New Jersey Division of Developmental Disabilities

iRecord 3.0 User Guide

DDD IT Department

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About this Guide

Purpose of this Guide

The iRecord user guide lists the features and provides instructions on carrying out daily operational tasks within the application.

Typographical Conventions

This guide complies with the following typographical conventions:

Typeface	Meaning
Hyperlink References	References to hyperlinked topics within or outside this guide.
Bold	Menus and menu options, input fields, radio buttons, check boxes, drop-down lists, tabs, buttons and messages displayed on the screen.
CAPS	Keys on the keyboard.
Note	Additional information that supports the understanding, functioning or flow of the concerned topic.
Italic	Enter the exact text at the requested location.

How to Get In Touch

The following sections provide information on how to obtain support for the documentation and the application.

Documentation Support

For any questions, comments, or suggestions on the documentation, you can contact us by e-mail at DDD.ITREQUESTS@dhs.state.nj.us

Please begin the **Subject** of the e-mail with *Documentation:* to let us know that this is for documentation support.

Support

If you have any questions, comments, or suggestions regarding this version of iRecord, or if you have problems with the application, contact us by e-mail at DDD.ITREQUESTS@dhs.state.nj.us.

While contacting support, be ready with the following information:

- Your name, e-mail address, phone number, and fax number.
- Your company name and address.
- A description of the problem and the steps that were performed prior to encountering the problem with all the pertinent error messages.

1 Introduction

The New Jersey Division of Developmental Disabilities (DDD), the state agency responsible for providing and funding services for adults with developmental disabilities, is in the process of system transformation. There are changes taking place with the service delivery system. These changes include a shift from reimbursement of contracted services to a fee-for-service system. During this transition, the Interim program implements the practices governing service delivery.

iRecord is an electronic health record (EHR) system that enables the Supports Program and Community Care Waiver. iRecord 3.0 is a complete revamp of the existing application, developed by the Information Technology (IT) team at DDD. The application, currently, supports the Interim program, and expected to support the planned implementation of the fee-for-service system.

Support Coordination agencies can request access to iRecord. These agencies manage the Support Coordination services for the participant through their team of Support Coordinators. The application facilitates the Support Coordinators to provide these services. It is a repository of the participant information, and aids the Support Coordinator to enter and review outcomes. It provides coordination of services and monitors the progress towards the identified outcomes in accordance with the DDD's principles.

The web application delivers a secure enhanced user interface and a consistent experience, applicable across any device. It categorizes and records the participant information, displayed according to the role of the user. Also, there are many additional enhancements to the different user roles of the application.

2 Getting Started

iRecord 3.0 is designed to deliver advanced features to the user in a friendly and efficient manner. The application categorizes information to help the user manage the participant records.

Before you start the application, you need a connected device with a browser. For a better experience, use one of the following browsers:

- Internet Explorer 10.0.9200 and higher
- Mozilla Firefox 30.0 and higher
- Google Chrome 42.0.2311 and higher
- Safari on iOS

Some of the browser requirements are:

- Enable JavaScript
- Flash plugin
- Disable pop-up blocker

Other requirements:

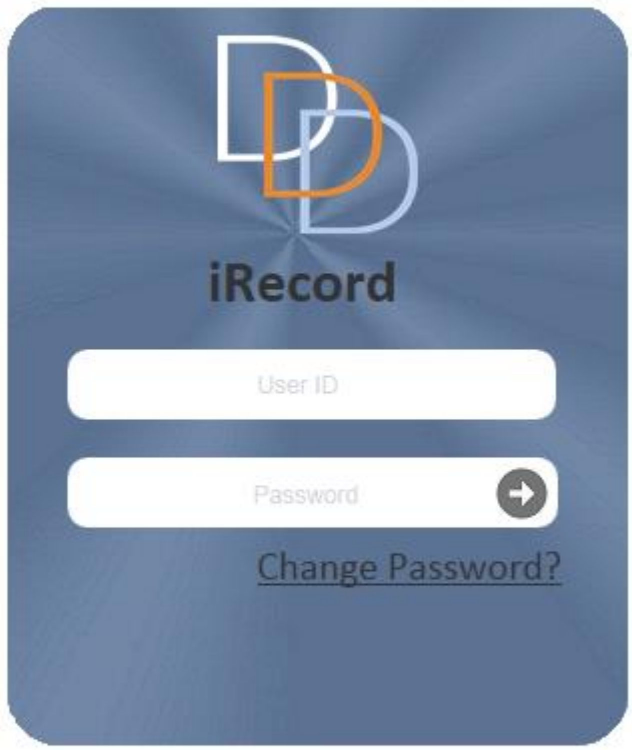
- Microsoft Word to view .doc/.docx file formats
- Microsoft Excel to view .xls/.xlsx file formats
- PDF Reader to view .pdf file formats

2.1 Log in to iRecord

iRecord provides secure access to the users of the application. The instructions below indicate the procedure followed to access iRecord and manage password.

To log in to iRecord

1. Enter the following URL within the address bar of the browser and then press ENTER.
   https://irecord.dhs.state.nj.us/
   View the **iRecord Login** dialog box.



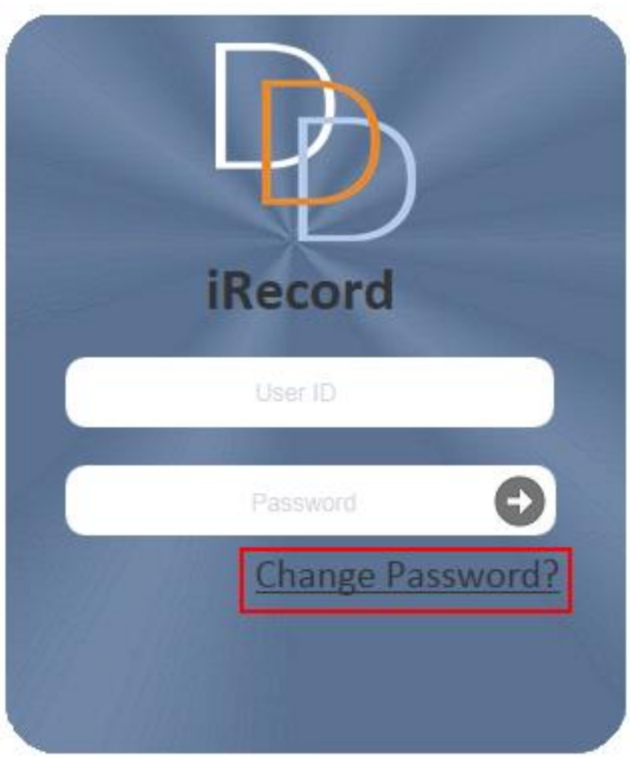
2. Enter the provided **User ID** and **Password** and then click the  button.

Field	Description
User ID	Enter your login id with the domain name in the format shown below. The domain name for SC, SCS, SC-VO, FI, SFI, and FI-VO is **CO**. The domain name for SWAC, WAC, and VO-TS is **DDD**. Format: <domain name>\<login id> Example: Enter **co\alex** for an SC with login id **alex**; enter **ddd\matt** for a VO-TS with login id **matt**.
Password	Enter your password within the text box.

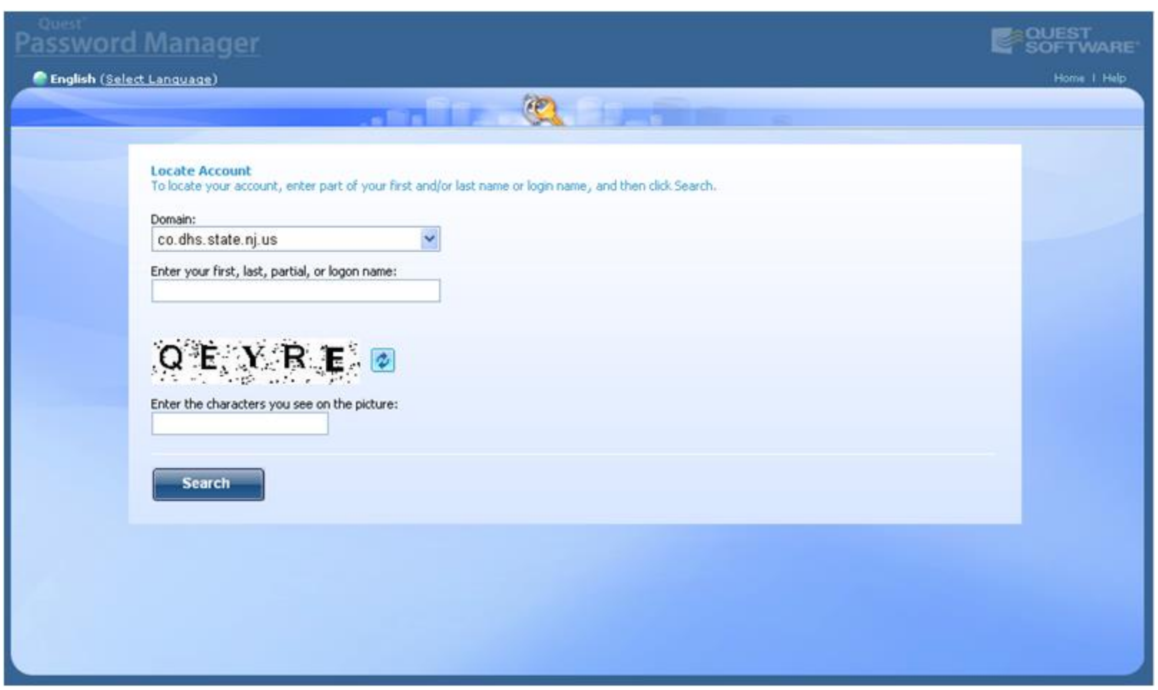
3. **iRecord** recognizes your user role based on the entered credentials, and displays your Dashboard (Home screen).
   With multiple user roles, select the role from the **Select Role** drop-down, shown below, and then view the Dashboard of the selected role.

To manage the password

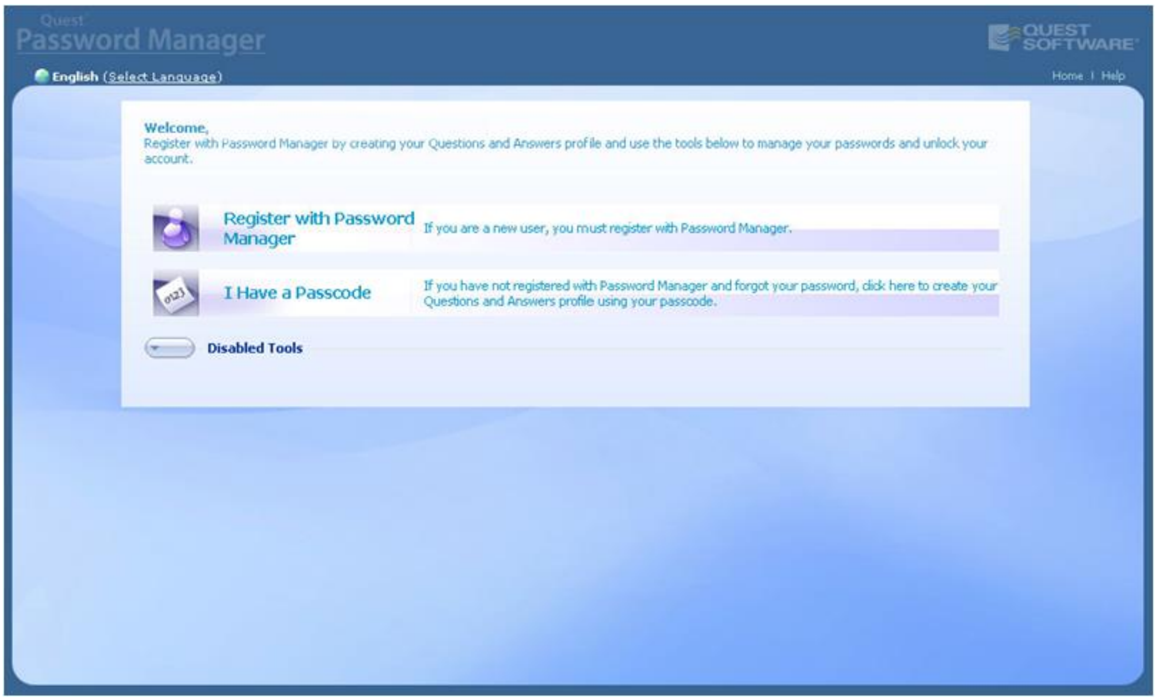
1. Click the **Change password?** link on the **iRecord Login** dialog box, indicated in the following figure.



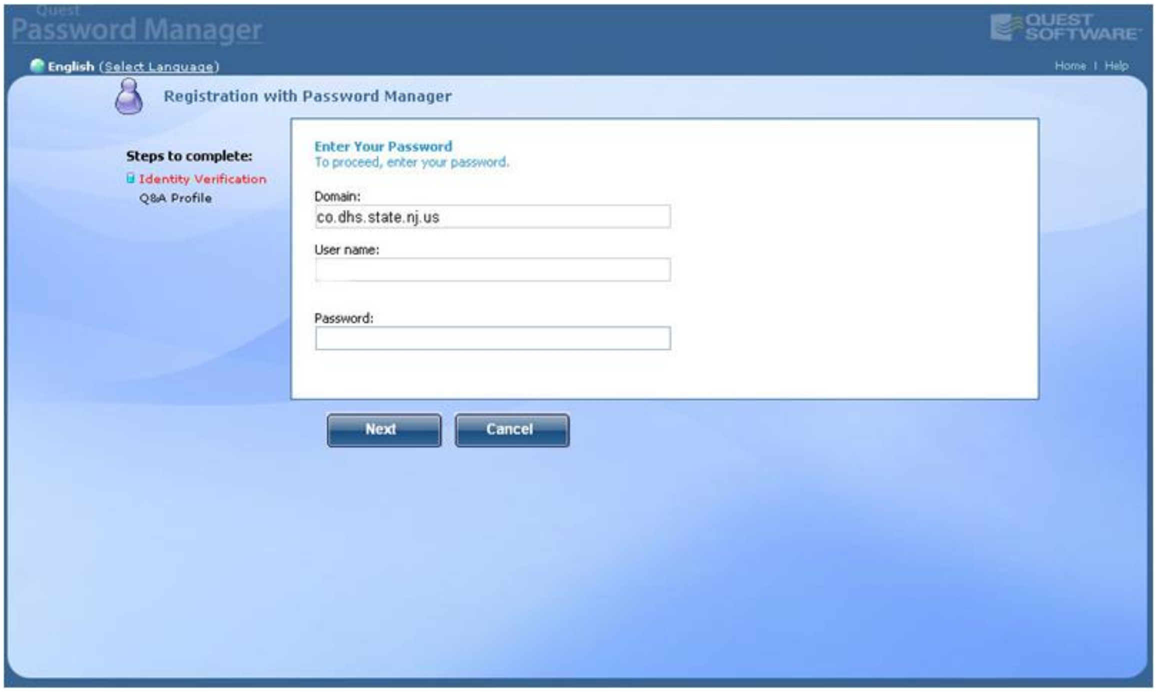
2. View the following screen on a new tab or a new window. Select your domain from the **Domain** drop-down list.



3. Enter your log in name, or all or part of your name in the **Enter your first, last, partial, or logon name:** text box.
4. Enter the characters exactly how it appears on the image above in the **Enter the characters you see on the picture:** text box.
5. Click **Search** to view the following screen.
   If you enter part of your name, it displays a list of names matching the search criteria. Select your name from the list to display the following screen.

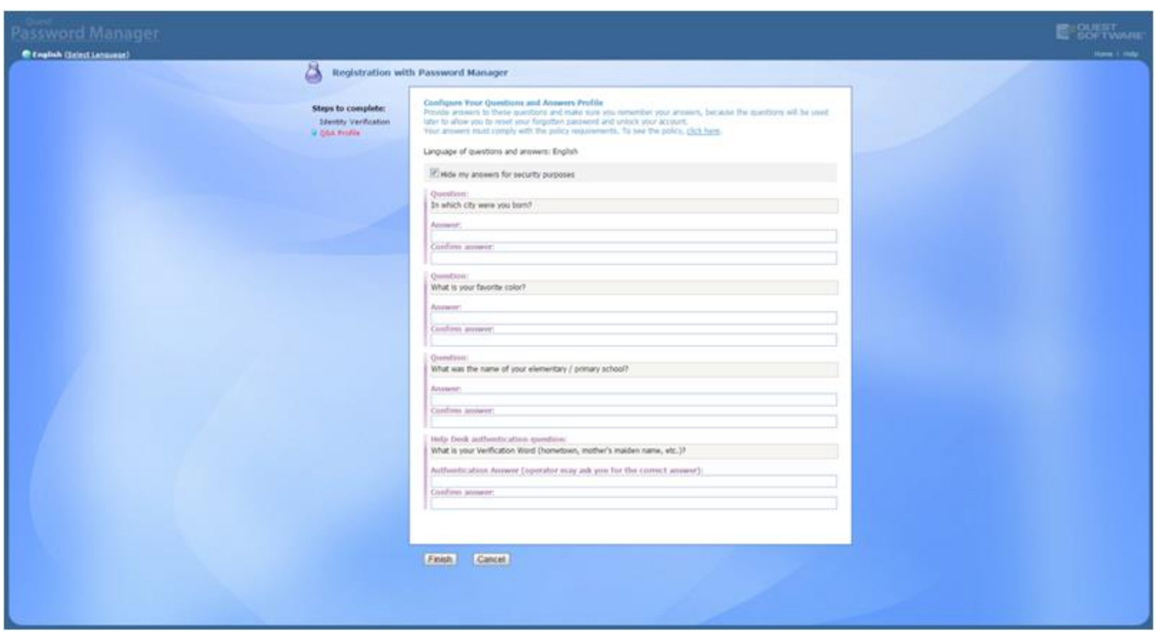


6. Click **Register with Password Manager** and view the following screen.



7. Enter the provided password in the **Password** text box.

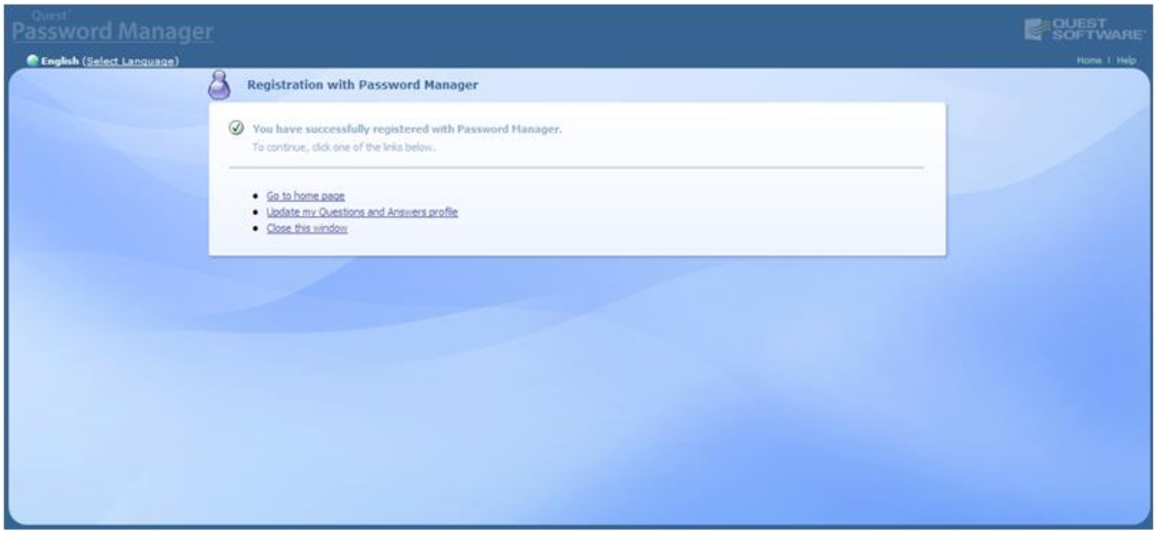
8. Click **Next** and view the following screen.



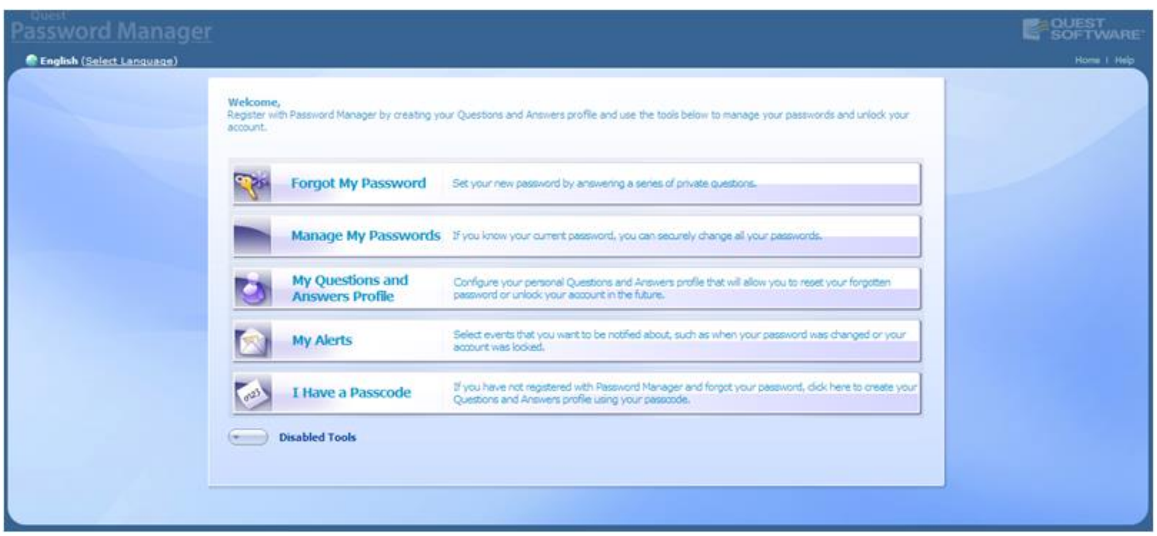
9. Enter the answer for the question and re-enter the same to confirm. For future reference, make an exact note of the questions and answers.

10. Click **Finish** to submit.

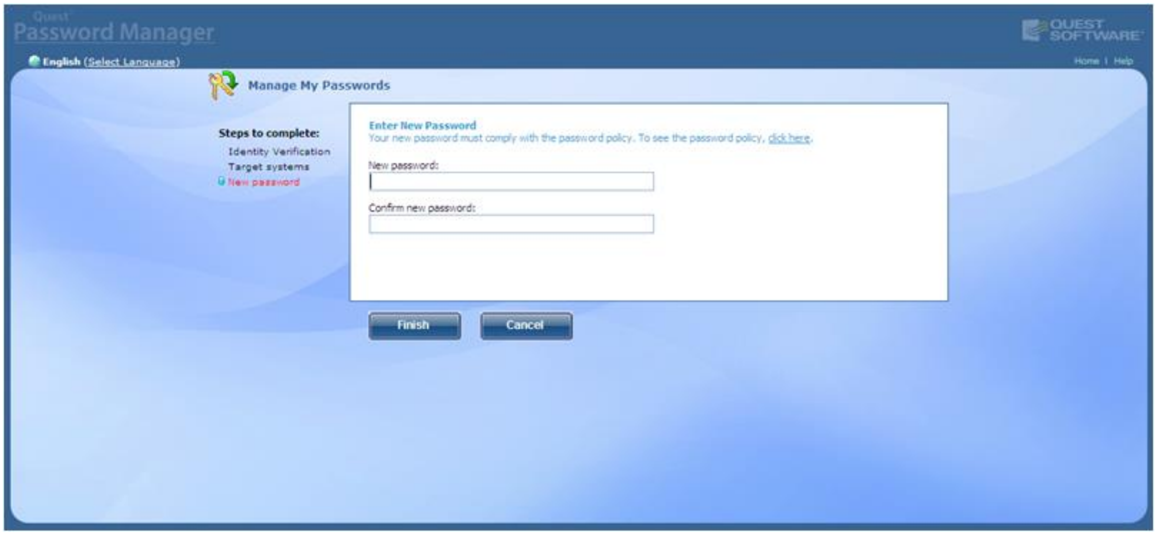
    The following screen displays the confirmation with **You have successfully registered with Password Manager**, as shown.



11. Click the **Go to Home Page** link and view the following screen.

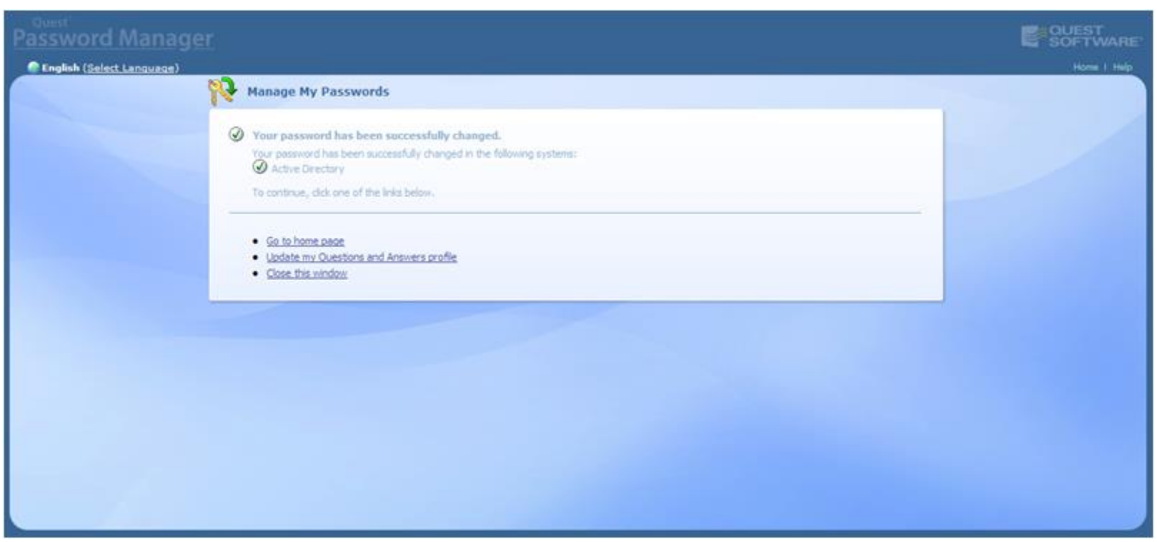


12. Click **Manage My Passwords** and view the following screen.



13. Enter the new password in the **New password** text box and re-enter the same password in the **Confirm password** text box.

14. Click **Finish**.
    The following screen displays the confirmation with **Your password has been successfully changed,** as shown.



2.2 User Roles

The user roles for the iRecord application are:

- SWAC – Supervisor of Waiver Assurance Coordinator
- WAC – Waiver Assurance Coordinator
- SCS – Support Coordination Supervisor
- SC – Support Coordinator
- SC-VO – Support Coordinator - View Only
- VO – View Only
- VO-TS – View Only - Troubleshoot
- SFI – Supervising Fiscal Intermediary
- FI – Fiscal Intermediary
- FI-VO – Fiscal Intermediary - View Only

2.3 User Interface

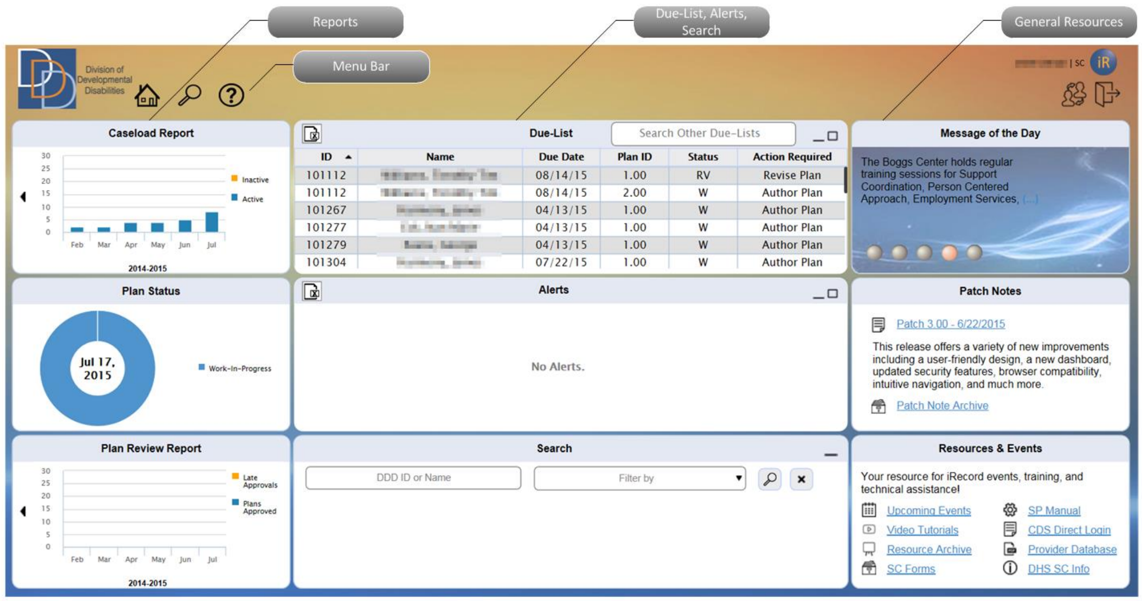
iRecord 3.0 brings you a new tile-based interface for a refined experience to the users of the application. It delivers consistently across any device connected to the internet via a browser. The application offers an identical user experience across the recommended browsers, giving you an option amongst the mainstream browsers.

2.3.1 Dashboard

iRecord displays the dashboard after you log into the application. It is the home screen for all user roles, but displaying information relevant to you based on your user role. The dashboard interface can be divided into the following three parts (left, center, and right) for all user roles:

- Reports (left)
- Due-List, Alerts, Search (center)
- General Resources (right)

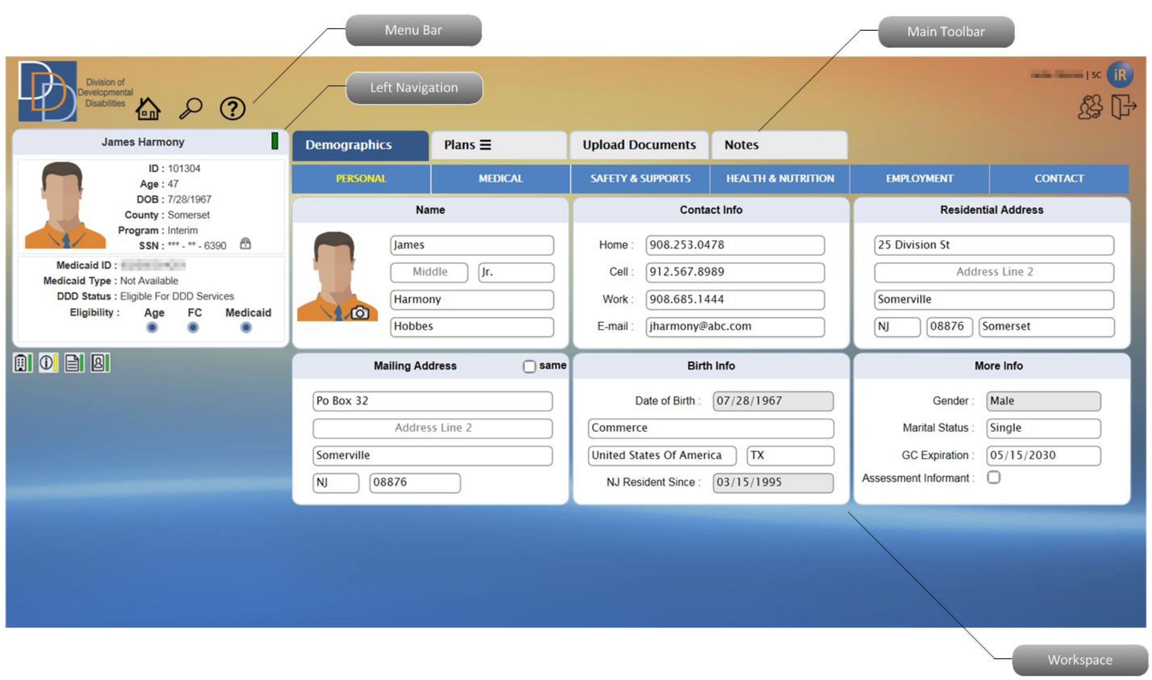
The figure below displays a typical interface of the Dashboard.



