Introducing

Prognotus 0.9.2

Who I am

Kevin C. Smith
Information Technology Specialist
Community Support Advocates
Mainstream Living, Inc.

Prognotus

Prognotus is case management software for human service organizations.

Prognotus is designed to meet the needs of a particular agency.

Prognotus provides a cost effective solution for:

- Progress note writing
- Information sharing within the organization
- Client goal tracking
- And more

What Is Covered

- Policies & Procedures
- Learn how to log in.
- Learn about your profile.
- Learn to create a Progress Note.
- Learn about the QA workflow.
- Learn to update a Progress Note.
- Overview of the Dashboard.
- Prognotus Tips
- Summary

Electronic Personal Health Information (ePHI)

Information recorded in Prognotus is considered "Electronic Personal Health Information" (ePHI), and therefore is covered under the agency HIPAA policies.

User Identity & ePHI

- Prognotus authenticates users of the system by username and password, which is unique to each user.
- Access to client information is limited by role and group.
  - Users only have access to clients within their assigned group(s).

User Identity & ePHI

- Prognotus passwords are encrypted and only known to the user.
  - It is the user's responsibility to maintain the security of their password and other identity information. No one inside or outside the agency should ask for a user's Prognotus password.

Security & ePHI

- Communications to and from Prognotus are secured via SSL.
- Data may be accessed only via the web interface, except in the case of agency IT staff.
- Entries requiring a signature receive an identity stamp at moment of creation or update. The identity stamp consists of current user's full name (display name), title, date plus time of creation, and agency employee ID (if available).

Electronic Signatures?

The term "electronic record" means a contract or other record created, generated, sent, communicated, received, or stored by electronic means. An electronic signature means an electronic sound, symbol, or process, attached to or logically associated with a contract or other record and executed or adopted by a person with the intent to sign the record.

Logging & ePHI

- Actions involving signed content are logged, and make available in a history.
- Original signed content is maintained in history when updating/modifying.
- Other actions are also logged, but are not made directly available to users for viewing.

Signing Process

- Prognotus verifies “intent” to sign by requiring the user to select/choose “Completed/Signed”.
  - At this point it is the user's responsibility to verify the contents accuracy, and to make corrections as needed.
  - Just like on paper they are expected to check before signing.

Administrative Safeguards

- Since the unique username and password combine to create the user's confidential and **legal** electronic signature all user will:
  - Select a password that is not easily guessed by others. (Favorite color, birth date, etc.)
  - Maintain confidentiality of user passwords by not sharing or disclosing the password to **anyone**.
  - The password should not be written down.
  - Users are forbidden from having computers automatically remember company confidential passwords.

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Administrative Safeguards

- Immediately change or have changed their personal password if it is known or suspected to be compromised.
- Do not use you user name or password outside of the company, such as other websites.
- Lock or Log off the computer when leaving it unattended.

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Administrative Safeguards

- Prevent unauthorized persons from seeing confidential information displayed on the screen by closing sensitive documents or locking/turning off the display.
- Do not access Prognotus on a public computer, or other computer not owned by the company or you.
- Immediately close any records they shouldn't have access to and notify IT staff to modify their access rights.

Administrative Safeguards

- Not download, copy, or otherwise transfer information from agency networks or databases to any personal or company device unless specifically authorized to do so by nature of the position. Authorized transfers must be secured and thoroughly deleted when no longer needed.

