that is used to register a new client in Provide® Enterprise.

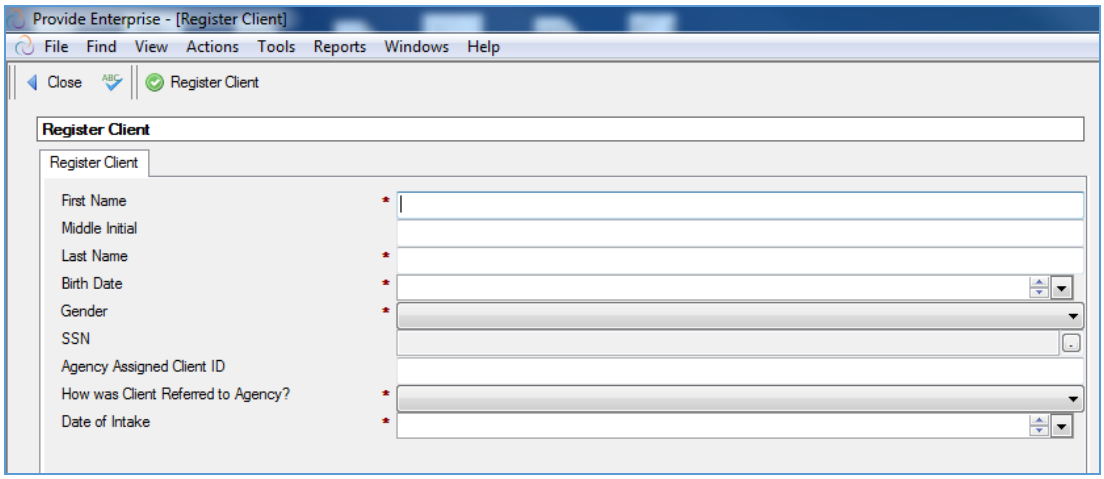
Register Client

- In order to register a client in Provide® Enterprise go to the Windows Toolbar, select "Actions" and then "Register Client".



- If your current user profile does not allow you to register clients, you will get the following error:

- If your current user profile does allow you to register clients, a window similar to the one below will appear on your screen:



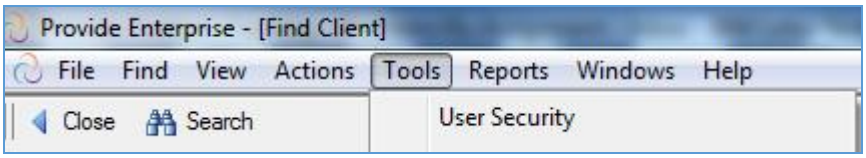
NOTE: This screen will be discussed in more detail later in this guide. The fields used in this form are customizable and may differ from agency to agency. For demonstration purposes we will look at a *Register Client* form that is similar to the one that is commonly used in the standard version of Provide® Enterprise. Fields marked with a red asterisk (*) are required.

Tools Menu

From the Tools Menu, you can set user preferences or refresh design elements.

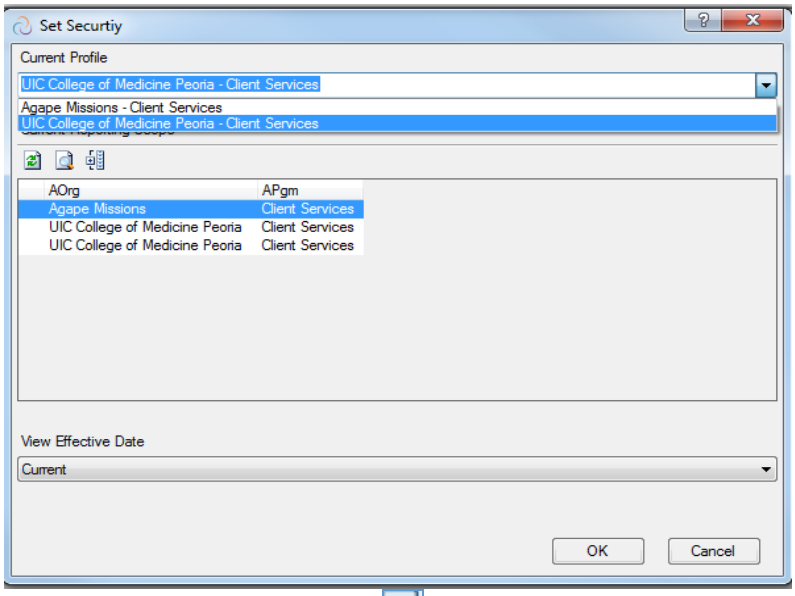
Set-Security

- Provide® Enterprise allows for a variety of user preferences to be set. Click on Tools and click on User Security.



Current Profile

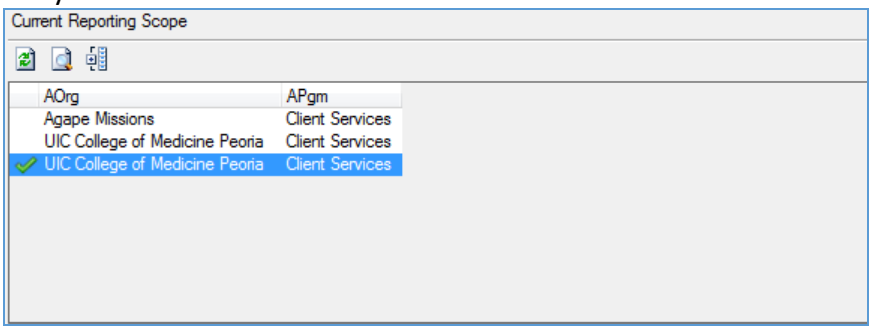
- The Current Profile box allows you to select and/or change the User Profile that you wish to enter and/or view information from.



- To change your current profile, click on the and then select the profile.
- The Set-Security Dialog Box consists of four different tabs, which will be discussed below.

Current Reporting Scope

- The Current Reporting Scope reflects the User Profiles that your System Administrator has defined for you.

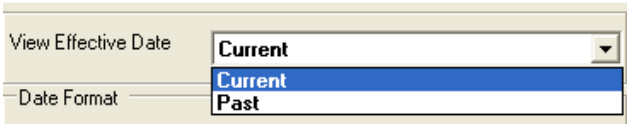


- The Current Reporting Scope reflects the User Profiles that your System Administrator has defined for you. To select reporting scopes, click on the scope and a green check mark will placed next to the scope selection.

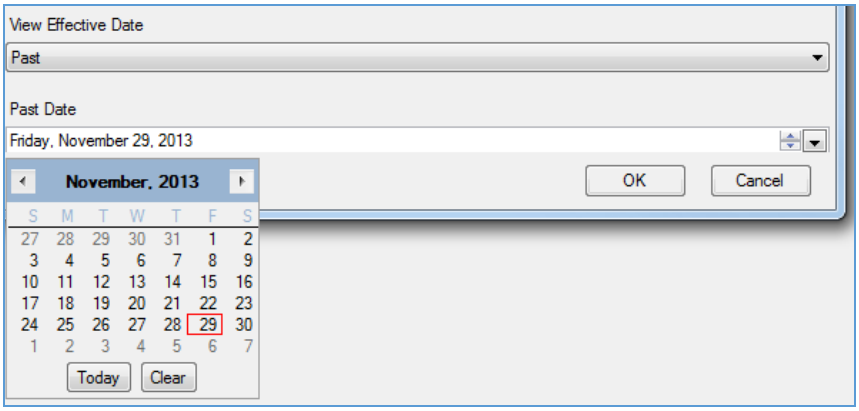
View Effective Date

- The View Effective Date preference allows you to select how you want to view client information – Current records or records as of a particular date range in the past.

- To change the View Effective Date, follow these steps:
  - Click on the ▼ next to the View Effective Date field. Your two choices can be seen in the following figure.



  - If you select "Past", an additional field (seen in the figure below) will appear to allow you to select the date that you wish to view information from.



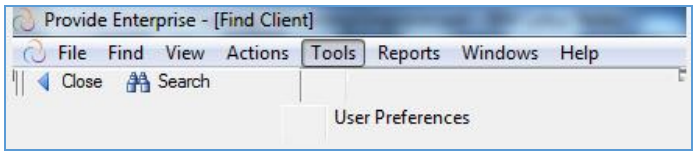
  - Simply click on the appropriate date in the calendar. To scroll between months, click on the ◀ or ▶ buttons.

Preferences

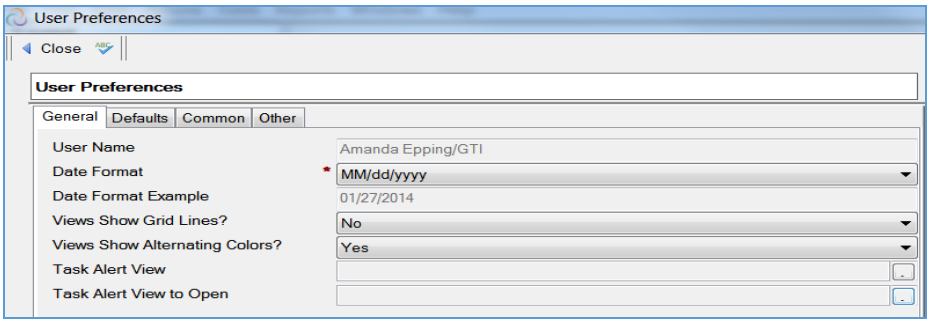
- Provide® Enterprise allows for a variety of user preferences to be set.

Opening the User Preferences Dialog

- To open the User Preferences Dialog box in Provide® Enterprise, follow the steps below: From the Windows Toolbar (in the figure below), select "Tools" and then " User Preferences".



- This will activate the User Preferences Dialog seen in the figure below:



- The User Preferences Dialog Box consists of four different tabs, which will be discussed below.

General Tab

- The General Tab of the User Preferences consists of the most basic preferences you can define in Provide® Enterprise.

Date Format

- The Date Format user preference allows you to select the format of all date fields within the Provide® Enterprise system.

- To change your default Date Format, simply follow these steps:

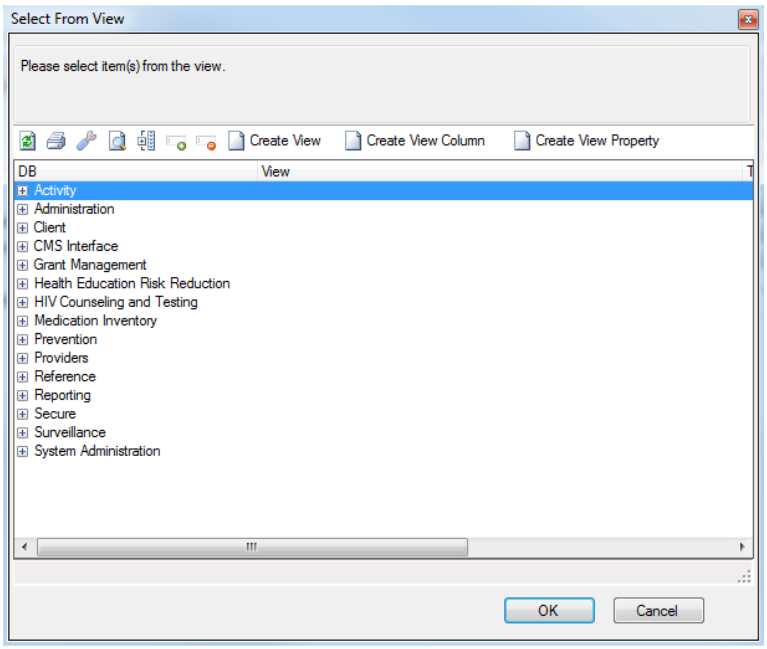
Single click in the button on the date format line and select the date format you wish to use.

Display: View Grid Lines/Alternating Colors

- You can to select to view grid lines and alternate colors within the Provide® Enterprise system. Select Yes or NO for each of these preferences.

Task Alert View

- The "Task Alert View" is the view that Provide uses to determine if task alerts should be sent to you. You can select your Task Alerts View. Click on the and the below window will be displayed. Click on the to expand the options under each category.



- To select a particular task alert view, double click on the particular view. Double click the Task Alert View to select that view.

Task Alert View to Open

- The "Task Alert View To Open" is the view that will open when you click on the new alert that will be highlighted the color red in your status bar. You can select your Task Alerts View to Open. Click on the and a new window will be displayed. Click on the to expand the options under each category.

Defaults Tab

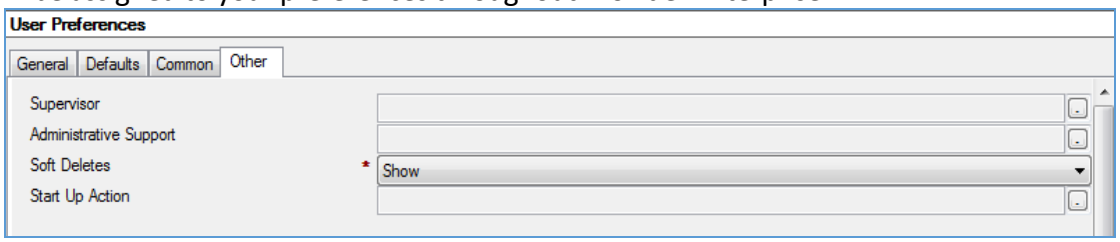
- The Defaults Tab of the User Preferences allows you to define some of the values that will default in various activity records throughout Provide® Enterprise. You can define a default Diagnosis, Diagnosis Description, Facility, Provider, Superbill and Appointment Length. These default values are then used to populate fields on Activity records you create. For example, if you set the default Appointment Length to 15 minutes, every time you create an Appointment the end time will default to15 minutes after the start time. This is variable by customer.

Common Tab

- The Common Tab of the User Preferences allows you to define some of the values that will default in various activity records throughout the system. You can define a common list of Diagnosis, Procedures, Providers, Facilities, Medical Groups, Organizations, Drugs and Tests. This is variable by customer.

Other Tab

The Other Tab of the User Preferences allows you to define some additional values that will be assigned to your preferences throughout Provide® Enterprise.

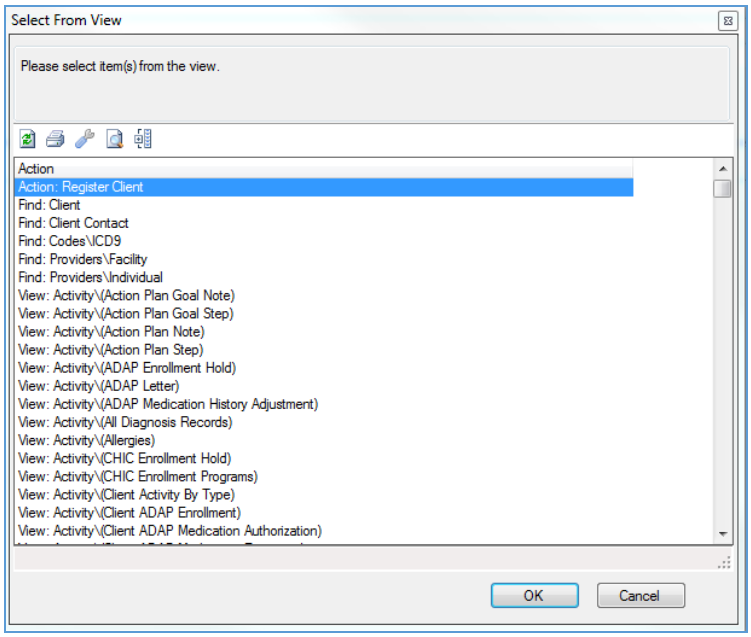


- **Supervisor**: This field allows you to define your Supervisor from the Provider's List.
- **Administrative Support**: This field allows you to define your Administrative Support person from the Provider's list.
- **Show/Hide Soft Deletes**: This field allows you to specify whether or not you want to see deleted records when reviewing a Client Chart.
- **Startup Action**: This field allows you to define what happens automatically when you launch the Provide® Enterprise Client. The options are "Find Client", Action "Register Client" or even open a view each time that you start up Provide® Enterprise.
- This is variable by customer.

Defining a Startup Action

The Startup Action will be your first view when you first log into Provide. To define a Startup Action, follow the steps below:

- Click on the button on the Start-up Action. A window similar to the following will appear:

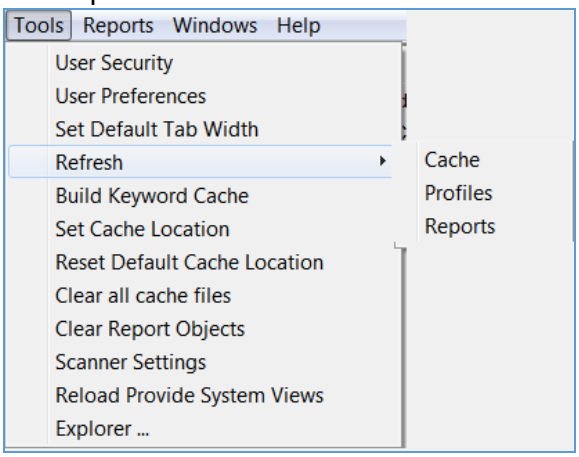


- Scroll up and down the list as necessary and double click on an Action or a View that you wish to have opened each time you launch Provide® Enterprise. Click on the "OK" button and the next time you launch the system the setting will be applied.

Refresh

- Provide® Enterprise allows you to refresh certain design elements without having to log out of the application.

- If the System Administrator has made changes to your Data Dictionary, Keywords, Program Profiles, Reports or available Views while you have been logged into Provide® Enterprise, you can update them instantly by clicking on the Tools - Refresh menu and selecting one of the options from the list.



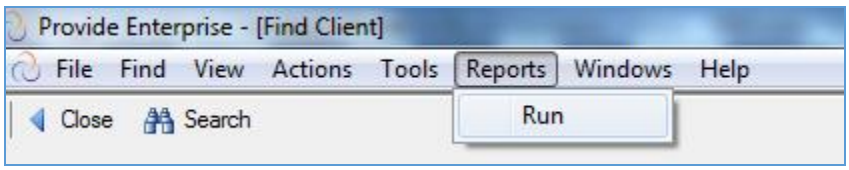
- After you have made a selection you will see the spinning blue circle icon while the design element is updating. Each time you log into Provide® Enterprise these design elements are automatically updated for you.