2.3.2 Participant Record

The Participant Record is the most common interface on the iRecord application. This is the interface for managing the participant information. To get to this screen, you have to select a participant. Your user role determines the options that appear within the interface elements.

The figure below displays a typical interface for participant records.



Interface Elements

The table below provides an overview of the interface elements that appear within the participant record screens.

Interface Element	Actions
Menu Bar	Access the menu options, change role or log out from iRecord. Also, view the name and the current role of the user logged into iRecord. View the copyright information and the recent patch notes from the iRecord logo.
Main Toolbar	Access the options for each participant. The options are: • Demographics • Plans • Upload Documents • Notes
Left Navigation	View the relevant participant information and, also, provide quick navigation options.
Workspace	Add, view or modify the details within the iRecord application.

2.3.3 Menu Bar

The **Menu Bar** is common across all interfaces of the application. The **Menu Bar** options change with the roles of the user.

The table below provides an overview of the **Menu Bar**.

Icon	Action
	Return to the dashboard of the current user.
	Quick Search to access the participant details.
	Management options based on the user role.

	Access the help options – **User Guide** and provide feedback.
	Change user role for users with multiple roles.
	Log out from iRecord.
User Name	Displays the name of the user logged into iRecord. The example shown in the above menu bar is Jane Doe.
Role	Displays the current user role. The example shown in the above menu bar is an SC.
iR	Click to view the **About iRecord** tile. This tile contains: • Copyright • Version number • Link to the patch notes

2.3.4 Icons

iRecord 3.0 has many icons throughout the application. The icon may perform an action and in a few cases, provides a visual representation of certain information.

Action

The table below serves as a reference to the common action icons.

Icon	Action
✓	Save or confirm
×	Cancel the action
X	Clears the text box (appears with entry of data)
+	Add data
	Edit data
	Delete data

	Print a report or tile-related information
	Search
	Export the results to an Excel file
	Filter results
	Close the tile
	Minimize
	Maximize
	Restore
	Next
	Previous

Information

The table below serves as a reference to the information icons.

Icon	Information
	Ascending order sort
	Descending order sort
	Employment related outcome

2.4 Change Role

The Change Role option appears on the **Menu Bar** for a user with multiple roles.

To change user role

1. On the **Menu Bar**, click .

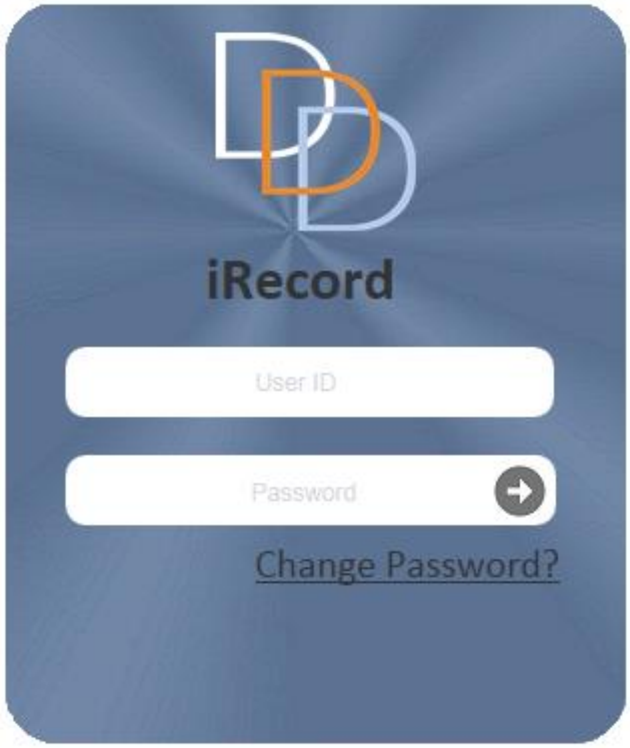
2. The multiple user role dialog box appears, as shown below. Select the appropriate role from the **Select Role** drop-down list.

3. View your Dashboard for the selected role.

2.5 Log out

To log out from iRecord

1. On the **Menu Bar**, click .
2. You are now logged out from iRecord and the browser displays the **iRecord Login** dialog box, shown below.


iRecord
User ID
Password
Change Password?

3 Dashboard

Dashboard is the home screen of the application. You can access the Dashboard from any screen by clicking on the **Menu Bar**.

The Dashboard displays the following tiles:

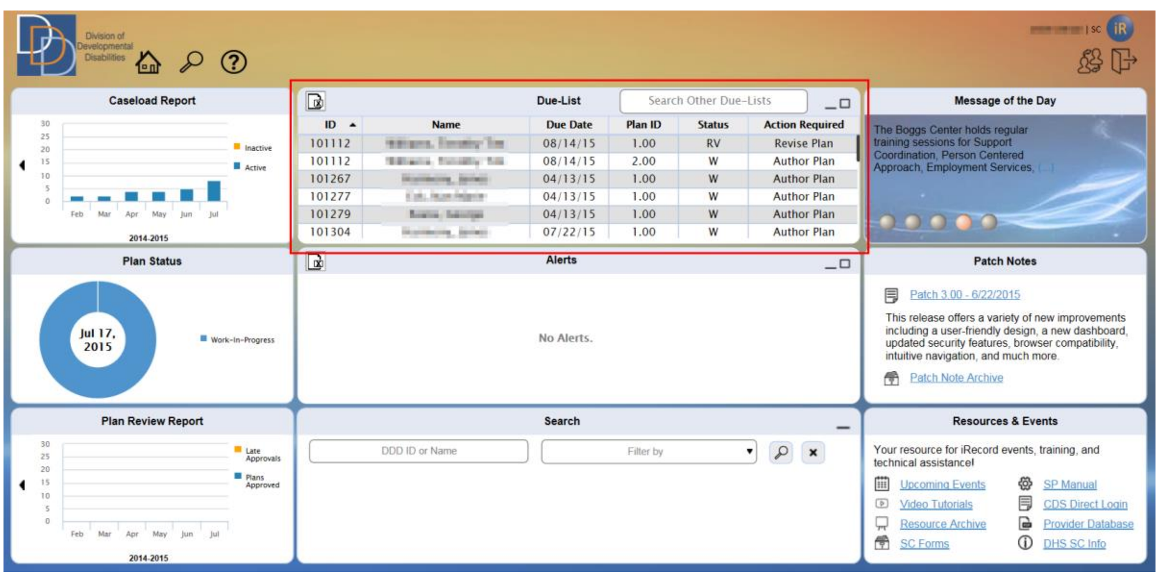
- Due-List (based on your user role)
- Alerts (based on your user role)
- Search (for all user roles)
- Reports (the report tiles vary based on your user role)
- Message of the Day (for all user roles)
- Patch Notes (for all user roles)
- Training & Events (for all user roles)

For more information, refer to User Privileges.

3.1 Due-List

Due-List displays the individual plan information summaries and the required activities that need to be performed.

The **Due-List** tile is on the Dashboard and the application displays the due-list items based on your user role. Refer to User Privileges to check whether your user role displays a due-list.



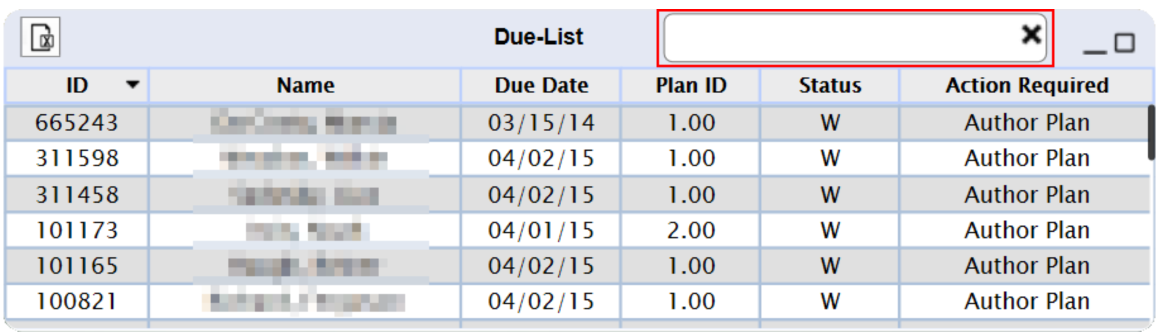
3.1.1 Due-List Tile

By default, you can view a maximum of the first six line items. You have a scroll bar to view the remaining items. Click icon to minimize the tile to its header. Click to maximize the tile and display the complete due-list items. In minimized or maximized mode, view the icon. Click icon to restore the tile to its default size.

The tile displays **No Due-List** when you do not have any items. With multiple line items in the grid, you can sort the grid from any column. Click the column header and view the for an ascending order sort. Double-click the column header and view the for a descending order sort. The or displays to the right of the sorted column header, as shown in the figure below for the **ID** column.

Click (on the extreme left of the tile header) to export the **Due-List** to an Excel sheet.

The tile includes an autocomplete search that allows you to view the due-list of another user, based on your permissions. Refer to the following table to view the due-list view permissions. You can enter the user within the autocomplete text box, highlighted in the figure below.

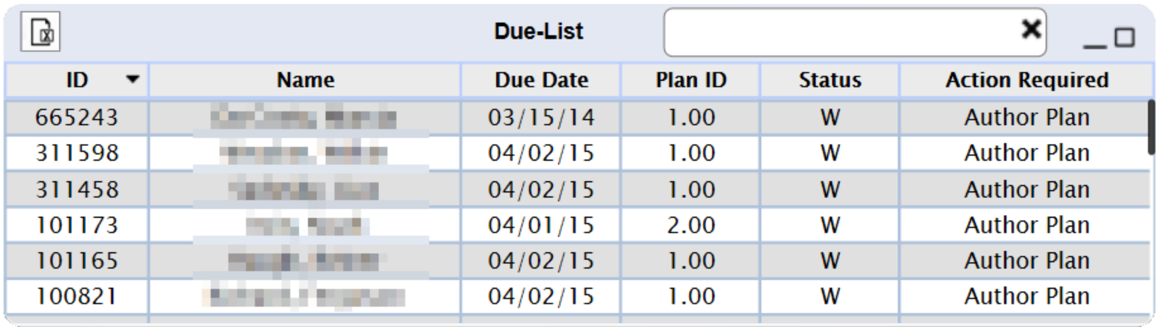


User Role	Due-List View Permission
SCS	Any SC and SCS within the same agency
SC	Any SC within the same agency
SWAC	Any WAC assigned to the SWAC
WAC	Any WAC assigned to the same SWAC
SFI/FI	Not Applicable
VO	None

VO-TS	All

3.1.2 Due-List - SCS/SC

- The following figure displays a sample due-list tile.



Due-List

ID	Name	Due Date	Plan ID	Status	Action Required
665243	[illegible]	03/15/14	1.00	W	Author Plan
311598	[illegible]	04/02/15	1.00	W	Author Plan
311458	[illegible]	04/02/15	1.00	W	Author Plan
101173	[illegible]	04/01/15	2.00	W	Author Plan
101165	[illegible]	04/02/15	1.00	W	Author Plan
100821	[illegible]	04/02/15	1.00	W	Author Plan

- View the message **No Due-List** when there are no pending cases for you.
- The tile lists your due-list items. The table below serves as a reference to the information on the **Due-List** tile.

Column	Description
ID	View the DDD ID of the participant.
Name	View the name of the participant. For trimmed names, hover and view the full name on a tooltip. Format: <Last Name>, <First Name>
Plan ID	View the plan ID for the participant.
Due Date	You have to perform an action on this item before the due date, which is calculated based on the event assignment date. Format: MM/DD/YY

Status	View the plan status. The options are: • A • R • RV • RR • RI • SR1 • SR2
Action Required	View a brief description of the action that needs to be performed. Hover displays the full message on a tooltip. The options are: • Author Plan • Revise Plan • Review Plan • Assign Case(s) • Assign Supervisor(s)

- Click on a due-list line item anywhere to be directed to the appropriate screens to view or perform an action. The scenarios are:
  - Individual plan record for a plan related item.
  - Caseload management for case assignment.
  - SCS management for SC assignment.
- For an SC, the table below serves as a reference for inclusion and removal of a due-list line item.

Display	Removal
Any plan in W status.	Change the plan to R status.
Any plan in RV status.	

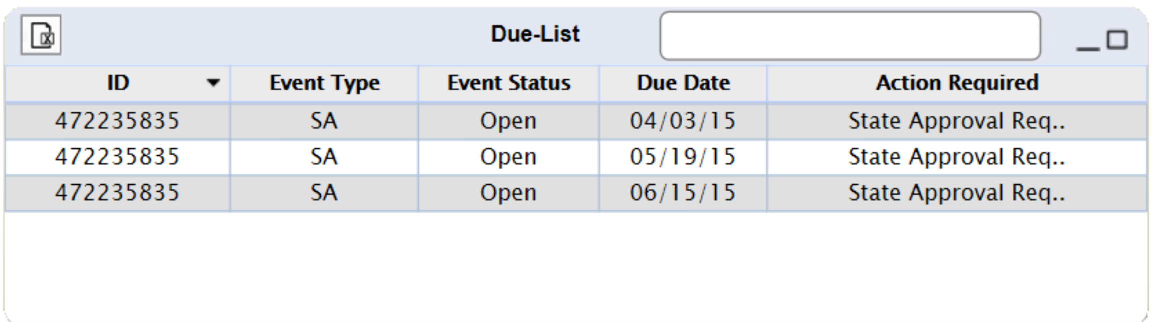
- For an SC, you may have two active plans from the same participant on your due-list. Example: A participant with **Plan ID 1.5** in **RV** status and an auto-generated **Plan ID 2.0** in **W** status.
- For an SCS, the table below serves as a reference for inclusion and removal of a due-list line item.

Display	Removal

Any plan in R status for your SCs.	Change the plan to RV, SR1 or A status.
Any SC in the agency not assigned to an SCS.	Assign to an SCS.
Any unassigned cases.	Assign to an SC.

3.1.3 Due-List - SWAC/WAC

- The following figure displays a sample due-list tile for the SWAC or WAC user role.


Due-List

ID	Event Type	Event Status	Due Date	Action Required
472235835	SA	Open	04/03/15	State Approval Req..
472235835	SA	Open	05/19/15	State Approval Req..
472235835	SA	Open	06/15/15	State Approval Req..

- View the message **No Due-List** when there are no pending cases for you.
- The tile lists your due-list items. The table below serves as a reference to the information on the **Due-List** tile.

Column	Description
ID	View the DDD ID or Provider ID. Hover and view the name of the participant or provider on a tooltip.
Event Type	View the type of event.
Event Status	View the status of the event.
Due Date	You have to perform an action on this item before the due date, which is calculated based on the event assignment date. Format: MM/DD/YY
Action Required	View a brief description of the action that needs to be performed. The options are:

	• State Approval Required • State Approval Required: Resubmitted <#> • Plan Review Required • Contact Agency • Review Monthly Monitoring Tool • Review Quarterly Monitoring Tool • Review Annual Monitoring Tool • Initiate Corrective Action • Initiate TA and Training • Review Bump-Up Request • Assign Supervisor

- Click a due-list line item anywhere on the row to be directed to the appropriate screens to view or perform an action. The scenarios are:
  - Individual plan record for plan approval events.
  - Event-load management for plan approval events where the status is SR1 or RI.
  - Event information for all events not related to plan approval.
  - SWAC management for SWAC or WAC assignments.
- For a WAC, the table below serves as a reference for inclusion and removal of a due-list line item.

Display	Removal
Any assigned event with an Open or In Progress status.	Close the assigned event.

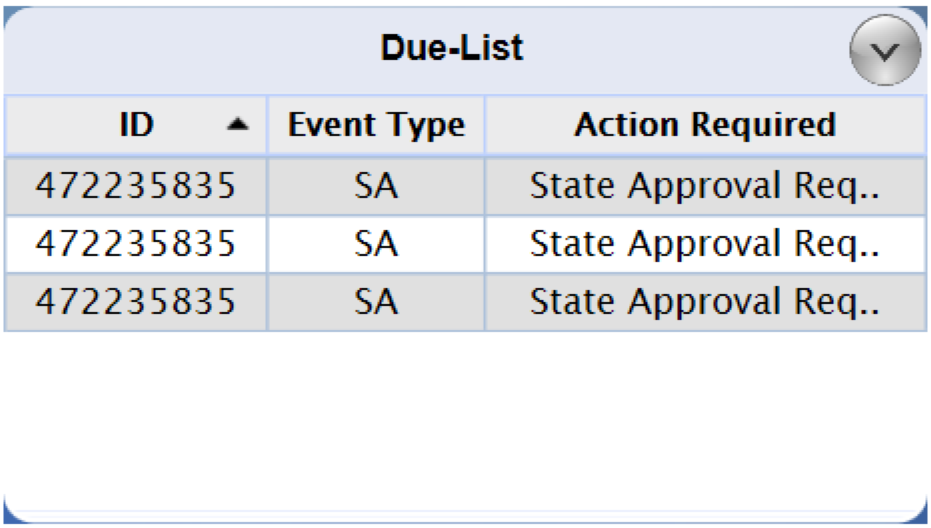
- For a SWAC, the table below serves as a reference for inclusion and removal of a due-list line item.

Display	Removal
Any assigned event with an Open or In Progress status.	Close the assigned event.
Any WAC not assigned to a SWAC.	Assign to a SWAC.
Any agency not assigned to a SWAC.	Assign to a SWAC.

- For a plan event with a status change from **SR1** to **SR2**, the event is removed from the WAC's due-list and automatically assigned to the appropriate SWAC (based on the assigned agency).

3.1.4 Mobile Devices

- The **Due-List** tile on mobile or one-column display devices shows only three columns within the table. The following figure displays a sample SWAC due-list.

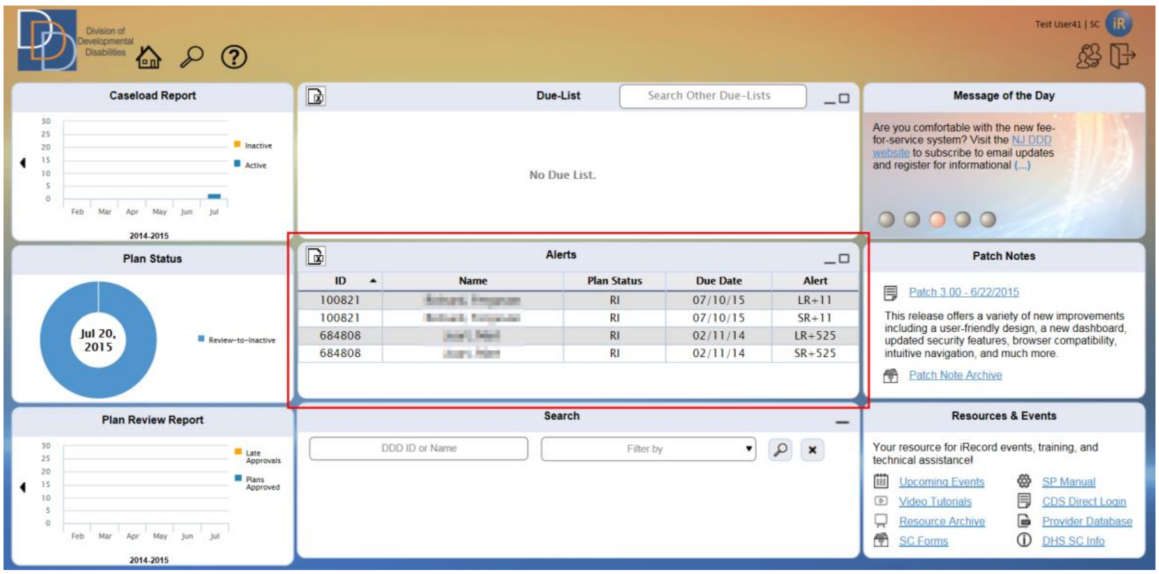


- View the message **No Due-List-** when you do not have any pending activities.
- The default state of the tile shows maximum of 6 line items. You have a scroll bar when there are more items.
- Click to minimize the tile. Click to expand the tile to the default state.
- The three columns for the SWAC user role are:
  - ID
  - Event Type
  - Action Required
- The three columns for all other user roles are:
  - ID
  - Name
  - Action Required

3.2 Alerts

The **Alerts** tile displays the relevant cases that require an action performed by another entity. These cases are pertinent for you but you cannot effect any change to the item. It has to be acted upon by another role before it is taken off your **Alerts** tile.

The **Alerts** tile is typically displayed on the **Dashboard** below the **Due-List** tile, as shown in the figure below. In case you do not have a **Due-List**, the **Alerts** tile is on top. Refer to User Privileges to check whether your user role displays an **Alerts** tile.



3.2.1 Alerts Tile

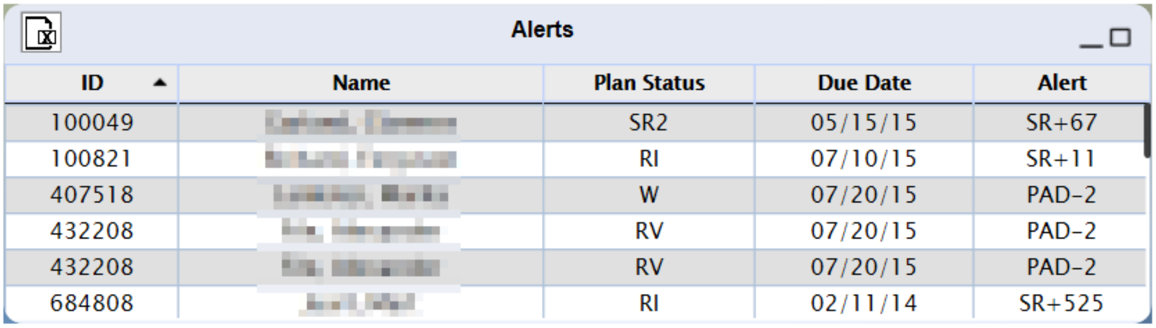
By default, you can view a maximum of the first six line items. You have a scroll bar to view the remaining items. Click — icon to minimize the tile to its header. Click ☐ to maximize the tile and display the complete due-list items. In minimized or maximized mode, view the ❐ icon. Click ❐ icon to restore the tile to its default size.

The tile displays **No Alerts** when there are no available alerts for you. Click the column header and view the ▲ for an ascending order sort. Double-click the column header and view the ▼ for a descending order sort. The ▲ or ▼ displays to the right of the sorted column header, as shown in the figure below for the **ID** column.

Click (on the extreme left of the tile header) to export the **Alerts** to an Excel sheet.

3.2.2 Alerts - SCS/SC

- The following figure displays a sample **Alerts** tile for the SCS or SC user role.



- The tile lists your alert items. The table below serves as a reference to the information on the **Alerts** tile.

Column	Description
ID	View the DDD ID of the participant.
Name	View the name of the participant. For trimmed names, hover over the name to view the full name on a tooltip. Format: <Last Name>, <First Name>
Plan Status	View the plan status.
Due Date	View the due date of the plan. The due date is 30 days from the assigned date. Format: MM/DD/YY
Alert	View the alert for the particular participant. The alert codes are : • SR (State Review) - plan status in RI, SR1, SR2 • LR (Long Review) - plan status in review for more than 5 days • PAD (Plan Approaching Due) - plan not approved in 27 days of creation • PO (Plan Overdue) - plan not approved in 30 days of creation • NAD (Notes Approaching Due) - monthly contact notes not entered in the last 27 days • NO (Notes Overdue) - monthly contact notes not entered in the last 30 days

	The codes are also followed by + or - and a number. + indicates that the Due Date has passed and - indicates that it is approaching. The number represents the days passed (+) or approaching (-) from/ to the due date.

- Hover over an alert on the **Alerts** column and view the full alert on a tooltip.
- For an SC, the table below serves as a reference for inclusion and removal of an alerts line item.

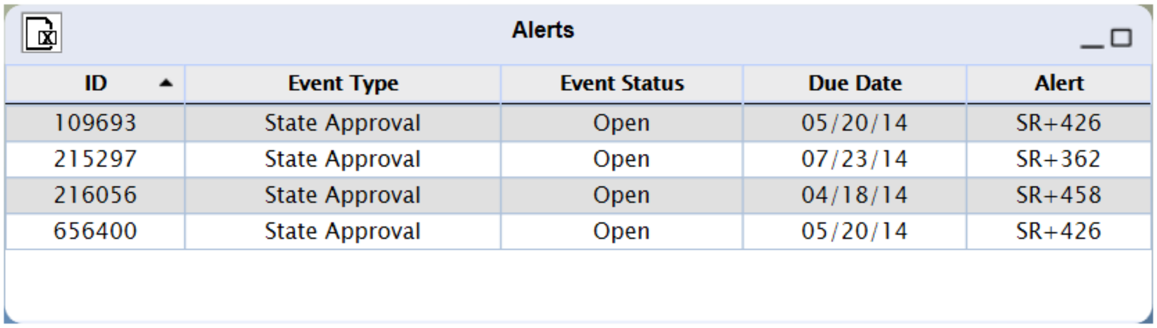
Display	Removal
Any plan in RI status.	Plan status changed by the appropriate role.
Any plan in SR1 status.	
Any plan in SR2 status.	
Any plan in RR status.	
Any plan in R status for more than 5 days.	

- For an SCS, the table below serves as a reference for inclusion and removal of an alerts line item.

Display	Removal
Any plan in RI status.	Plan status changed by the appropriate role.
Any plan in SR1 status.	
Any plan in SR2 status.	
Any plan in RR status.	
Any plan not in the A status after exceeding 27 days from plan generation.	

3.2.3 Alerts - SWAC

- The following figure displays a sample Alerts tile for the SWAC user role.



Alerts

ID	Event Type	Event Status	Due Date	Alert
109693	State Approval	Open	05/20/14	SR+426
215297	State Approval	Open	07/23/14	SR+362
216056	State Approval	Open	04/18/14	SR+458
656400	State Approval	Open	05/20/14	SR+426

- The tile lists your alert items. The table below serves as a reference to the information on the **Alerts** tile.

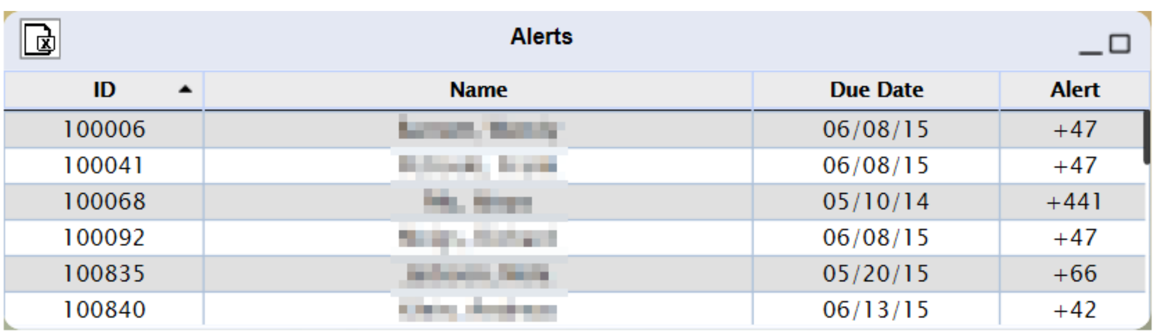
Column	Description
ID	View the DDD ID for an event pertinent to the participant. View the FEIN for an event pertinent to the provider.
Event Type	View the type of event.
Event Status	View the status of the event. The options are: • Open • Re-opened • In Progress
Due Date	View the due date of the event. Format: MM/DD/YY
Alert	View the alert for the event. The alert codes are : • SR (State Review) - plan status in RI, SR1, SR2 • LR (Long Review) - plan status in review for more than 5 days • PAD (Plan Approaching Due) - plan not approved in 27 days of creation • PO (Plan Overdue) - plan not approved in 30 days of creation • NAD (Notes Approaching Due) - monthly contact notes not entered in the last 27 days • NO (Notes Overdue) - monthly contact notes not entered in the last 30 days The codes are also followed by + or - and a number. + indicates that the Due Date has passed and - indicates that it is approaching. The number represents the days passed (+) or approaching (-) from/ to the due date.

- Hover over an alert on the **Alerts** column and view the full alert on a tooltip.
- The table below serves as a reference for inclusion and removal of an alerts line item.

Display	Removal
Any event with a SWAC that has an SR1 plan status of 5 days or more.	Plan status changed by the appropriate role.
Any event with a SWAC that includes a plan not in A status after exceeding 35 days from plan generation.	
Any plan with a SWAC that has had an approval, not inactive and has had no Monthly Contact Note uploaded greater than or equal to 5 days after the expected timeframe.	Monthly Contact Note is uploaded by an SC.

3.2.4 Alerts - FI & SFI

- The following figure displays a sample Alerts tile for the SFI and FI user role.


Alerts

ID	Name	Due Date	Alert
100006	[illegible]	06/08/15	+47
100041	[illegible]	06/08/15	+47
100068	[illegible]	05/10/14	+441
100092	[illegible]	06/08/15	+47
100835	[illegible]	05/20/15	+66
100840	[illegible]	06/13/15	+42

- The tile lists your alert items. The table below serves as a reference to the information on the **Alerts** tile.

Column	Description

ID	View the DDD ID of the participant.
Name	View the name of the participant. For trimmed names, hover over the name to view the full name on a tooltip. Format: <Last Name>, <First Name>
Due Date	View the date before which the task needs to be completed. The due date is the fifth day from the plan approval date. Format: MM/DD/YY
Alert	View the alert with the number of days. The codes shown as + and then the number of days.

3.2.5 Mobile Devices

- The Alerts tile on mobile or one-column display devices shows only three columns within the table. The following figure displays a sample SWAC alerts.