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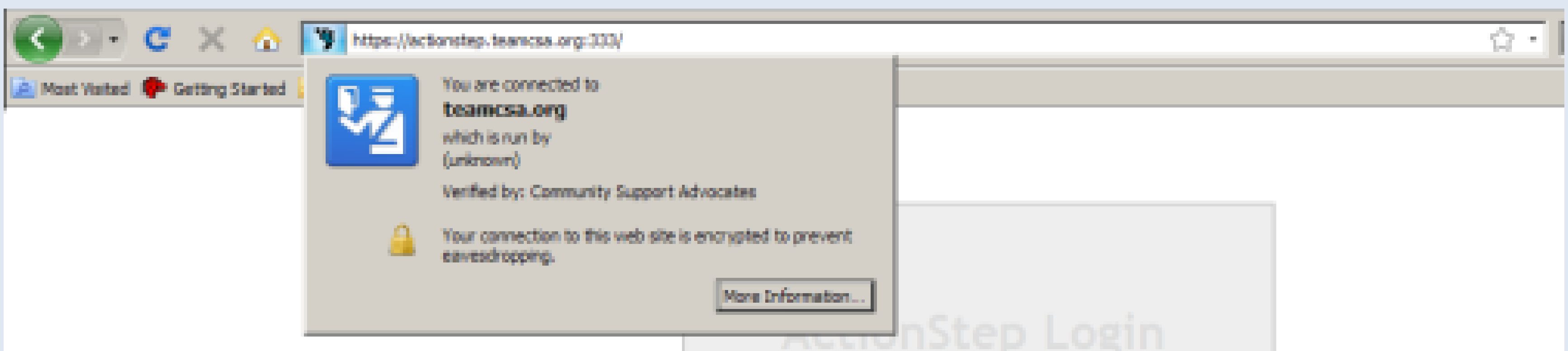
Administrative Safeguards

- Realize that by clicking save, submit, approve, etc. you are electronically signing that record.
- This electronic signature is legally binding and carries the same legal weight and responsibilities as a traditional handwritten signature.

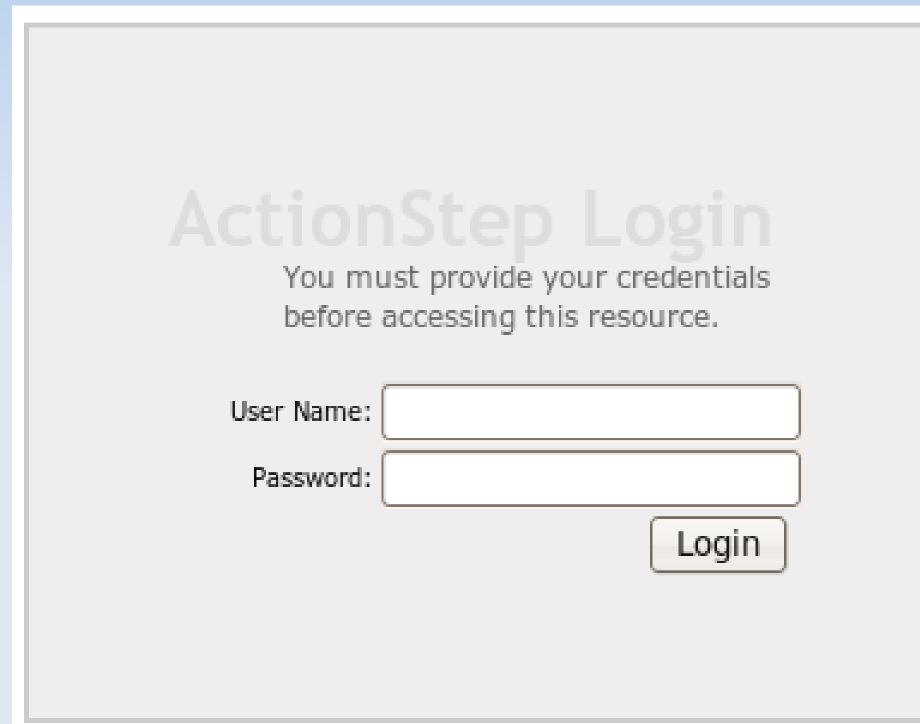
Logging In

Open a browser and enter the Prognotus URL (web address) https://secure.prognotus.net into the Location Bar.