Reports Menu

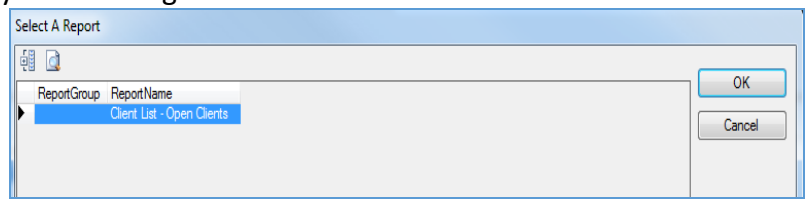
From the Reports Menu you can either run a report or manage your report objects. Each of these items is discussed below.

Run Reports

- Using the "Run" selection will allow you to run any "Stand Alone" reports that have been added to your system. To do this, follow these steps:
- Select the Reports - Run menu as shown below:



- If you have reports that are available to be run as a "Stand Alone" report, they will be displayed in a dialog box similar the one shown below:



  - Simply click on the Report name and then click on the

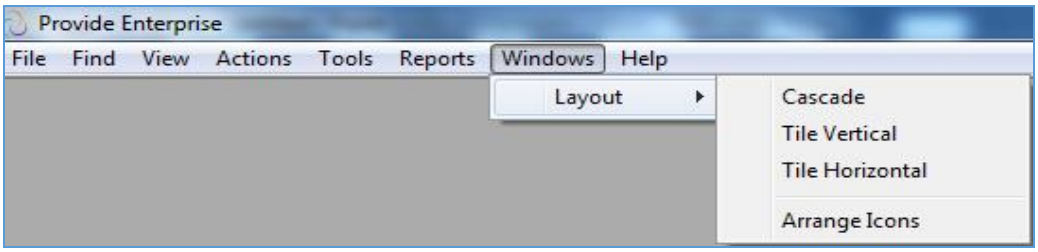
button to run the report.

Windows Menu

Clicking on the Windows Menu will present a few different options for you.

Layout Selection

- The "Layout Selection" choice of the Windows Menu, will allow you to select how you wish to view the open windows on your screen.



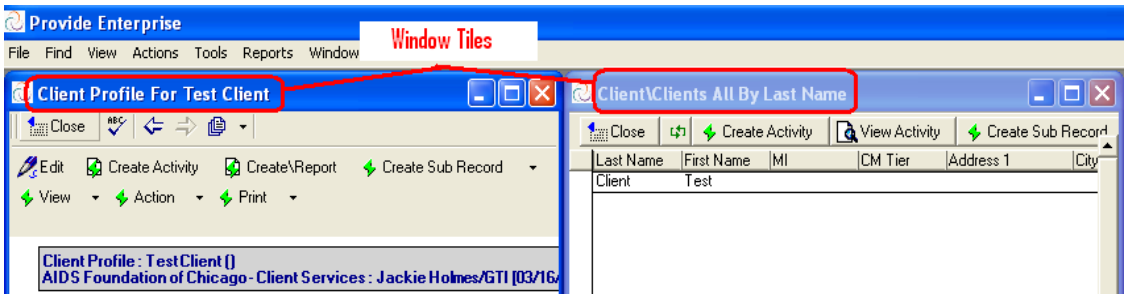
Cascading Windows

If you select "Cascade" from the Layout Selection menu, all of the windows you have open in Provide® Enterprise will be opened, one on top of each other, and you will be able to see the title of each open window at the top of that window. This can be seen in the figure below:

Switching between windows is as simple as clicking on the window you want to view.

Vertically Tiling Windows

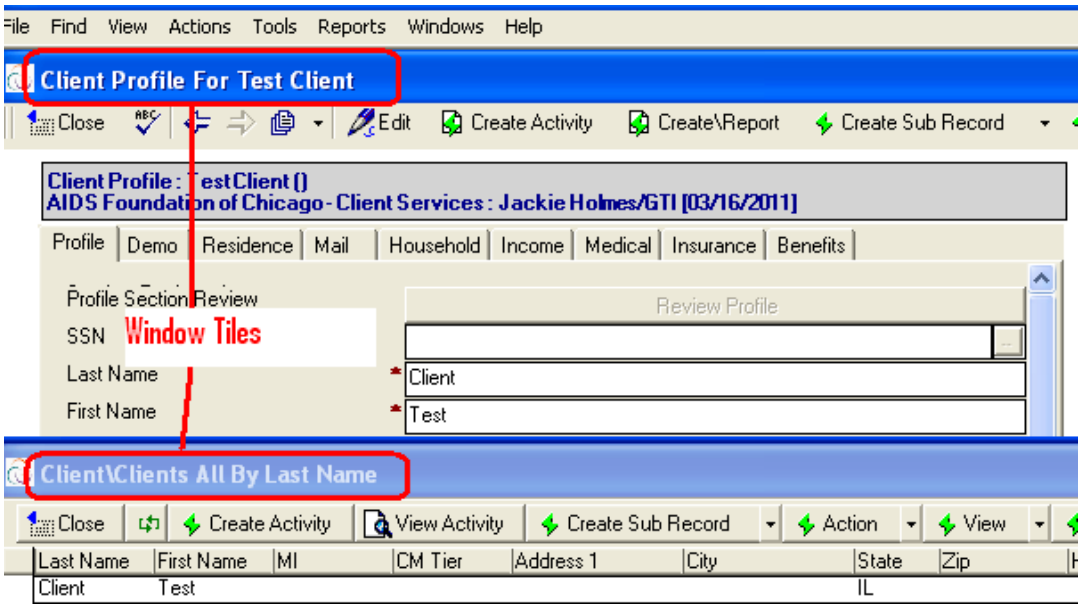
If you select "Tile Vertical" from the Layout Selection menu, all of the windows you have open in Provide® Enterprise will appear on your screen in a vertical tiled pattern, similar to that in the figure below:



Switching between windows is as simple as clicking on the window you want to view.

Horizontally Tiling Windows

If you select "Tile Horizontal" from the Layout Selection menu, all of the windows you have open in Provide® Enterprise will appear on your screen in a horizontal tiled pattern, similar to that in the following figure.



Switching between windows is as simple as clicking on the window you want to view.

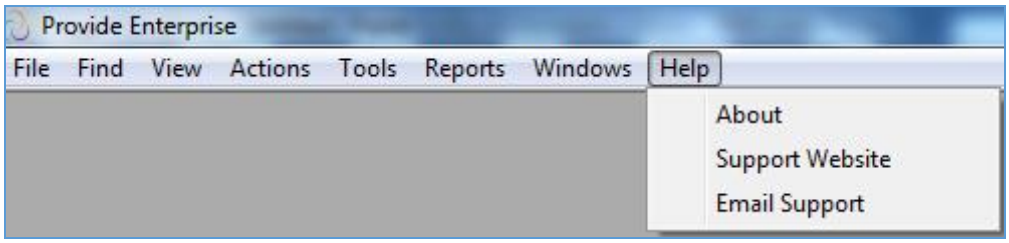
Viewing Open Windows

The final choice under the Windows Menu is a numbered list of all windows that are open in Provide® Enterprise. The window with the check mark by it is the active window.

NOTE: You can select any of the numbered window choices to move to a different window.

Help Menu

From the Help Menu you can find more information regarding the Provide® Enterprise version on your machine, direct you the Provide® Enterprise support website, and Provide® Enterprise email support.



- Clicking on "Help" and then "About" will bring up the following Window:

NOTE: You can see the current version of the Provide® Enterprise that is installed on your machine.

- Clicking on "Help" and then "Support Website" will bring the Provide® Enterprise website and help documentation.

- Clicking on “Help” and then “Email Support” will link to your email and allow you to email the Provide® Enterprise technical support team.

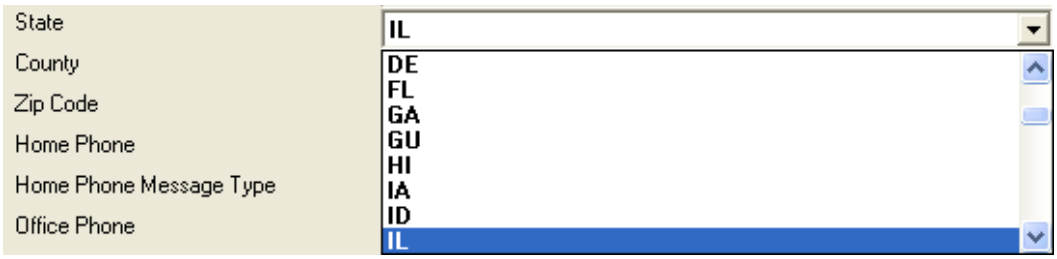
Fields

There are several different types of fields used within the Provide® Enterprise system. They will each be described briefly below.

When a field is editable, the text is bold. When not editable it is grayed out. It may be grayed out because you are not in edit mode or because your System Administrator has locked the field.

Pick list

For fields that contain a downward arrow like this, click on the arrow to display the list of preset values from which to choose. You can also type the first letter of a value if known and it will jump to the first keyword that starts with that value. Typing the same letter again will scroll you to the next value that starts with that letter. For example in a State field, typing “i” will bring up “IA”, typing a “i” a second time will bring up “ID” and typing “i” a third time will bring up “IL”.



Multi-value field

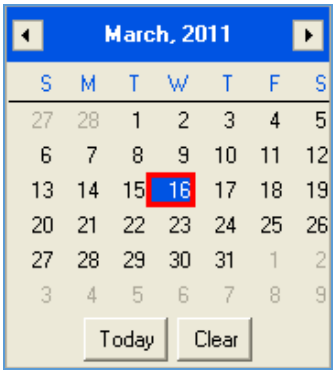
There are some fields similar to the one shown below that allow multiple values to be selected. To check an item on the list, click on the item’s name and a check mark will appear to the left of the name. To remove a check mark, click on the name again.

Required Fields

A red asterisk (*) next to any field signifies that the field is required by Provide® Enterprise in order to save the document. Some required fields already have a default value while others are blank by default.

Date Fields

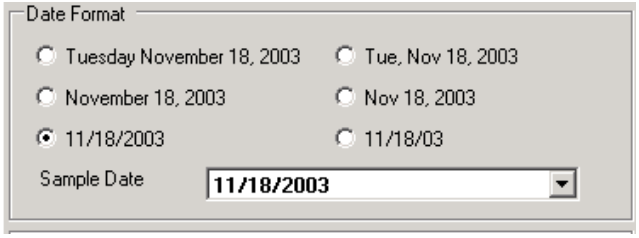
When you see a date field in Provide® Enterprise you can accept the default value, hit the delete or backspace key to remove the current date and type in a different date, or click on the button which will bring up a calendar window shown below.



- Click on the day you wish to select. To move backward or forward a month at a time, use the appropriate button.
- You can also change the month by clicking on the name of the current month. This will bring up a list of months. Simply select the month that you wish to navigate to.
- You can change the year that is shown by clicking in the year (on the calendar) and using the up and down arrows (circled in the following figure) to change the year.

Radio Button

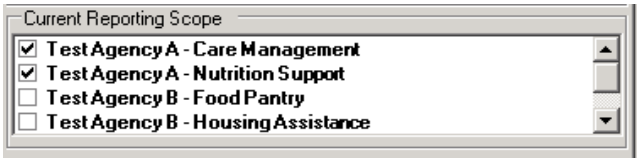
An example of a radio button ( ) is shown below:



- A radio button will allow you to select one or more choices. Simply click on the radio button ( ) that corresponds to the choice or choices you wish to select.

Check Box

Some fields in the system have check box fields. To check an item, click on the box to select it.



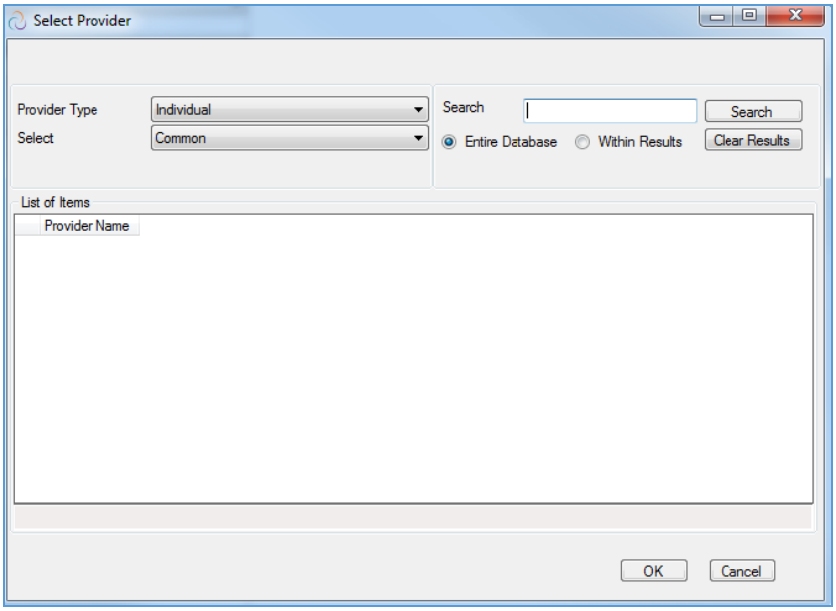
Field Dialog Control Button

Some fields have lists from which to choose a value. Most of these fields will have a button to click that will activate the list. To select an item in the list, click on the item name. To deselect an item, click on the item name again. Provider fields, Diagnosis fields, Procedure fields, Drug name fields and Test name fields are examples where Field Dialog Control Buttons are used. In some cases you are able to select only a single value and in others you are able to select multiple values. Both types will be discussed below.

Click on the to expand the options under each category and click on the to collapse the options under each category.

Provider Field Single Value

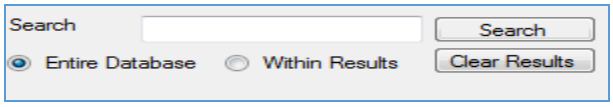
There are many fields within Provide® Enterprise where you can select a Facility, Individual, Medical Group, Service Organization, Service Program or manually enter a value. You will be able to view your available provider options when you click on the button as the following shows.



- **Provider Type**: The choices available for this field are set by your System Administrator in the data dictionary field properties of Provide® Enterprise. Generally you will have the

ability to choose from a Facility, Individual, Medical Group, Service Organization or Service Program. Both the "Provider Type" and the "Select" group that is chosen will limit your choices in the "Provider Name" view.

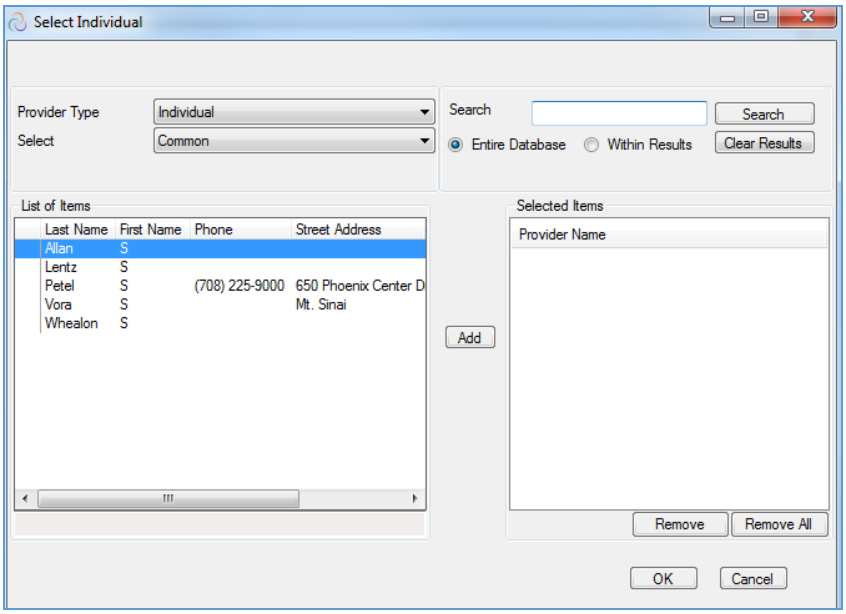
- **Select**: By default this field is set to Common and will display a list of common providers that you have defined in your user preferences. If you have not defined any common providers, the "Provider Name" view will be blank. You may also choose to change this setting to "All" to display all providers that have been defined in Provide® Enterprise.
- **List of Items (Provider Name)**: This view will be limited by both the "Provider Type" and the "Select" group that is chosen.
- **Search:**



- You may manually type a provider name such as "Smith" in the search field and then click on the Search button. All of the provider names with the first name or last name of "Smith" will appear. When searching for a word or phrase you can use an asterisk (*) as a wild card. If used at the end of the string like smith*, it will find all values that start with "smith". If used at the front like *smith, it will find all entries that contain "smith" anywhere in the string. You can also use a wild card in the middle like s*h to pull values like "smith" or "seth". You can also search the entire database or just the subset of displayed results.
- **Clear Results**: You can use this button to clear your search results.
- **Cancel**: You can use this button to cancel out of the provider selection screen.
- NOTE: Once you have the provider name in the "List of Items" you can select your provider by double clicking on the provider name, by clicking on the provider name once with your mouse and pressing the "Enter" key on your keyboard or by clicking on the provider name once with your mouse and then clicking on the OK button.