Alerts

ID	Event Type	Alert
109693	State Approval	SR+407
215297	State Approval	SR+343
216056	State Approval	SR+439
656400	State Approval	SR+407

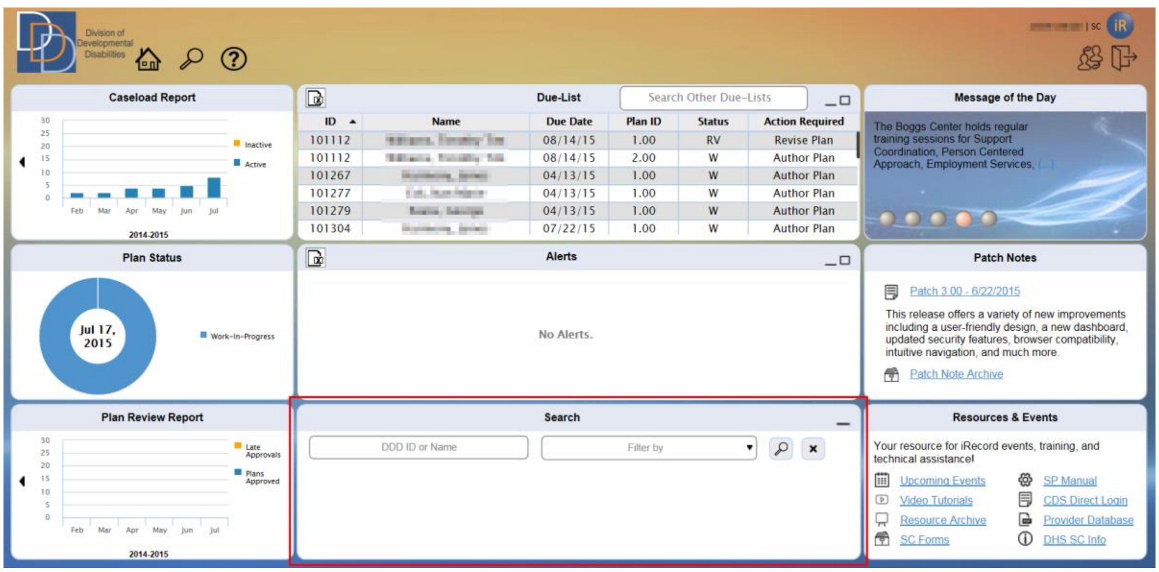
- View the message **No Alerts** when there are no alerts.
- The default state of the tile shows maximum of 3 line items. You have a scroll bar when there are more items.
- Click to minimize the tile. Click to expand the tile to the default state of 3 line items.
- The three columns for the SWAC user role are:

- ID
- Event Type
- Alert

- The three columns for all other user roles are:
  - ID
  - Name
  - Alert

3.3 Search

iRecord provides the users with multiple options to search for participant records. The user permissions decide the search results. The **Search** tile is typically located below the **Due-List** and the **Alerts** tile on the dashboard, as highlighted in the figure below. In case the **Due-List** and/or the **Alerts** tile are not shown, based on user role, the Search tile then moves up the screen.



3.3.1 Search Tile

- The **Search** tile displays two fields to locate the participant records. You may use one of the fields or a combination of the two to search for the desired participant record. The tile header displays the label **Search** and — icon. Click — icon to minimize the tile to its header. In the minimized mode, the tile displays the ☐ icon. Click ☐ to maximize the tile. By default, the tile is as shown below.

- The following table serves as a reference for the search permissions based on the user role.

<table>
<tr><th>User Role</th><th>Search Permission</th></tr>
<tr><td>SCS</td><td rowspan="3">Any individual within their agency.</td></tr>
<tr><td>SC</td></tr>
<tr><td>SC-VO</td></tr>
<tr><td>SWAC</td><td>Any individual within an agency assigned to them.</td></tr>
<tr><td>WAC</td><td>Any individual assigned to their supervisor.</td></tr>
<tr><td>VO</td><td>All individuals in iRecord.</td></tr>
<tr><td>VO-TS</td><td>All individuals in iRecord.</td></tr>
<tr><td>SFI</td><td rowspan="2">Any individual within an approved plan where at least one of the service payment types is FI.</td></tr>
<tr><td>FI</td></tr>
</table>

- The table below describes the controls on the **Search** tile.

Controls	Description
DDD ID or Name	Enter the DDD ID or Name within the text box. This field has an autocomplete feature. It displays a list of up to 10 suggestions that contain the entered characters. Press ENTER and you select the first suggestion on the list.

Filter by	Select the appropriate filters from the drop-down list. The drop-down list depends on your user role. The available categories of filter options are: • SC • SCS • Waiver Program • SC Agency (not shown for SC/SCS) Click the category and expand the list of options that fall within. Select the check box(es) and add the option(s) to the filter. Once the option(s) is selected, you may select the filters in the other categories by following the same process.
	Displays the results in a grid format that matches the search criteria within **DDD ID or Name** or the selected options for **Filter by**. It is also possible to filter results using a combination of the two fields. The columns on the grid results depend on your user role. View the message **No results found** when there are no results for the search criteria.
	Clears the fields and resets the tile to the initial state.

- The table below describes the controls that appear with the search results, displayed in a grid format.

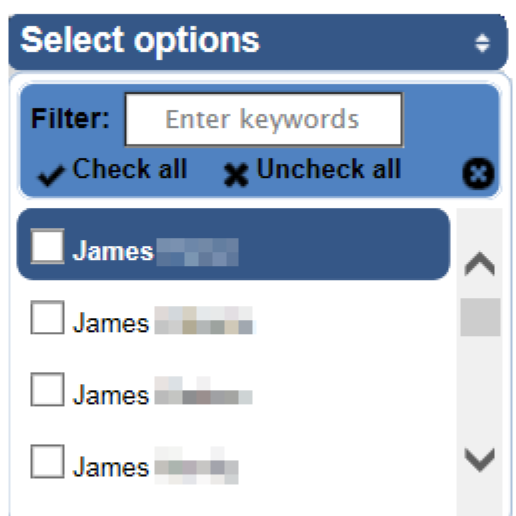
Controls	Description
	Prints the results that appear on the grid.
	Copies the results that appear on the grid.
	Exports the results that appear on the grid to an Excel file.
	Exports the results that appear on the grid to a PDF file.
Filter	Enter the appropriate filter within the text box. View an instant update of the grid results based on the filter criteria. The grid displays the results that contain the typed characters.
Clear Filter	The button clears the **Filter** text box and displays the complete search results.

Show/Hide columns	Click the button and view the additional grid column options. Select the column check box(es) to add the column(s) to the grid results. Clear the check box(es) to remove the column(s) from the grid results. DDD ID is not available within the grid column options, and it cannot be removed from the results. The available column options are (based on user role): • Name • Waiver Program • SC Agency • Active Plan Allocated • Active Plan Budget • Active Plan Expended • Active Plan Version • Address • Age • Contact Phone • Date of Birth • E-mail • SC (Support Coordinator) • SC Agency Phone • SC E-mail • SCS (Support Coordination Supervisor) E-mail • Status • County • Current Plan Allocated • Current Plan Budget • Current Plan • Current Plan Status • Due Date • Current Plan Version • Functional Criteria Met • Gender • Last Assessment Date • Last Monthly Contact • Medicaid Eligibility • Medicaid End Date • Medicaid ID

	• Medicaid Program Status Code To view the grid results with all the available columns, select the **Select All** check box. Clear the **Select All** check box and the grid defaults to the initial columns.

Note: SFI, FI and FI-VO roles do not have the following column options on the search results grid: County, Current Plan Allocated (Total), Current Plan Budget (Total), Current Plan Due Date, Current Plan Status, Current Plan Version, Functional Criteria Met, Gender, Last Assessment Date, Last Monthly Contact, Medicaid Eligibility, Medicaid End Date, Medicaid ID, Medicaid Program Status Code.

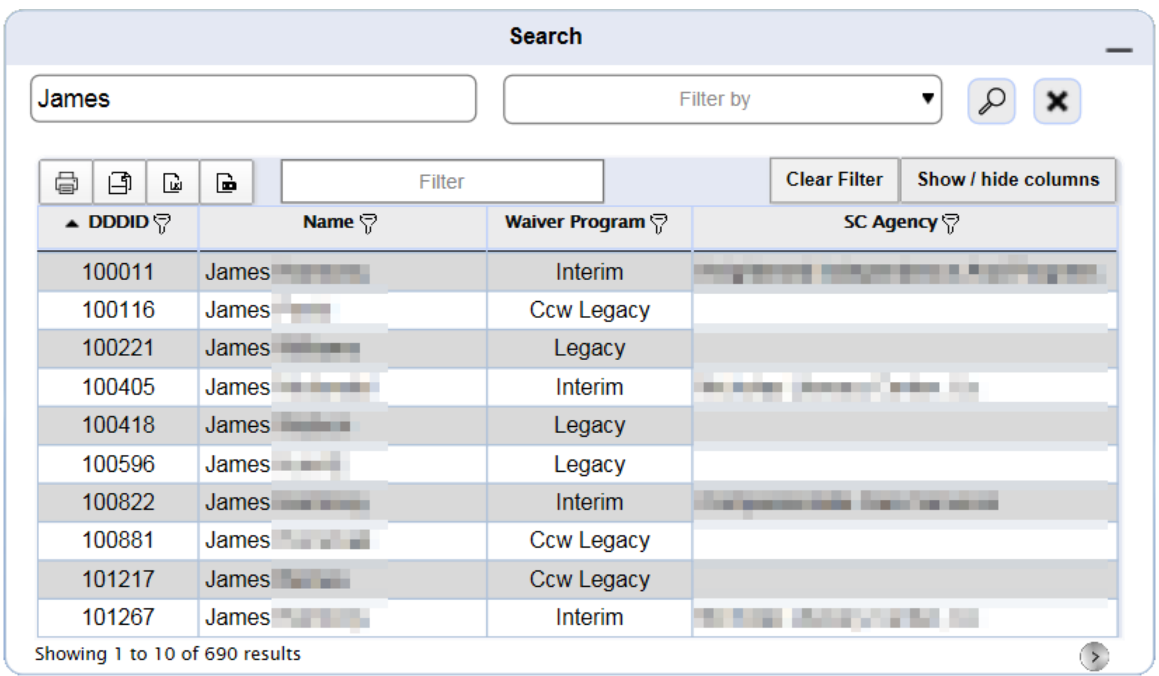
- The table below describes the column controls.

Controls	Description
▲	Click the column and the icon appears, indicating that the grid information is sorted in the ascending order of this column.
▼	Double-click on a column and the icon appears, indicating that the grid information is sorted in the descending order of this column.
	Filter the grid information based on the column. Click the icon on the appropriate column and **Select Options** pop-up appears, as shown. You have the option to filter the details with the **Filter** text box. Select the check box(es) and filter the grid information with the selected entities. 

To search for a participant

1. On the **Search** tile, enter the **DDD ID or Name** of the participant. The field displays a maximum list of 10 suggestions depending on the characters entered within the box. You can select the appropriate participant on the list.
   And/or
   On the **Search** tile, select the appropriate filters from the **Filter by** drop-down list.

2. Click . The **Search** tile expands and a grid appears with the results, as shown in the figure below.

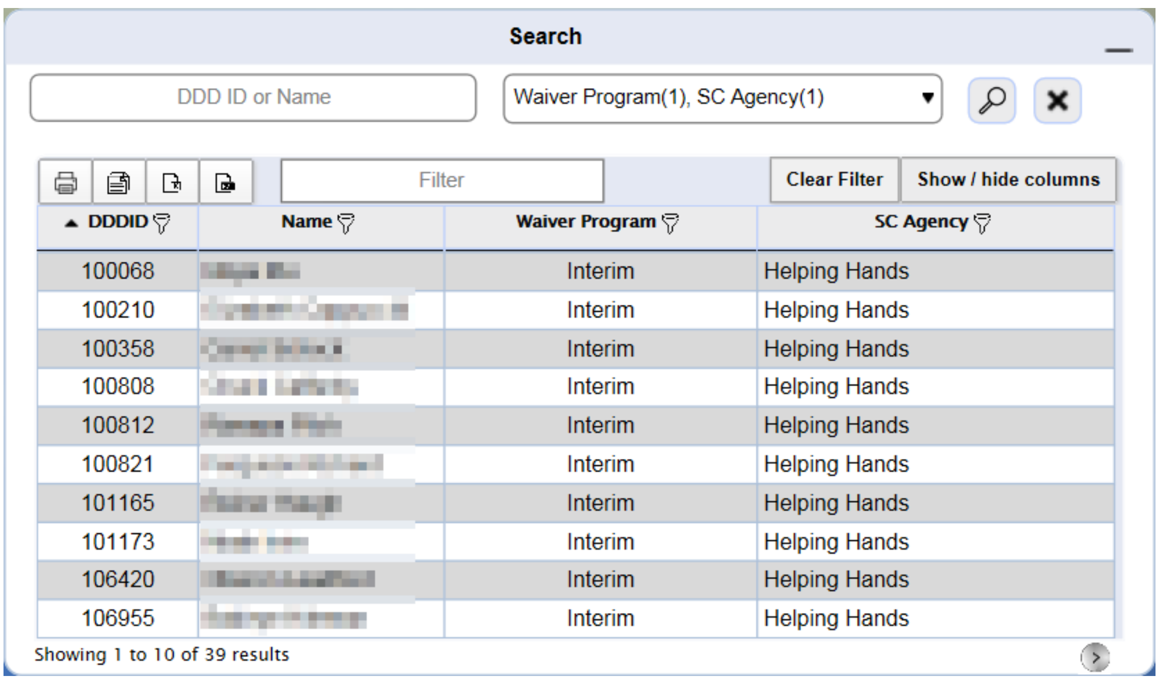


3. You can select a participant on the grid by clicking anywhere on the line item. This directs you to the selected participant's **Demographics** screen.

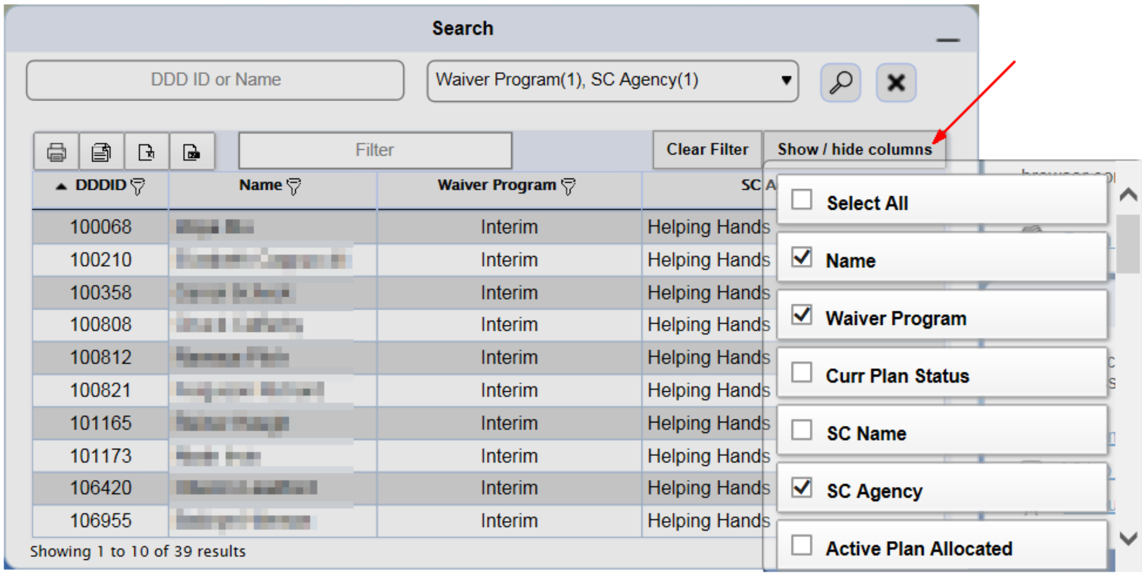
To generate a report

1. On the **Search** tile, select the appropriate filters from the **Filter by** drop-down list.

2. Click . The **Search** tile expands and a grid appears with the results. The figure below displays the results with the selection of **Interim** for **Waiver Program** for the Helping Hands (example) agency.

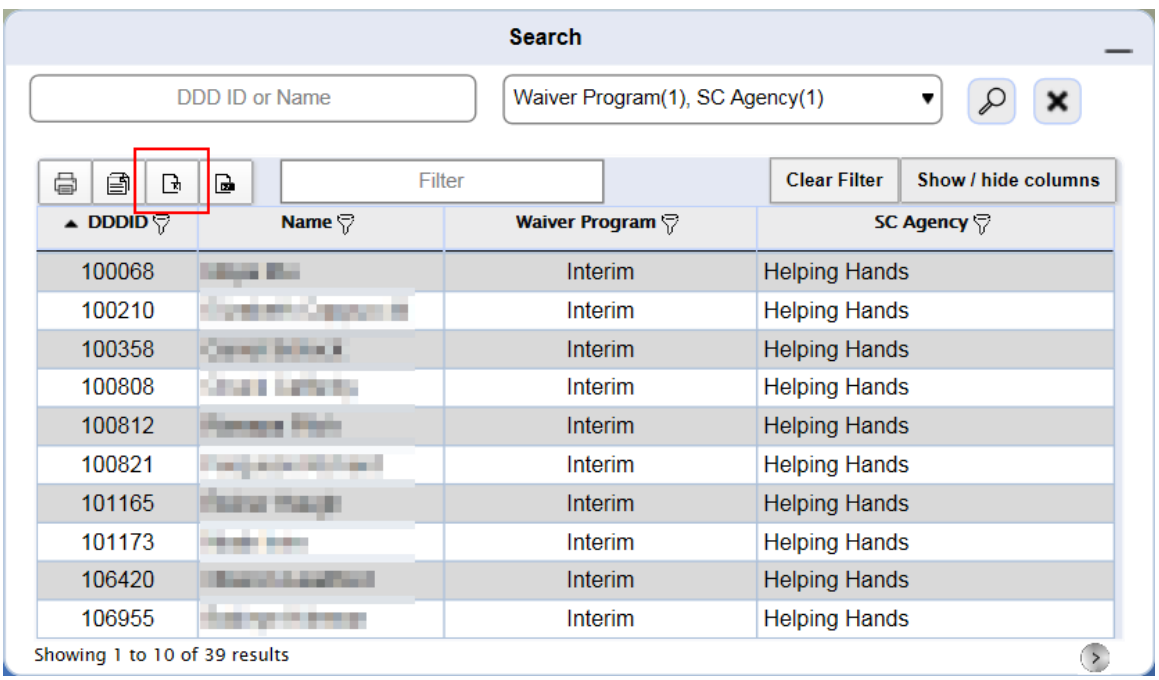


3. Click the **Show/hide columns** button and select the columns that you would like on your report. Scroll down to view all the column options.

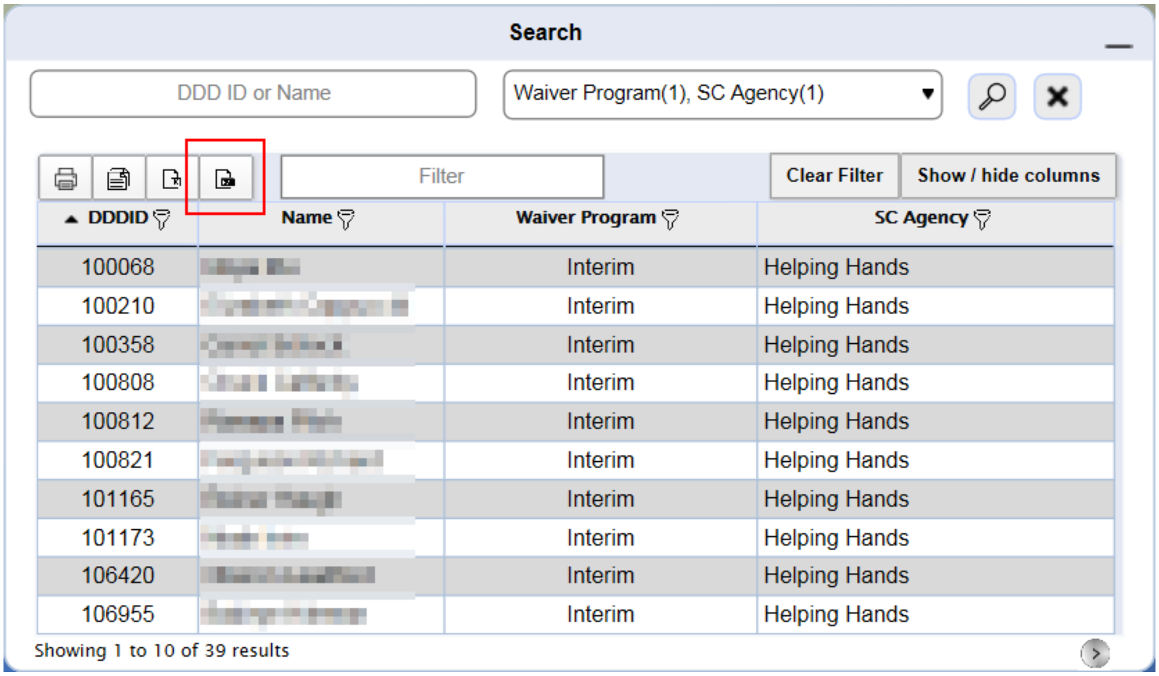


4. The following options are available for the results:

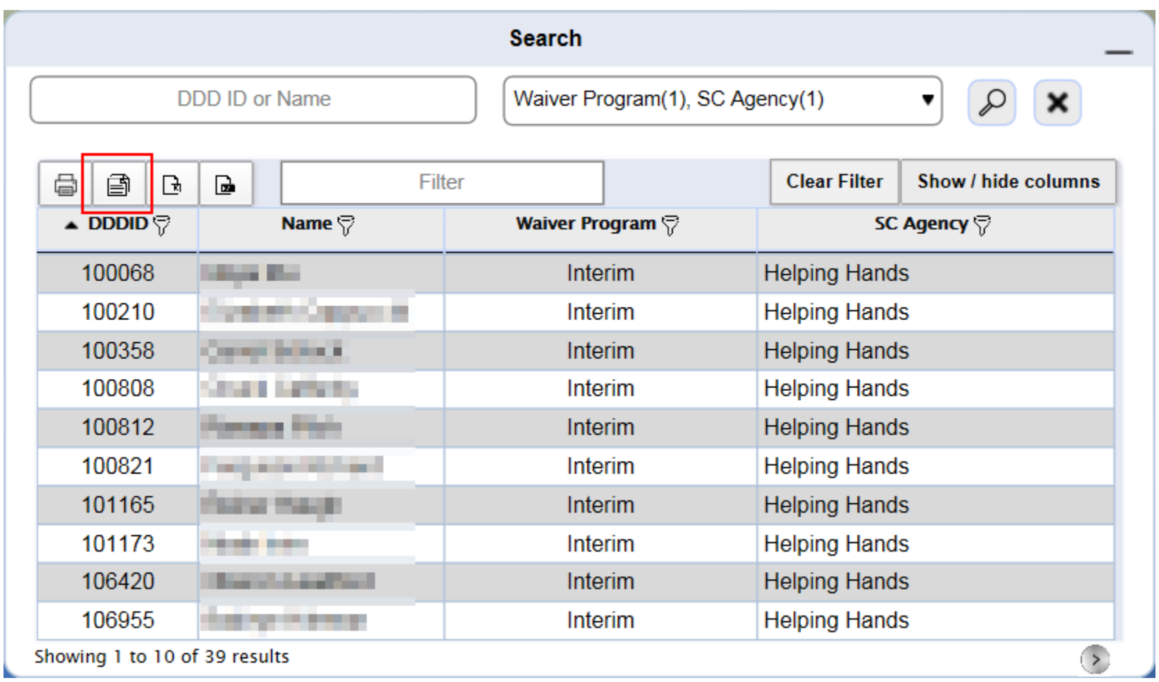
- Click to generate a report in the Excel format.



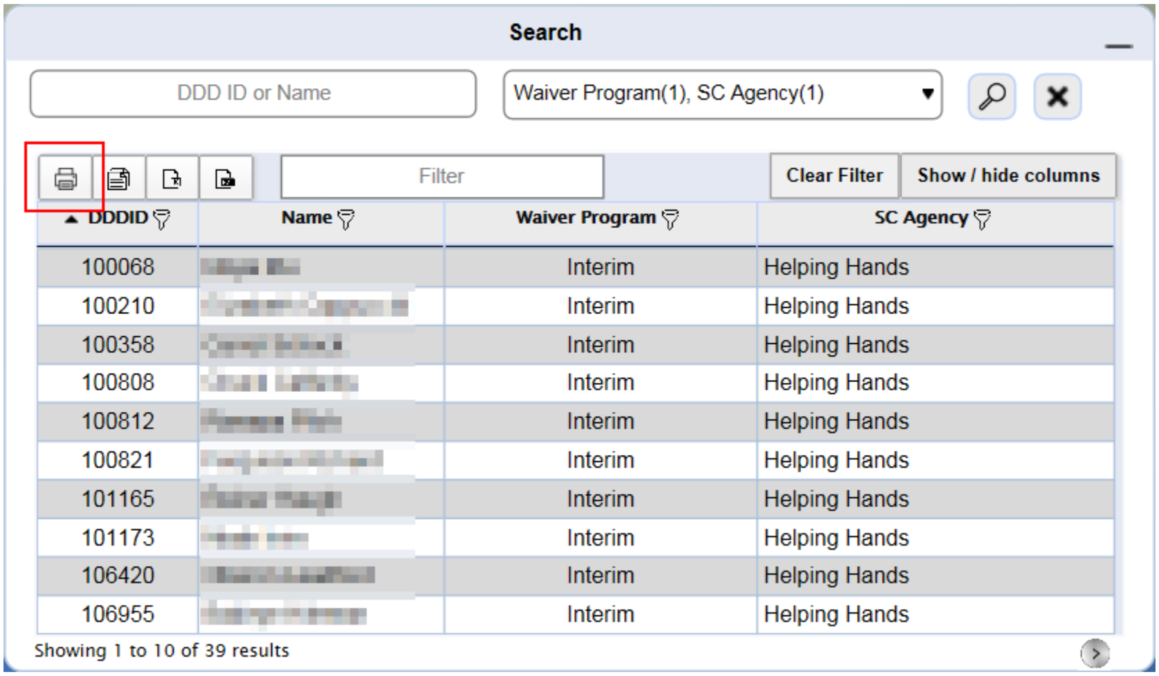
- Click to generate a report in the PDF format.



- Click to copy the report and paste it to the document of your choice.



- Click to generate a hard copy report.



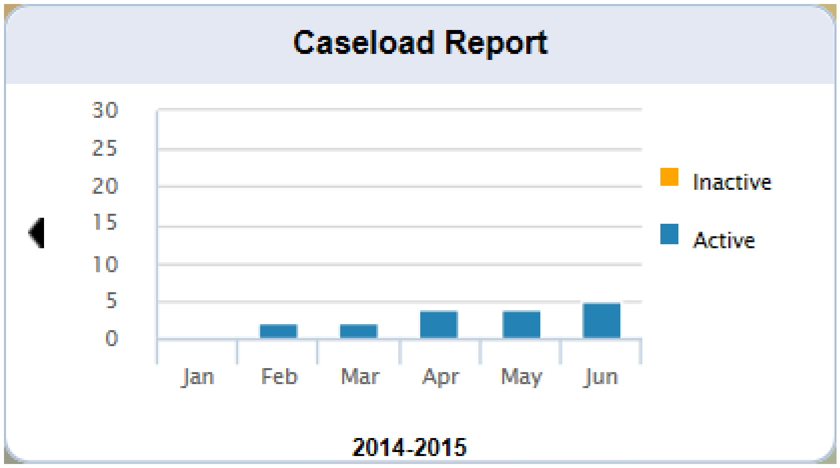
5. Follow the step below for each of the options:

    - For Excel or PDF, save the file at the appropriate location for future reference (e-mail or documentation purposes) using the system dialog box.
    - For hard copy, the **Print View** of the report appears and a message instructs you to use the **Print** option on your browser.
      Press ESC to return to the application screen.
    - For copy, paste the report on the document of your choice at the appropriate location.

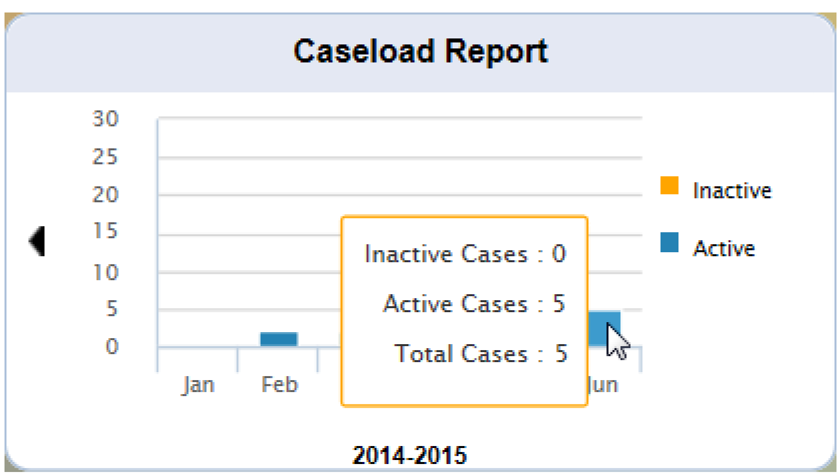
3.4 Reports

These reports are available on the Dashboard, based on your user role.

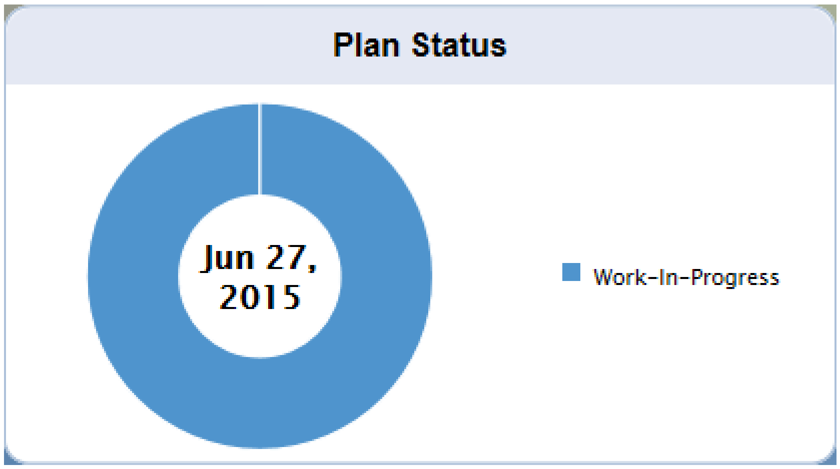
3.4.1 Caseload Report



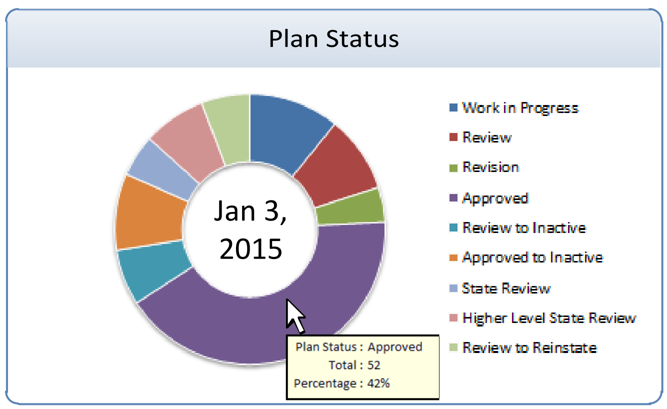
- **Caseload** report is the top tile on the left of the Dashboard interface for the SC, SCS and SC-VO.
- The report displays the active cases (all plans except AI or RR) and the inactive cases (AI and RR) for each month in the form of a bar graph.
- Active cases appear in blue and inactive in orange.
- By default, the graph displays the last 6 months from the current date. You can see up to a maximum of the last 12 months from the current date.
- Click ◀ to view the preceding 6 months. Click ▶ to view the next 6 months.
- With zero caseload, the graph displays **No Caseload Available**.
- Hover on each month displays the number of active cases, inactive cases and the total cases.