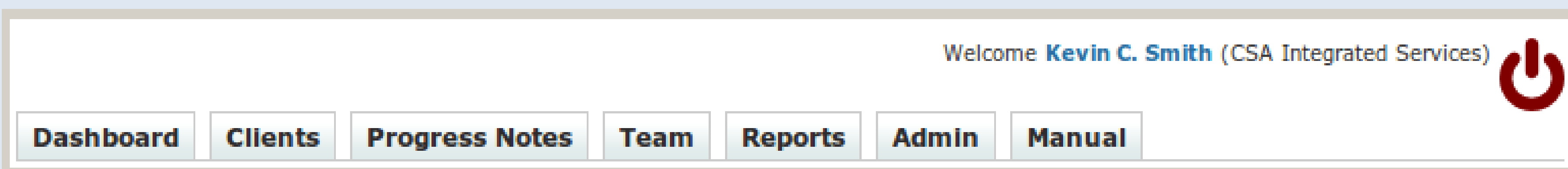
Logging In

- You should now see the Prognotus login box.
- To begin, log in using the “User Name” and “Password” provided to you.



User Profile

- Click your “Display Name” near the top right of the page to edit your profile.
- Your current group is shown near your “Display Name”.



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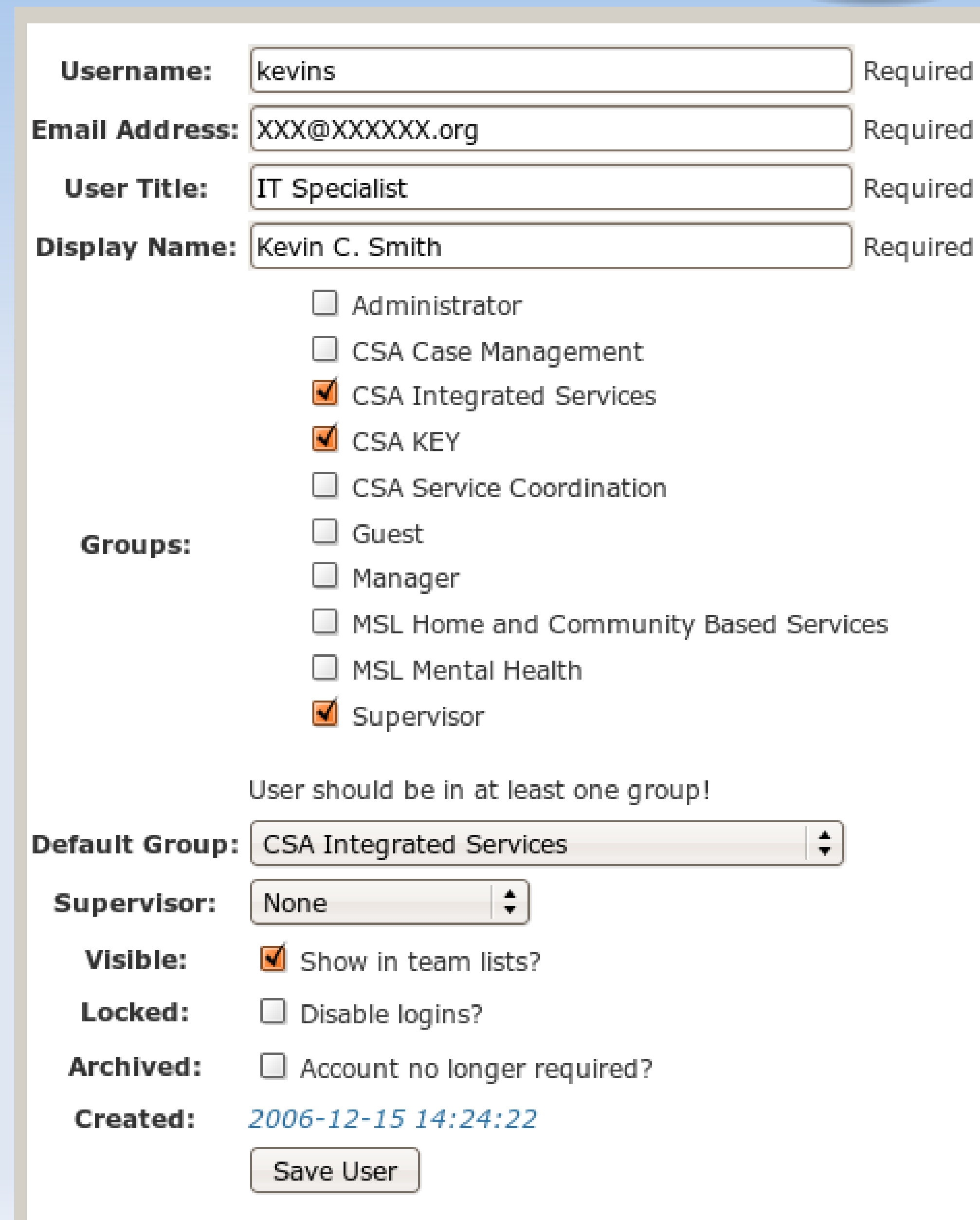
User Profile