Provider Field Multi-value

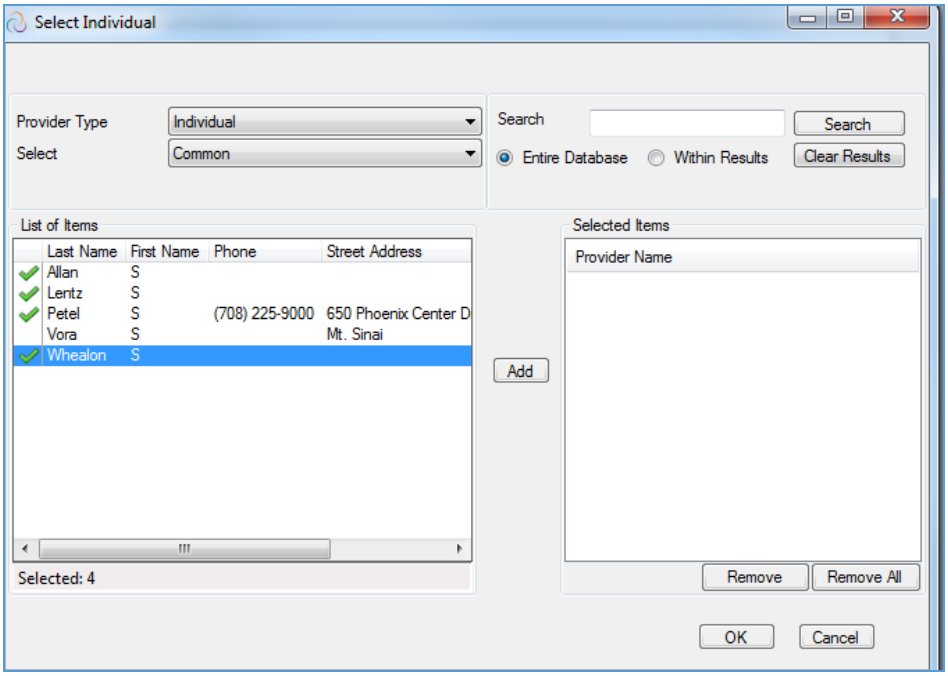
There are places within Provide® Enterprise where you can select more than one Facility, Individual, Medical Group, Service Organization, and Service Program or manually enter a value. You will be able to view your available provider options when you click on the button as the following shows.



- **Provider Type**: The choices available for this field are set by your System Administrator in the data dictionary field properties of Provide® Enterprise. Generally you will have the ability to choose from a Facility, Individual, Medical Group, Service Organization or Service Program. Both the "Provider Type" and the "Select" group that is chosen will limit your choices in the "Provider Name" view.
- **Select**: By default this field is set to Common and will display a list of common providers that you have defined in your user preferences. If you have not defined any, the "Provider Name" view will be blank. You may also choose to change this setting to "All" to display all providers that have been defined in Provide® Enterprise.
- **View By**: In looking at the "View By" field above you will see that it is sorting the providers by Name. You could also choose to view providers by "Role" such as Nurse or Social Worker.
- **List of Items (Provider Name)**: This view will be limited by both the "Provider Type" and the "Select" group that is chosen.
- **Manual Entry:** This field is used to manually enter a provider that you do not have defined in any of your lists. If this is a provider that will be used more than once, you should notify your Provide® Enterprise Administrator so they can add the provider to your list of values.
- **Search:** You may manually type a provider name such as "Smith" in the search field and then click on the Search button. All of the provider names with the first name or last name of "Smith" will appear. When searching for a word or phrase you can use an asterisk (*) as a wild card. If used at the end of the string like smith*, it will find all values that start with "smith". If used at the front like *smith, it will find all entries that contain "smith" anywhere in the string. You can also use a wild card in the

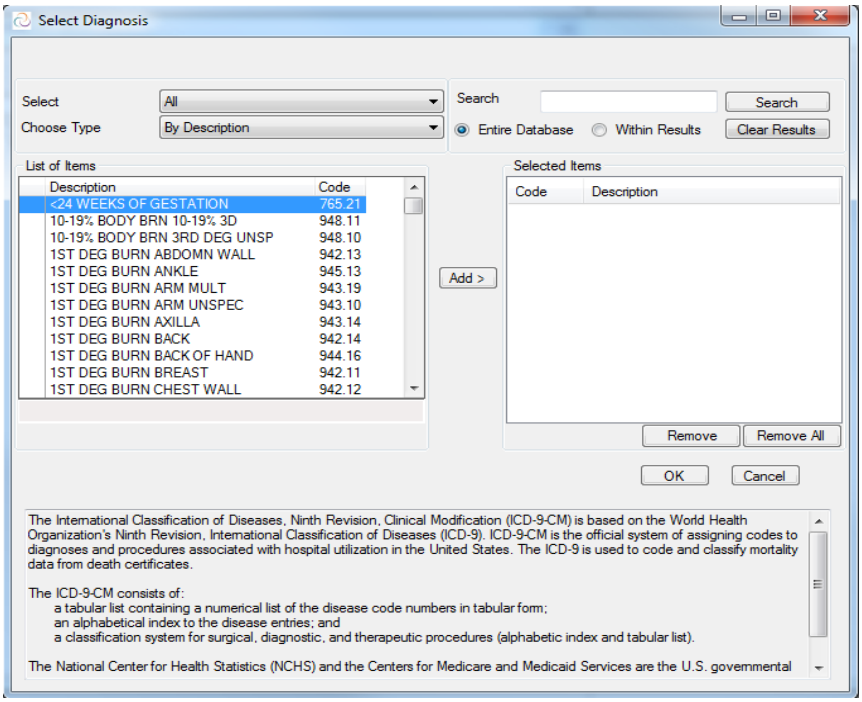
middle like s*h to pull values like “smith” or “seth”. You can also search the entire database or just the subset of displayed results.

- **Clear Results**: You can use this button to clear your search results.
- **Cancel**: You can use this button to cancel out of the provider selection screen.
- **Add Button**: Whether adding just one provider or adding multiple providers to your Selected Items list you need to place a check mark to the left of their name as shown in the figure below.



Diagnosis Field Single Value

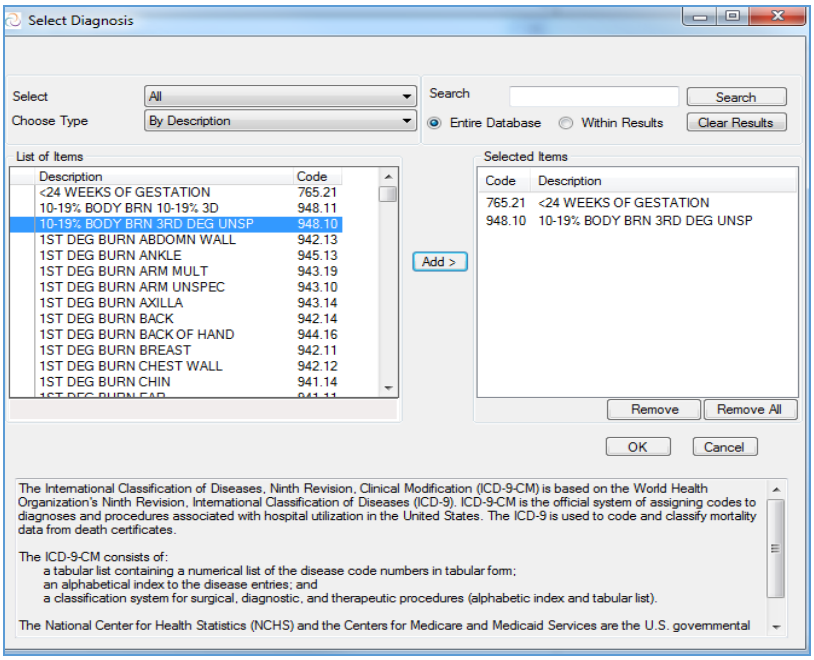
There are several places within Provide® Enterprise where you can select a diagnosis. You will be able to view your available diagnosis options when you click on the button as shown below:



- **Select Menu**: By default this field is set to your "Common" values. You can also choose to see "All" DSM-IV Axis I, II or III diagnosis types. The "Search", "Clear Results", "OK" and "Cancel" buttons work the same way as described in the "Provider Field Single Value" except there is no option for manual entry.

Diagnosis Field Multi-value

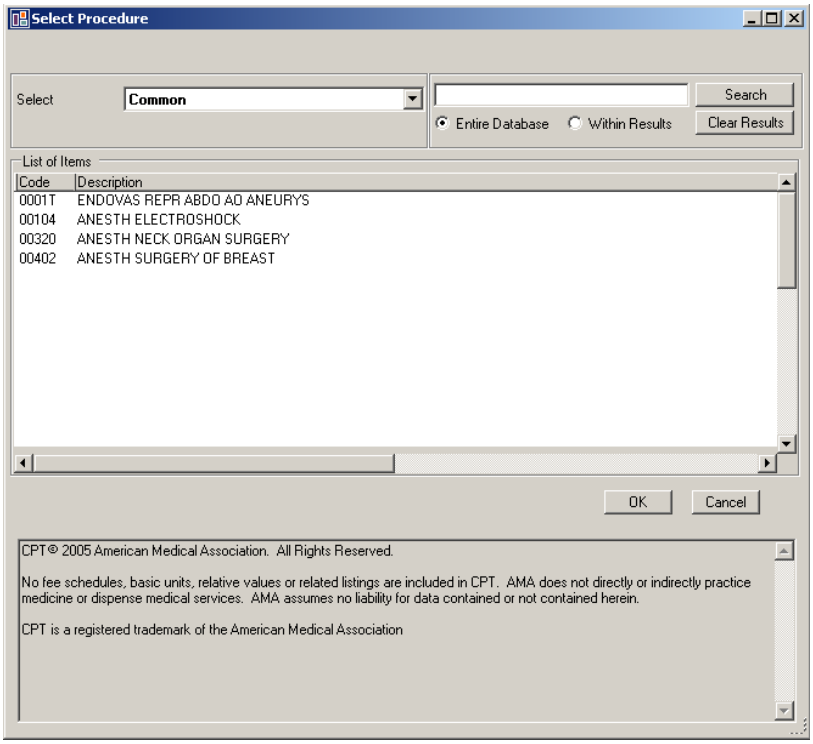
There are places within Provide® Enterprise where you can select more than one diagnosis record. You will be able to view your available diagnosis options when you click on the button as shown below:



- **Select Menu**: By default this field is set to your "Common" values. You can also choose to see "All" diagnosis types. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry.

Procedure Field Single Value

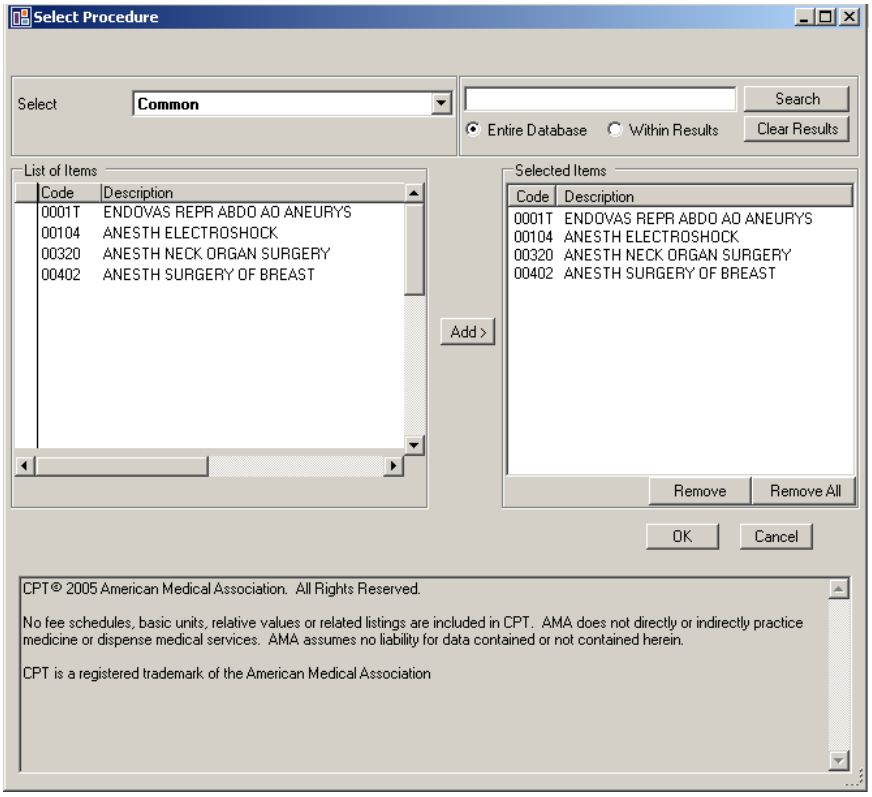
There are fields within Provide® Enterprise where you can select a diagnosis. You will be able to view your available diagnosis options when you click on the button as the following shows.



- **Select Menu**: By default this field is set to your "Common" values. You can also choose to see "All" procedure types. The "Search", "Clear Results", "OK" and "Cancel" buttons work the same way as described in the "Provider Field Single Value" except there is no option for manual entry.

Procedure Field Multi-value

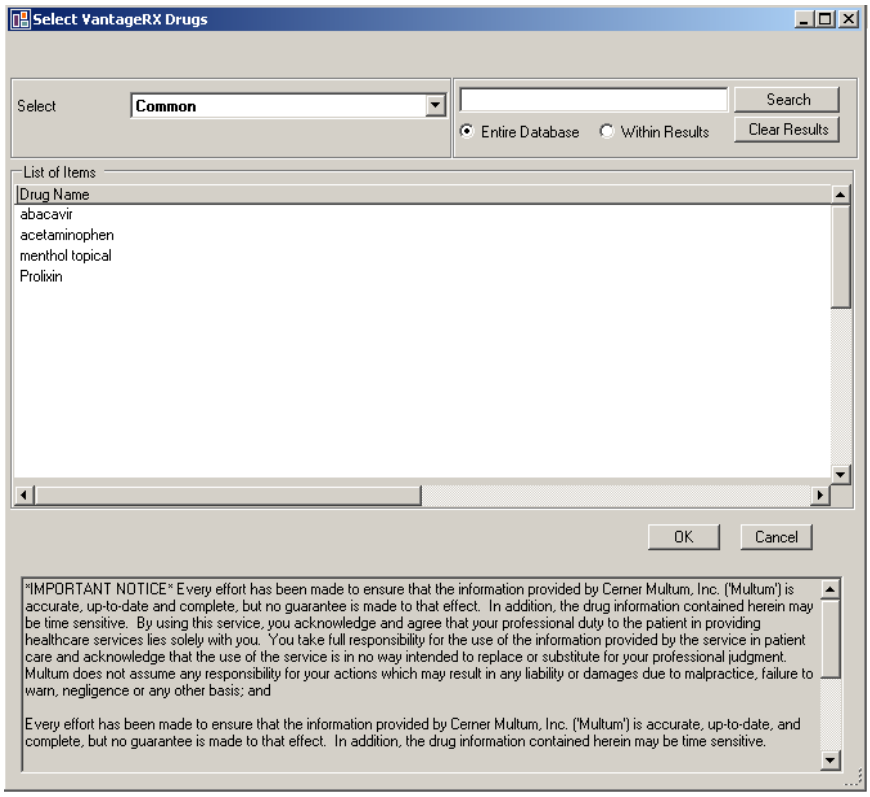
There are places within Provide® Enterprise where you can select more than one procedure. You will be able to view your available provider options when you click on the button as shown below:



- **Select Menu**: By default this field is set to your "Common" values. You can also choose to see "All" procedure types. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry.

Drug Field Single Value

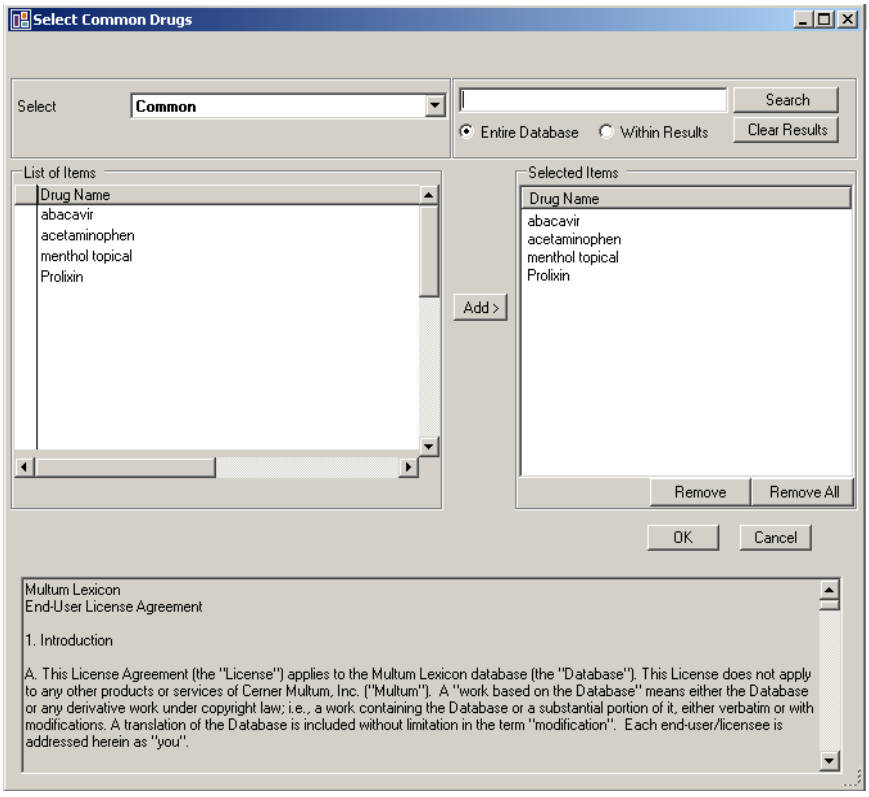
There are fields within Provide® Enterprise where you can select a drug name. You will be able to view your available drug names when you click on the button as shown below:



- **Select Menu**: By default this field is set to your "Common" values. You can also choose to see "All" drug types. The "Search", "Clear Results", "OK" and "Cancel" buttons work the same way as described in the "Provider Field Single Value" except there is no option for manual entry.