3.4.2 Plan Status Report



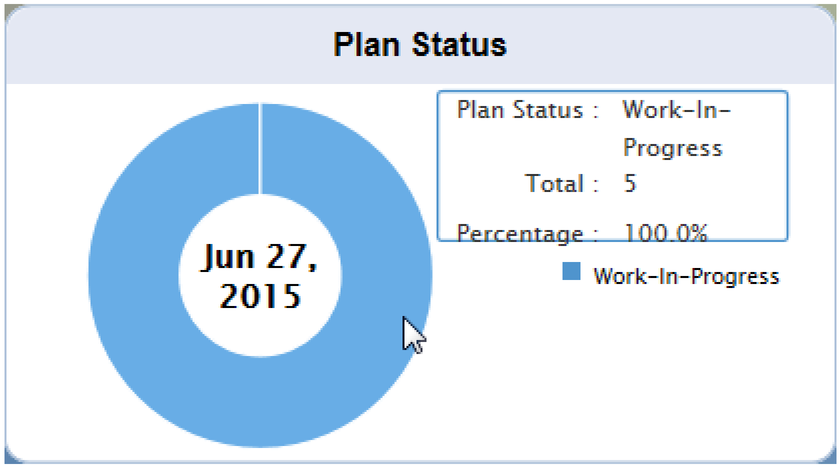
Actual Report



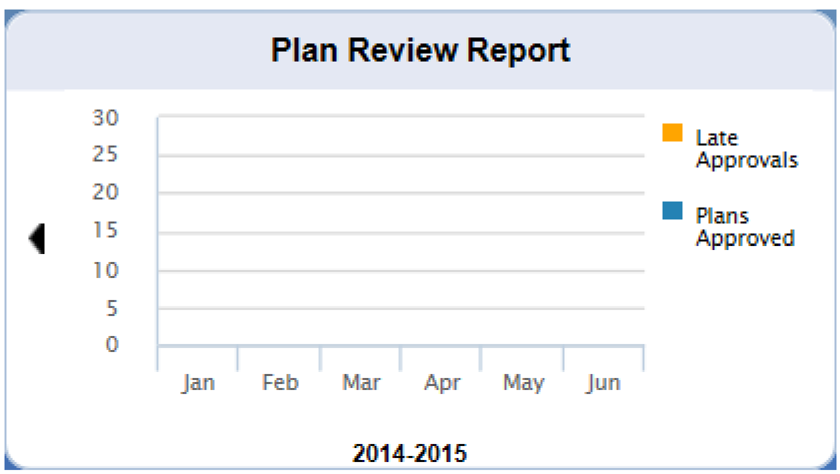
Illustration

- **Plan Status** report is the middle tile on the left of the Dashboard interface for SC, SCS and SC-VO.
- The report displays the current cases under different statuses in a Doughnut graph for SC and SCS.
- The report displays the agency's current cases under different statuses in a Doughnut graph for SC-VO.
- Current date is displayed in the center of the graph.
- With zero caseload, the graph displays **No Information Available**.

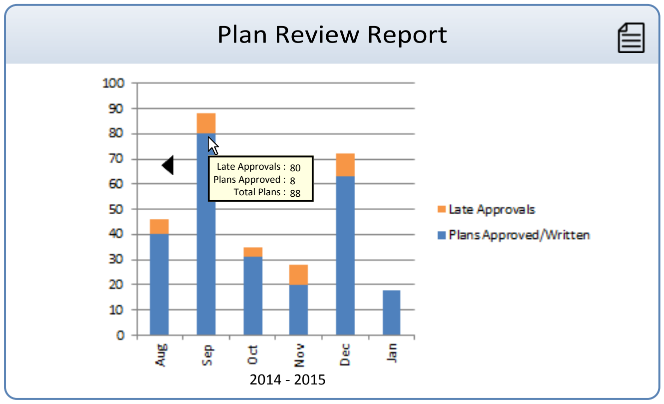
- Hover on each color code and view the plan status for the selected color code, total number of cases in the selected plan status, and the percentage of the total number of cases in the selected plan status.



3.4.3 Plan Review Report

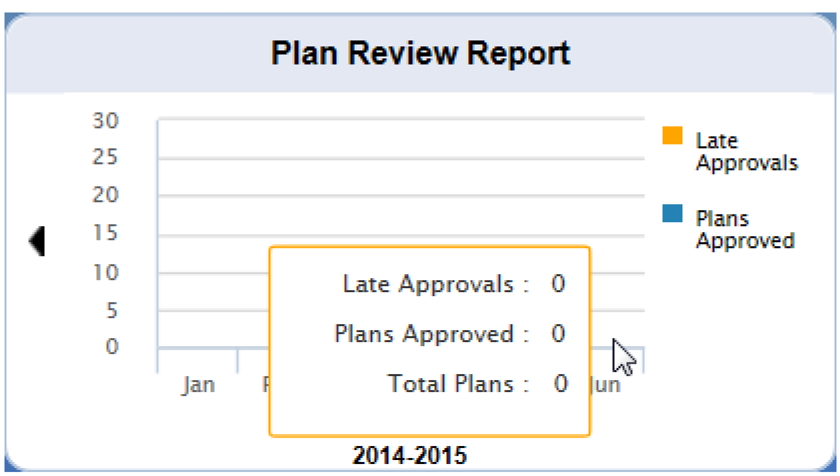


Actual Report

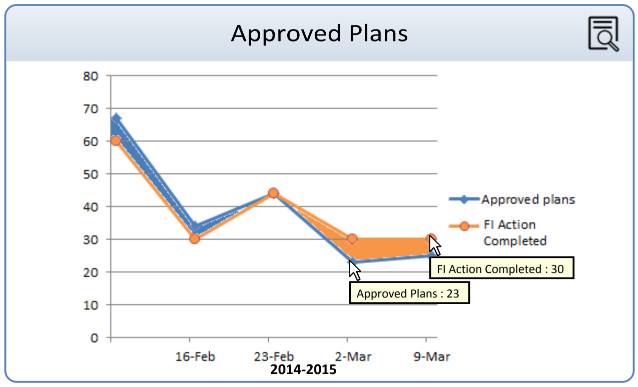


Illustration

- **Plan Review** report is the bottom tile on the left of the Dashboard interface for SC, SCS and SC-VO.
- The report displays the total number of plans approved and total number of late plans in a month in a bar graph for SC and SCS.
- The report displays the SC agency's total number of plans approved and total number of late plans in a month in a bar graph for SC-VO.
- By default, the graph displays the last 6 months from the current date. You can see up to a maximum of the last 12 months from the current date.
- Click ◀ to view the preceding 6 months. Click ▶ to view the next 6 months.
- With zero caseload, the graph displays **No Information Available**.
- Hover on each month displays the number of plans in A or AI status, number of plans in A or AI status greater than 30 days from the date of assignment, and the total number of cases.



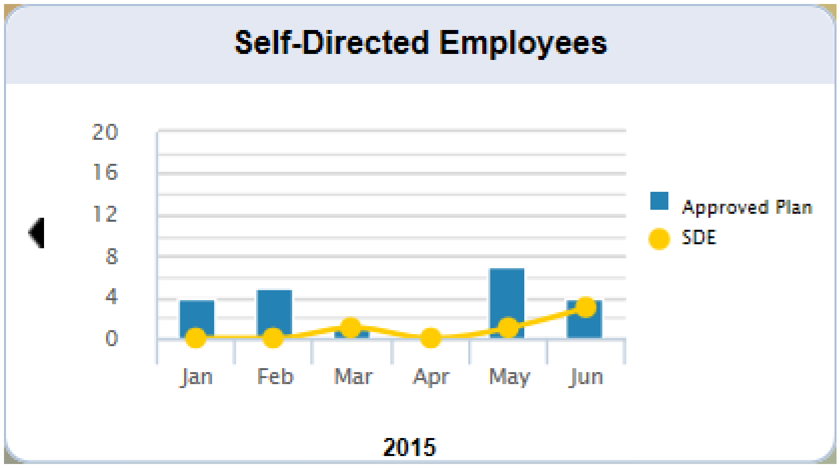
3.4.4 Approved Plan Report



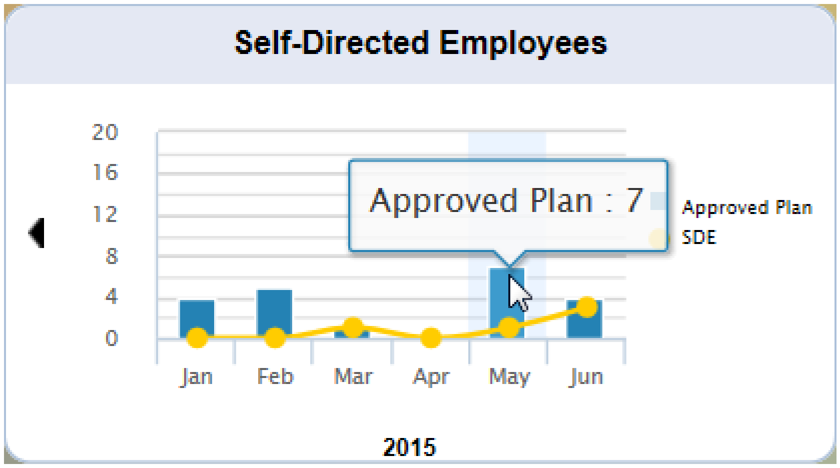
Illustration

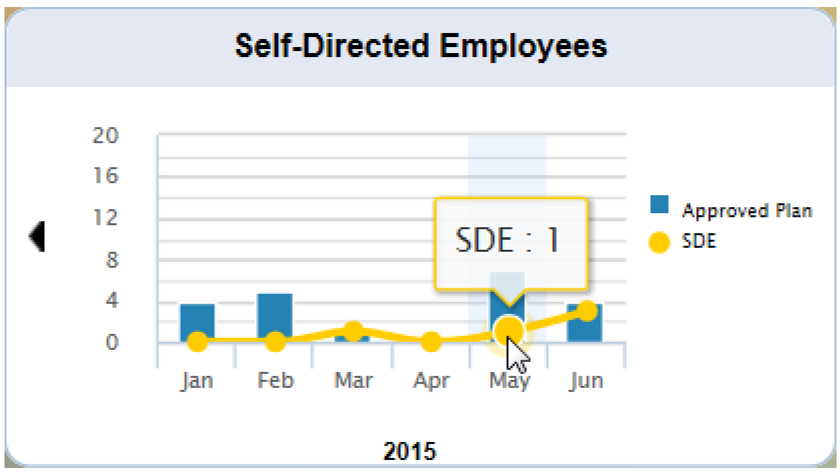
- **Approved Plan** report is the top tile on the left of the Dashboard interface for the FI, SFI and FI-VO.
- The report displays the cumulative total of the approved plans and FI action completed by the FIs for the current week and the preceding 4 weeks. Each week is considered from Sunday through Saturday.
- Approved plan is the most recent plan of a participant in Approved status where at least one of the services has an FI payment type. This is represented by the blue line.
- FI Action completed indicates that the FI action has been completed on an approved plan, represented by the orange line.
- With approved plans greater than completed, the area between is in blue.
- With FI action completed greater than assigned, the area between is in orange.
- With no available information, the graph displays **No Information Available**.
- Hover on a data point on the orange line to view the number of FI Action Completed.
- Hover on a data point on the blue line to view the number of Approved Plans.

3.4.5 Self-Directed Employee Report

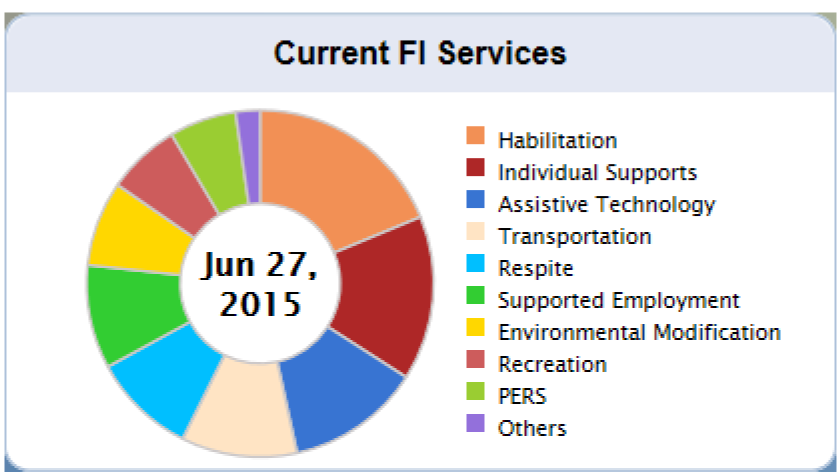


- **Self-Directed Employee** report is the middle tile on the left of the Dashboard interface for the FI, SFI and FI-VO.
- The report displays the total number of approved Self-Directed Employee (SDE) and total number of approved plans (with one FI payment source) in a month on a combination graph for a period of the previous 12 months from the current date.
- Approved Plan is the most recent plan of a participant in Approved (A) status where at least one of the services has payment type as FI. Total approved plans in a month are represented by blue columns.
- Self-Directed Employee services indicate that the service is being provided through a Self-Directed Employee selected by the participant. Total number of Self-Directed Employee services is represented by orange line.
- View the last 6 months data from the current month on the chart by default. The preceding 6 months is available by clicking ◀. Click ▶ to view the next 6 months.
- With no approved plan and Self-Directed Employee service, view **No Information Available** on the report.
- Hover displays the number of approved plan (with one FI payment source) for each blue column. Hover on a data point on the orange line displays the number of approved SDE service in a month.

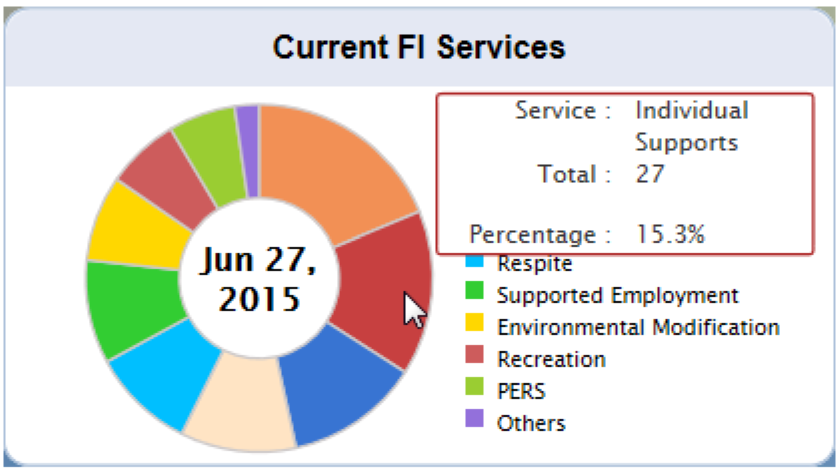




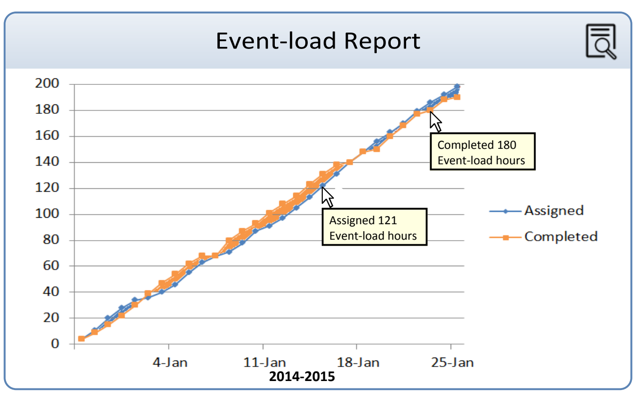
3.4.6 Current FI Services



- **Current FI Services** is the bottom tile on the left of the Dashboard interface for FI, SFI, and FI-VO user roles.
- **Current FI Services** report displays total number of active services in the most recent approved plan payable through FI in a doughnut graph, grouped by their service name.
- Doughnut graph consists of 10 sectors where 9 sectors represent 9 different services with the highest total number of Services in approved plans. The 10th sector aggregates the remaining services.
- With no services payable through FI, view **No Information Available** on the report.
- Hover displays the service name, total number of services in that category, and percentage of the same category.
- View the current date in the center of the graph.



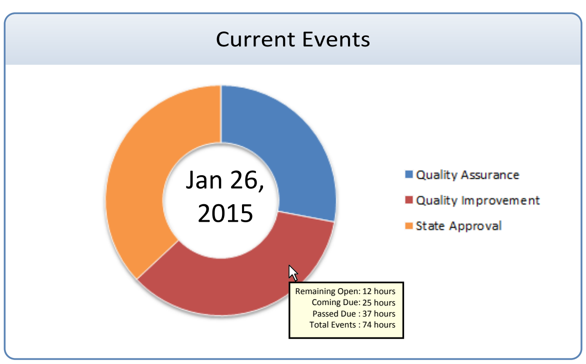
3.4.7 Event-Load Report



Illustration

- **Event-Load** report is the top tile on the left of the Dashboard interface for the WAC and SWAC user roles.
- **Event-Load** report displays the event-load assigned to you compared to event-load completed in a Cumulative Line Graph.
- **Event-Load** report displays cumulative event-load assigned to and completed by you for the current week and the preceding 4 weeks. A week is considered from Sunday through Saturday.
- Event-load assigned represented in blue and event-load completed shown in orange.
- When event-load assigned is greater than completed, the area between the lines show blue.
- When event-load completed is greater than assigned, the area between the lines appear in orange
- The data points (marks) represent the cumulative total event-load starting the first day of the first of the four weeks.
- With zero event-load hours assigned or completed, view **No Event-load available** on the report.
- Hover on a data point on the blue line displays the cumulative event-load assigned on the date.
- Hover on a data point on the orange line displays the cumulative event-load completed on the date.

3.4.8 Current Events Report

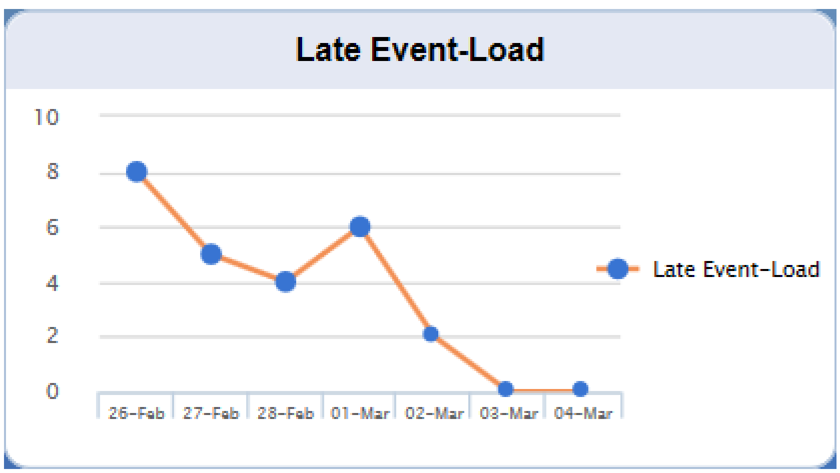


Illustration

- **Current Events** report is the middle tile on the left of the Dashboard interface for the WAC and SWAC user roles.

- **Current Events** report displays the different status of event-load as of the current date on a doughnut graph.
- Event-load is the total of the weight in terms of hours.
- With zero event-load currently, view **No Information available** on the report.
- Hover on a data point on the blue line displays the cumulative event-load assigned on the date.
- Hover on a sector displays the total event-load hours with due date greater than 7 days from the current date, total event-load hours with due date 7 days from the current date, total even-load hours with due date less than the current date, and total event-load hours in a sector in the doughnut chart.

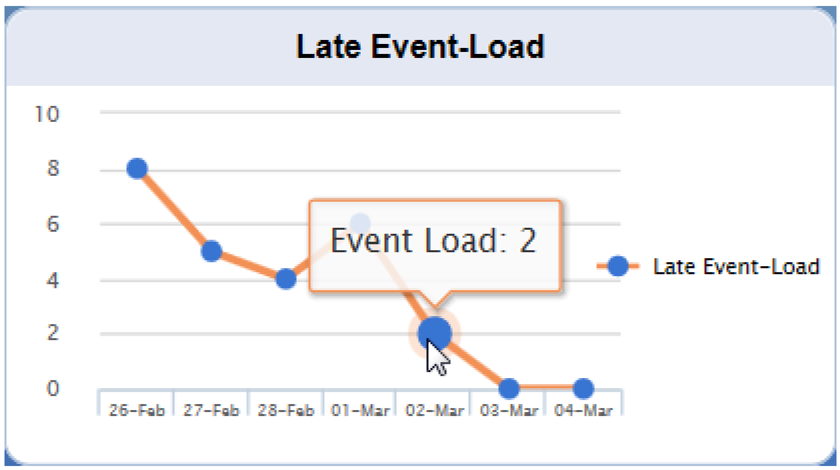
3.4.9 Late Event-Load Report



- **Late Event-Load** report is the bottom tile on the left of the Dashboard interface for the WAC and SWAC user roles.
- **Late Event-Load** report is a line graph that displays the event-load completed beyond the event's pre-defined timeframe.
- Event-load is the total of the weight in terms of hours.
- By default, view the last 7 days data including the current day on the graph. A week is considered from Sunday through Saturday.
- With zero event-load, view **No Information available** on the graph.
- The following is defined as Late Event-load hours:

- Events in closed, where status date is greater than pre-defined timeframe of the event.
- Events in status other than closed, where assigned date is greater than pre-defined timeframe of the event.

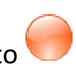
- Hover on a data point displays the total event-load hours in Closed where status date is greater than pre-defined timeframe of the event or Event is in Open, In Progress or Reassigned status for more than pre-defined timeframe of the event.

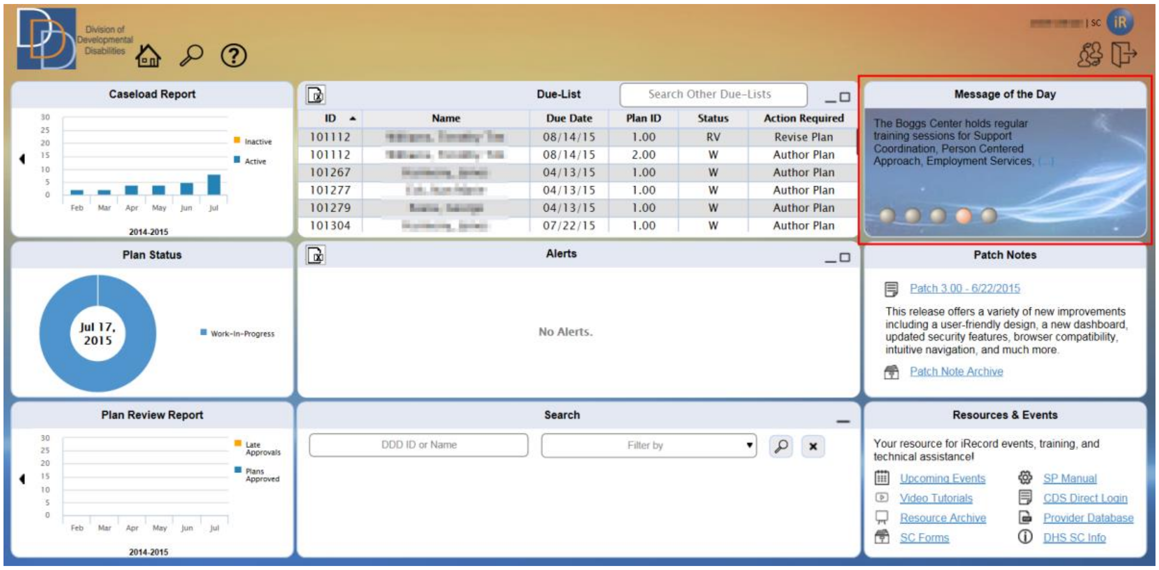


3.5 Message of the Day

iRecord 3.0 adds a new feature that displays the five most recent messages. The messages hold information pertinent to the users of the application.

The **Message of the Day** tile is positioned on the **Dashboard**, as indicated in the figure below.

The tile displays the five most recent messages on a rotating banner. There is an icon representation for each message. The icon changes color from  to  with the displayed message. Click the icon for the corresponding message and you can view the message. In case the message displays an ellipsis (...), click the ellipsis to view the full message on a pop-up tile. Click the close button or press ESC to close the pop-up tile.

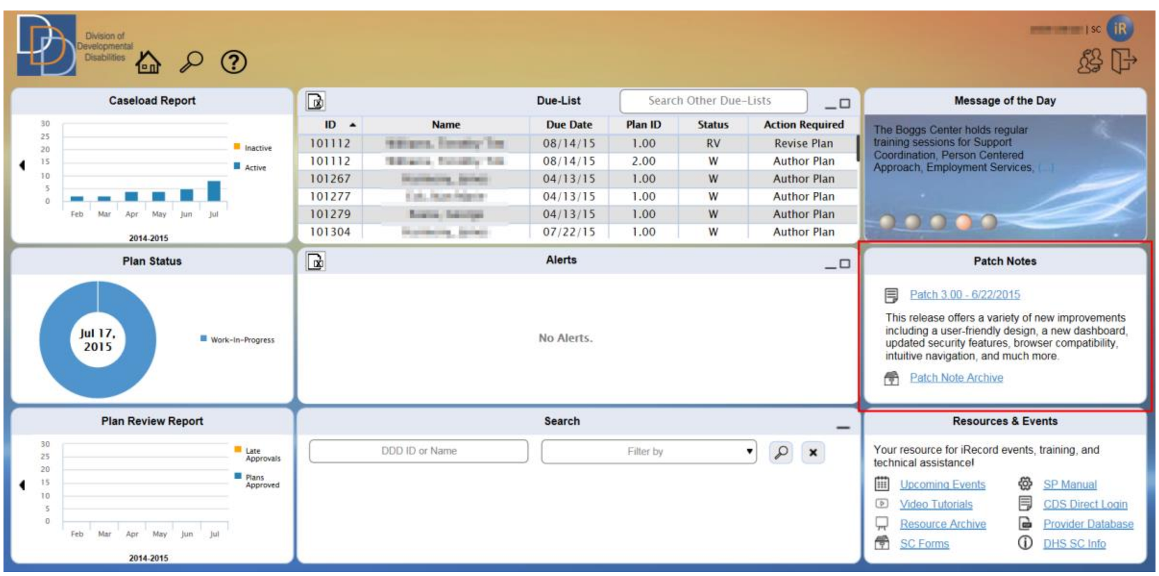


3.6 Patch Notes

The **Patch Notes** list the feature changes from the previous version of iRecord. All users of the application have access to view the patch notes. The **Patch Notes** tile is located on the Dashboard.

The **Patch Notes** tile displays the patch notes link to the current version and, if available, two previous versions. There is an additional link to the patch notes archive.

The figure below displays the **Patch Notes** tile on the **Dashboard**.



3.7 Resources & Events

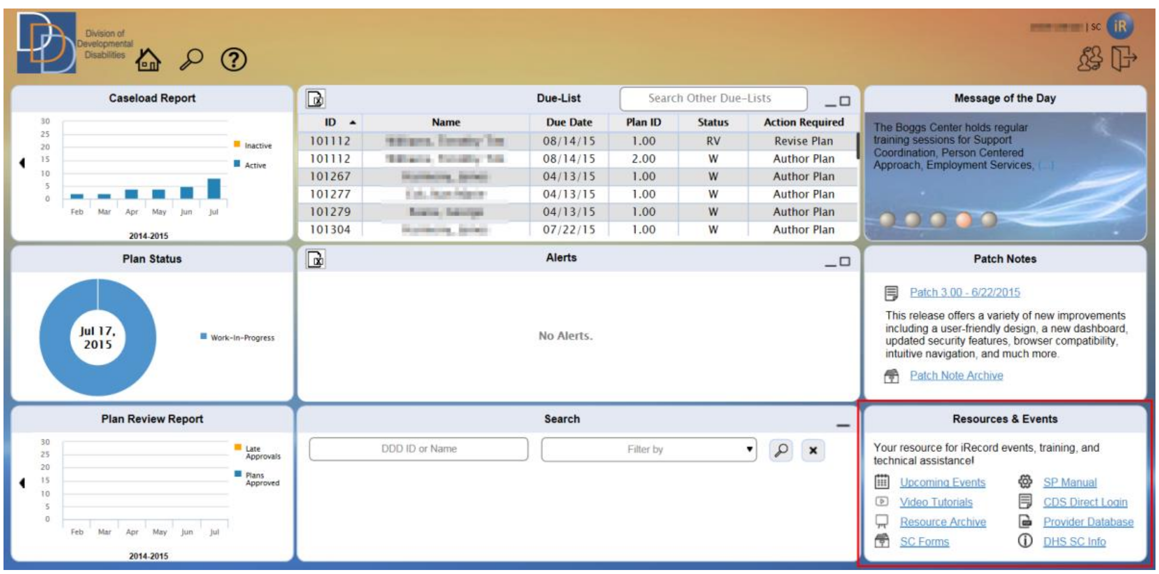
Explore a variety of iRecord events, training and technical assistance resources. All users have access to this information.

The **Resources & Events** tile provides a link to:

- Upcoming Events
- Video Tutorials
- Resource Archive
- SC Forms
- SP Manual
- CDS Direct Login
- Provider Database
- DHS SC Info

Click the appropriate link and you are directed to a separate web page that holds the respective information.

The figure below displays the **Resources & Events** tile on the **Dashboard**.



4 Participant Record

The participant record refers to the interface that manages the relevant participant information within the application. This information includes the details that are pertinent to provide services to each participant. The interface displays the details on tiles, which are then grouped together on a tab.