- Available fields are dependent on the user's role.
- This example shows a user in a “Supervisor” role.



User Profile

- Change the “User Title” and “Display Name” as needed.
  - These fields are used in reports and are part of your electronic signature, and therefore should be your legal name and real job title.
- To change your default group, use the provided select field.
  - You are only able to change your current group to one you are a member of.

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Creating a Progress Note

- Search for a “Client”.
- Click “Add Note” to use the Progress Note entry form.

Kevin C. Smith Caseload

	Last Name	First Name	SSN				
	Bobb	Bing	765-09-0987	(Plans)	(Add Note)	(Events)	(Notes)
	Snowflake	Madalyn	234-00-0983	(Plans)	(Add Note)	(Events)	(Notes)
	Twain	Mark	707-98-4723	(Plans)	(Add Note)	(Events)	(Notes)
	Washington	George	102-11-2222	(Plans)	(Add Note)	(Events)	(Notes)

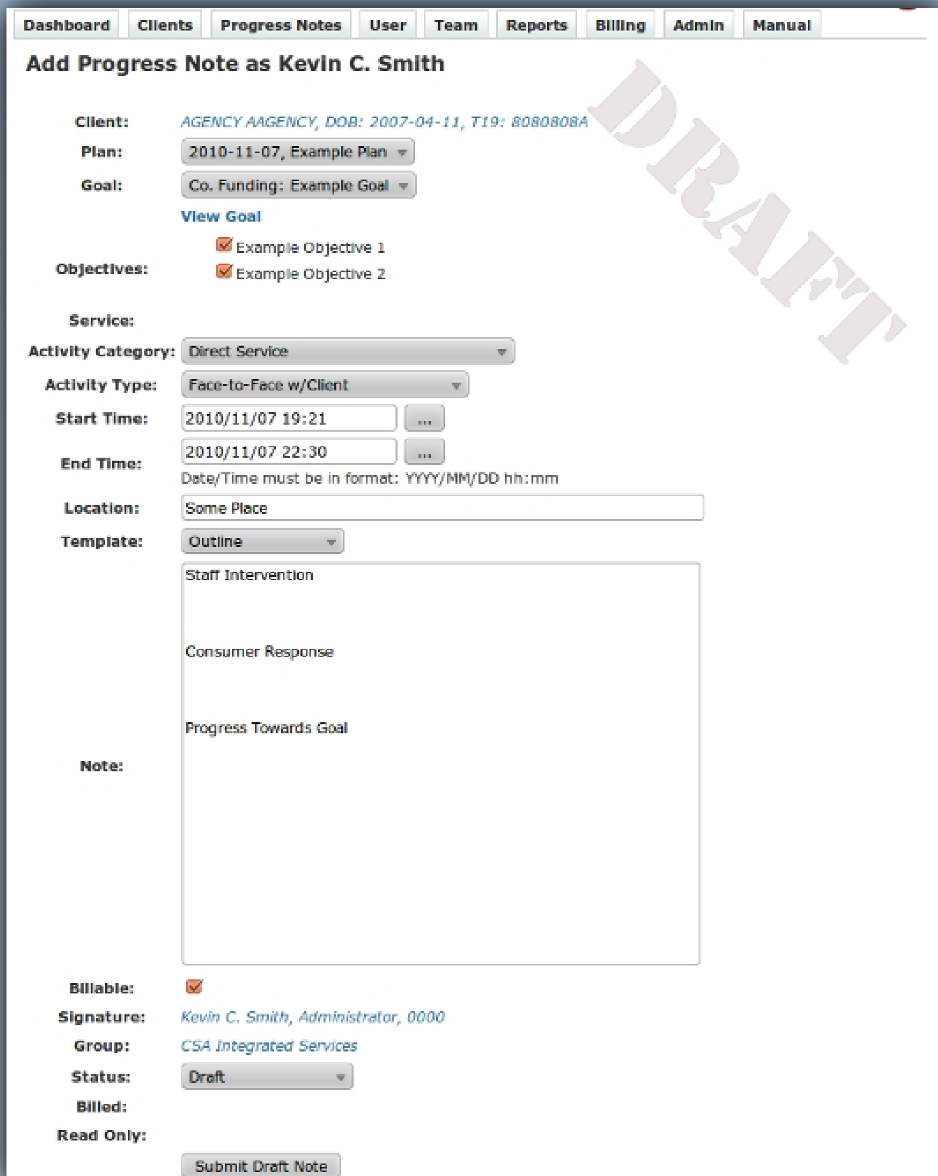
Last or First Name

Client Search

Creating a Progress Note

- If the note is to be linked with a client's objectives. Select a Plan, a Goal, and then check as many objectives as applies to your note.
  - Click "View Goal" for an overview of the Plan.
- Choose an "Activity Type".
- Enter the "Start Time" and "End Time".
  - Start and End times can to go past midnight.
  - Time over midnight must be slit into two notes.

Creating a Progress Note



- Enter the “Location” information.
- Optionally, select a template.
- Write your “Note”.
- Billable defaults are set by group. Modify if needed.
- Select note status.
- Click “Submit” to finish.