Drug Field Multi-value

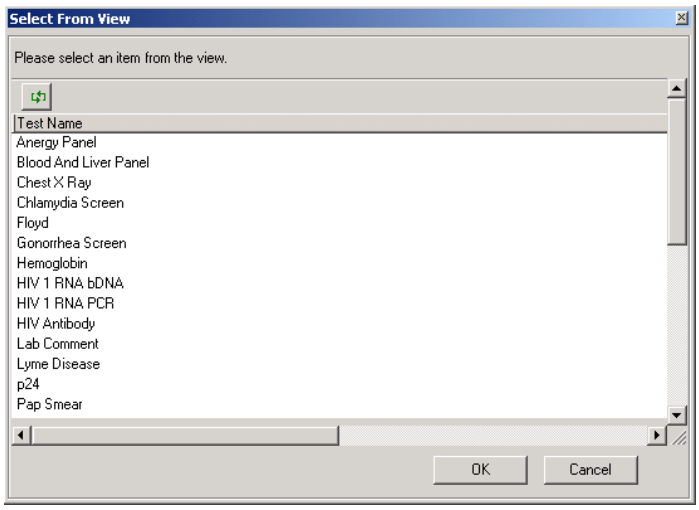
There are places within Provide® Enterprise where you can select more than one drug name. You will be able to view your available provider options when you click on the button as shown below:



- **Select Menu**: By default this field is set to your "Common" values. You can also choose to see "All" drug names. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry.
- **Choose Type**: This Field allows you to sort drugs by Brand Name, by Drug Name, Brand Name by Therapeutic Class or Drug Name by Therapeutic Class.

Test Field Single Value

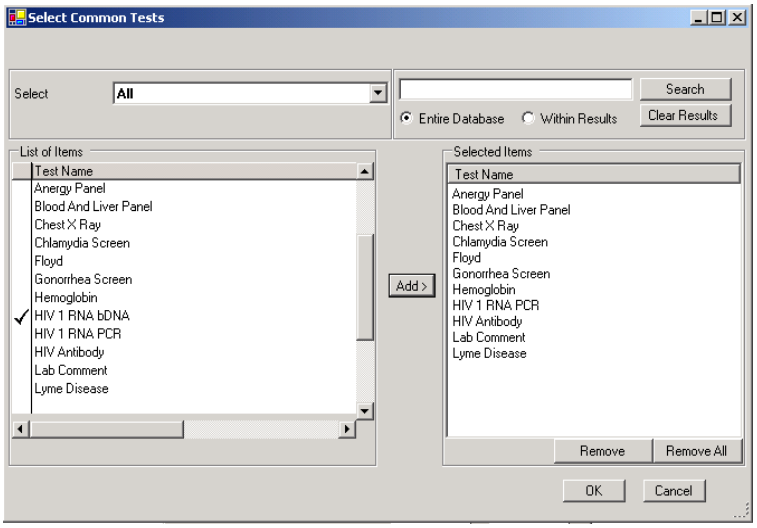
There are fields within Provide® Enterprise where you can select a test name. You will be able to view your test names when you click on the button as shown below:



- **Select Menu**: By default this field is set to your "Common" values.

Test Field Multi-value

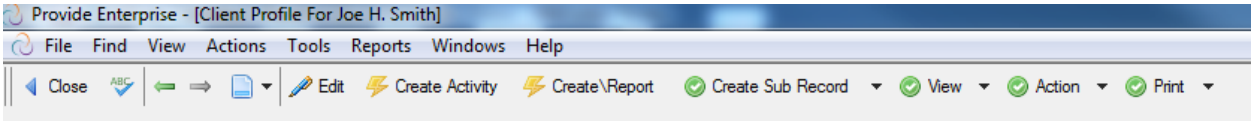
There are places within Provide® Enterprise where you can select more than one test name. You will be able to view available provider options when you click on the button as shown below:



- **Select Menu**: By default this field is set to your "Common" values. You can also choose to see "All" test names. The "Search", "Clear Results", "OK", "Cancel", "Remove" and "Remove All" buttons work the same way as described in the "Provider Field Multi-value" except there is no option for manual entry.

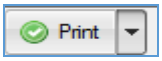
Button Bar

There are many places in Provide® Enterprise where you will notice a series of buttons arranged at the top of records and views. Below is an example of a button bar from the Client Profile record:

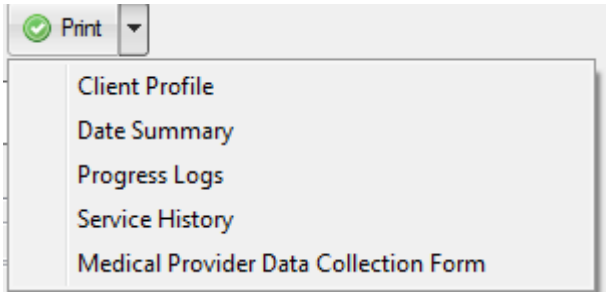


The kinds of buttons will vary from record to record. Some of the more common buttons are described in detail below.

Print

The 

button will allow you to print data from the open record to a Crystal Report template. The output can be set to either display on screen in order to review before printing or it can be automatically sent to the user's default printer. You can select what you would like to print by clinking on the down arrow and selecting your printing choice.

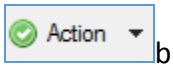


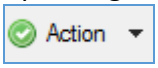
Edit

The

button places the record you are viewing into "edit mode." Once in "edit mode" you will be able to change field values and select items from drop down lists.

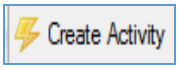
Action

The 

button allows you to select from a list of available actions. These actions differ depending on what you are doing in the Client file. To see each available action click on the 

and a list of actions will be displayed.

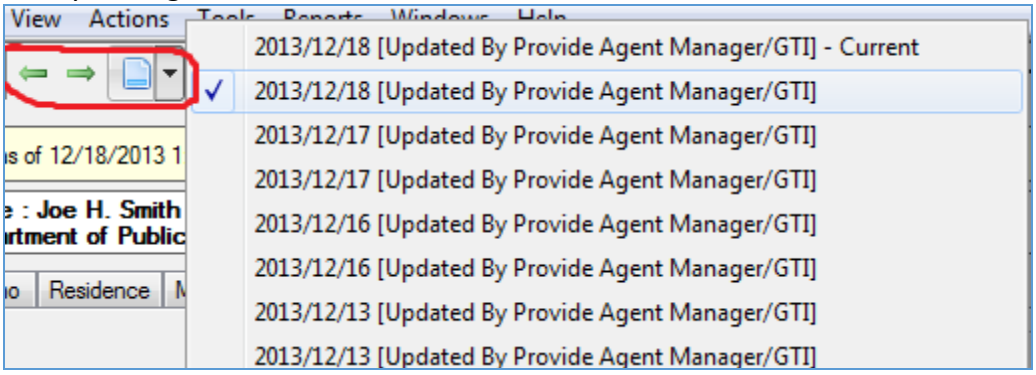
Create

Clicking on the 

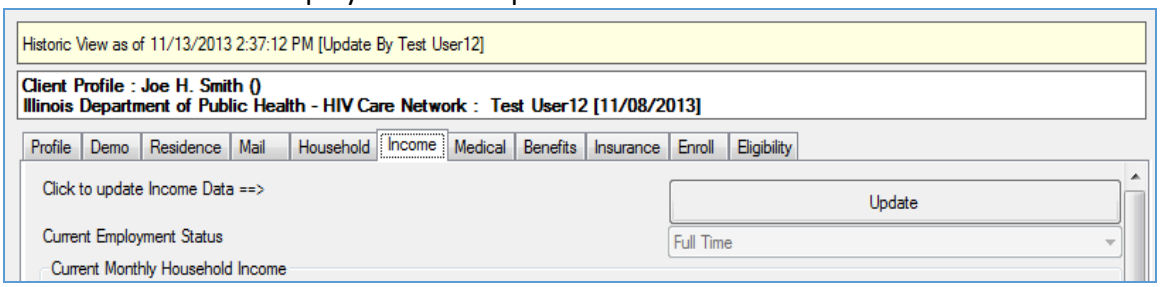
button will show you a pull down list of all Activity Record types you are able to create.

Document History

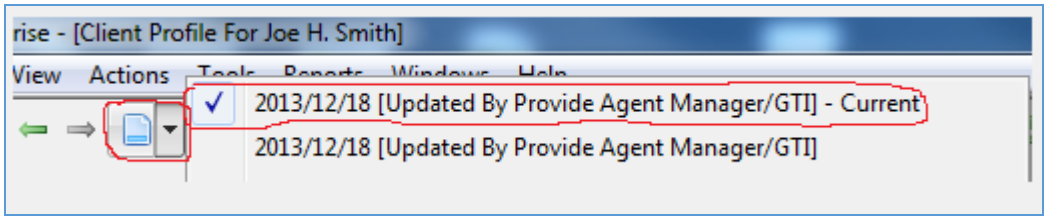
Every time changes are saved to a record in Provide® Enterprise, an updated version of the record is created. The buttons allow you to view previous versions of the record you have open in order to see what the record looked like at a particular point in time. You can either pick a date from the drop down list or move backwards one change at a time by clicking the "left arrow".



- When viewing a previous version of the record you will notice that "Historic View as of …" will be displayed at the top of the record.



- Fields that are highlighted in yellow are fields that are different from the most recent version of the record. You are not allowed to edit a Historic View of the record. To edit the record after referencing a Historic View you will need to switch to the Current view as shown below:



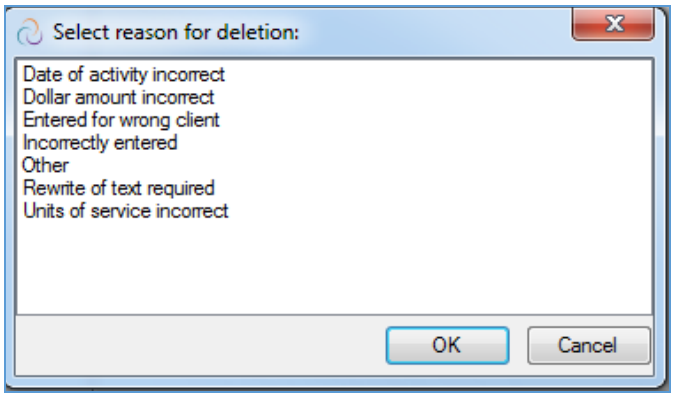
Delete

Provide® Enterprise allows you to delete any Client Sub-Records and Activity Records. Only the creator of the original document or their supervisor can delete the document. When a document is deleted it is not truly deleted from the database. It will remain a permanent

part of the client record, but will be "marked" as deleted (similar to putting a line through an incorrect entry in a paper record) and thus, will not be counted in reports. To delete a record, follow these steps:

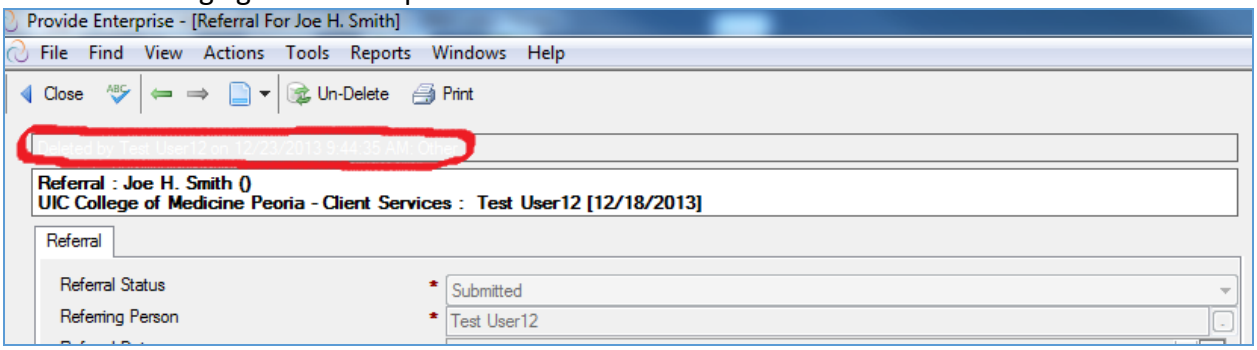
- Open the Record in question.
- On the Action Bar, you will see the

button. Clicking on this button will activate the following dialog box:



- Select the reason you are deleting the chart note and then click on the

button. You will be backed out of the note.
- Any time the record is opened in the future, you will see a message similar to that in the following figure at the top of the record:



- In small white font, it will state who deleted the records and the date and time the record was deleted.

Un-Delete

Once a record has been marked as deleted, you have the ability to "un-delete" the record within Provide® Enterprise. Only the creators of the record, their supervisor or System Administrator can "un-delete" a record. To "Un-Delete" a record, follow the steps below:

- Navigate to the particular record in question and open the record. Because the record has been marked as deleted, you will see the

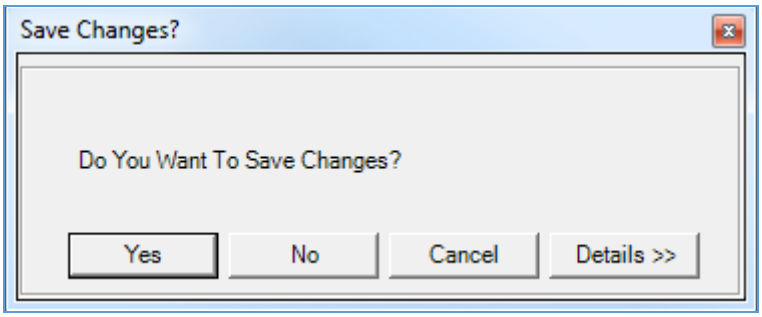
button.
- Click on this button to "Un-Delete" the record. The deletion information will be removed, the record will be re-saved and you will be closed out of the record. You will notice after refreshing your screen that the Delete flag has now disappeared from the database views for this document.

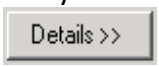
Saving Record Changes

The

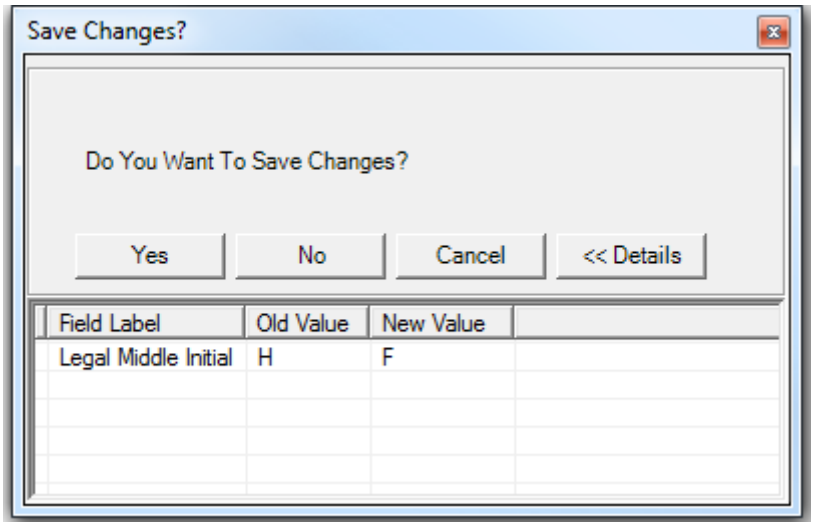
button closes the current record you are viewing.

- If you have changed fields, you will usually be asked if you want to save the changes you have made as shown below.

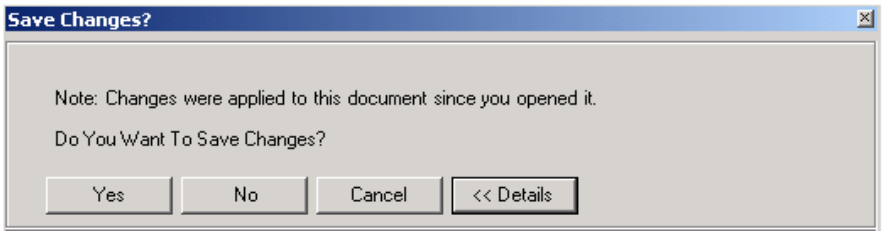


- If you have made changes that you want to save, be sure to select "Yes".
- You could also click on the 

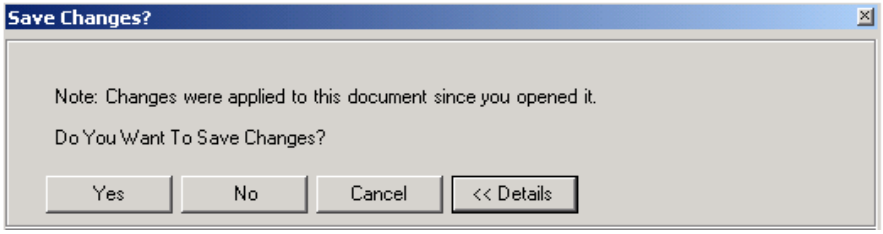
button to see a list of all the changes that were made while you were in the record. A sample of what you might see is displayed below:



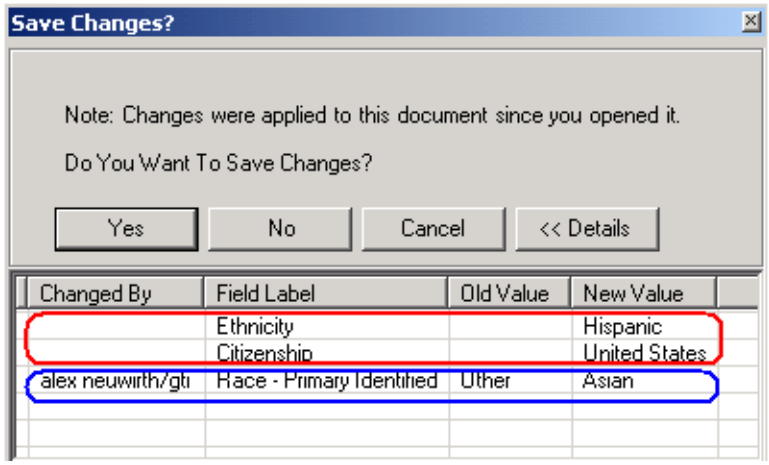
- You can choose to save all of the changes that you made or you can delete changes that you do not want by clicking on them individually and hitting the delete key on your keyboard. If you double click on the change you will be taken to the Sub-tab that contains the field that you modified. You can also select "Cancel" to return to the document or "No" when prompted to save your changes, and the record you were in will close.
- Sometimes when you click on the Close button to save your changes you will see a box that looks like this:



- This can happen because the Provide® Enterprise system does not "lock" records when they are opened by users, so two or more users could be editing the same record at the same time. Here is a scenario where this may occur. First, we assume that two users open the same Client Profile at the same time. One person may make changes to the "Ethnicity" and "Race - Primary Identified" fields in the Client Profile as shown in the example above, and that person saves their changes. A second user may change the "Ethnicity" field and "Citizenship" field, when the second user closes the Client Profile they see the following message:



- If they click on the << Details button, they would see a screen similar to the one below:



The following rules apply to the "Details" display when two users make changes to the same record:

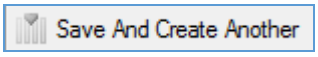
- The first user to save their changes will have the changes applied without any warning message.
- The second user to save their changes will see the warning "Note: Changes were applied to this document since you opened it. Do You Want To Save Changes?"
- If both users make changes to the same field, the second user will only see the original value of the field and the changes that they made. The "Changed By" box will be blank.
- If only the first user changed a field (See "Race - Primary Identified"), the second user will see both the original value and the new value of that field. The "Changed By" box will show the name of the user who made the change.
- The second user will always see every field they changed and the original value. The "Changed By" box will be blank.
- Any change that is deleted from the "Details" display will result in the original value that is shown in the "Old Value" field being saved.
- If the second user accepts all of the changes and clicks on the "Yes" button, they will update every field they changed and all unique changes that the first user made.
- If the second user selects "No" when prompted "Do You Want to Save Changes?", only the first user's changes will remain.