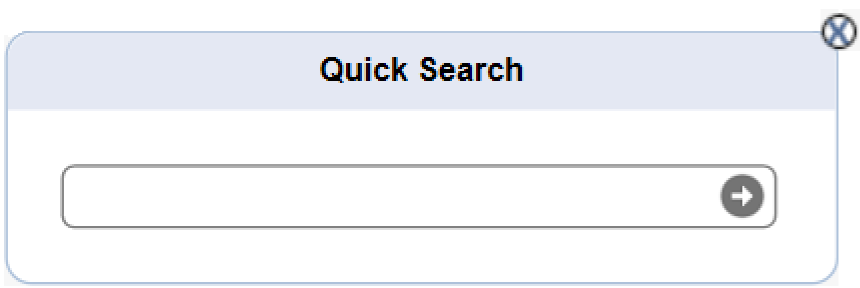
Before we delve further into participant records, we would like to bring an important feature added to this application to your attention. This is the **Quick Search** feature.

Quick Search

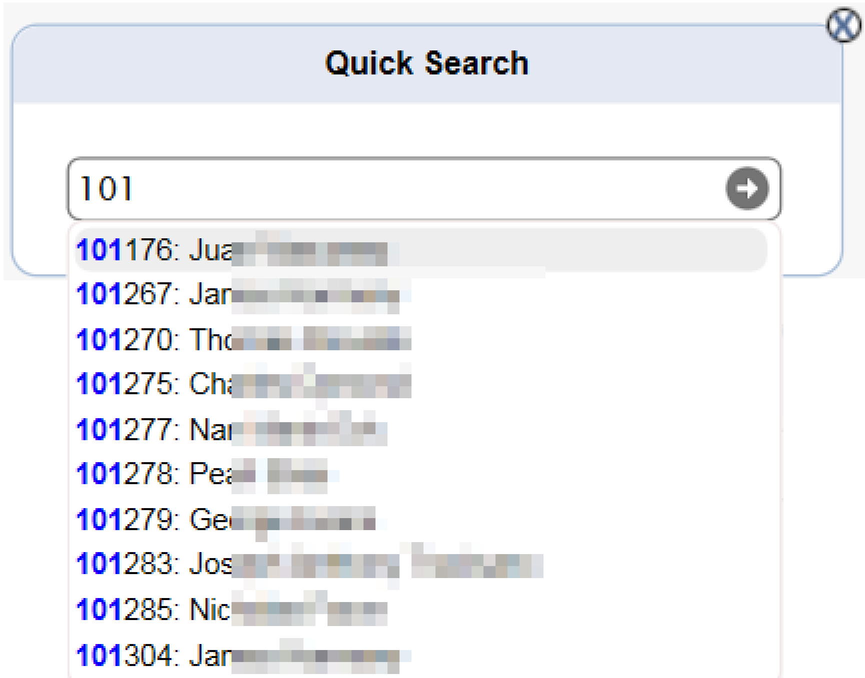
The **Quick Search** tile provides you an option for quick search of a participant. The figure below displays the quick search controls that appear with the selection of the option.

To perform a quick search

1. On the **Menu Bar**, click . The **Quick Search** pop-up controls appear as shown below.



2. Enter the participant's DDD ID or name within the text box. It has an autocomplete feature that displays a list of up to 10 available results, based on the typed characters.



3. You can either select from the list or continue typing the complete name or DDD ID. Click or press ENTER.
4. You are now directed to the **Personal** tab of the selected participant.

4.1 Left Navigation

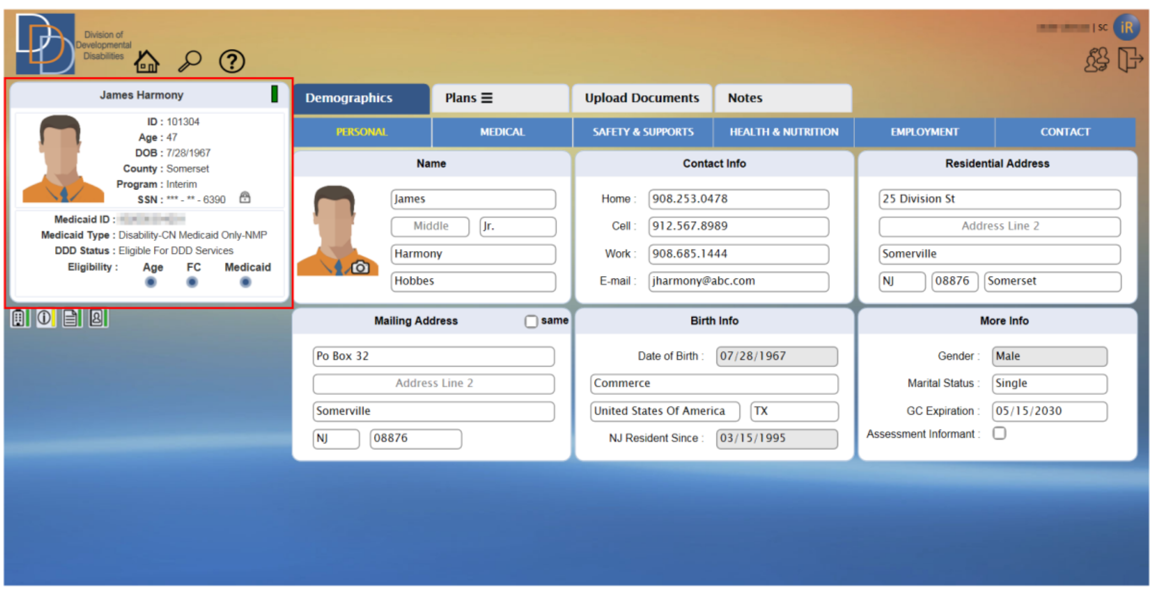
View the following tiles on the left navigation of the participant record interface:

- Participant
- Support Coordination
- Current Plan Info
- Assessments
- Contacts

4.1.1 Participant

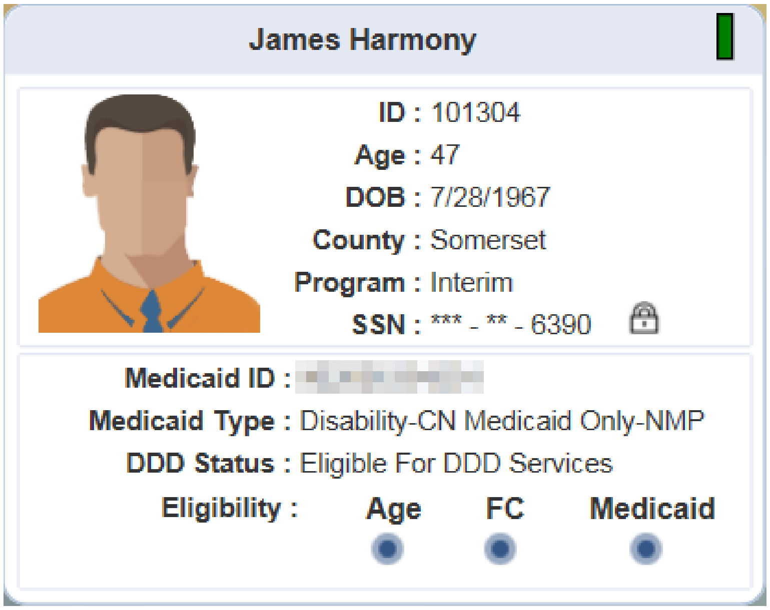
iRecord 3.0 displays **Demographics** with the selection of a participant record. The left navigation tiles allow quick viewing of the pertinent participant information and also provide quick access to multiple actions.

The participant information tile is indicated in the figure below. This is the first tile to the left of the participant screen. It serves as a reference for the iRecord participant information.



Participant Tile

The **Participant** tile displays the details of the participant with respect to iRecord. By default, the participant displays the masked SSN. Your user role determines the permission to unmask the SSN. The tile displays a three-toned status indicator to the right of the header. The tile also displays the status for the eligibility based on the following factors: Age, FC, and Medicaid.



The table below serves as a reference for the Participant tile.

Field	Description
Participant Name	View the name of the participant on the header of the tile.
Photo	View the photo of the participant, if available.
ID	View the DDD ID of the participant. This is a unique number provided for the participant on iRecord.
Age	View the age of the participant as per the current date.
DOB	View the date of birth of the participant.
County	View the county of residence of the participant.
Program	View the program type of the participant, which is the program that the participant has enrolled.
Last Enrollment Date	Hover over the Program information and view the last enrollment date of the participant.

SSN	The tile displays a masked Social Security Number (SSN) of the participant. You can view the last 4 digits of the SSN. The lock icon adjacent to the SSN allows you to view the unmasked SSN, based on permissions. The procedure is discussed below.
Medicaid ID	View the unique Medicaid ID of the participant.
Medicaid Type	View the type of Medicaid for the participant.
DDD Status	View the status of the participant at the Division of Developmental Disabilities (DDD).
Eligibility	The eligibility of the participant is based on the following three factors. The factors are: • Age • FC • Medicaid The status indicator on each of these criteria indicates whether they have been met or not. Blue indicates criteria met and gray indicates unavailable information.

Status Indicator

The Participant tile displays a three-toned status indicator on the right of the header. The indicator serves the purpose of informing the user that all the vital information of the participant has been captured. Follow the table below for information on the status indicator and tooltip information on hover.

Note: For multiple conditions that include red and yellow statuses, view the red status indicator. Hover displays a list of the multiple conditions.

Indicator	Condition	Hover
Green	The participant information is available and current.	Information up-to-date.
Yellow	The participant has not been enrolled in a Program.	Participant has not been enrolled in a Program.
	DDD status is at intake.	DDD status is at intake.

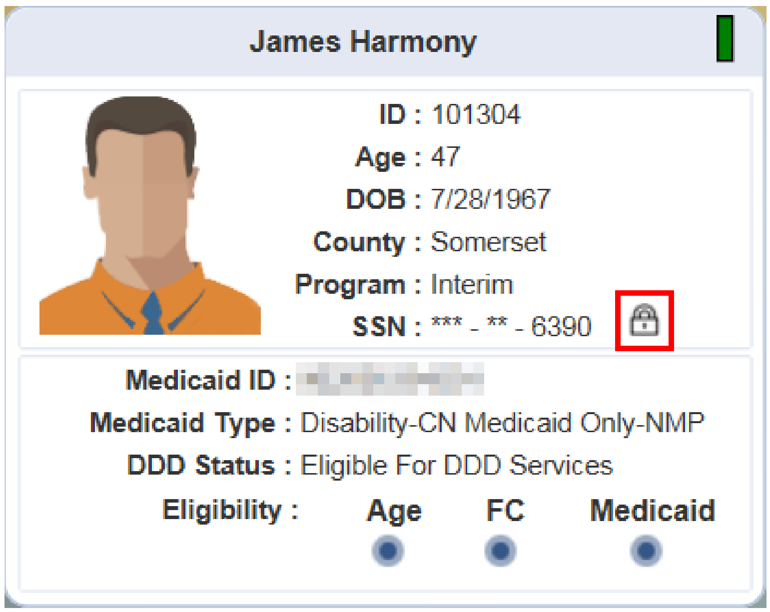
	Medicaid eligibility end date falls within 60 days from the current date.	Medicaid eligibility ends on <End Date>.
Red	DDD status is at DCF.	DDD status is at DCF.
	Any of the following Medicaid detail is not available: • Medicaid ID • Medicaid Type	<Medicaid Detail> information is not available.
	Medicaid eligibility end date is less than the current date.	Medicaid eligibility ended on <End Date>.
	One or more of the following participant detail is unavailable: • Name (First Name or Last Name) • Date of Birth • Birth Country • NJ Resident Since • Gender • None of the participant's phone number is available • E-mail address • Primary Diagnosis Code • County	No NJ residency information available (for unavailable **NJ Resident Since** detail). No <Participant Detail> information available (for all others).
	Allergy information unavailable.	No allergy information available.
	Self-care needs unavailable.	No self-care need information available.
	Dietary information unavailable.	No dietary need information available.
	Health hazards/concerns information unavailable.	No health hazards/concern information available.
	Mobility and adaptive equipment need unavailable.	No mobility and adaptive equipment need information available.
	Behavioral or sensory need information unavailable.	No behavioral or sensory need information available.

	Voting information unavailable.	No voting information available.

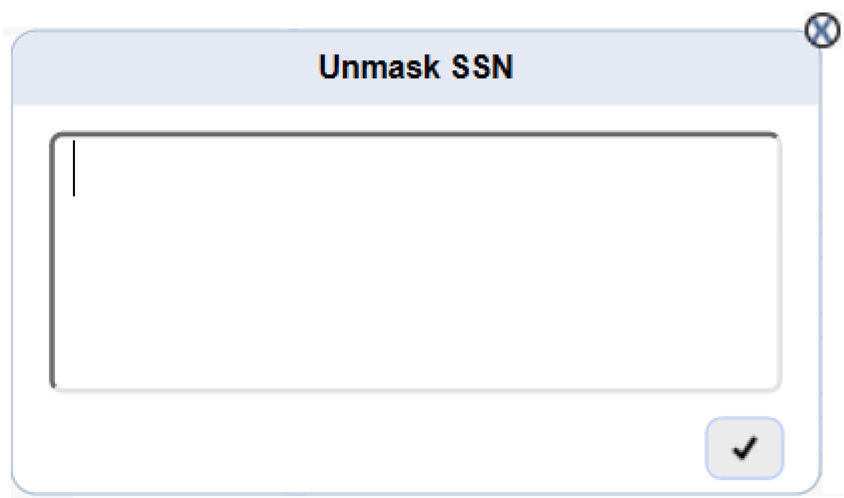
To unlock the SSN

Note: Based on user permissions, you can unmask the SSN.

1. On the **Participant** tile, click adjacent to the **SSN** indicated in the figure below.



2. An **Unmask SSN** dialog box appears as shown below. Enter the appropriate notes, which are required, to unmask the SSN within the box. There is a limit of 1000 characters.



3. Click . View the unmasked SSN on the participant tile with the icon.

Note: It is advisable to mask the SSN after viewing the information. Click icon to mask the SSN.

4.1.2 Support Coordination

The Support Coordination information of the participant is always available on the left navigation once you are on the Participant Record interface.

Support Coordination Tile

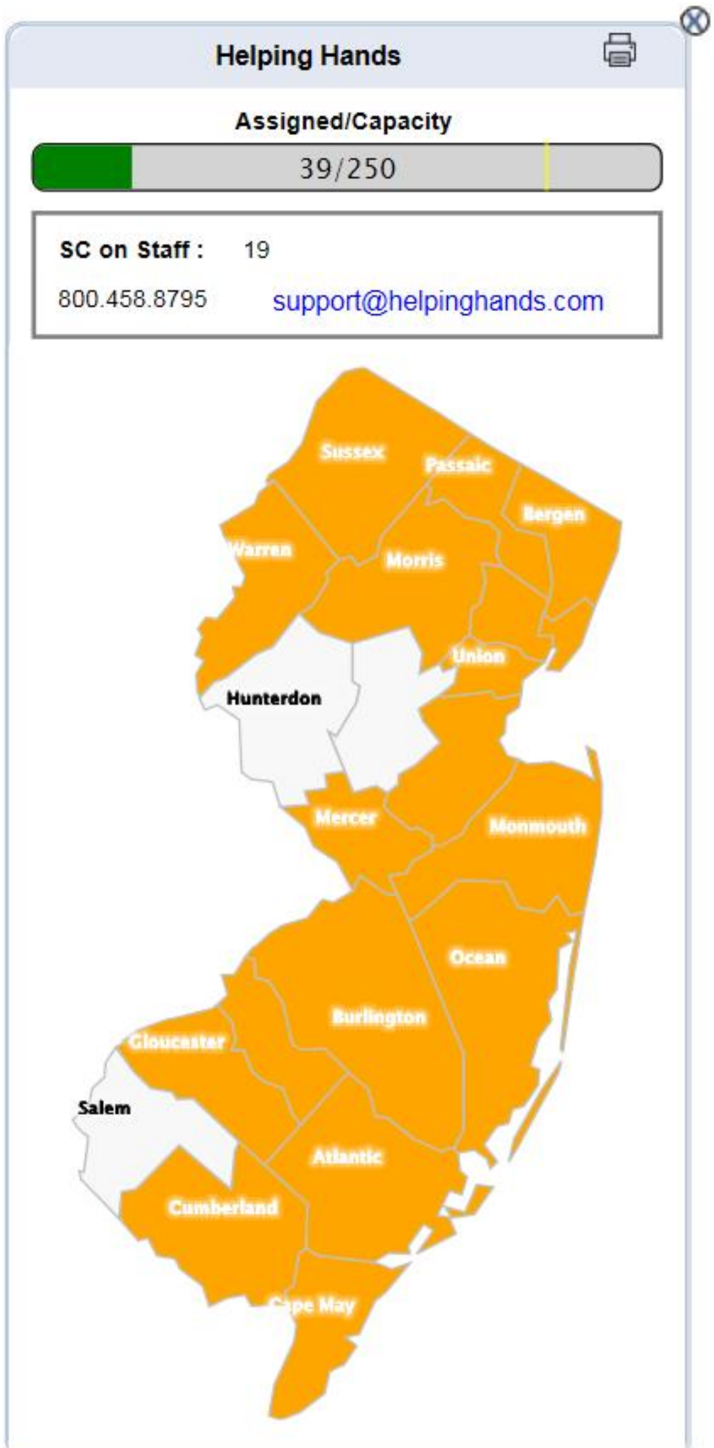
- The **Support Coordination** tile, shown below, displays the information referenced in the following table. Click the icon, indicated below, to minimize or maximize the tile. In minimized mode, the icon appears below the **Participant** tile. The icon displays a status indicator in both modes.

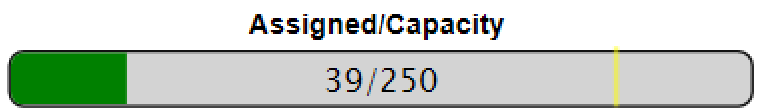
Maximize

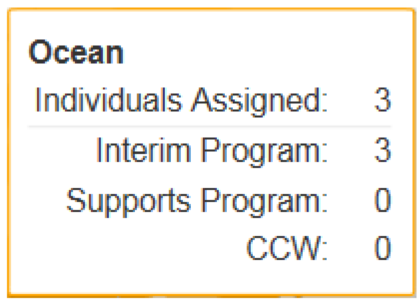
Minimize

Field	Description
Agency Name	View the name of the Support Coordination Agency. It is the first detail on the tile, and displayed in bold. Click the name and a pop-up tile appears with the agency information.
SC	View the Support Coordinator (SC) of the participant. Click the name and view a pop-up tile with the Support Coordinator information.
SCS	View the supervisor of the participant's Support Coordinator. Click the name and view a pop-up tile for the Support Coordination Supervisor.
P	View the phone number of the Support Coordination Agency.
E	View the e-mail address of the Support Coordination Agency. Click the e-mail address and you are directed to your e-mail client, if configured. The address automatically appears in the To field of the e-mail client.

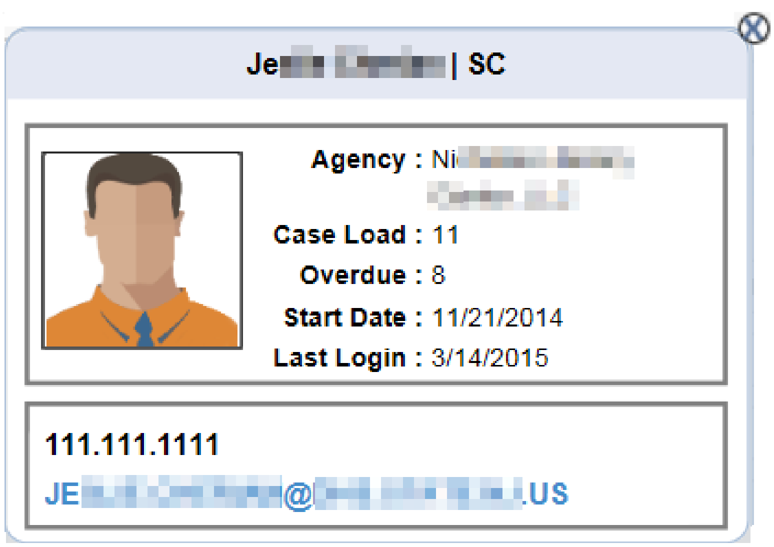
- Click the Support Coordination Agency name and a pop-up tile appears, as shown below. The following table discusses the controls on the pop-up tile.



Field	Description
Agency Name	View the Agency Name on the header of the tile.
Assigned/Capacity	 View a bar that displays the number of individuals assigned versus the total capacity of the agency. An example is as shown in the figure, 39/250, where 39 denotes the assigned individuals and 250 refers to the total capacity. A yellow line on the bar represents 90% of the total capacity. For the assigned below the 90% capacity, view a green bar. At 90% or above, the bar appears in yellow. If it is beyond capacity, the bar shows red.
SC on Staff	View the number of Support Coordinators working with the agency.
Agency Phone Number	View the contact phone number of the agency.
Agency E-mail Address	View the e-mail address of the agency.

Approved County	View a color coded map that displays the counties within New Jersey. An orange shaded county indicates that the agency provides services. Hover and view tooltip information of the individuals and their programs within that county. The information shown are: • Individuals Assigned • Interim Program • Supports Program • CCW A white shaded county indicates that the Agency does not provide services. Hover on an orange shaded county to view the following figure. 

- Click the SC name or the SCS name and a pop-up tile appears with the relevant details of the SC or SCS, as shown below. The following table discusses the controls on the pop-up tile.



Field	Description
SC / SCS Name	View the Name of the SC or SCS on the header of the tile.
Role	View the role on the header of the tile.
Photo	View the photo or an avatar of the SC or SCS.
Agency	View the Agency of the SC or SCS.
Case Load	View the total number of cases assigned to the SC or SCS.
Overdue	View the total number of plans that are overdue.
Start Date	View the date that the SC or SCS was given access to the iRecord application.
Last Login	View the date that the SC or SCS last logged in to the iRecord application.
Phone	View the contact phone number of the SC or SCS.
E-mail	View the e-mail address of the SC or SCS.

Status Indicator

The tile displays a three-toned status indicator on the right of the header. Follow the table below for information on the status indicator and the tooltip information with hover.

Note: For multiple conditions that include red and yellow statuses, view the red status indicator. Hover displays a list of the multiple conditions.

Indicator	Condition	Hover
Green	None of the below conditions.	Information up-to-date.
Yellow	The participant has not been assigned to an SC or SCS.	<SC or SCS> has not been assigned.
Red	The participant has not been assigned to an SC agency.	SC Agency has not been assigned.

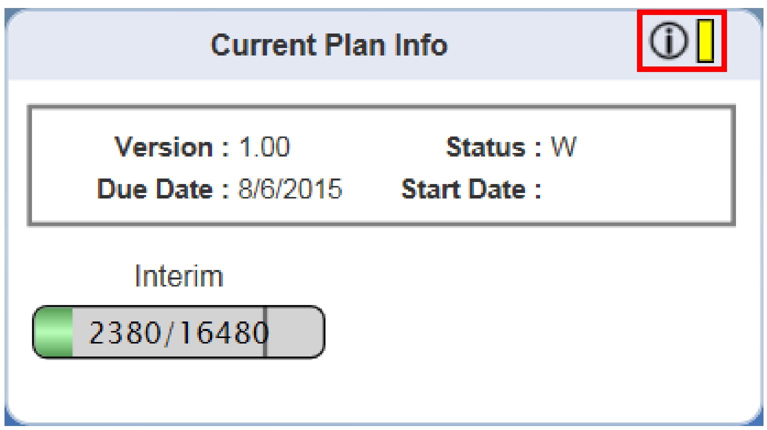
	The most recent monitoring tool is overdue for the participant.	Monthly contract notes missing for the <Period> contact period.

4.1.3 Current Plan Info

The current plan information of the participant is always available on the left navigation once you are on the **Participant Record** interface.

Current Plan Info Tile

- The **Current Plan Info** tile, shown below, displays the information referenced in the following table. Click the icon, indicated below, to minimize or maximize the tile. In minimized mode, the icon appears below the **Participant** tile. The icon displays a status indicator in both modes.



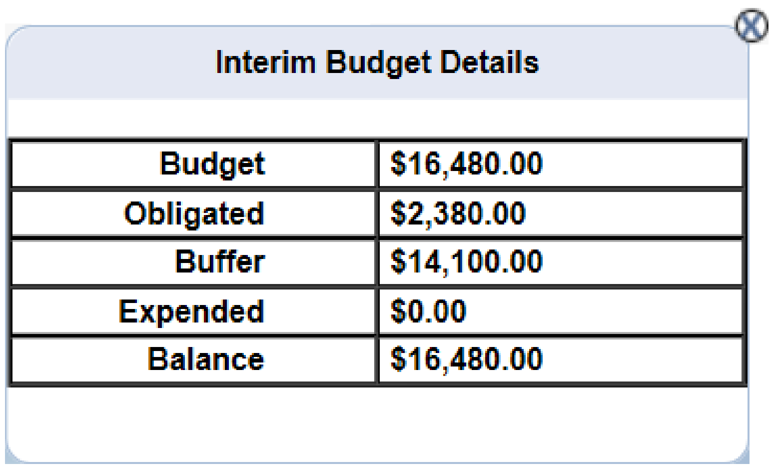
Maximize

Minimize

Field	Description
Version	View the version number of the current plan.
Due Date	View the date by which the plan needs to be approved. A future due date and on hover displays a tooltip with the number of days left to reach the due date. A past due date and on hover displays the tooltip with **Plan overdue by <the number of> days**.
Status	View the status of the plan. Hover displays the full status of the plan on a tooltip.
Start Date	View the start date of the plan. Hover displays the plan term, start and end date.
Interim	View a bar that displays the budget obligated versus the budget allocated. An example is as shown in the figure, 2380/16480, where 2380 represents the budget obligated and 16480 refers to the budget allocated.

	The threshold is the yellow line on the bar and it represents 80% of the budget allocated. If the budget obligated is below the yellow line, the bar is shown in green. At 80% or above, the bar appears in yellow. For budget obligated higher than the budget allocated, view a red bar.
Bump-Up	You have the same set of conditions for the Bump-Up budget bar as in the Interim budget bar.

- Click the **Interim** or **Bump-up** budget bars and the respective pop-up tile appears, as shown below. The following table discusses the controls on the pop-up tile.



Field	Description
Budget	View the total allocated budget.
Obligated	View the obligated budget amount.
Buffer	View the buffer for the allocated budget with the obligated budget.
Expended	View the total expenses of all the services that fall within the budget type.
Balance	View the remaining balance on the allocated budget.

Status Indicator

The tile displays a three-toned status indicator on the right of the header. Follow the table below for information on the status indicator and tooltip information with hover.

Note: For multiple conditions that include red and yellow statuses, the red status indicator is shown. Hover displays a list of the multiple conditions.

Indicator	Condition	Hover
Green	None of the below conditions.	Information up-to-date.
Yellow	The plan is not in A or AI status.	Plan is in <Plan Status> status.
Red	The plan is overdue.	Plan Overdue.
	The plan is in AI status.	Plan Status is Approved-to-Inactive.

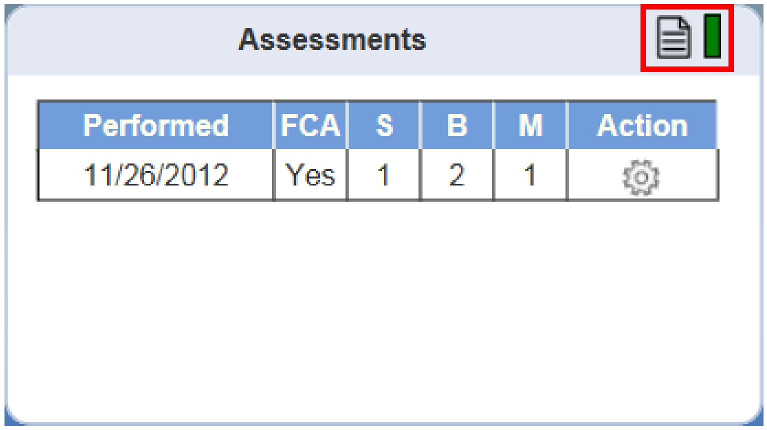
Note: Initial plan is due to be completed within 30 days from date of assignment to SC Agency. All subsequent plans are due to be completed 30 days from the date when plan status is set to W or RV for the first time. Annual Plan is due to be completed within 30 days from date of plan generation.

4.1.4 Assessments

The assessment information of the participant is always available on the left navigation once you are on the Participant Record interface. This tile is unavailable for the FI, SFI and FI-VO user roles.

Assessments Tile

- The **Assessments** tile, shown below, displays the information in the grid format. For more information on the controls, refer to the following table. Click the icon, indicated below, to minimize or maximize the tile. In minimized mode, the icon appears below the **Participant** tile. The icon displays a status indicator in both modes.



Maximize

Minimize

Field	Description
Performed	View the dates that the assessments were performed.
FCA	View the FCA score from the assessment tool.
S	S represents Self Care. View the Self Care score from the assessment tool.

B	B represents Behavioral. View the Behavioral score from the assessment tool.
M	M represents Medical. View the Medical score from the assessment tool.
Action	Click icon and view the following option: • View Document Click **View Document** to view the assessment in the PDF format.

Status Indicator

The tile displays a three-toned status indicator on the right of the header. Follow the table below for information on the status indicator and the tooltip information on hover.

Note: For multiple conditions that include red and yellow statuses, view the red status indicator. Hover displays a list of the multiple conditions.

Indicator	Condition	Hover
Green	Assessment information is available, complete, indicates the individual has an FCA of 1 or has been overridden and the last assessment date within the last 5 years.	Information up-to-date.
Yellow	The last assessment was 4 years, 6 months or more prior to today's date.	<Field Name> information is not available.
	Assessment type is DDRT and is incomplete (i.e. all the scores are not available).	<Field Name> information is not available.
	The participant does not have a current Assessment Informant.	No Assessment Informant has been selected yet.
Red	All the scores are available and FCA score is zero.	<Field Name> information is not available.
	Participant has no assessment.	<Field Name> information is not

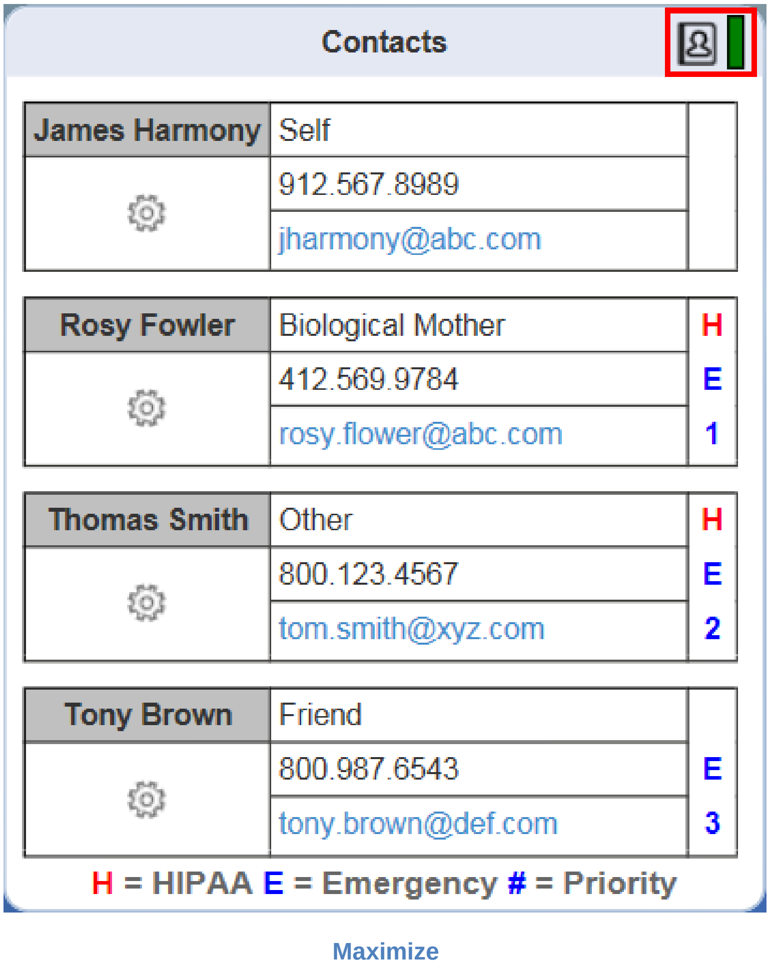
		available.
	The last assessment date is 5 years or more from the current date.	<Field Name> information is not available.