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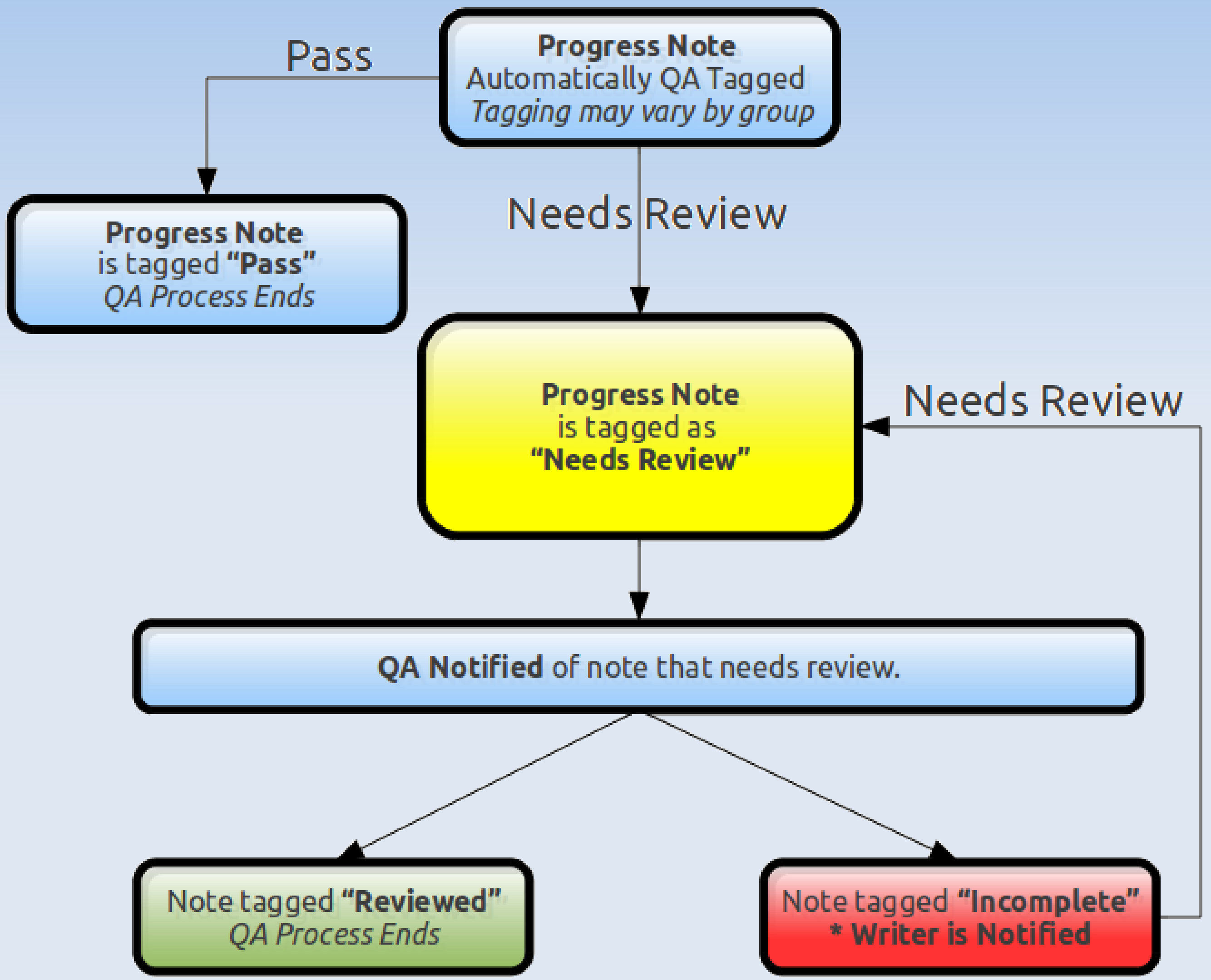
QA Workflow



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Updating a Progress Note

- Click the “Edit” icon.
  - A red shaded icon indicates “Incomplete” and green is “Billable”.
  - Progress Notes reviewed by Quality Assurance or billed cannot be changed.
- Make changes then click “Submit”.
- The updated note will be marked “Needs Review” if it's in the QA process.