You can choose to save all of the changes that you or the other person made by clicking on the

button, or you can delete changes that you do not want by clicking on them individually and hitting the delete key on your keyboard. If you double click on the change, you will be taken to the Sub-tab that contains the field that you modified. You can also select "Cancel" to return to the document or "No" when prompted to save your changes and the record you were in will close.

NOTE: You might also see the "Changes were applied to this document since you opened it" if you make changes to the Client Profile and then edit the Current address record. This happens because whenever you save changes to the "Current Address" record the Provide® Enterprise program automatically updates the fields in the Client Profile then as well. This is accomplished by saving a new version of the Client Profile with the same values as entered on the Current Address record.

Save and Create Another

The 

Button is available in many of the Activity Records within Provide® Enterprise. When you see this button, you can use it to close and save the current document you are in and open a blank record of the same type.

Chapter

3

Client Registration/Intake

- Intake is the process of collecting information concerning the client and his or her support system, as well as determining program eligibility prior to any services being provided and funded.

New Client Registration

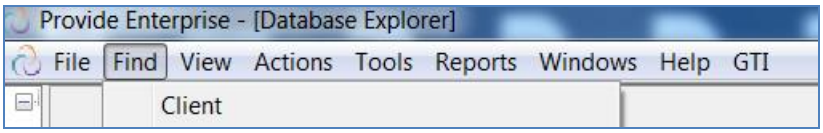
- The following procedures should be followed at the time a new client is to be entered in the Provide® Enterprise system. Only specific users will have the ability to register clients.

Registration Verification

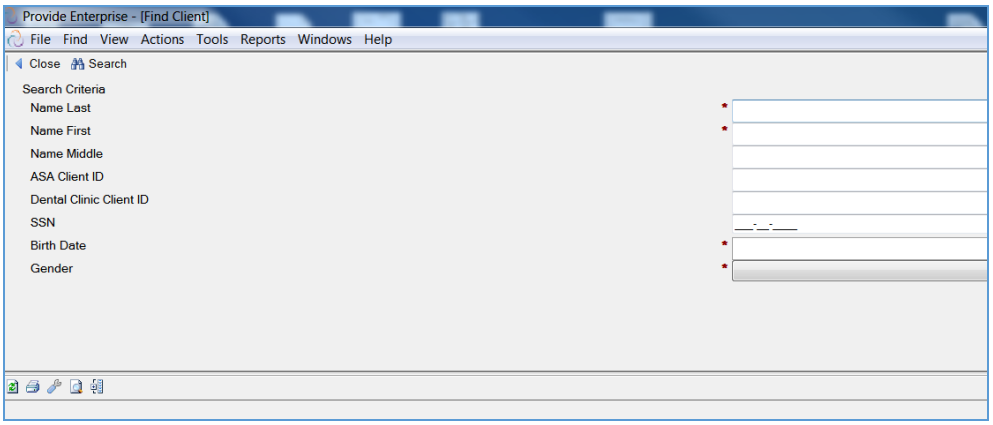
Prior to entering the client in the Provide® Enterprise database, you should check to make sure that the client has not previously been entered in the database. To verify that the client has not already been registered, follow the steps below.

Find Client

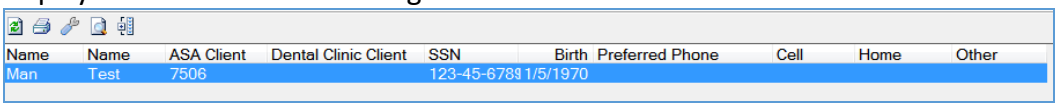
- The "Find Client" function will search the entire database to see if the client has previously been entered in the system and, therefore, has received services in the past. To do this, follow the steps below:
  - Select the "Find Client" screen in the menu bar.



  - This will activate the "Search" criteria screen, seen in the figure below:



- Fill out the search criteria as appropriate and click on the Search button to complete the search. NOTE: You may not want to enter full SSN or names in the appropriate fields, due to possibility of prior data entry errors.
- You can enter an asterisk (*) as a wild card to do more general searches.
- After the search is completed, the client records that match the search criteria are listed and displayed below the search dialog in a view like the one below:

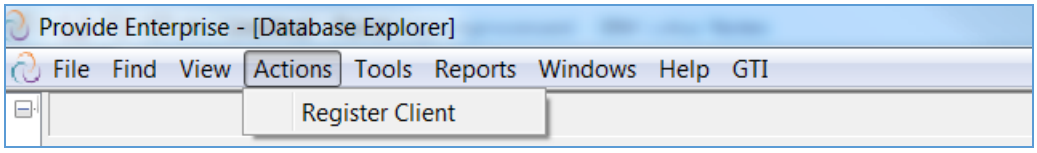


- Simply double click on the record that you wish to view in order to open the desired Client Profile.
- If, after reviewing the Client Profile, you determine that it is not the client that is present at your agency to receive services, you can move onto the next steps and actually register the client in the system (only specific users will have this authority).
- If you come to the conclusion that the existing Client Profile is that of the client that is listed, follow the steps listed below.

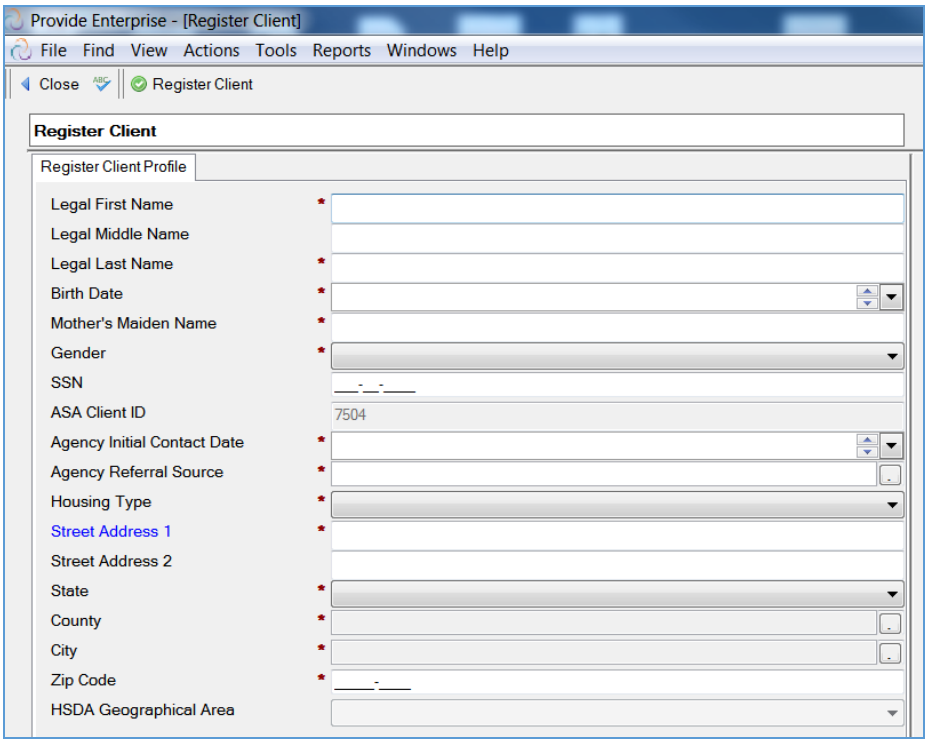
Client Registration

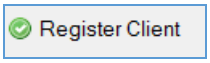
If, after searching the database, you determine that the client is NOT in the database, you will want to register the client in the system. To do that, follow the steps below:

- From the Menu Bar, select "**Actions ⇒ Register Client**".

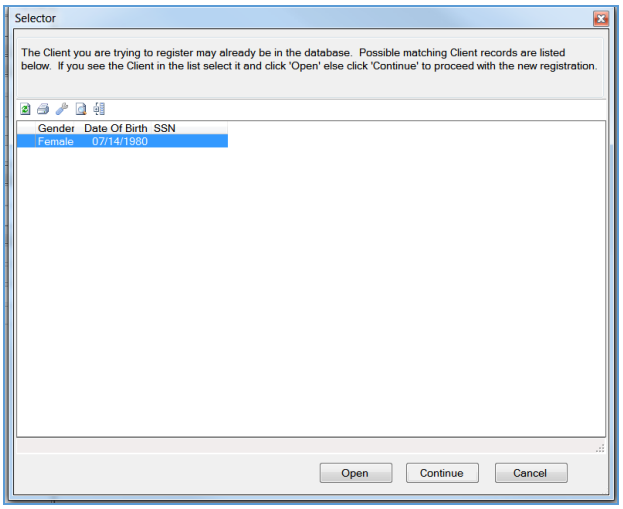


The "Register Client" screen will appear. The Register screen appears similar to the one below (this screen is customized and different for each customer:



- Fill out the fields as appropriate.
- The "Agency Assigned Client ID" should reflect the ID number that is used at your agency to identify clients. In addition, if your agency uses a formula to assign ID number to your clients, GTI can build the formula into this button (as long as the fields used to compute your ID number are in the Register Client screen). Contact the Provide® Help Desk for more information.
- Once the form is completed, click the 

button on the button bar.
- At this time, the system will start the duplicate check process to see if this client may already be in the database. The first part of the duplicate checking logic is looking to ensure none of the client records you have access to are possible duplicates of the client you are trying to register.
- If the system believes that this client is already in the system and you have access to that client record, a dialog box similar to the following will appear:



- If you believe that one of the clients listed in the duplicate check window is the client you are trying to register, simply place a checkmark next to the client and click the "Open" button to go to that Client Profile rather than registering a duplicate.
- If you click the "Continue" button it will proceed with registering the client.
- If you click on "Cancel," the registration process will be cancelled.

Duplicate Checking Logic

The PE system has been configured for Austin to help prevent the possible duplication of client records.

When a user attempts to "Register" a client in the PE database the system runs a series of checks to help prevent duplication. First, the system checks to see if the client the user is trying to register matches a client that the user has access to in the system by looking for matches according to the following comparisons:

- Matching Agency Assigned Client ID
- Matching SSN
- Matching Last and First Name
- Matching Last Name and Date of Birth

If there are not any matches to clients that the user has access to then the registration process does a second round of possible duplicate checking against all client records in the database even those client records that the user does not have direct access to. The following duplicate checks are issued:

- Matching Agency Assigned Client ID
- Matching SSN
- Matching Last and First Name
- Matching Last Name and Date of Birth

Chapter 4

Client Profile

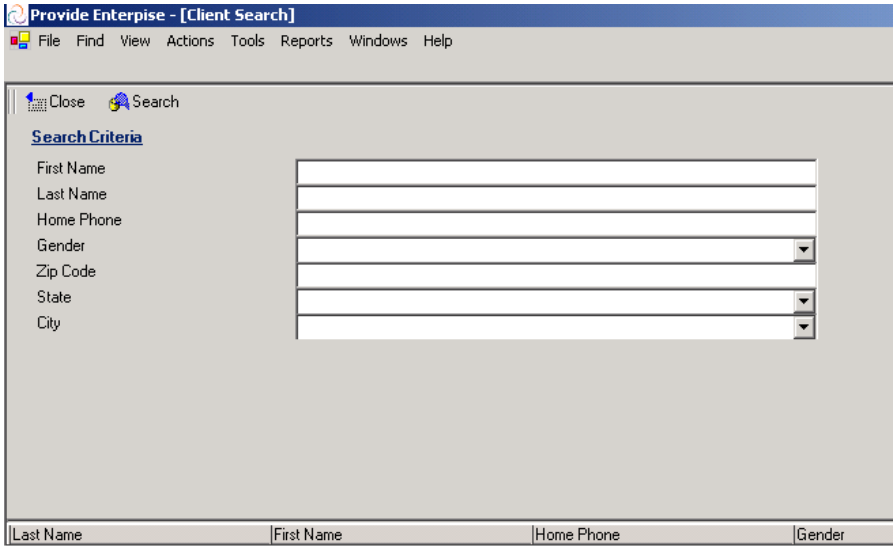
The Client Profile contains information such as name, address, date of birth and a variety of demographic information about a person in care. Within the Client Profile you can also document detailed client information (Client Sub-records), create Activity records (Progress Notes to Test Results) and view Activity records previously created for the Client.

Opening the Client Profile

To Open the Client Profile, you can double click on the Client's name from one of the Client views or double click on the Client's name from the "Find Client" Action.

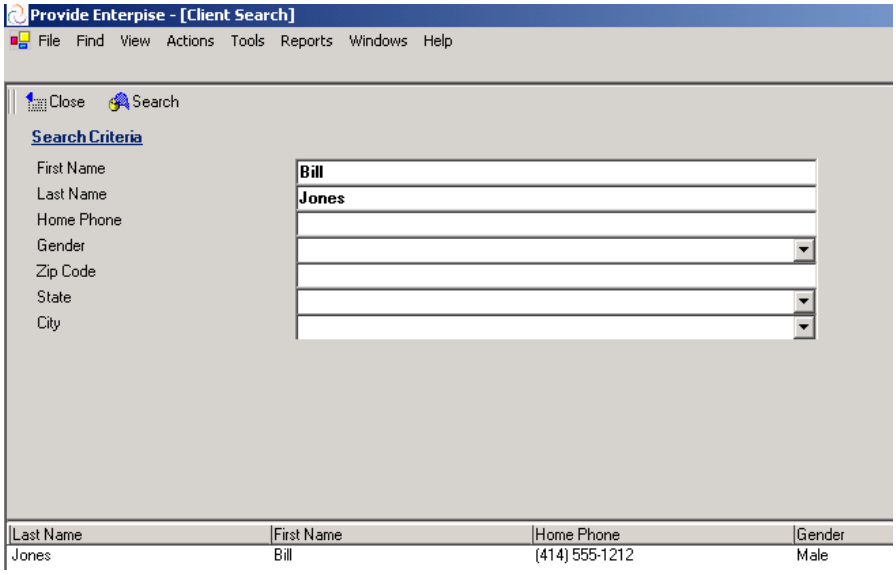
- To use the "Find Client" Action click on the Windows Toolbar menu choices as shown below:

- A window similar to the one below will appear:

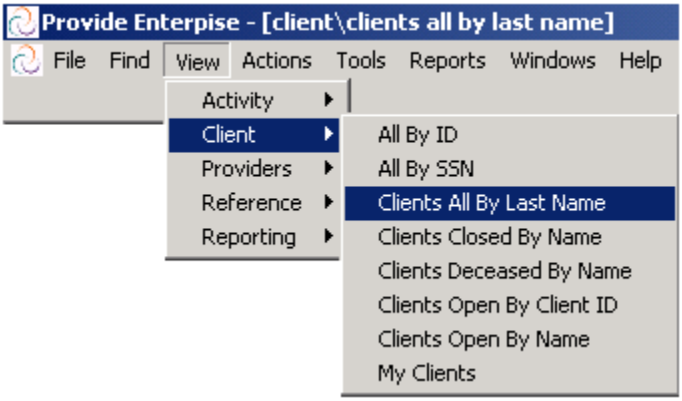


- Type in the client's first and last name or one of the ID's and then click on the

button. Double Click on the Client's Name to open the Client Profile.

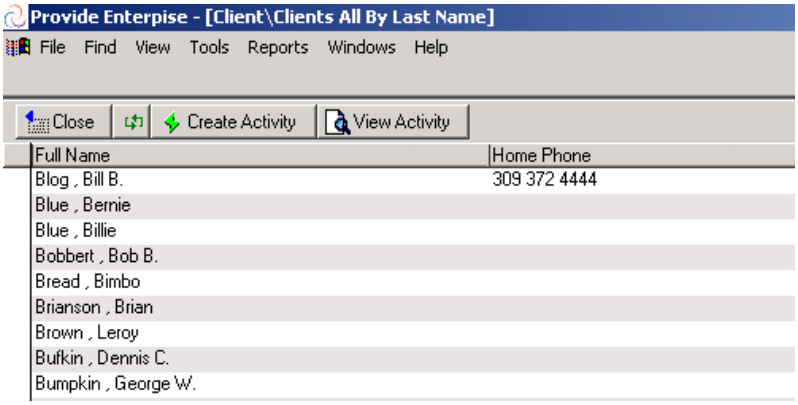


- You can also open the Client Profile by double clicking on the Client's name from one of the Client views as shown below:



NOTE: Because all views can be customized in Provide® Enterprise the list of Client views that you see may contain more views or different views than the picture shown above.