4.1.5 Contacts

The emergency contacts of the participant are always shown on the left navigation of the Participant Record interface.

Contacts Tile

- The **Contacts** tile, shown below, displays the list of active emergency contacts. Each contact is shown as a record on the tile. For more information on the controls, refer to the following table. Click the icon, indicated below, to minimize or maximize the tile. In minimized mode, the icon appears below the **Participant** tile. The icon displays a status indicator in both modes.


Contacts
James Harmony
Self
912.567.8989
jharmony@abc.com
Rosy Fowler
Biological Mother
412.569.9784
rosy.flower@abc.com
H
E
1
Thomas Smith
Other
800.123.4567
tom.smith@xyz.com
H
E
2
Tony Brown
Friend
800.987.6543
tony.brown@def.com
E
3
H = HIPAA E = Emergency # = Priority
Maximize

Minimize

Field	Description
Name	View the name of the contact.
Relationship	View the relationship of the contact to the participant.
Phone Number	View the phone number of the contact.
E-mail Address	View the e-mail address of the contact.
H	H represents HIPAA. This signifies that the contact holds HIPAA authorization to the participant information.
E	E represents Emergency Contact. This signifies that the contact is an emergency contact for the participant. By default, all contacts on this tile must display **E**.

#	**#** represents priority number. The value signifies the priority number of the emergency contact to the participant. 1 has the highest priority, followed by the sequential order.

- Click icon on any contact and you are directed to the **Contacts** tab. The tab displays the information of the selected contact.

Status Indicator

The tile displays a three-toned status indicator on the right of the header. Follow the table below for information on the status indicator and the tooltip information with hover.

Note: For multiple conditions that include red and yellow statuses, view the red status indicator. Hover displays a list of the multiple conditions.

Indicator	Condition	Hover
Green	The contact information is available and current.	Information up-to-date.
Yellow	A contact has not provided the e-mail address.	<E-mail> information is not available for <Contact Name>.
	A contact has not provided the relationship to the participant.	<Relationship> information is not available for <Contact Name>.
	A contact has not provided any of their contact phone numbers.	<Contact Phone> information is not available for <Contact Name>.
Red	The participant does not have an emergency contact.	Emergency contacts must be identified.

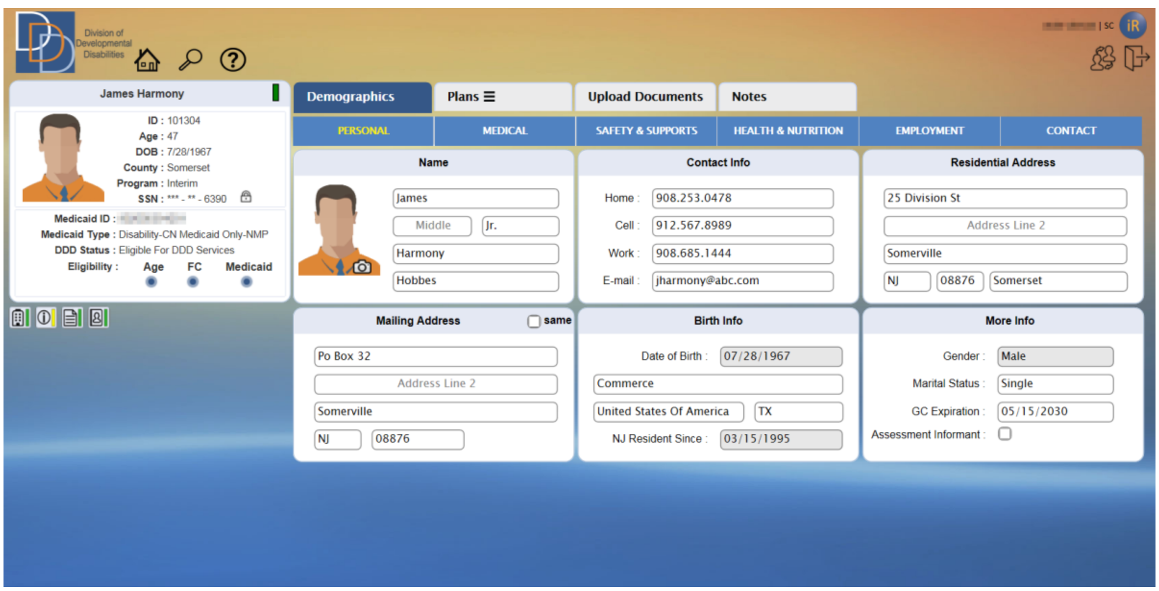
4.2 Personal

The **Personal** tab displays the following tiles:

- Name
- Contact Info
- Residential Address
- Mailing Address
- Birth Info
- More Info

We discuss each of these tiles below. The order of discussion for these tiles is from left to right and then down. The following figure below displays the **Personal** tab on **Demographics**.

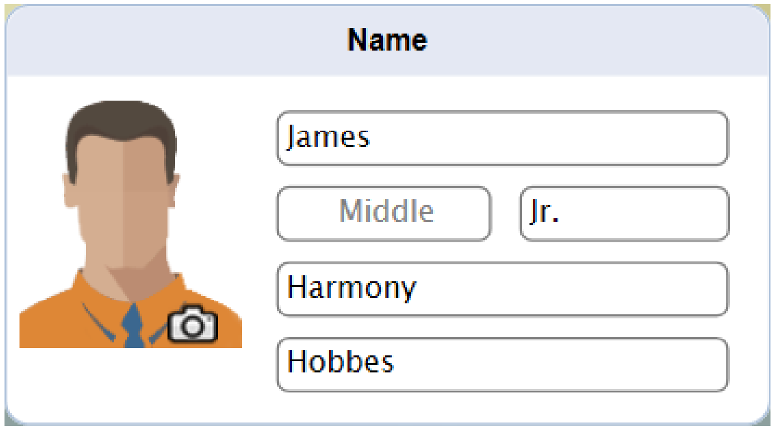
It is important to let you know that the tiles and the fields may be unavailable to certain user roles. Refer to User Privileges for more information.



4.2.1 Name

The **Name** tile records the name details of the participant. The details on this tile provide the name information to the participant tile.

The figure below displays a blank **Name** tile. By default, you will always find the name details of the participant on this tile. The following table discusses the controls on the **Name** tile.



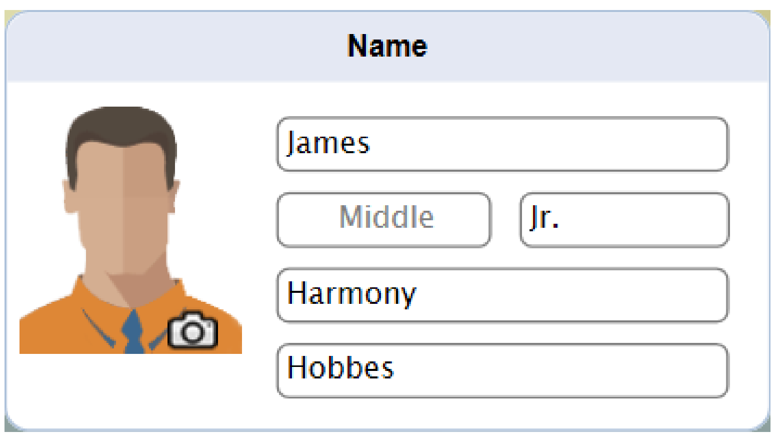
Field	Description
	Add, view or modify the photograph of the participant. View a default image without a photograph. Click the icon on the bottom right of the default image or photograph to add or modify a photograph. The default picture displays a male or female avatar based on the gender of the participant. Mandatory/Optional: Optional
First Name	View or modify the first name of the participant. Click the text box and the controls appear for you to modify the first name of the participant. Mandatory/Optional: Mandatory
M.	Add, view or modify the middle name of the participant. Click the text box and the controls appear for you to modify the middle name of the participant. Mandatory/Optional: Optional
Suffix	Add, view or modify the suffix of the participant. Jr. represents Junior and Sr. represents Senior. Click the box and view the controls with the suffix options. The options are: • Junior • Senior Mandatory/Optional: Optional

Last Name	View or modify the last name of the participant. Click the text box and the controls appear for you to modify the last name of the participant. Mandatory/Optional: Mandatory
A.K.A.	Add, view or modify any alternative name of the participant. Click the text box and the controls appear for you to modify the alternate name of the participant. Mandatory/Optional: Optional

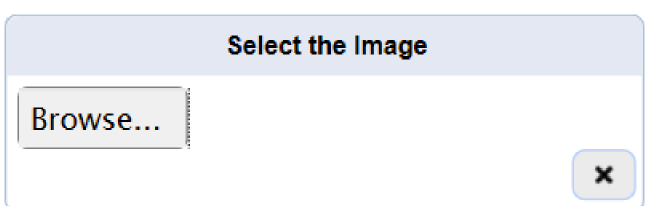
To add a photograph

The instructions below discuss the procedure for adding a photograph for a participant. The procedure is the same for changing the photograph. Here, we discuss the scenario for the Windows desktop OS (Operating System). For another system, the screens change but the procedure remains similar.

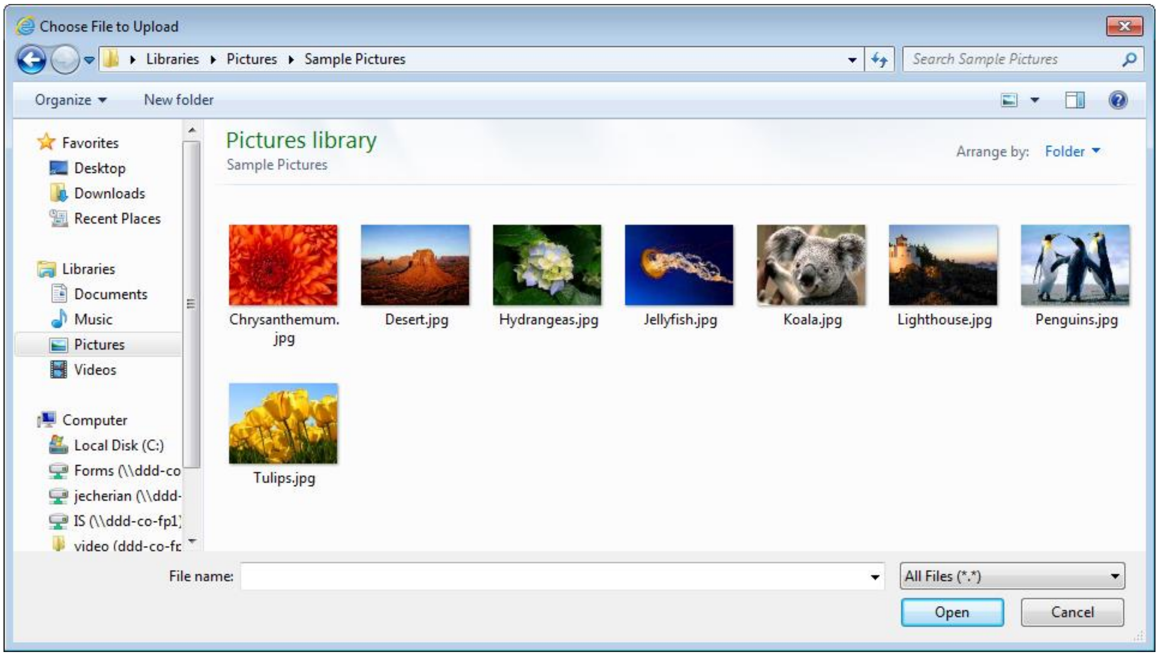
1. Click the icon on the bottom right of the default image or photograph, as shown, to add or modify a photograph.



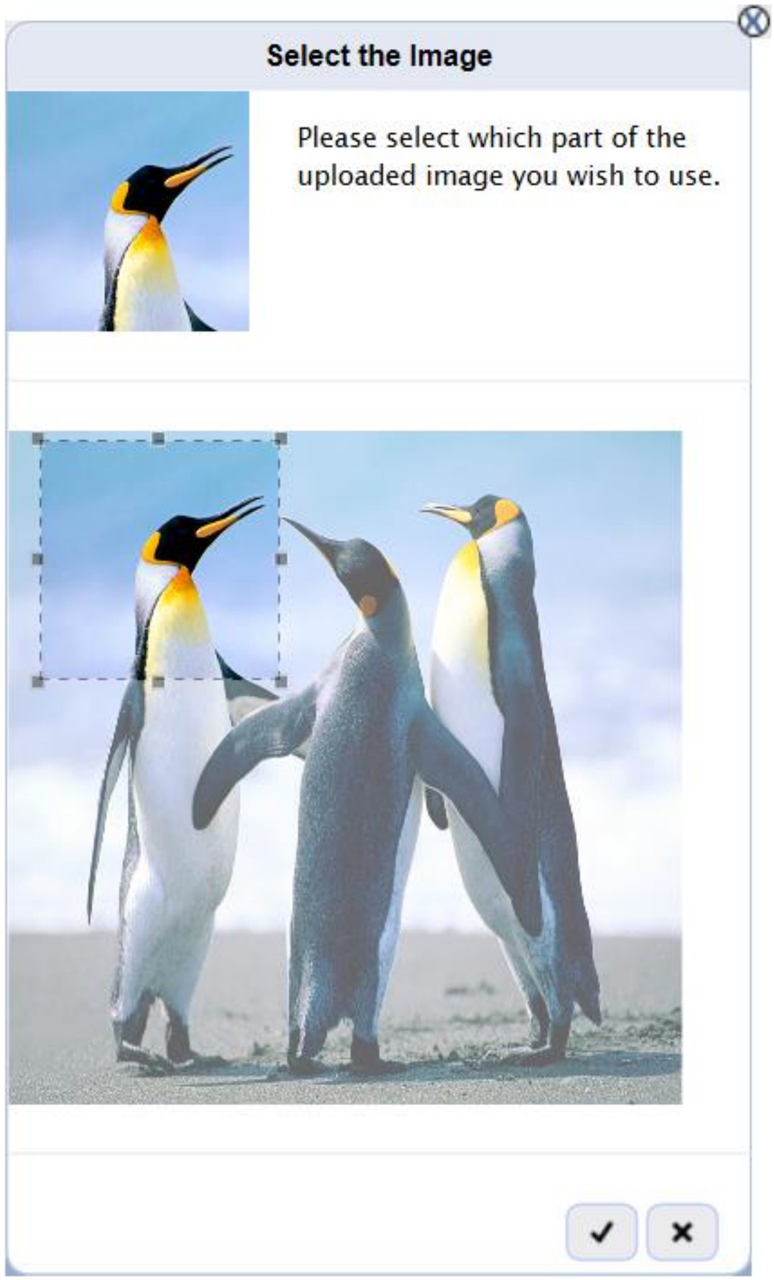
2. The controls appear to upload a photograph, as shown below. Click the **Browse...** button.



3. **Choose File to Upload** dialog box appears (for Windows desktop OS) for you to upload the appropriate photograph file.
   For other systems, the appropriate upload controls appear for you to select the picture file.



4. View the **Select the Image** controls shown below. The controls include a simple editing tool that allows you to crop the image. By default, the selection is 100 * 100 pixels from the top left of the image. Click and drag the square selection to the choice of area on the photograph. You can also drag the corners for a larger square.

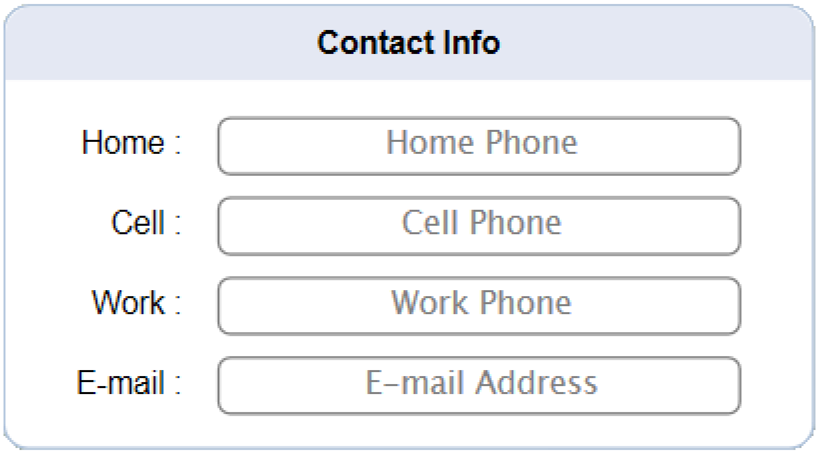


5. Click . iRecord resizes the photograph to 250 Kb, when greater.
6. View the new photograph on the **Name** tile.

4.2.2 Contact Info

The **Contact Info** tile records the contact phone numbers of the participant.

The figure below displays the **Contact Info** tile. The following table discusses the fields within the tile.

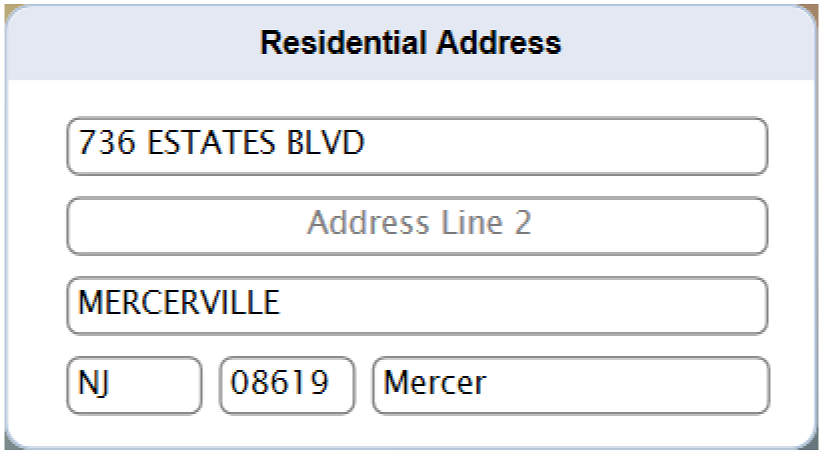


Field	**Description**
Home	Add, view or modify the home phone number of the participant. Click the text box and the controls appear for you to add or modify the home phone number of the participant. Mandatory/Optional: Mandatory
Cell	Add, view or modify the cell phone number of the participant. Click the text box and the controls appear for you to add or modify the cell phone number of the participant. Mandatory/Optional: Optional
Work	Add, view or modify the work phone number of the participant. Click the text box and the controls appear for you to add or modify the work phone number of the participant. Mandatory/Optional: Optional
E-mail	Add, view or modify the e-mail address of the participant. Click the text box and the controls appear for you to add or modify the e-mail address of the participant. Mandatory/Optional: Mandatory

4.2.3 Residential Address

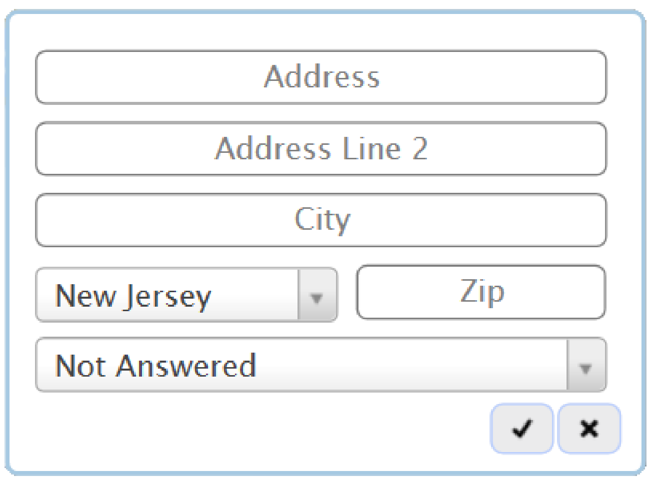
The **Residential Address** tile records the home address of the participant.

The figure below displays the **Residential Address** tile.



To add the residential address

1. Click any of the text boxes within the **Residential Address** tile and the controls appear, as shown below.



2. Enter the details within the respective fields. For more information, refer to the table below.

Field	Description
Address	Enter the first line of the participant's address. Mandatory/Optional: Mandatory
Address Line 2	Enter the second line of the participant's address. Mandatory/Optional: Optional

City	Enter the city of the participant's address. Mandatory/Optional: Mandatory
State	New Jersey is the default state. For any other state, select the state from the drop-down list. Mandatory/Optional: Mandatory
ZIP	Enter the ZIP of the participant's address. Mandatory/Optional: Mandatory
County	Select the county from the drop-down list. Mandatory/Optional: Mandatory

3. Click ✓. An address verification process takes place with the USPS web service. Based on this verification, view the suggested options or an **Override Address** option.
4. Select the appropriate address from the **Recommended Address** option(s).
   or
   Select the **Override Address** option to retain the entered address.
5. Click ✓.
6. View the address on the **Residential Address** tile.

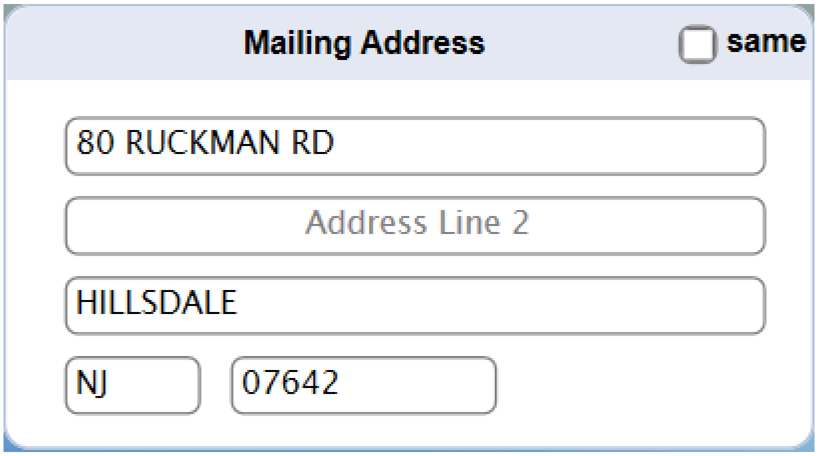
To edit the residential address

1. Click any text box and the controls appear.
2. Modify the field that you wish to modify and/or any other associated field(s).
3. Follow the steps from 3 to 6 for addition of a residential address.

4.2.4 Mailing Address

The **Mailing Address** tile records the mailing address information of the participant. It is possible that the mailing address is the same as the residential address.

The figure below displays the **Mailing Address** tile.



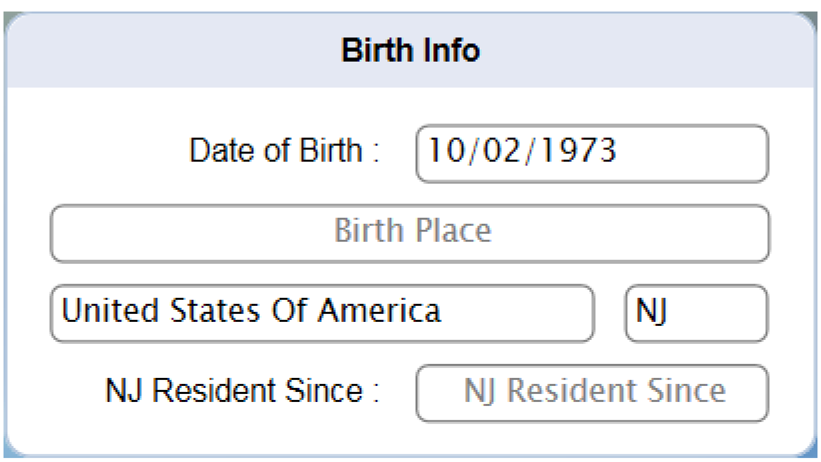
To add the mailing address

- For a mailing address identical to the residential address, click the **Same** check box on the right of the tile header. The fields are populated with the respective details of the **Residential Address** tile.
  To enter an address, follow the instructions for addition of the residential address.

4.2.5 Birth Info

The **Birth Info** tile records certain birth information details of the participant.

The figure below displays the **Birth Info** tile. The following table discusses the fields within the tile.

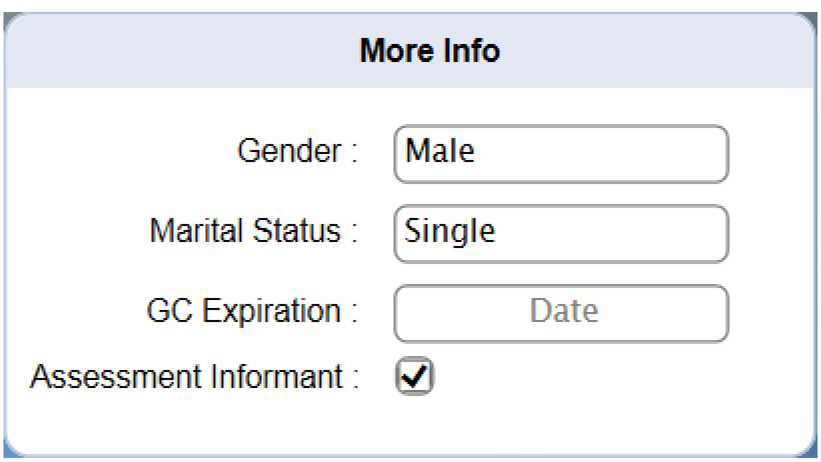


Field	Description
Date of Birth	View the date of birth of the participant. Mandatory/Optional: Mandatory
Birth Place	View or modify the birth place of the participant. Click the text box and the controls appear for you to modify the birth place of the participant. Mandatory/Optional: Mandatory
Birth Country	View or modify the birth country of the participant. Click the text box and the controls appear for you to modify the birth country of the participant. Mandatory/Optional: Mandatory
Birth State	View the birth state of the participant. Mandatory/Optional: Mandatory
NJ Resident Since	View the date that the participant became a resident of New Jersey. Mandatory/Optional: Mandatory

4.2.6 More Info

The **More Info** tile records additional details of the participant.

The figure below displays the **More Info** tile. The following table discusses the fields within the tile.



Field	Description
Gender	View the gender of the participant.
Marital Status	View or modify the marital status of the participant.
GC Expiration	View or modify the date that the Green Card (GC) of the participant expires. Hover displays the expiration date of the GC.
Assessment Informant	Select the check box to indicate that the participant is the assessment informant. With an existing assessment informant, a pop-up message appears that informs the change in the assessment informant to the participant. You have to enter notes to effect the change. The notes cannot exceed 1000 characters.

Note: It is required for the participant to have an assessment informant (either the participant or a contact).

4.3 Medical

Medical tab categorizes the medical related information of the participant.

Medical displays the following tiles:

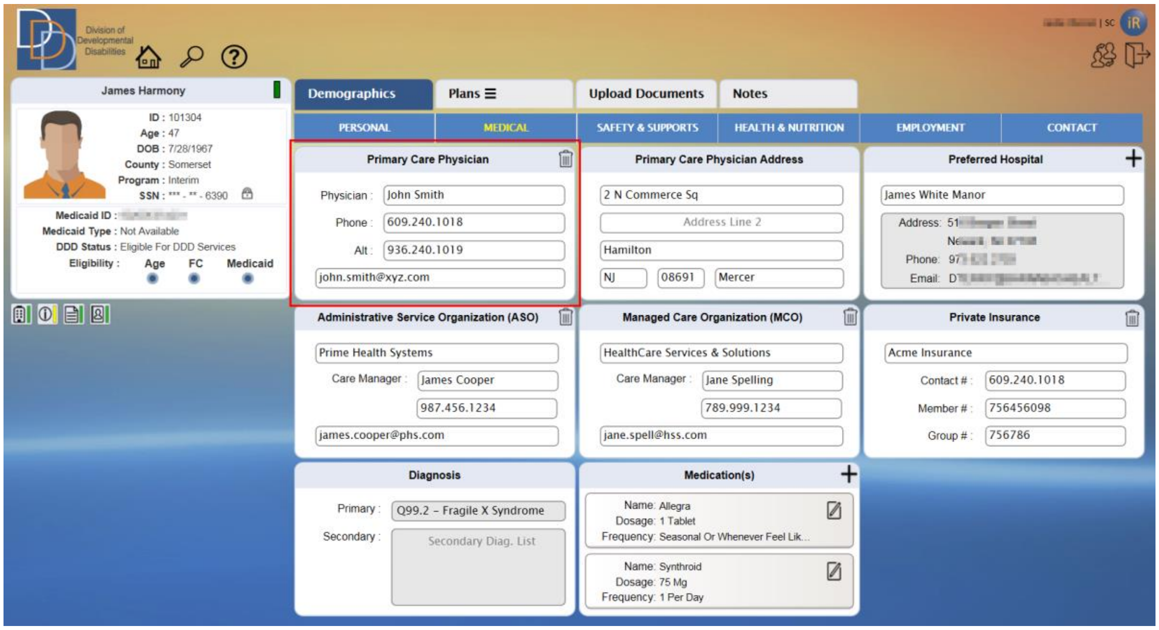
- Primary Care Physician
- Primary Care Physician Address
- Preferred Hospital
- Administrative Services Organization
- Managed Care Organization
- Private Insurance
- Diagnosis
- Medication

4.3.1 Primary Care Physician

A primary care physician is an important point of contact for any health related concerns of the participant. The details must be accessible at any point in time and it is for this reason that the information is maintained on iRecord.

Your user role determines the permissions on this tile. Refer to User Privileges for more information.

The figure below displays the **Primary Care Physician** tile on the **Medical** tab.