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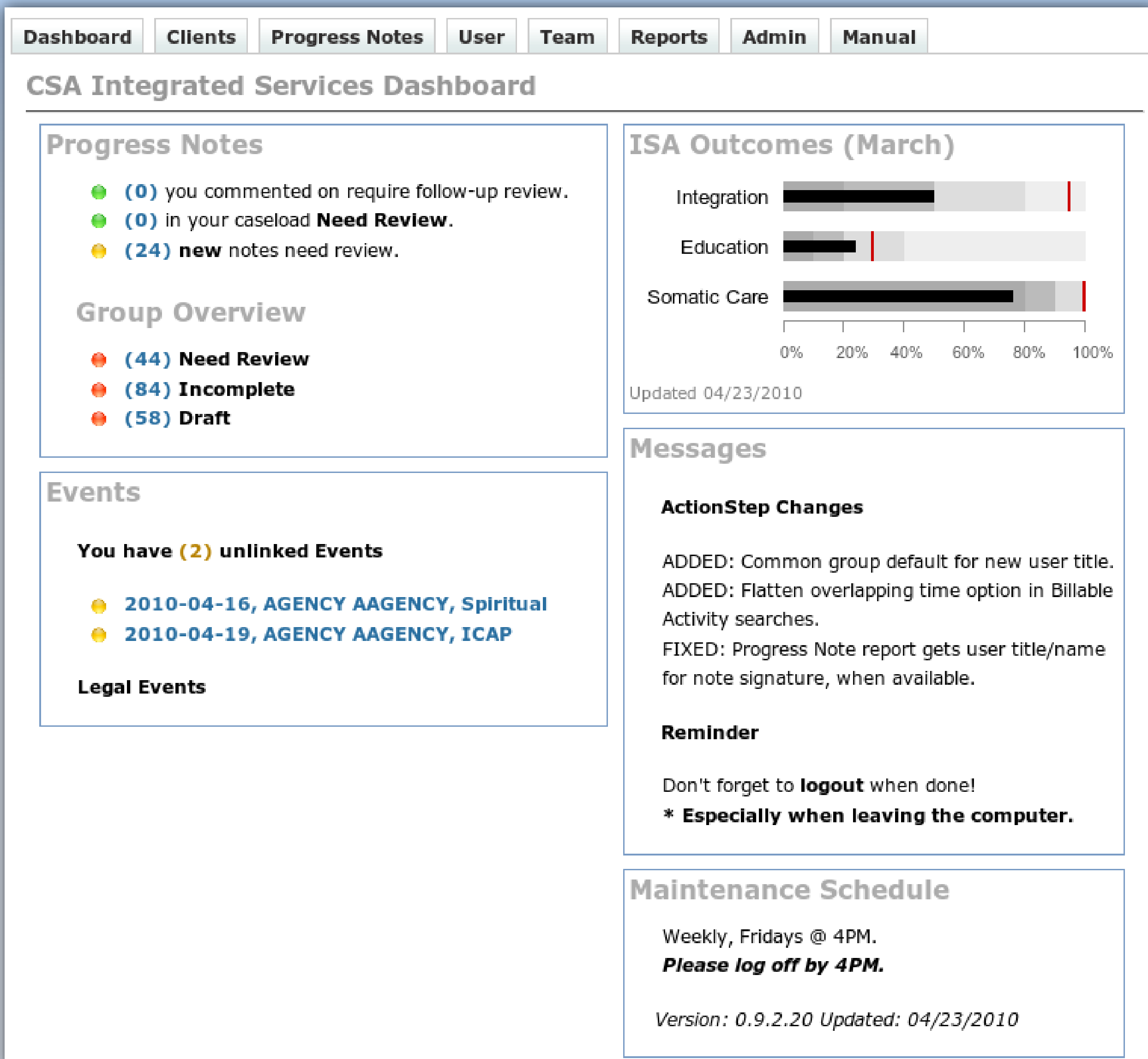
The Dashboard



- "Incomplete" notes appear in the Progress Notes section.
- Watch "Status and Updates" for updates.

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Progress Note Tips

- Include a specific location for each Face-to-Face.
- Don't link all services to ongoing supports. Use other goals first if applicable.
- Write separate notes when required.
  - Avoid start/end time overlapping on notes.
  - A different location requires a separate note.
  - Working on two different goals requires two notes. Split the time between each note.

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Progress Note Tips

- When documenting a Face-to-Face or other billable time, document only that time.
  - This is important because this is billable time.
  - Create an other note for additional non-billable activities.
  - For group activities that require time to be split, enter start & end times for that client's time and document full time in the note.

Prognotus Tips

- Write your notes professionally:
  - Use spell checking when the browser supports it.
  - Reasonable grammar rules should apply such as, capitalization, punctuation, etc.

Progress Note Tips

- Activity Types are from your perspective and about how you spent **your** time.
  - **Face-to-Face** means you saw the client in person.
  - **Telephone** means you spoke on the phone with the client.
  - **Sick** means **you** were sick not the client. This documents **your** sick time, which may or may not be required by your program.

Activity Types Examples

- Admin
- Collateral
- Collateral Attempted
- E-Mail
- **Face-to-Face /w Client**
- Face-to-Face Attempted
- **Face-to-Face & Collateral**
- Fax
- Funeral
- Holiday
- Indirect
- Sick
- Telephone w/ Client
- Telephone Attempted
- Training
- Travel Time
- Vacation
- Voicemail

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Bad Note Example #1

- GOAL = Socialization
- Start Time = 10:00 AM, End Time = 01:00 PM
- Location = Apartment
- Note = Prompted Kevin three times for outing and appointment. He finally showed up.