- Selecting a view will present a screen similar to the one following. Double click on the Client name to open the Client Profile.



Client Profile Overview

The Client Profile has a tabbed interface. In order to navigate from one section to the next simply click your mouse on the tab of the section that you wish to navigate to. Click on the tab that you wish to view in order to make it "active". The top row of tabs are "Main tabs". Beneath each "Main tab" are one or more related "Sub tabs" that help break down the information and group it into smaller pieces of information.

Each Provide® Enterprise deployment may have different Main tabs and Sub-tabs due to requested customization and optimization, but the standard set will be outlined below.

Before making any changes to the Client Profile you will first need to make sure you have clicked the Edit button. Once you have clicked this button and are in "edit mode" the Edit button will no longer appear on your screen.

By clicking on the top row of main tabs (Profile, Demographics, Financial, Insurance and Relations) you will be able to switch to a different section of the client file. Each section of the client profile has a number of Subsections, seen in the lower row of sub-tabs (for example, for the Profile Section there are nine different tabs, beginning with General and ending with Nutrition).

As you switch to each section, the color of the label on the active section will move forward. You should complete the appropriate information in the various sections of the profile. Many of the sections will have information in them that was input during the initial client registration.

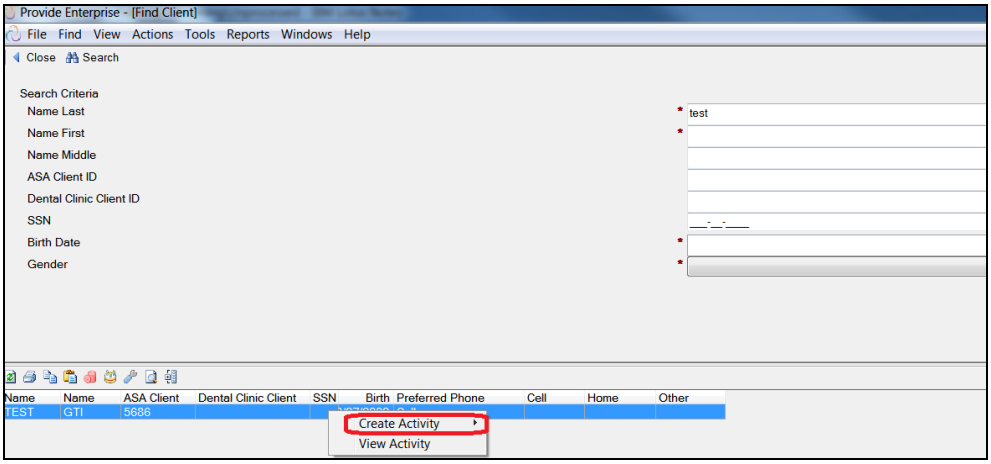
Chapter 5

Client Activity and Sub-Records

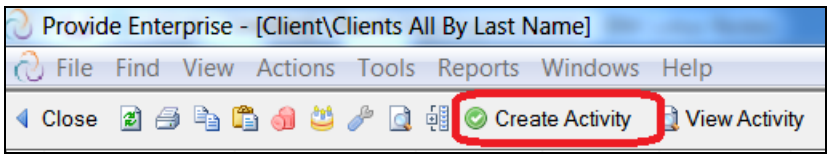
Client Activity

There are four places within Provide® Enterprise where you can create Activity:

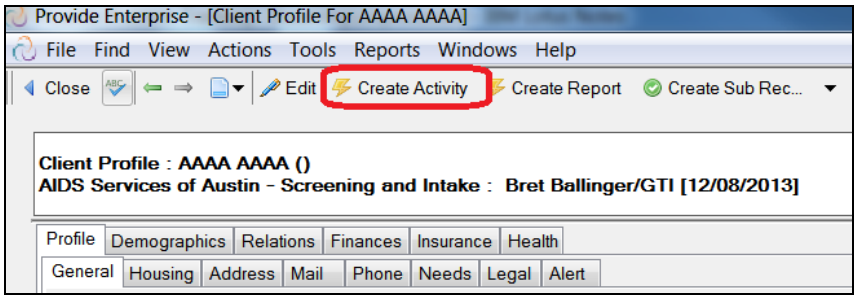
- From the "Find Client" action you can right mouse click on the client name and choose the "Create Activity" option as shown below:



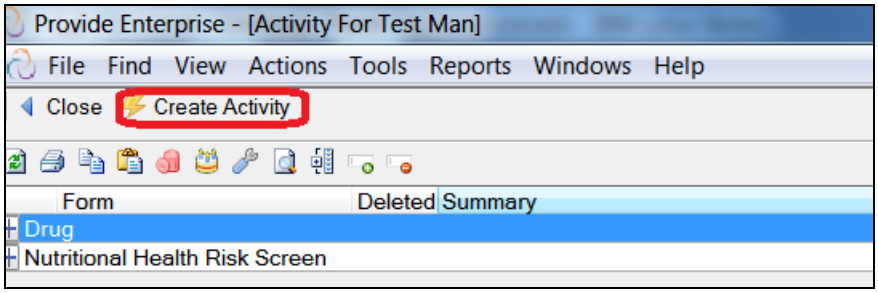
- From within a Client view such as "Patients\All\By Last Name":



- From within the Client Profile:



- And from within the Client's Activity View:



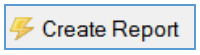
When you click on the

button you will see a list of options that you are allowed to select.

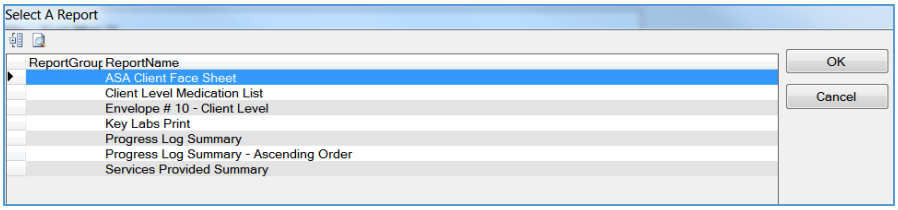
Note: This is a partial listing of available Activity records and the list defined by your System Administrator will likely be different. In Provide® Enterprise the number of fields for each Activity record can also be customized. As a result, the same record type might look very different from one agency to the next.

Creating Reports

Client Specific Reports

To create client specific reports, you would click on 

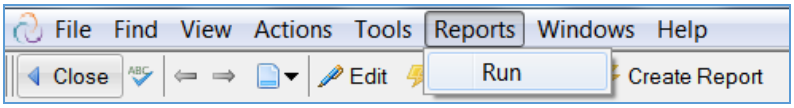
and select the report you would like to run.



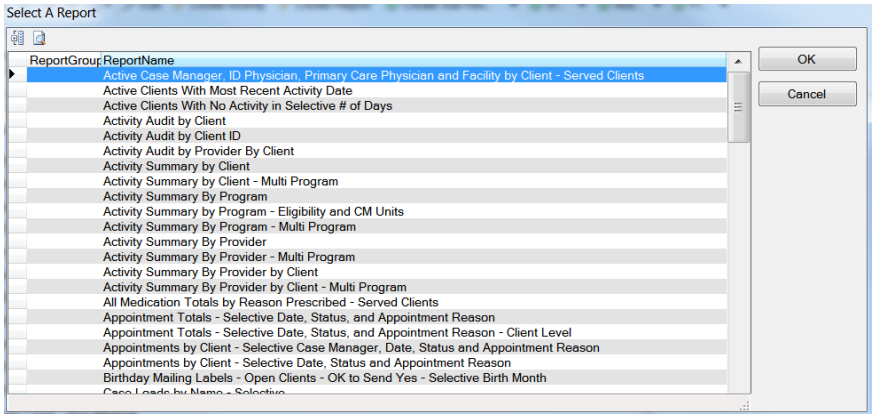
- Click on the report and then on "Ok" to run the report.

Reports

To create reports, you would click on Reports – Run.



- A list of reports you are able to create will populate.



- Select the report and click on "Ok." Depending on the report you select, you may need to enter report parameters. The report will then generate.

Print

Within any Client Profile there is always the option to print. The Print button is located on the right hand side of the Action button. This option allows you to print all of your day to day operations.

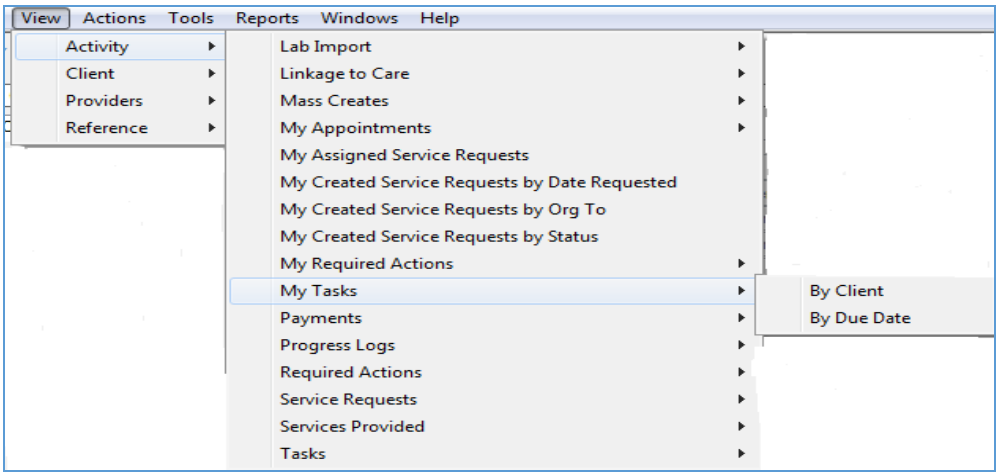
- These options include:
  - Client Profile
  - Progress Logs
  - Service History

Monitoring Required Actions

Required Actions can be monitored in a few different ways. These are discussed below.

My Tasks

The "My Tasks" views will show you any Required Actions assigned to you. The "My Tasks" views can be accessed via the Activity views in the database. These are found under "View – Activity – My Tasks" and can be viewed By Client or By Due Date.



When opening these views, you can view the specific assigned tasks by expanding the view by clicking on the ▶ next to the appropriate column.

Creating Sub-Records

A sub-record can be created under “Create a Sub-Record” or within the client profile. To create sub-records, you would click on “Create Sub-Record” and select the sub-record would like to create. Each customer may have slightly different sub-records as a result of customer customization. Each user has different security access which also could restrict the sub-records each user is allowed to create.

Chapter

6

View History

There are several options under the "View" button within the Client Profile. This view is also customized for each customer. Under the "View" button in the Client Profile, you may have the ability to view the following:

- Activity
- Address History
- Client Service Profiles
- Contact History
- Drug Protocol
- HIV History
- Income History
- Informed Consents
- Insurance History
- Lab History
- Medical Summary
- Provider Relationships
- Scanned Documents
- Service History

- **Note:** This is a partial listing of available "Views" and the list defined by your System Administrator will likely be different. In Provide® Enterprise the number of "Views" can also be customized. As a result, the same record type might look very different from one agency to the next.

Chapter

7

Actions

This chapter outlines the options under the "Action" button within the Client Profile.
Under the "Action" button in the Client Profile, you have the ability to complete the following:

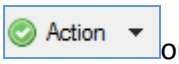
- Check For Completeness
- Close Client File
- Open Client File
- Scan for Required Actions

Each of these actions will be discussed below.

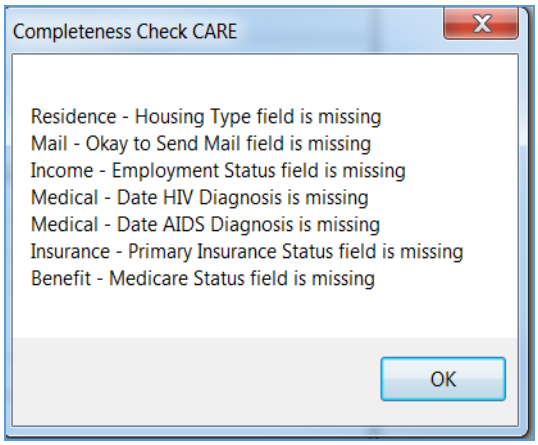
Note: This is a partial listing of available Action and the list defined by your System Administrator will likely be different. In Provide® Enterprise the number of actions can be customized. As a result, the same record type might look very different from one agency to the next.

Check For Completeness

- At any time when you are working in the Client Profile, you can scan to see if all fields necessary for invoicing and reporting have been completed.
- To perform a completeness check, follow the steps below:
  - From within the Client Profile, click on the

button and then click 

on the elect "Check for Completeness".
  - The system will review your Client Profile and check to see if all fields necessary for eligibility determination and reporting have been completed. If you have not filled out all required fields, a dialog box similar to that in the figure below will appear:

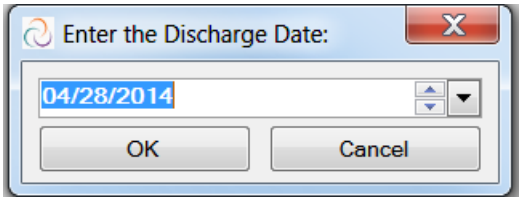


- This dialog shows you the Section of the profile as well as the specific field(s) in that section that need to be completed. To return to the profile to fill out the missing fields, simply click the OK button.
- If all required data is complete in the profile, you will see a message similar to that in the figure below:

- Simply click the OK button to return to the profile.
- Remember, you can run the Check for Completeness at any time to verify that all documentation is complete.

Close Client File

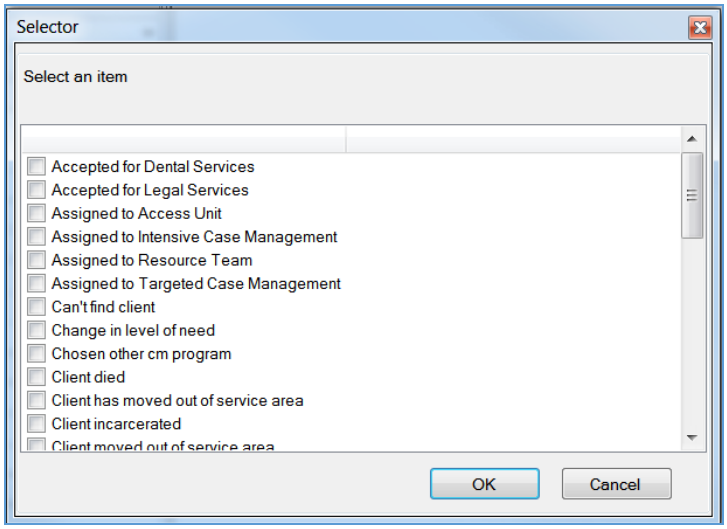
- To close a client file, click on "Close Client File" under actions. A box will appear to enter the discharge date:



- Enter the date of discharge and click on "Ok."

Open Client File

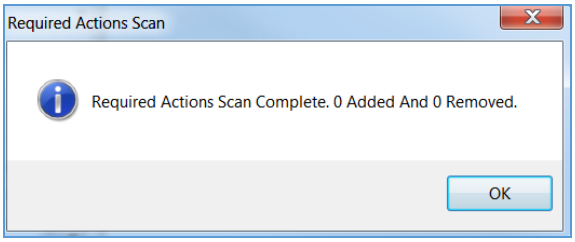
- To open a client file, click on “Open Client File” under actions. A box will appear to select the reason for opening client:



  - After you select the reason for opening the client file, click “OK.” The client file will then be open.

Scan for Required Actions

- To scan for required action, click on “Scan for Required Actions” under actions. A box will appear stating how many required actions were added and/or completed/removed.



Chapter

8

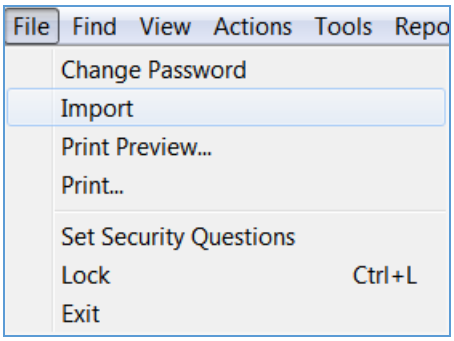
Client Management

Importing

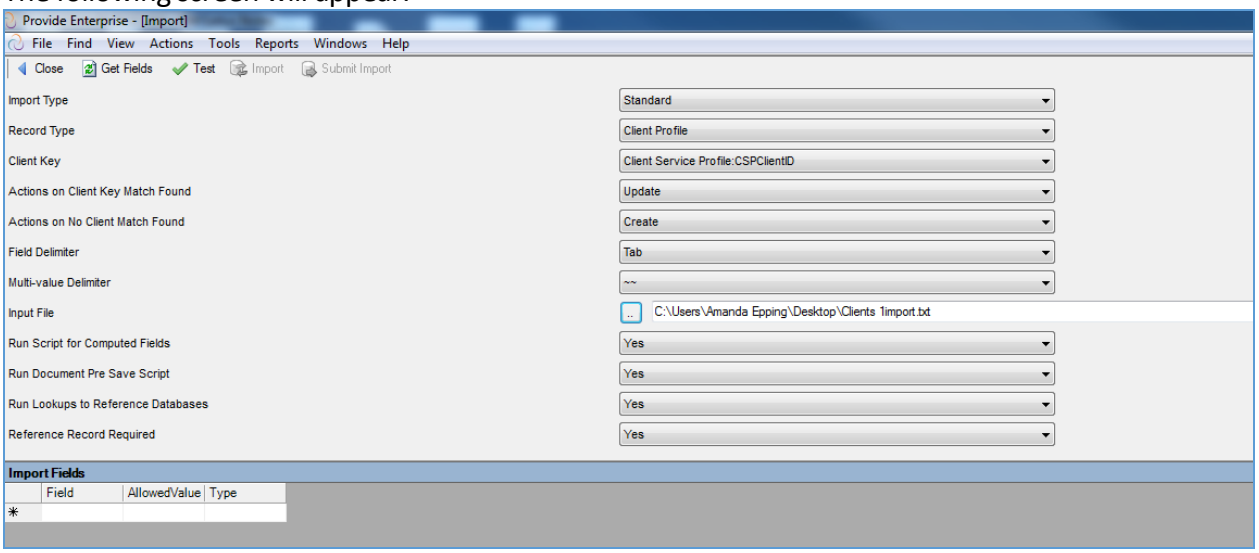
You can import Client Records, Client Sub Records and Activity Records into Provide® Enterprise. There are a number of common characteristics that you must keep in mind when preparing to import records into the system.