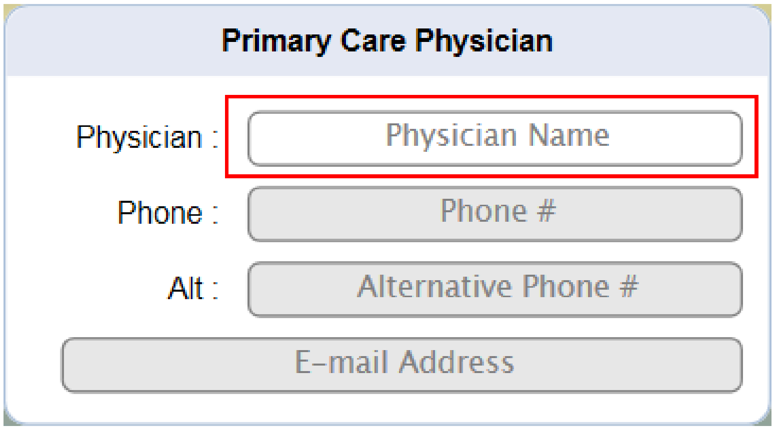


Primary Care Physician Tile

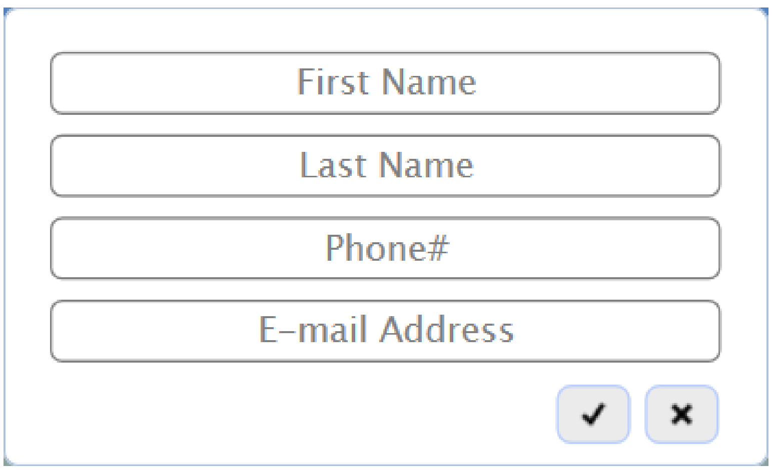
- The **Primary Care Physician** tile does not permit adding any other details before entering the name of the physician.
- The **Primary Care Physician** tile links with the **Primary Care Physician Address** tile. You cannot enter the address details before you add the primary care physician. Similarly, delete the primary care physician and the address details are automatically deleted.

To add the primary care physician details

1. On the **Primary Care Physician** tile, click the **Physician** text box highlighted in the figure below.



2. iRecord displays the primary care physician controls, shown below. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.



Field	Description
First Name	Enter the first name of the primary care physician. Mandatory/Optional: Mandatory Maximum limit: 50 characters
Last Name	Enter the last name of the primary care physician. Mandatory/Optional: Mandatory Maximum limit: 50 characters
Phone #	Enter the work phone number of the primary care physician. Mandatory/Optional: Mandatory

E-mail Address	Enter the e-mail contact address of the primary care physician. Mandatory/Optional: Mandatory Format: Standard (Example: test@email.com) Max limit: 100 characters

3. Click ✓ to save and close the controls.
4. View the details on the **Primary Care Physician** tile with the **Alt** text box blank.
   To add the alternate phone number of the primary care physician, click the **Alt** text box and record the detail using the inline controls.

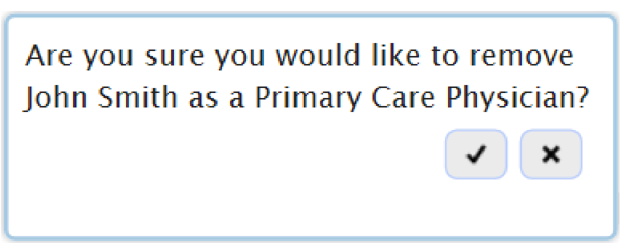
To edit the primary care physician details

Note: Do not edit the details for a new primary care physician of a participant. Delete and then add the new primary care physician.

1. On the **Primary Care Physician** tile, click the text box of the field that you want to modify.
2. Modify the appropriate detail with the inline controls. For more information, refer to the field in the preceding table.
3. View the edited details on the tile.
4. Repeat the steps to modify another field, if required.

To delete the primary care physician details

1. On the Primary Care Physician tile, click 🗑 (available on the tile header with an existing primary care physician).
2. A confirmation message appears as shown below. Click ✓ and confirm delete.



3. View the blank **Primary Care Physician** tile.

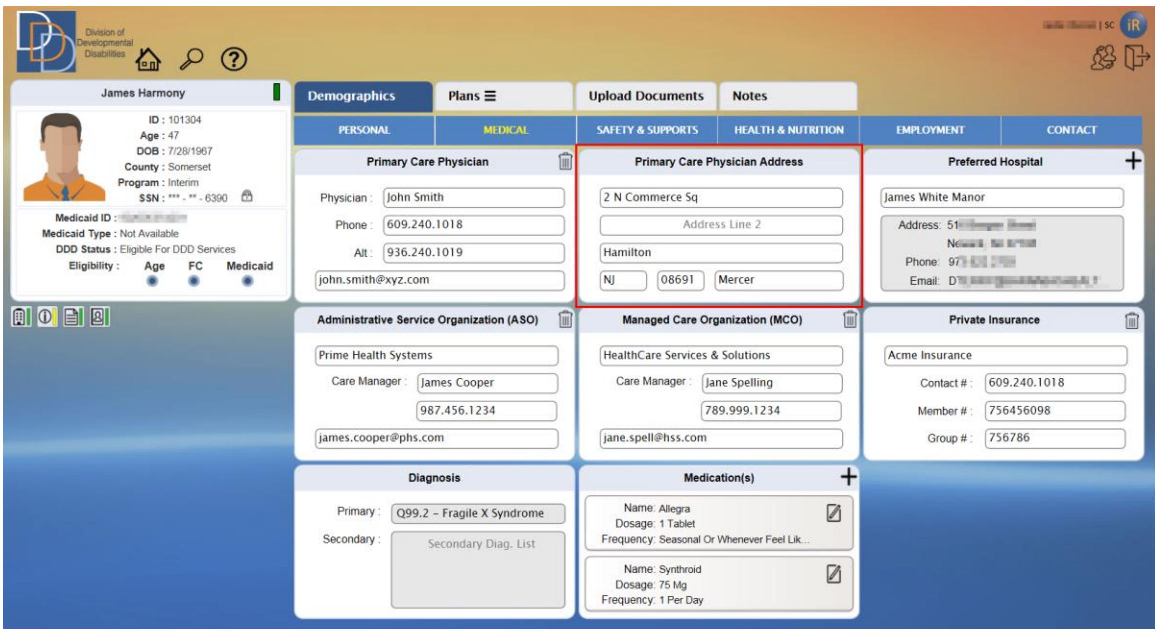
Note: iRecord automatically deletes the information on the **Primary Care Physician Address** tile with the deletion of the primary care physician.

4.3.2 Primary Care Physician Address

The address of the primary care physician is maintained on iRecord on a separate tile to the primary care physician information. The address tile is linked to the primary care physician.

Your user role determines the permissions on this tile. Refer to User Privileges for more information.

The figure below displays the **Primary Care Physician Address** tile on the **Medical** tab.



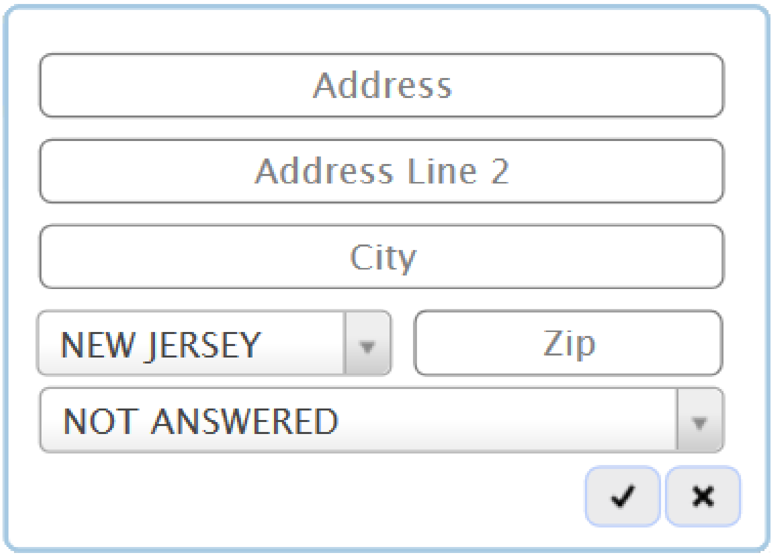
Primary Care Physician Address Tile

- The **Primary Care Physician Address** tile links to the **Primary Care Physician** tile. You cannot enter the address details before you add the primary care physician information. Similarly, delete the primary care physician and the address details are automatically deleted.

To add the primary care physician address

Note: You cannot add the address before you add the primary care physician information.

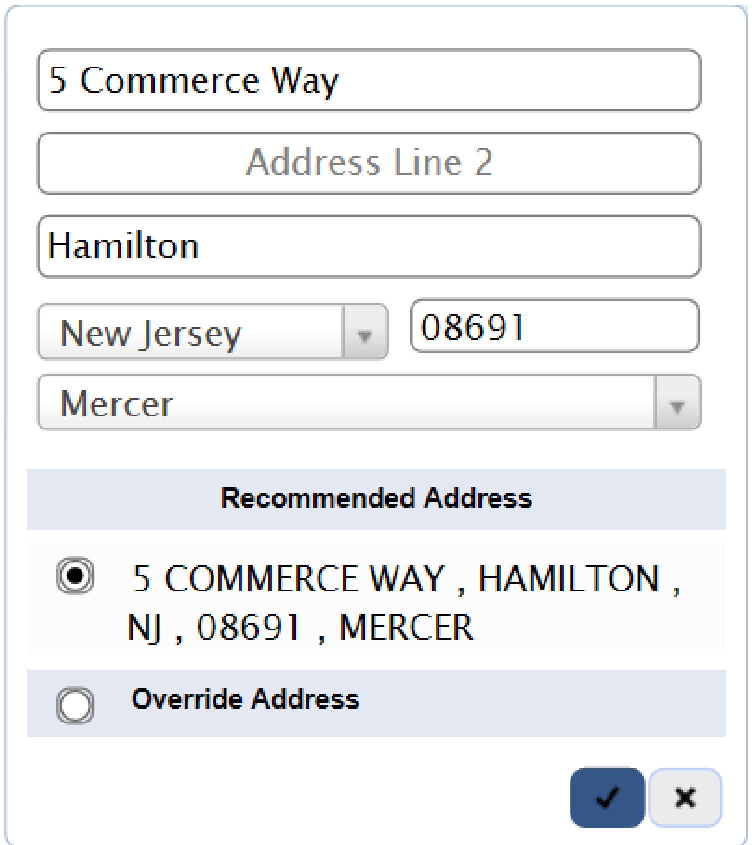
1. On the **Primary Care Physician Address** tile, click any text box and iRecord displays the primary care physician address controls shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	Description
Address	Enter the first line of the primary care physician address. Mandatory/Optional: Mandatory Maximum limit: 50 characters
Address Line 2	Enter the second line of the primary care physician address. Mandatory/Optional: Optional Maximum limit: 50 characters
City	Enter the city for the given address of the primary care physician. Mandatory/Optional: Mandatory Maximum limit: 50 characters
State	Select the state from the drop-down list for the given address of the primary care physician. **New Jersey** is the default selection.
Zip	Enter the zip for the given address of the primary care physician. Mandatory/Optional: Mandatory
County	Select the county from the drop-down list for the given address of the primary care physician. Mandatory/Optional: Mandatory

3. Click ✓. iRecord verifies the address with the USPS web server and then displays the address options. An example is shown below.



4. Select the appropriate address from the **Recommended Address** option(s).
   or
   Select the **Override Address** option to retain the entered address.
5. View the details on the **Primary Care Physician Address** tile.

To edit the primary care physician address

1. On the **Primary Care Physician Address** tile, click any text box and the address controls appear with the given address.
2. Modify the address within the appropriate text box(es). For more information, refer to the preceding table.

3. Click ✓. iRecord verifies the address and then displays the address options, as shown in step 3 of the preceding section (to add the primary care physician address).
4. Select the appropriate address from the **Recommended Address** option(s).
   or
   Select the **Override Address** option to retain the entered address.
5. View the edited details on the **Primary Care Physician Address** tile.

To delete the primary care physician address

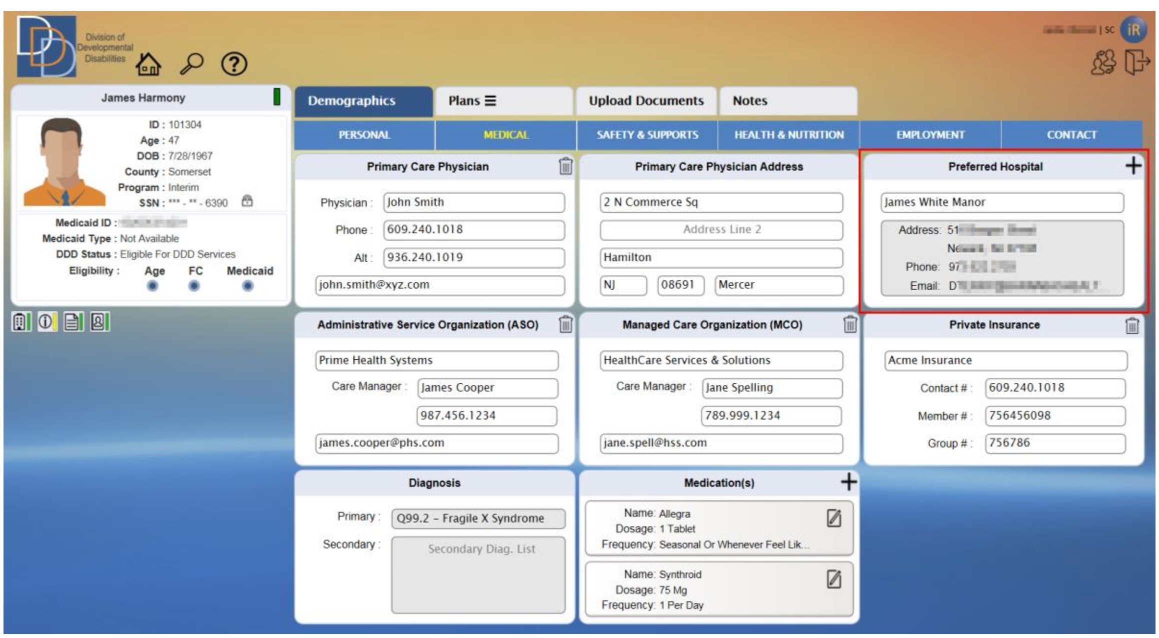
- You cannot delete the primary care physician address without deleting the primary care physician.

Note: iRecord automatically deletes the information on the **Primary Care Physician Address** tile with the deletion of the primary care physician.

4.3.3 Preferred Hospital

iRecord includes a provision to record the participant's preferred hospital information.

You can view the preferred hospital details on the **Medical** tab in **Demographics**, as shown. Your user role determines the permissions on the tile. Refer to User Privileges for more information.



Preferred Hospital Tile

- The **Preferred Hospital** tile displays the preferred hospital of the participant. Initially, the preferred hospital displays **No Information Available**. iRecord maintains a list of hospitals and their details.
- For a hospital that does not appear on the list, click + to add. An e-mail is sent with the entered details to request the addition of the hospital to the list.

To add or modify a preferred hospital

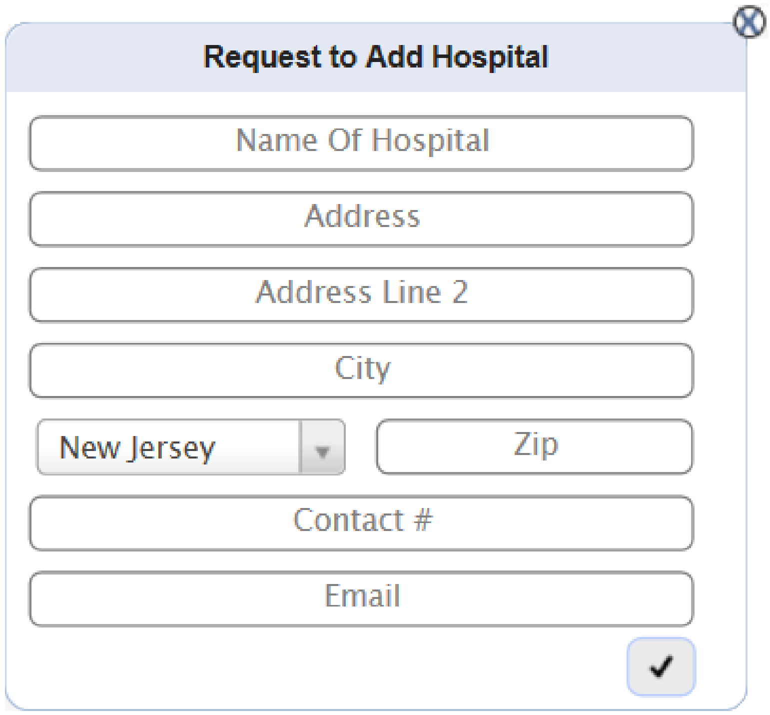
1. On the **Preferred Hospital** tile, click the **Preferred Hospital** text box and the controls appears as a pop-up, shown below.

2. Enter the preferred hospital within the text box. The text box has an autocomplete feature that displays a list of up to 5 hospitals. To narrow down the selection, you can continue typing until you locate the hospital. Click and select the preferred hospital. The figure below displays a sample of the autocomplete feature.
3. Click ✓.
4. On the **Preferred Hospital** tile; view the selected hospital's name, address, phone and e-mail details.

To add an unlisted preferred hospital

Note: Before you add a hospital, check the name and spelling.
Example: Check that the hospital has St. or Saint.

1. On the **Preferred Hospital** tile header, click +. The **Request to Add Hospital** pop-up tile appears, as shown.

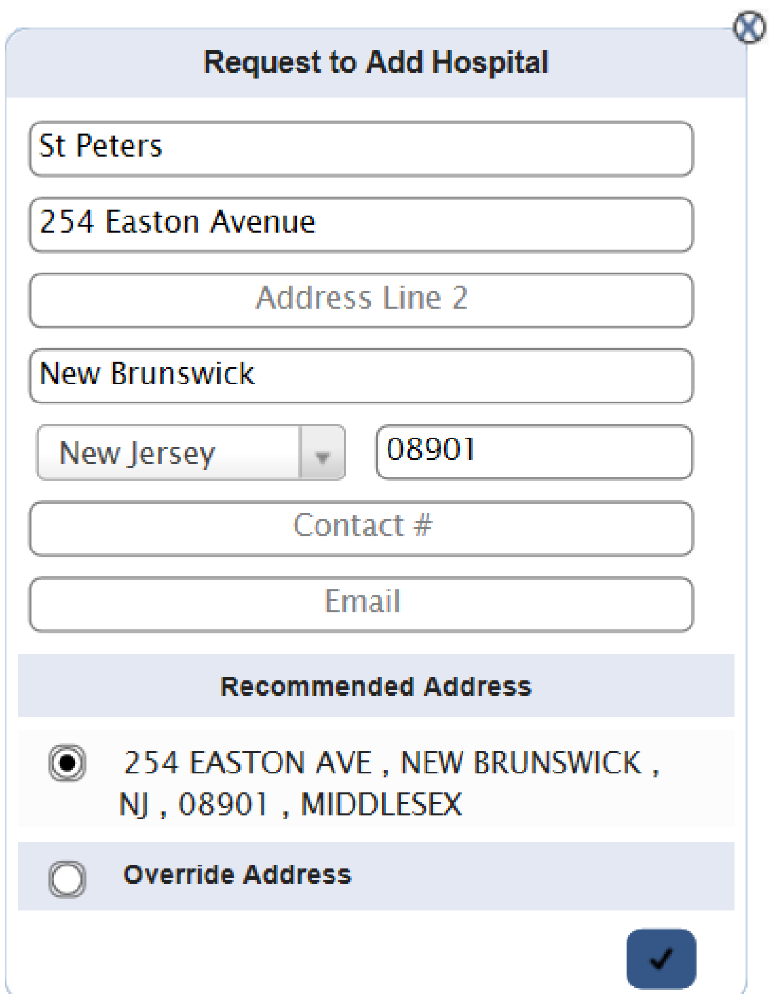


2. Enter the details within the tile. For more information, refer to the following table.

Field	Description
Name	Enter the name of the hospital.
Address	Enter the first line of the hospital address. Mandatory/Optional: Mandatory Maximum limit: 50 characters
Address Line 2	Enter the second line of the hospital address. Mandatory/Optional: Optional Maximum limit: 50 characters
City	Enter the city for the given address. Mandatory/Optional: Mandatory Maximum limit: 50 characters
State	Select the state from the drop-down list for the given address of the hospital. **New Jersey** is the default selection.

ZIP	Enter the ZIP of the given address for the hospital. Mandatory/Optional: Mandatory
Contact	Enter the contact number of the hospital. Mandatory/Optional: Optional
E-mail	Enter the contact number of the hospital. Mandatory/Optional: Optional

3. Click ✓. The system verifies the address with the USPS web server and displays the **Recommended Address** option(s) and the **Override Address** option, shown below.



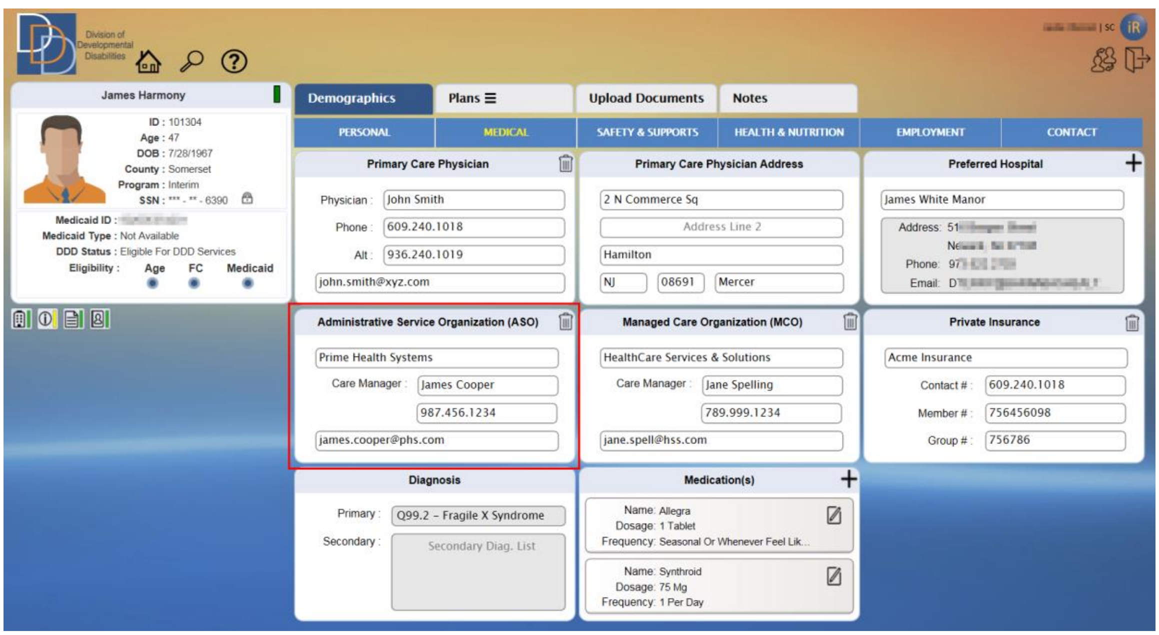
4. Select the appropriate address from the **Recommended Address** option(s).
   or
   Select the **Override Address** option and retain the entered address.

5. Click .
6. iRecord sends an e-mail with the request to ddd.itrequests@dhs.state.nj.us.
   If successful, view the message **Request to Add Preferred Hospital sent successfully.**
   If unsuccessful, view the message **Sending e-mail to ddd.itrequests@dhs.state.nj.us failed. Please try again.**
7. Click to close the message.

4.3.4 Administrative Services Organization (ASO)

iRecord has a provision that records the participant's Administrative Services Organization (ASO) details.

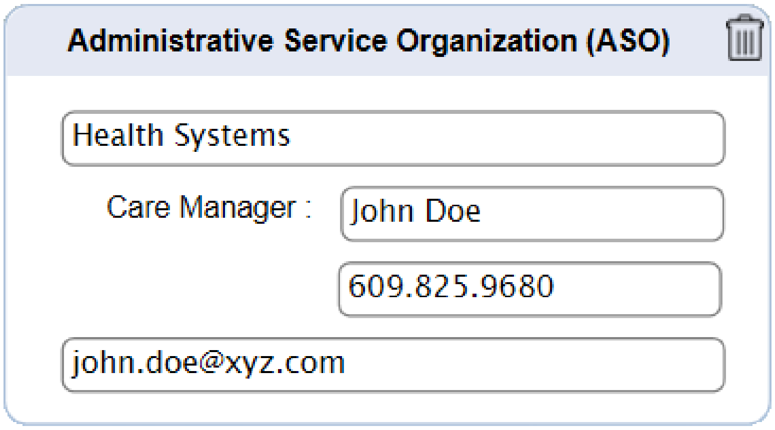
You can view the ASO details on the **Medical** tab in **Demographics**, as shown. Your user role determines the permissions on this tile. Refer to User Privileges for more information.



ASO Tile

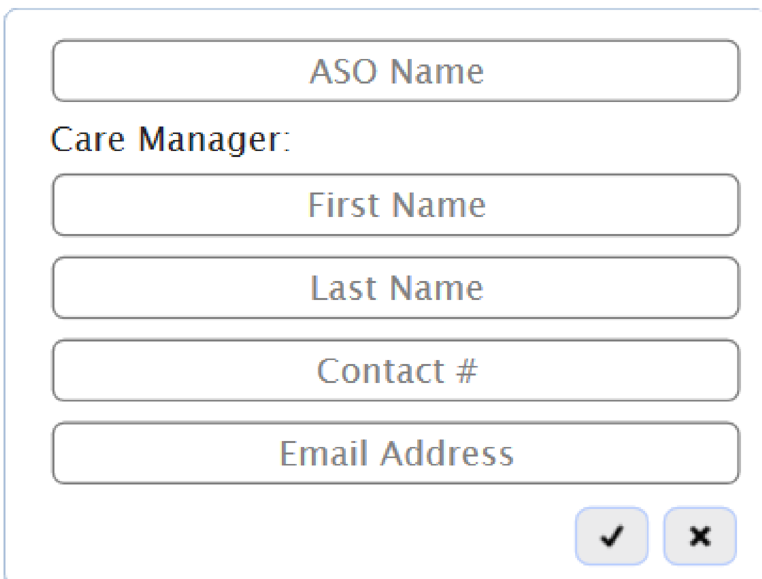
- The **ASO** tile displays the participant's ASO details. It is not necessary for the participant to have an ASO. In such a case or if the participant has not provided the ASO information, this tile remains blank.

- With a blank **ASO** tile, you have to first enter the name of the ASO before entering any other information.



To add an ASO

1. On the **ASO** tile, click the **Name** text box and the pop-up controls appear, as shown below, for entering the details of the ASO.



2. Enter the information within the fields. For more information, refer the following table.

Field	Description
Name	Enter the name of the participant's ASO. Mandatory/Optional: Mandatory
Care Manager	
First Name	Enter the first name of the participant's care manager at the ASO. Mandatory/Optional: Mandatory
Last Name	Enter the last name of the participant's care manager at the ASO. Mandatory/Optional: Mandatory
Contact #	Enter the contact number of the participant's care manager at the ASO. Mandatory/Optional: Mandatory
E-mail Address	Enter the e-mail address of the participant's care manager at the ASO. Mandatory/Optional: Mandatory

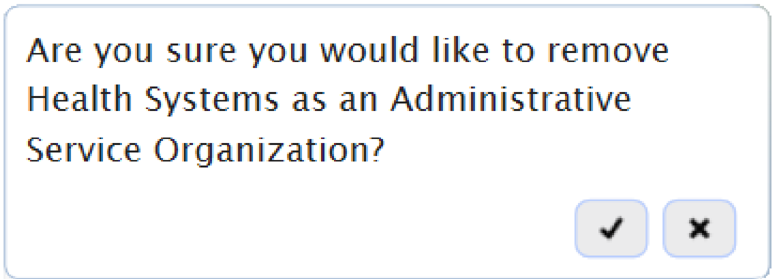
3. Click ✓.
4. View the information on the **ASO** tile.

To edit an ASO

- On the **ASO** tile, click the field that you would like to modify. Inline pop-up controls appear for each field. Edit the field and then click ✓.

To delete an ASO

1. Click 🗑 icon on the **ASO** tile header.
2. A dialog box appears confirming the delete, as shown.

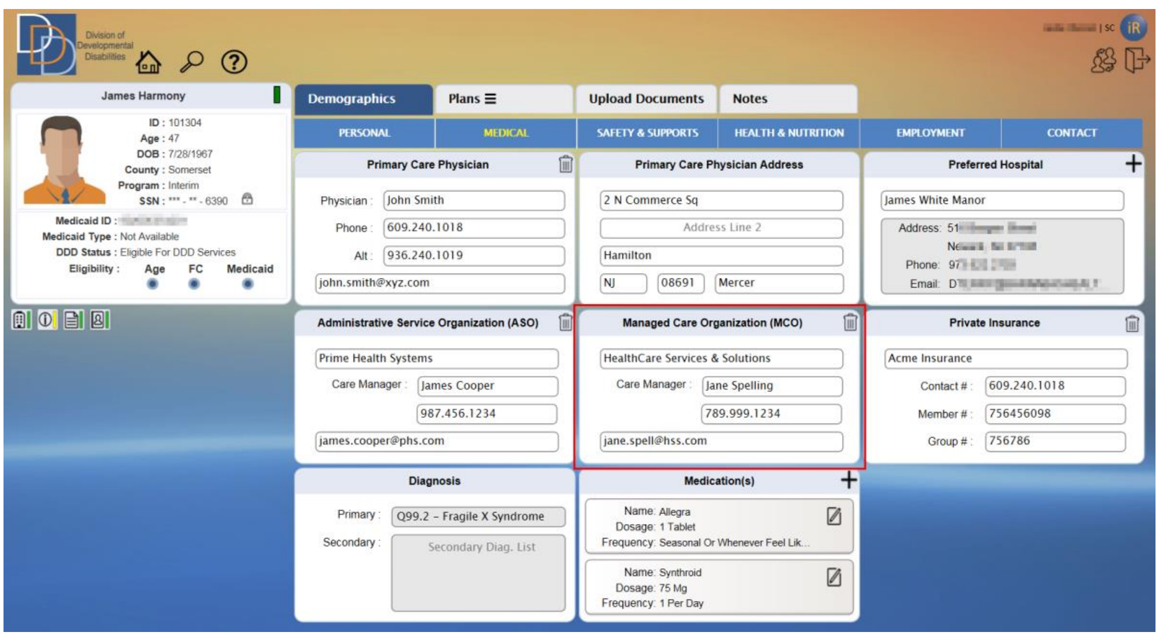


3. Click .

4.3.5 Managed Care Organization (MCO)

iRecord has a provision that records the participant's Managed Care Organization (MCO) details.