What's wrong with this example?

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Bad Note Example #1

- GOAL = Socialization
- Start Time = 10:00 AM, End Time = 01:00 PM
- Location = Apartment
- Note = Prompted Kevin three times for outing and appointment. He finally showed up.

The documentation does not support a **three hour** long contact and is confusing.

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Bad Note Example #2

- GOAL = Socialization
- Start Time = 01:00 PM, End Time = 03:30 PM
- Location = Des Moines & Community & Doctor office
- Note = Took Kevin to McDonalds then to doctor office then to pharmacy for new medication then home to fill medications.

What wrong with this example?

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Bad Note Example #2

- GOAL = Socialization
- Start Time = 01:00 PM, End Time = 03:30 PM
- Location = Des Moines & Community & Doctor office
- Note = Took Kevin to McDonalds then to doctor office then to pharmacy for new medication then home to fill medications.

Three different locations require three notes.

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Good Note Example #1

- GOAL = Socialization
- Start Time = 01:00 PM, End Time = 01:30 PM
- Location = McDonalds on SW 9th
- Note = Took Kevin to McDonalds …

Good Note Example #2

- GOAL = Appointments
- Start Time = 01:30 PM, End Time = 02:30 PM
- Location = Dr. Smith's office
- Note = Took Kevin to Dr. Smith's office for appointment …

Good Note Example #3

- GOAL = Medications
- Start Time = 02:30 PM, End Time = 03:00 PM
- Location = Walgreens on SW 9th
- Note = Took Kevin to Walgreens pharmacy to refill prescriptions ...

Good Note Example #4

- GOAL = Medications
  - *Same goal as Note #3 with different location.*
- Start Time = 03:00 PM, End Time = 03:30 PM
- Location = Kevin's apartment
- Note = Took Assisted Kevin with medication review, filling medication planner ...

Things to Remember

- Login session expires after **20 minutes** of inactivity.
  - If a session expires before a note is saved, you are required to re-login; **do so immediately**.
  - If you wait to re-login your Progress Note will be lost.
- Logout when finished!
- Prognotus is updated at **4PM every Friday**.
  - **Logout before 4PM on Friday**.

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Web Browsers

- Prognotus is developed using Firefox 3.
  - For best results use Firefox 3.
- Prognotus should work with modern browsers.
  - IE 8, Opera 9, Safari 3, Google Chrome.
- JavaScript must be enabled in the browser.
- Browser password remembering must be off.
  - Browsers do not provide secure password storage.
  - It opens access to ePHI to unauthorized users.

Security Summary

- Information recorded in Prognotus is considered “Electronic Personal Health Information” (ePHI).
- Take all measures to ensure client privacy.

Security Summary

- Username and password combine to create the user's confidential and **legal** electronic signature.
- It is the user's responsibility to maintain the security of their password and other identity information.
- Do not tell anyone your password.
- Select a password that is not easily guessed by others.

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Security Summary

- Do not have computers automatically remember company confidential passwords.
- Do not write down your password.
- Log out when done.
- Do not use your agency password(s) for other purposes.

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Progress Note Summary

- Log in using the provided username and password.
- Search for a client by last, first name or nickname.
- Click “Add Note”.
- Complete the Progress Note form.
- Click “Submit”.
- Note is marked “Needs Review”.

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Progress Note Summary

- Notes marked “Incomplete” will appear on your Dashboard.
- Click the “Incomplete” number to see the list.
- Click “Edit” and make the necessary changes.
  - Click “Comments” to view QA comments regarding the note.
  - Reply with a commit if needed.
- Click “Submit”.

Useful Information

Prognotus Application

https://secure.prognotus.net

Prognotus Website & Documentation

http://www.prognotus.net