- All input files need to be formatted as an ASCII delimited text files with the first record (header) containing the Provide® field names.
- GTI recommends using "tab" for the field delimiter as input files may contain commas or semicolons.
- GTI does not support the import of rich text fields.
- All dates must be in MM/DD/YYYY format
- Imports require a unique file for each table. For example, data fields for the client profile cannot be imported at the same time as data fields for an allergy record. You must do two separate imports.
- Additionally, each record must have a separate row in the input file. For example, you cannot have three vaccinations in one row. A separate record would be needed for each vaccination.
- All records have a certain number of required fields that are needed in order to save a record. Within Provide® Enterprise these fields are marked with a red asterisk. When importing, however, the only time all required fields are necessary is when doing the initial client import. Though you may be able to import records without including all required fields, it is always better to include them. Not importing all required fields may cause errors when editing the record at a later date.
- All imports generate error files.
- In order for Client Sub-Records and Activity Records to be imported, the record's Client Key ("Client ID", "Client Name", "HealthPlan + Member ID" or "SSN") must match an existing Client Key of a Client Service Profile that fits the user's (Importer's) User Profile.
- In order for Client Sub-Records and Activity Records to be imported, the Client Profile or a backup Client Profile must be released to the record's Organization-Program.

To import into Provide, Click on "File – Import."



The following screen will appear:



Import Type: Select Standard or Custom

Record Type: Select Client Profile or Services Provided. (You must first have a client profile imported or in Provide before importing service provided.

Client Key: Select the client key that is based on the record type.

Multi-Value Delimiter: Select comma, tab, semicolon, colon, or ~~.

Input File: Click on the and select the file you are inputting.

Run Script for Computer Fields: Select "Yes" or "No." Within the Data Dictionary, there are a number of fields that are computed automatically within Provide® Enterprise. Examples of computed fields include the "ACreateDate" (the date a document is created in the system) and the Selector Description (the description of each document that shows in the database views). If you wish to automatically compute these fields at the time of import, simply leave this field set to "Yes". If you wish to actually include the computed fields in your import file, select "No" and make sure that you include all of the computed fields in your import file.

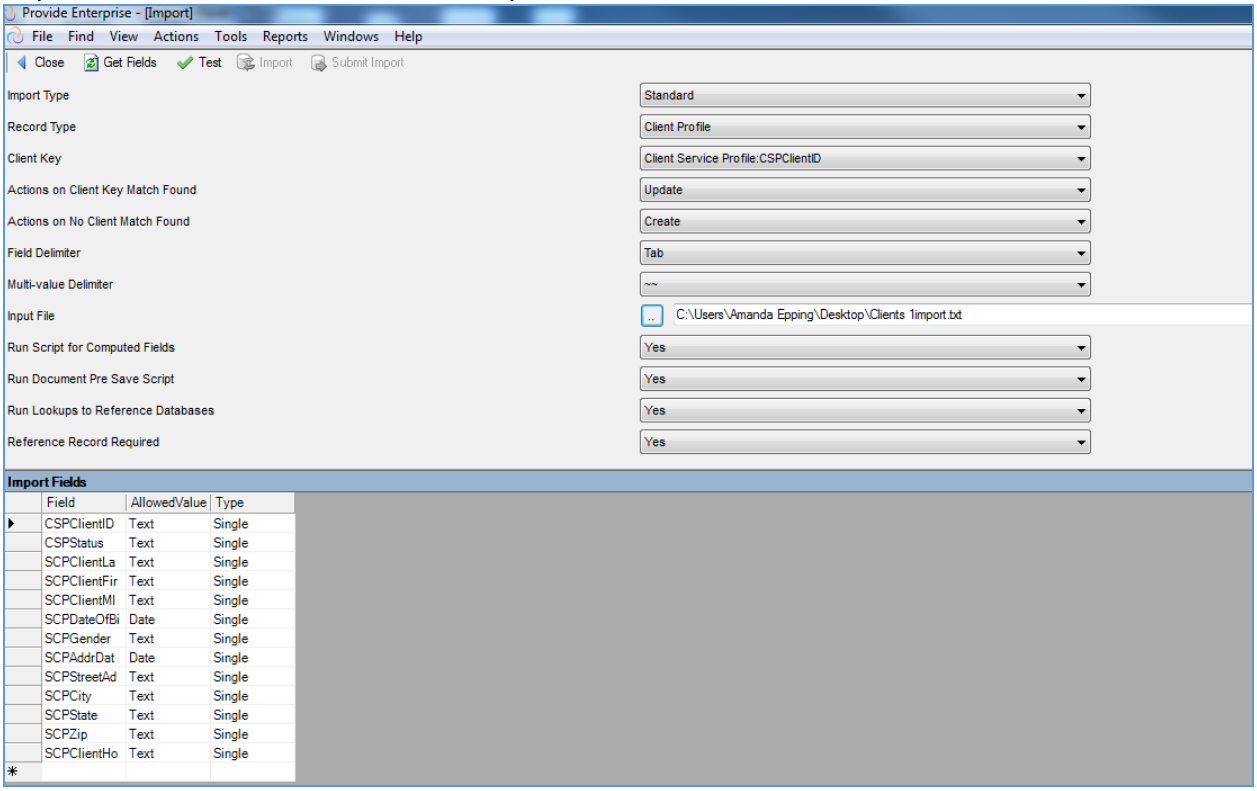
Run Document Pre Save Script: Select "Yes" or "No." There are a few documents in Provide® Enterprise that have an associated "Pre Save Script", meaning that prior to saving the document completely; a script is activated to perform a specific function. For example, when creating a Client Service Profile, there is a Pre Save Script in effect to create a Client Service Profile History record. If you want the system to automatically run these Pre Save scripts at

the time of import, simply leave the field set to "Yes". If you do not want to run the Pre Save scripts, set the field to "No".

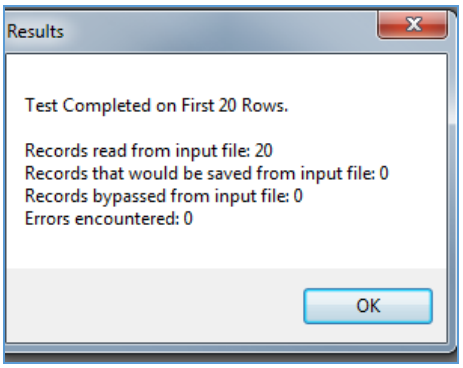
Run Lookups to Reference Databases: Select "Yes" or "No." For selected Activity imports, the system has the ability to lookup information in the Reference databases to ensure that data in the import file matches information in the Reference Databases. For example, if you are importing Procedure records, Provide® Enterprise can look to the Code Sets Database to ensure that the CPT Codes you are importing are valid. If you want the system to automatically Run lookups to the Reference Databases, leave this field set to "Yes". If not, change the field to "No". NOTE: It is recommended that you use the lookups to the Reference Databases to ensure data quality.

Reference Record Required: Select "Yes" or "No."

After you enter the information above, click on Get Fields. The fields there are giong to be imported are then indicated under "Import Fields."



Then, click on Test to complete a test of your import. The results will then appear as seen below:



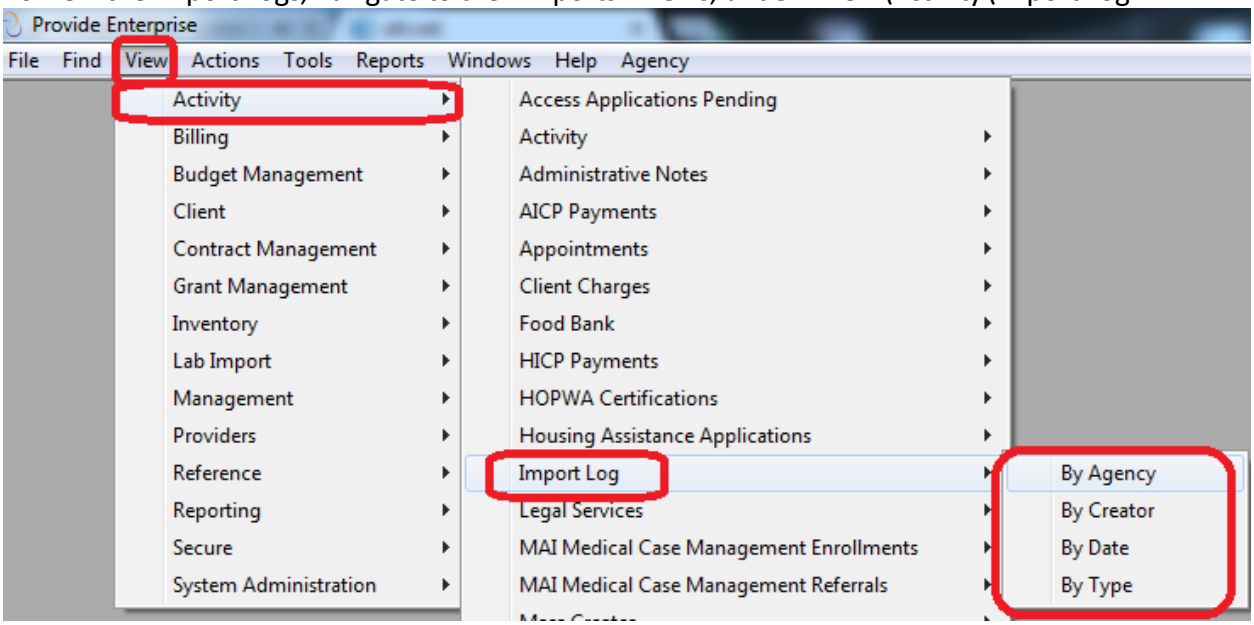
When you are satisfied with your results, you have two options to complete your import. If you click on Import, the import will be completed immediately in the system. If you click on Submit Import, the import will be completed in the system overnight.

If there are errors encountered (noted on your "Test"), open your error file and correct the issue and start the import process again.

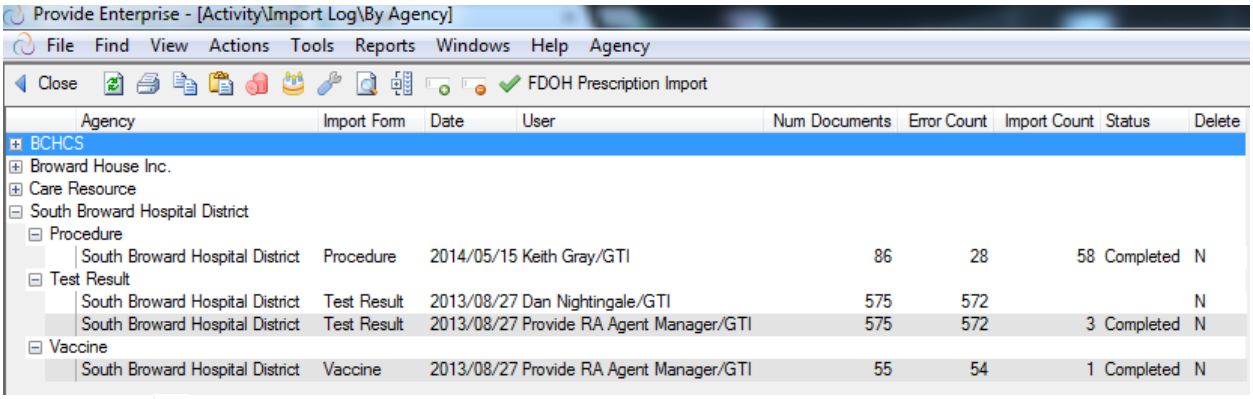
Monitoring Imports

After imports have been run, the import log contains the original import file as well as an error file (listing any errors that occurred during the Import Process), and an error records file (a file containing the records that caused errors during the initial import.) The Error Records file can be used to import corrections once they have been made (either in the file itself or the matching client files in Provide® Enterprise. It is important to monitor the import logs, especially if the system is automatically importing data from another system.

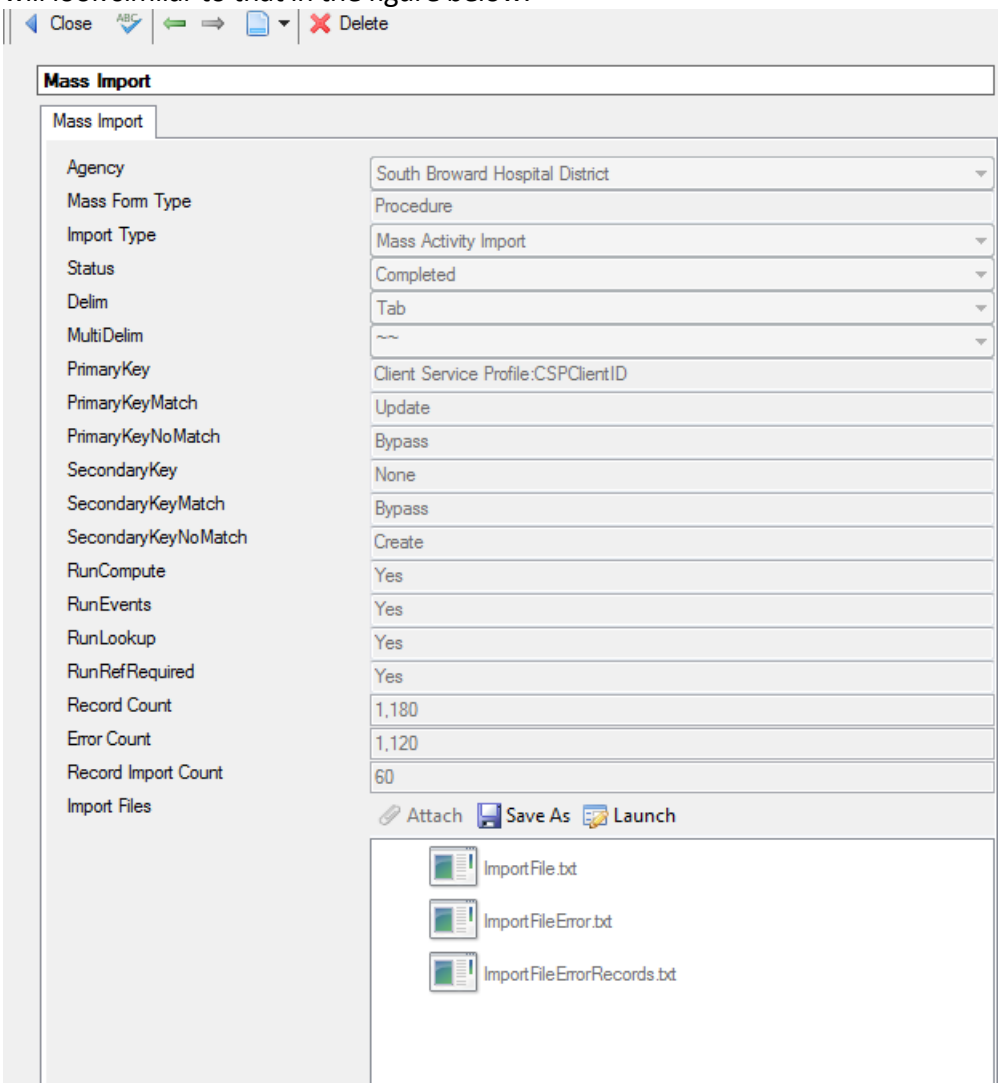
To view the Import Logs, navigate to the "Imports" Views, under "View\Activity\Import Log…"



You will see all Import Logs that have been created in the system, similar to that in the figure below:

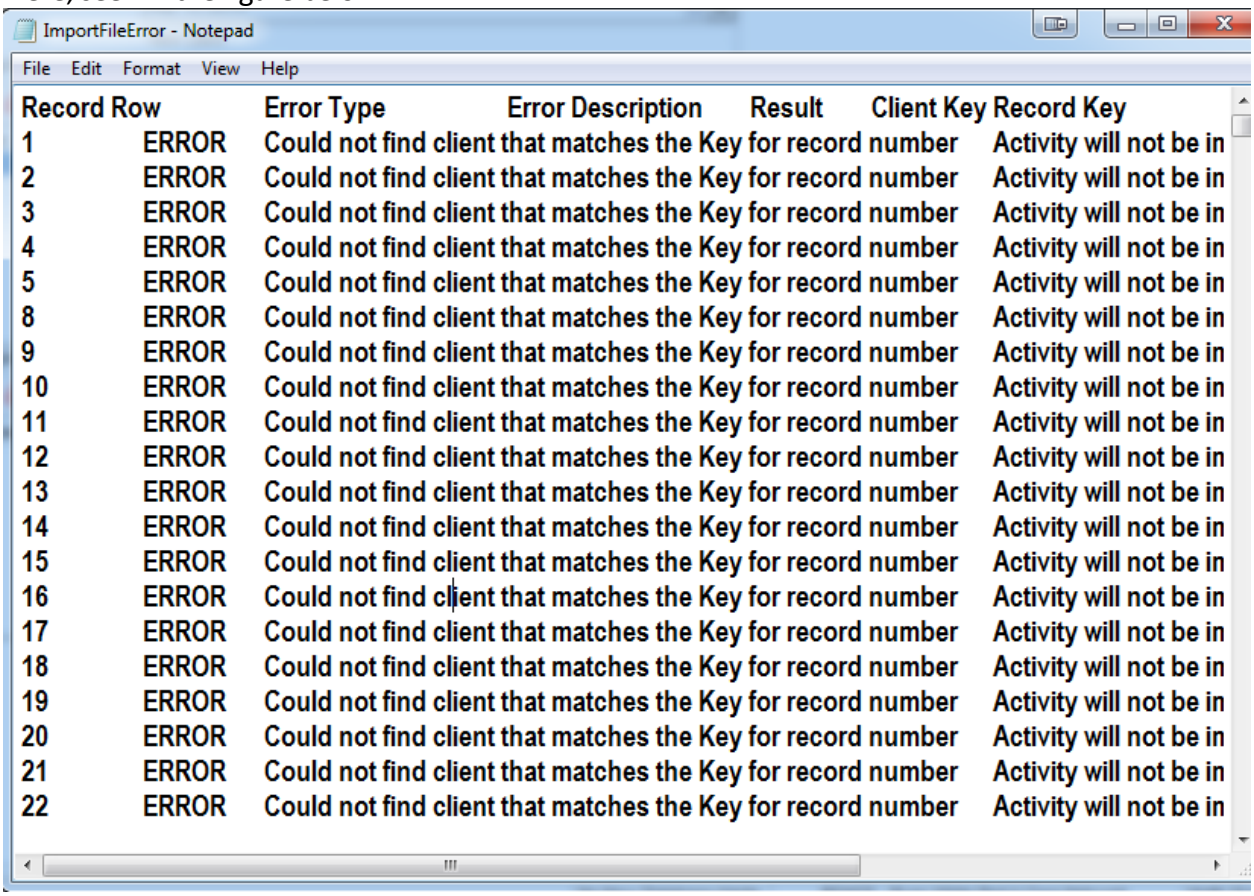


Click on the ⊞ next to a given category in the view to expand that section. Once the section is expanded, you can double click on the actual import log to open the log file. When the file opens, it will look similar to that in the figure below.



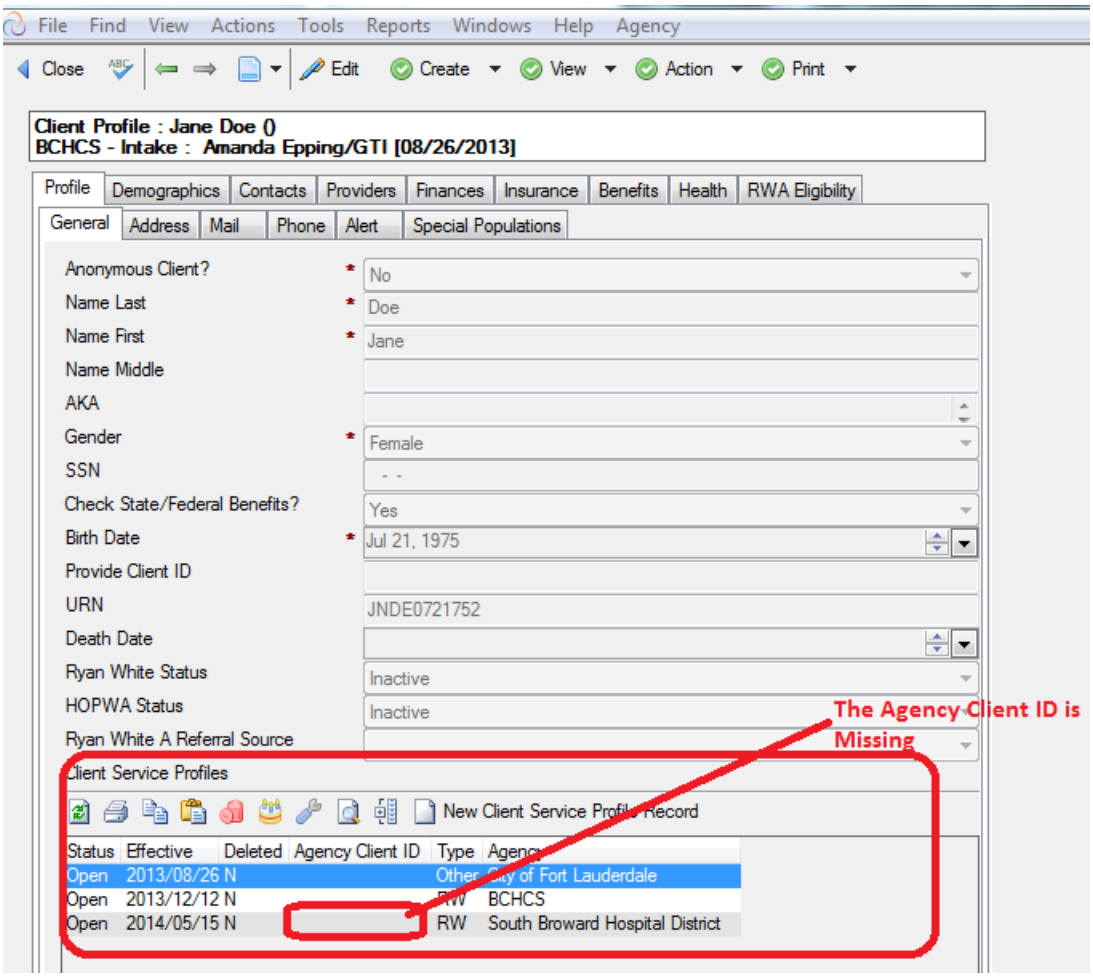
Note: In the screenshot above, the first Import file is the original file that was imported into Provide Enterprise.

The “Import File Error” file is the file that lists out each error that resulted from the import. The “Import File Error Records” is the file containing all of the records that generated errors.
If you “Launch” the Import File Error file, you will see messages defining what the specific errors were, seen in the figure below:



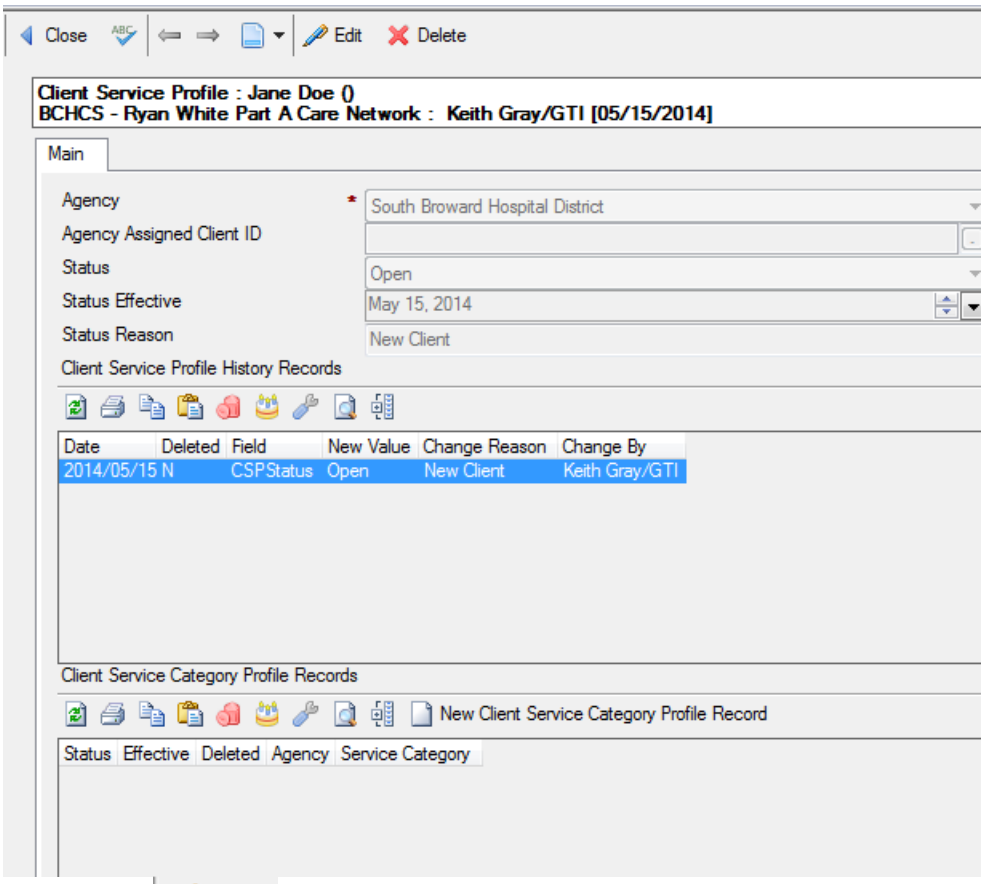
Record Row	Error Type	Error Description	Result	Client Key Record Key
1	ERROR	Could not find client that matches the Key for record number		Activity will not be in
2	ERROR	Could not find client that matches the Key for record number		Activity will not be in
3	ERROR	Could not find client that matches the Key for record number		Activity will not be in
4	ERROR	Could not find client that matches the Key for record number		Activity will not be in
5	ERROR	Could not find client that matches the Key for record number		Activity will not be in
8	ERROR	Could not find client that matches the Key for record number		Activity will not be in
9	ERROR	Could not find client that matches the Key for record number		Activity will not be in
10	ERROR	Could not find client that matches the Key for record number		Activity will not be in
11	ERROR	Could not find client that matches the Key for record number		Activity will not be in
12	ERROR	Could not find client that matches the Key for record number		Activity will not be in
13	ERROR	Could not find client that matches the Key for record number		Activity will not be in
14	ERROR	Could not find client that matches the Key for record number		Activity will not be in
15	ERROR	Could not find client that matches the Key for record number		Activity will not be in
16	ERROR	Could not find client that matches the Key for record number		Activity will not be in
17	ERROR	Could not find client that matches the Key for record number		Activity will not be in
18	ERROR	Could not find client that matches the Key for record number		Activity will not be in
19	ERROR	Could not find client that matches the Key for record number		Activity will not be in
20	ERROR	Could not find client that matches the Key for record number		Activity will not be in
21	ERROR	Could not find client that matches the Key for record number		Activity will not be in
22	ERROR	Could not find client that matches the Key for record number		Activity will not be in

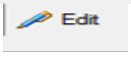
The most common error is “Could not find client that matches the Key for record number…”. This indicates that Provide Enterprise was unable to find a client using the key identified in your import file. Typically, this means that the client does not have a Client ID listed in their Client Service Profile Record.
To fix this, you will need to find out who the client is from your EMR system. Once you have figured out who the client is, you can navigate to that client’s profile in Provide Enterprise (using one of the Views of clients or using the Find\Client function). Once in the Client Profile, you can see the Client Service Profiles on the bottom of the “Profile – General” tab, seen in the screenshot below:



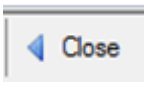
NOTE: In this case, the client is open to the importing Agency (South Broward Hospital District), because it is listed in this window. However, the client is missing an Agency Assigned Client ID (the key used in the import). If the client is not yet open to your Agency, you will not see the agency listed under Client Service Profiles. You can then open the client to the Agency by clicking on "New Client Service Profile Record and completing the details.

If the client is open to your agency, but missing a client ID, double click on the Client Service Profile to bring the Service Profile up on your screen. It will look similar to that in the figure below.



Click on the 

button. You will then be able to type in the "Agency Assigned Client ID".

After entering the ID, simply click the 

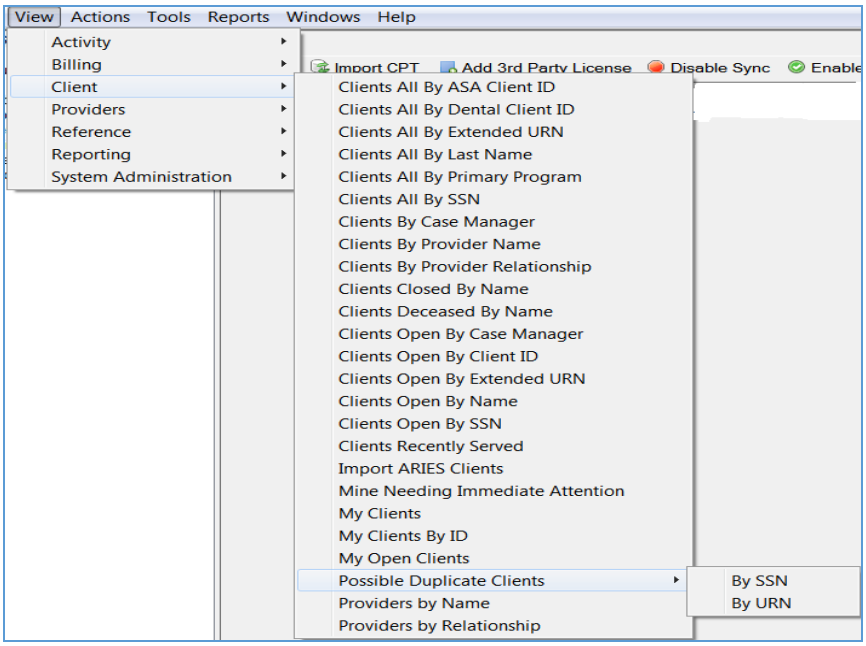
button to Close and save the record. This client will then be able to have services imported.

After fixing all appropriate errors, simply re-import the Import File Error Records by following the steps at the beginning of this guide.

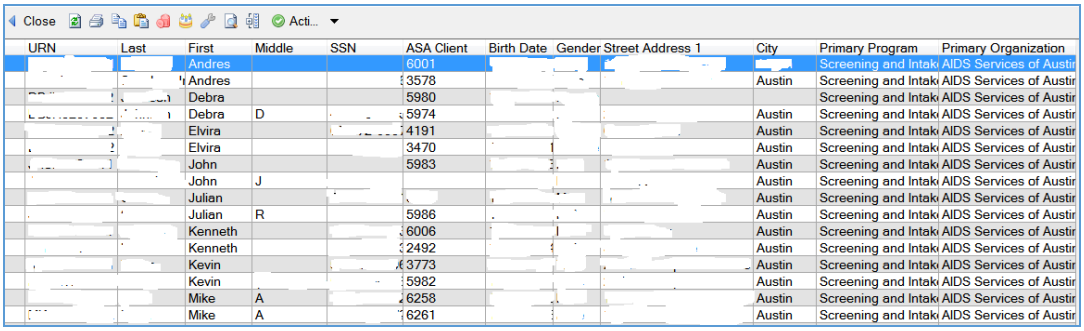
Contact the Provide Help Desk (provide.help@grouptech.com) should you receive other errors during the import process.

Merging Duplicate Clients

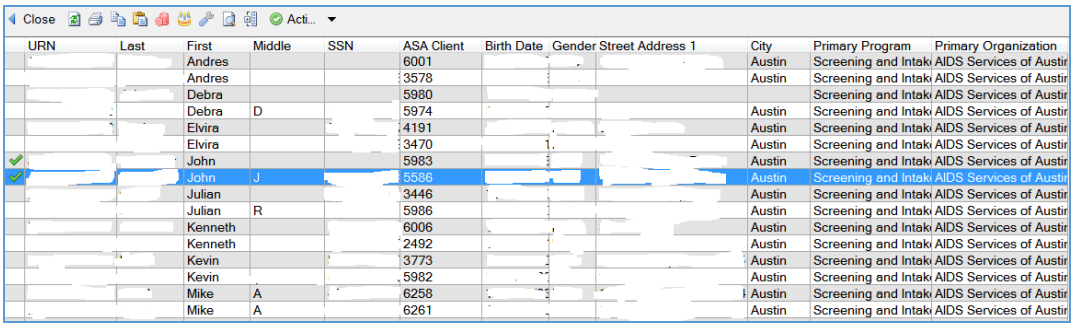
- When duplicate clients have been entered into Provide, the client's files can be merged into one file. To view possible duplicate clients, from the Menu Bar, select "**View – Client – Possible Duplicate Clients – By SSN or By URN"**.



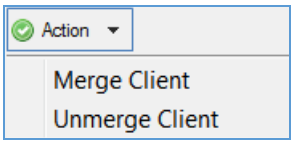
- A screen similar to the one below will appear:



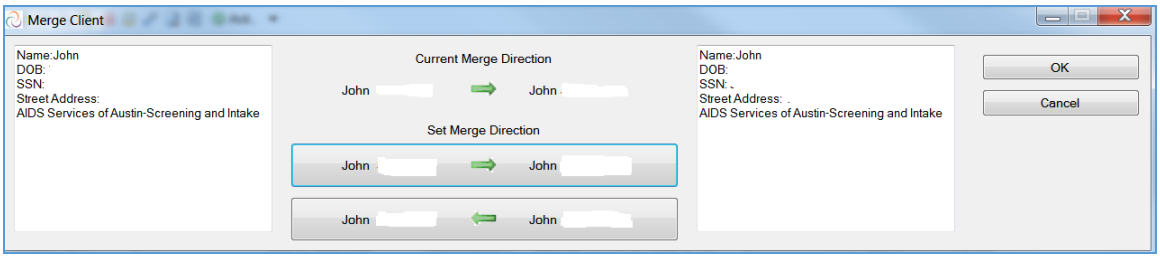
- To merge a client, click on the client records that should be merged. By clicking on the client, a green check mark will appear in the first column.



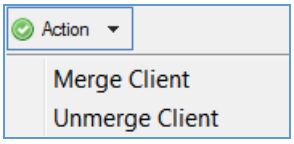
- Click on the Action button and select “Merge Client.”



- A screen similar to the one below will appear:



- The green arrow in the middle indicates the direction the client's file will be merged. In the example above, the client's file on the left will merge into the client's file that is on the right. If you need to switch the direction of merge, click on the correct box in the middle indicating the correct direction of the merge.

Unmerging Client Files

- To unmerge a client file that has been previously merged, you would follow the same steps above (when merging a client's files) with the exception of selection "Unmerge Client" under "Action."
- Click on the Action button and select "Unmerge Client."