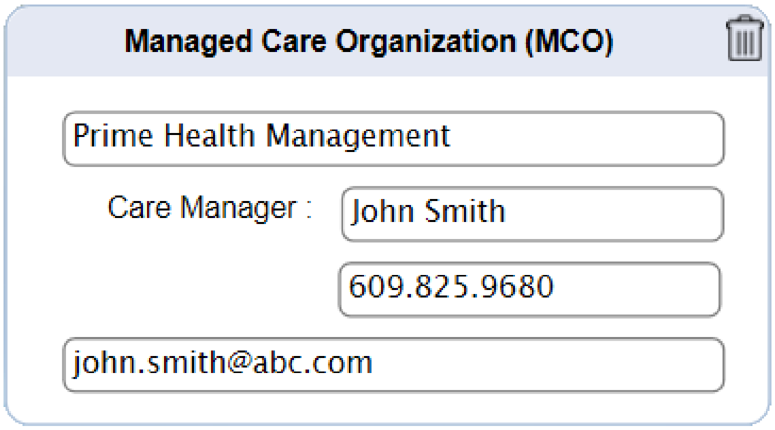
You can view the MCO details on the **Medical** tab in **Demographics**, as shown. Your user role determines the permissions on this tile. Refer to User Privileges for more information.



MCO Tile

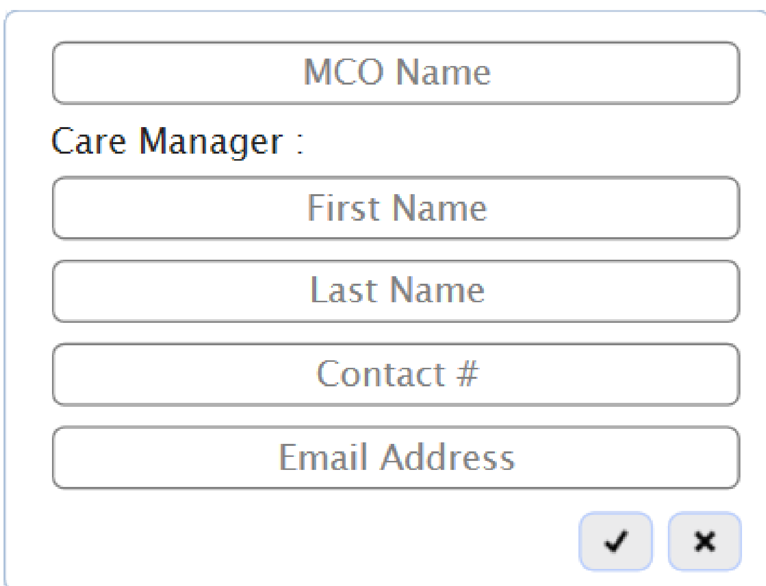
- The **MCO** tile displays the participant's MCO details. It is possible that the participant may not have an MCO. In such a case or if the participant has not provided the MCO information, the tile remains blank.

- With a blank MCO tile, you have to first enter the name of the MCO before entering any other information.



To add an MCO

1. On the **MCO** tile, click the **Name** text box and the pop-up controls appear, as shown below, for entering the details of the MCO.



2. Enter the information within the fields. For more information, refer the following table.

Field	Description
Name	Enter the name of the participant's MCO. Mandatory/Optional: Mandatory
Care Manager	
First Name	Enter the first name of the participant's care manager at the MCO. Mandatory/Optional: Mandatory
Last Name	Enter the last name of the participant's care manager at the MCO. Mandatory/Optional: Mandatory
Contact #	Enter the contact number of the participant's care manager at the MCO. Mandatory/Optional: Mandatory
E-mail Address	Enter the e-mail address of the participant's care manager at the MCO. Mandatory/Optional: Mandatory

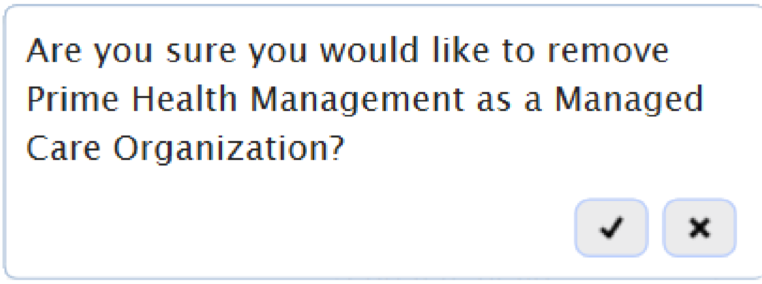
3. Click ✓.
4. View the information on the **MCO** tile.

To edit an MCO

- On the **MCO** tile, click the field that you would like to modify. Inline pop-up controls appear for each field. Edit the field and then click ✓.

To delete an MCO

1. Click icon on the **MCO** tile header.
2. A dialog box appears confirming the delete, as shown.

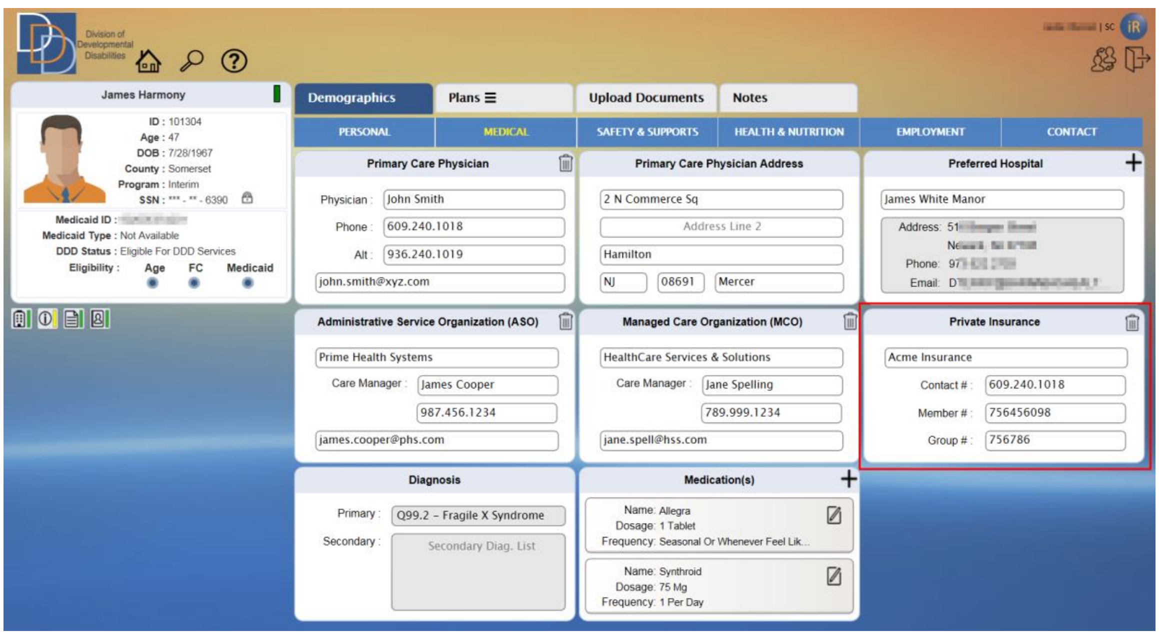


3. Click ✓.

4.3.6 Private Insurance

iRecord has a provision that records the participant's Private Insurance details.

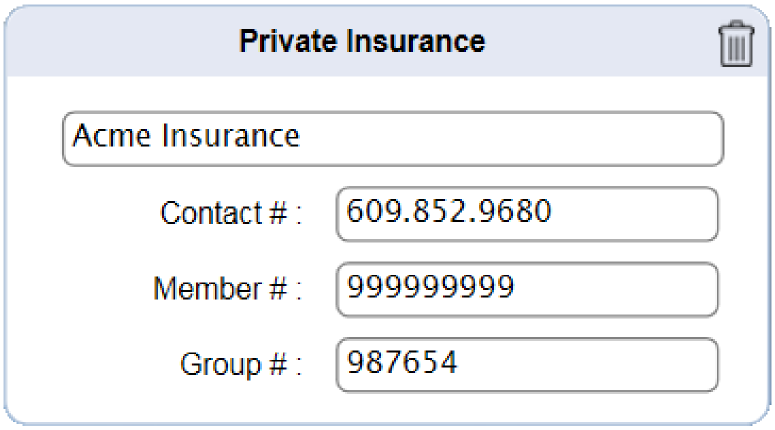
You can view the Private Insurance details on the **Medical** tab in **Demographics**, as shown. Your user role determines the permissions on this tile. Refer to User Privileges for more information.



Private Insurance Tile

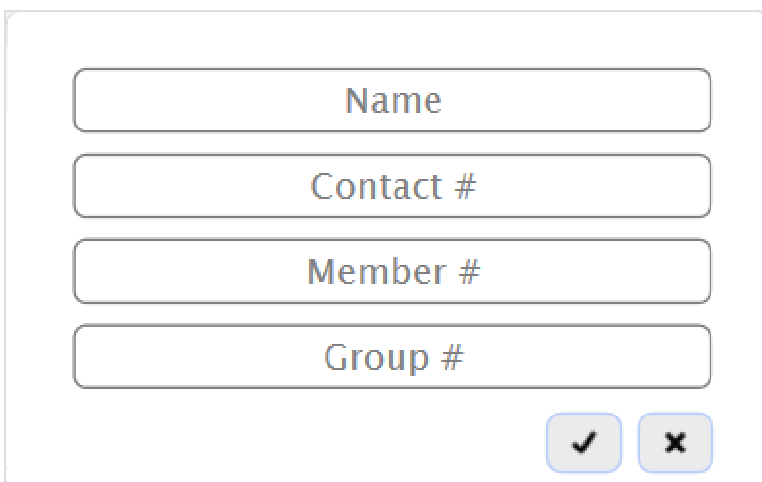
- The **Private Insurance** tile displays the participant's insurance details. It is possible that the participant may not have private insurance. In such a case or if the participant has not provided the private insurance information, this tile remains blank.

- With a blank **Private Insurance** tile, you have to first enter the name of the insurance before entering any other information.



To add Private Insurance

1. On the **Private Insurance** tile, click the **Name** text box and the pop-up controls appear, as shown below, for entering the details of the insurance.



2. Enter the information within the fields. For more information, refer the following table.

Field	Description
Name	Enter the name of the participant's private insurance. Mandatory/Optional: Mandatory
Contact #	Enter the contact number of the participant's private insurance.

	Mandatory/Optional: Mandatory
Member #	Enter the member number of the participant's private insurance. Mandatory/Optional: Mandatory
Group #	Enter the group number of the participant's private insurance. Mandatory/Optional: Mandatory

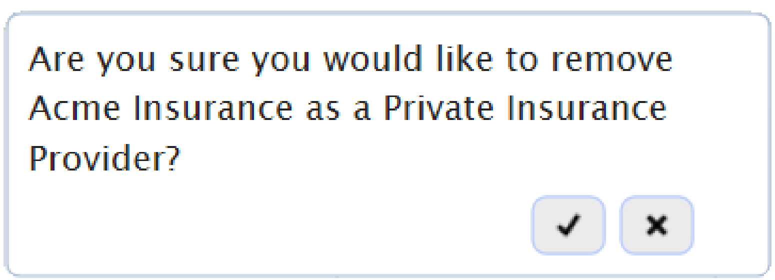
3. Click .
4. View the information on the **Private Insurance** tile.

To edit Private Insurance

- On the **Private Insurance** tile, click the field that you would like to modify. View inline pop-up controls for each field. Edit the field and then click .

To delete Private Insurance

1. Click icon on the **Private Insurance** tile header.
2. A dialog box appears confirming the delete, as shown.



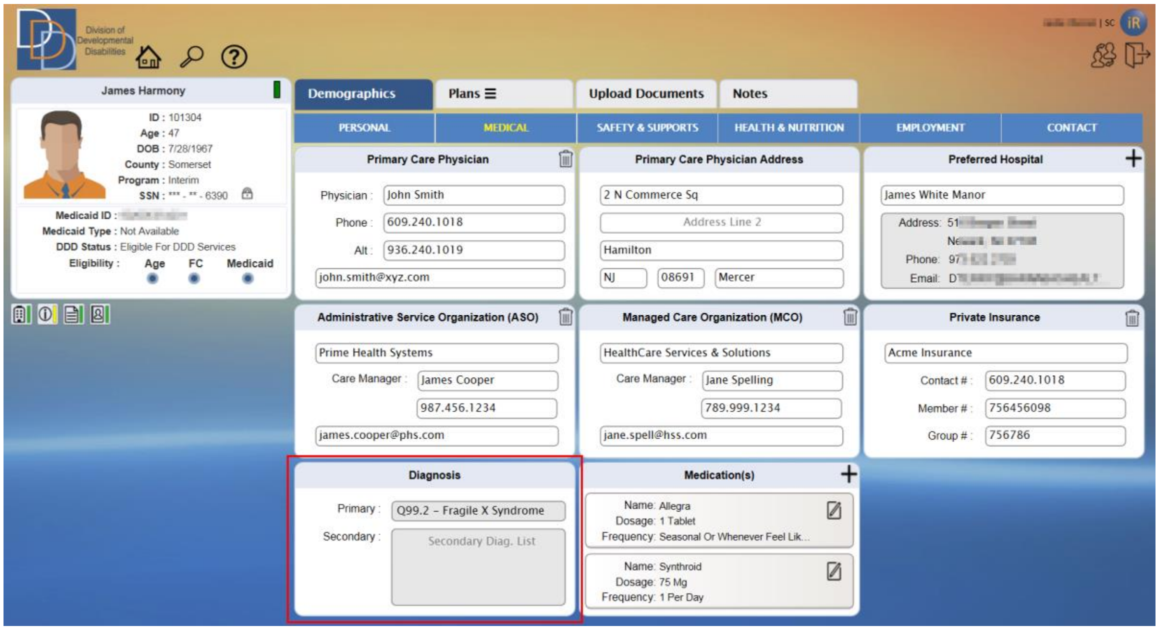
3. Click .

4.3.7 Diagnosis

The purpose of the **Diagnosis** tile is to record the diagnosis information. It is important for a participant to have the primary diagnosis information.

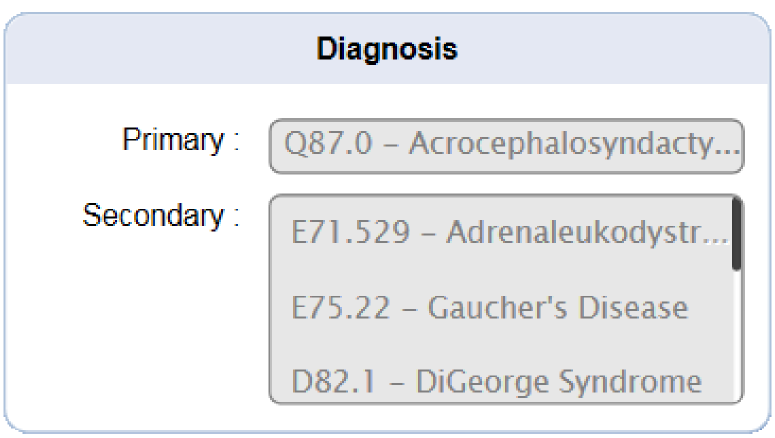
You can view the diagnosis details on the **Medical** tab in **Demographics**, as shown.

Your user role determines the permissions on this tile. Refer to User Privileges for more information.



Diagnosis Tile

- The **Diagnosis** tile displays the primary diagnosis and lists the secondary diagnosis of the participant. You cannot edit the diagnosis information. For more information, refer to the following table.
- You can scroll down to view the list of secondary diagnosis information.

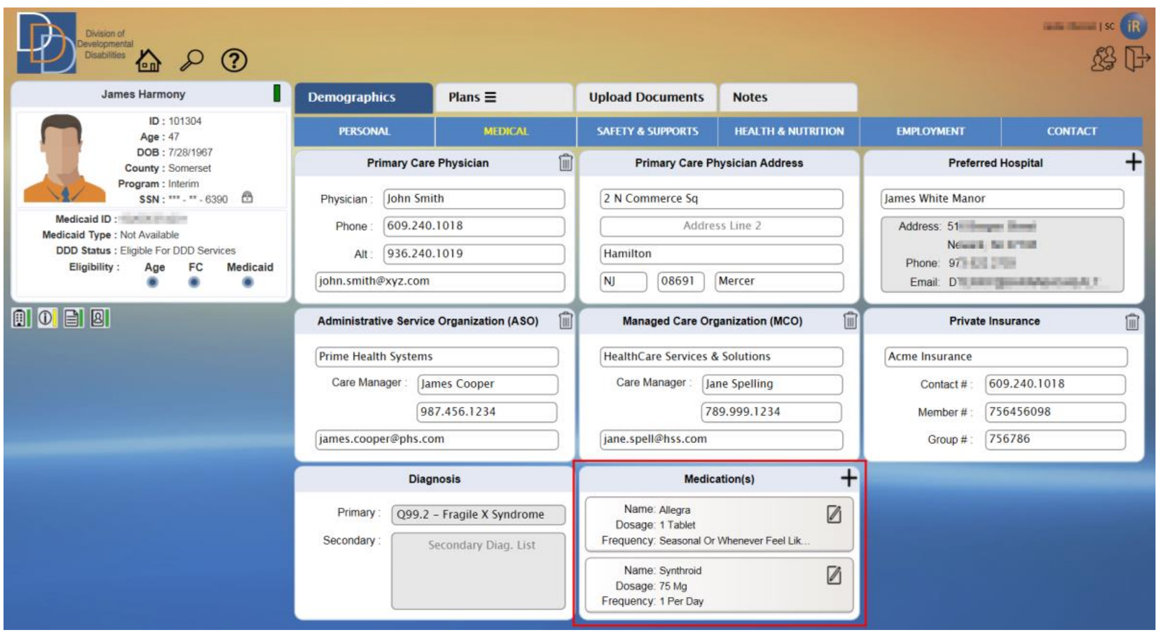


Field	Description
Primary	View the participant's primary diagnosis code and the description. Mandatory/Optional: Mandatory
Secondary	View the participant's secondary diagnosis information. This field contains a list of the secondary diagnosis, code and description. Mandatory/Optional: Optional

4.3.8 Medication

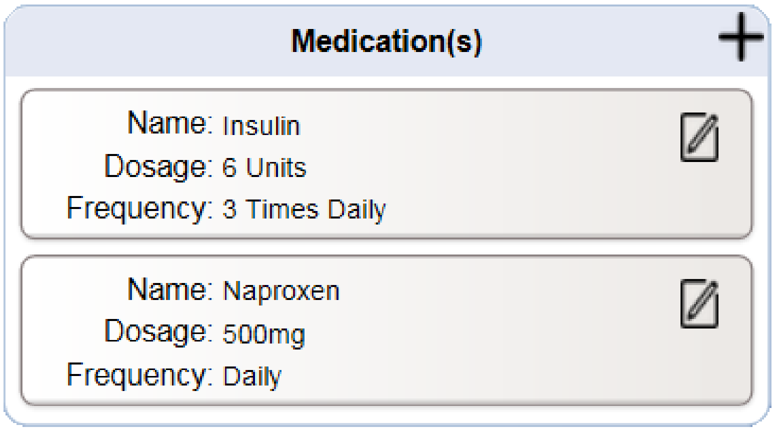
iRecord allows you to keep track of the participant's medication information. It is helpful that the medication details are available to the user with the appropriate permissions.

You can view the Private Insurance details on the **Medical** tab in **Demographics**, as shown. Your user role determines the permissions on the tile. Refer to User Privileges for more information.



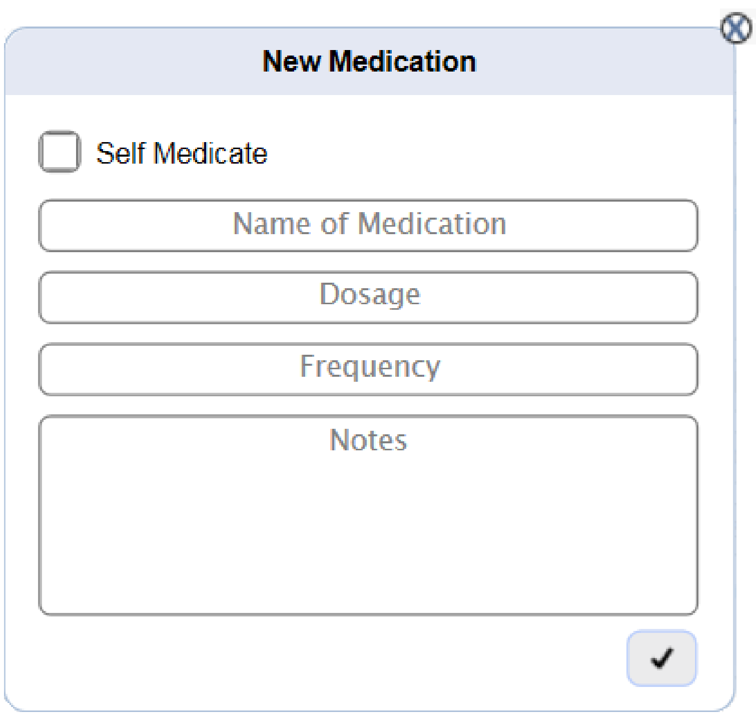
Medication Tile

- The **Medication** tile displays each medication as a separate record. The record for each medication displays the name, dosage and frequency. The records are arranged in the alphabetical order of the name. At any point, the tile displays a maximum of two medication records. For more than two, use the tile scroll bar and view the remaining medication records.



To add a medication record

1. On the **Medication(s)** tile header, click +. The New Medication pop-up tile appears, as shown.

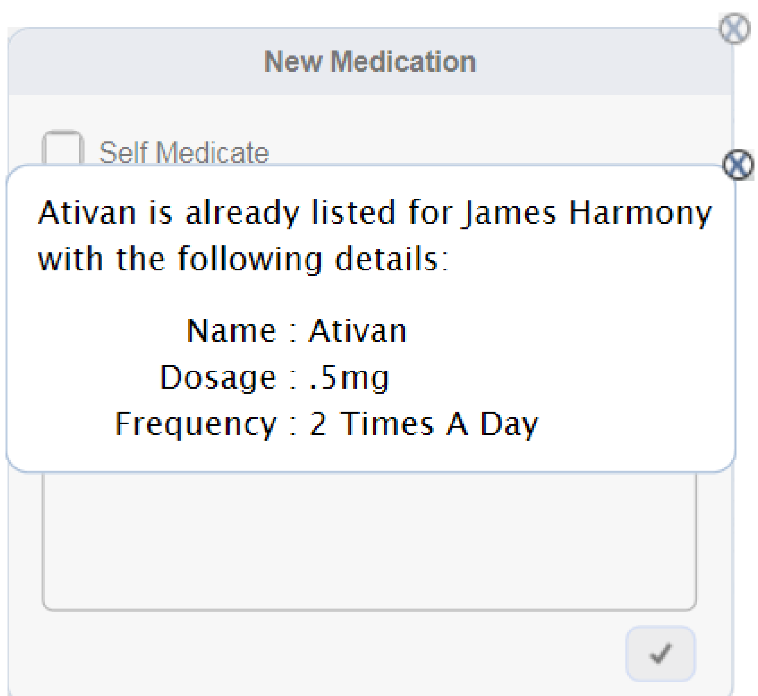


2. Enter the details within the respective fields using the table below.

Field	Description

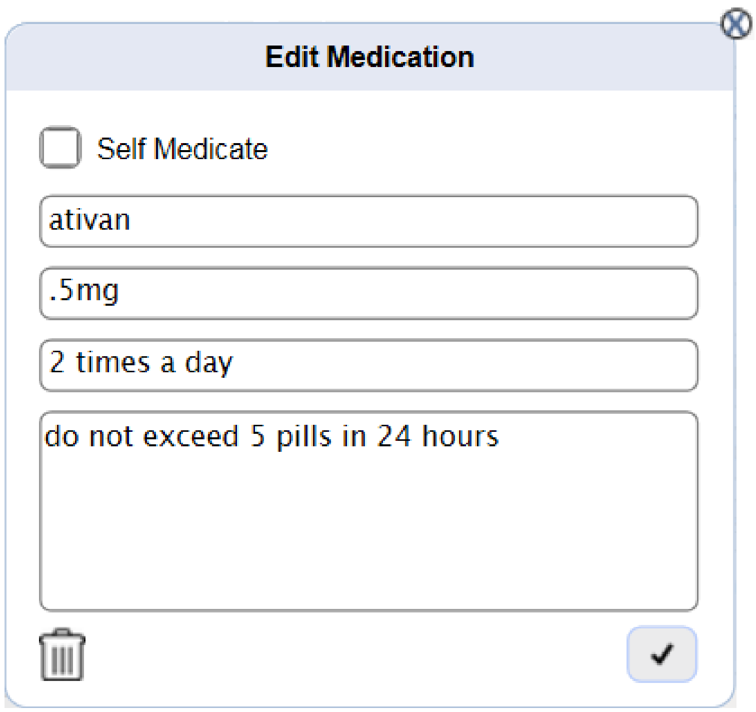
Self Medicate	Select the check box to indicate that the participant does not require supervision or assistance to take the medication.
Name	Enter the name of the participant's medication. Mandatory/Optional: Mandatory
Dosage	Enter the dosage of the medication. Mandatory/Optional: Mandatory
Frequency	Enter the frequency of the medication. Mandatory/Optional: Mandatory
Notes	Enter any relevant notes for the medication. Mandatory/Optional: Mandatory Max limit: 1000 characters

3. Click ✓.
4. View the medication record on the **Medication(s)** tile.
   In case a record of the medication exists, iRecord displays the message.



To edit a medication record

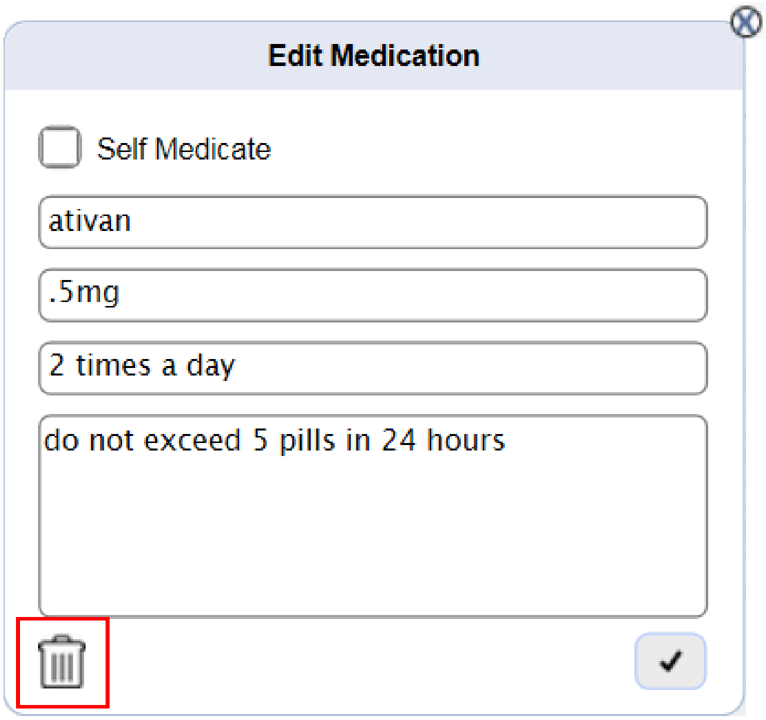
1. On the **Medication(s)** tile, locate the record that you want to edit and click . An **Edit Medication** pop-up tile appears, as shown.



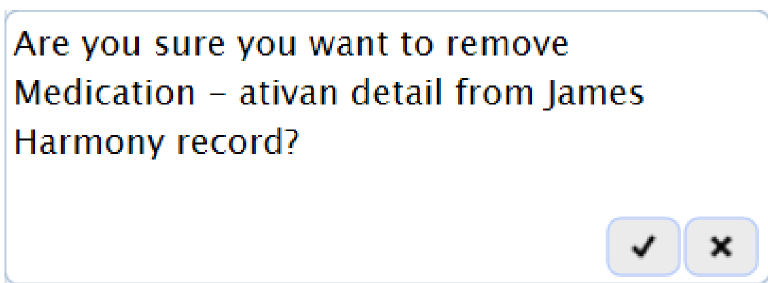
2. Edit the information within any particular field on this tile. For more information, refer to the preceding table.
3. Click .
4. View the medication record on the **Medication(s)** tile.

To delete a medication record

1. On the **Medication(s)** tile, locate the record that you want to delete and click . An **Edit Medication** pop-up tile appears.
2. Click , indicated in the figure below.



3. A confirmation message appears, as shown.



4. Click ✓ and confirm delete.

4.4 Safety & Supports

Safety & Supports tab categorizes the support related information of the participant.

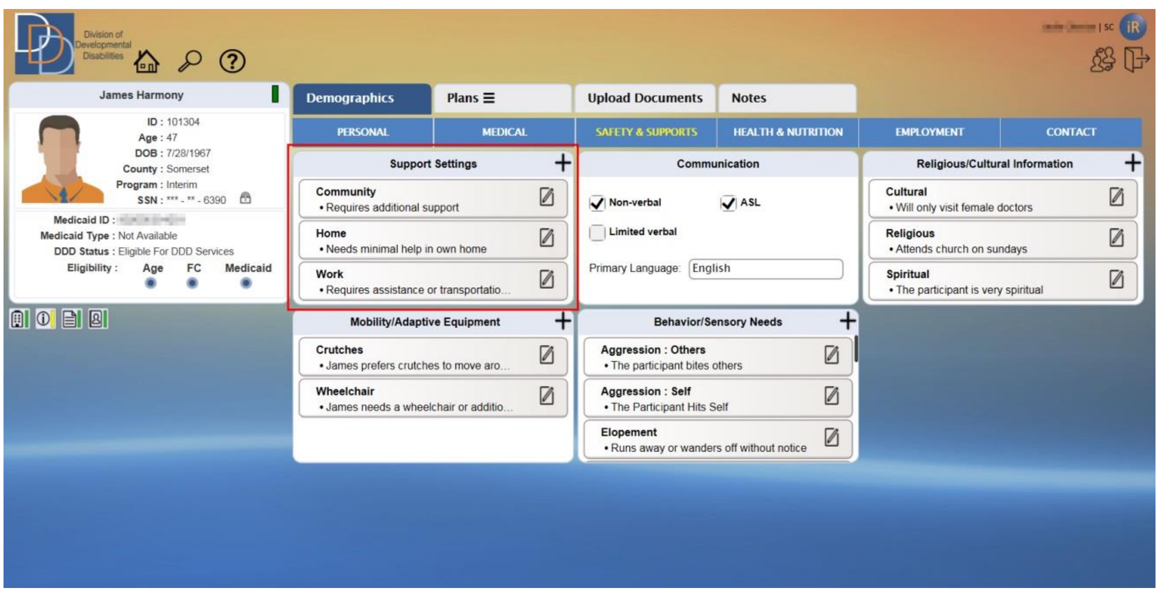
Safety & Supports displays the following tiles:

- Support Settings
- Communication
- Religious/Cultural Information
- Mobility/Adaptive Equipment
- Behavior/Sensory Needs

4.4.1 Support Settings

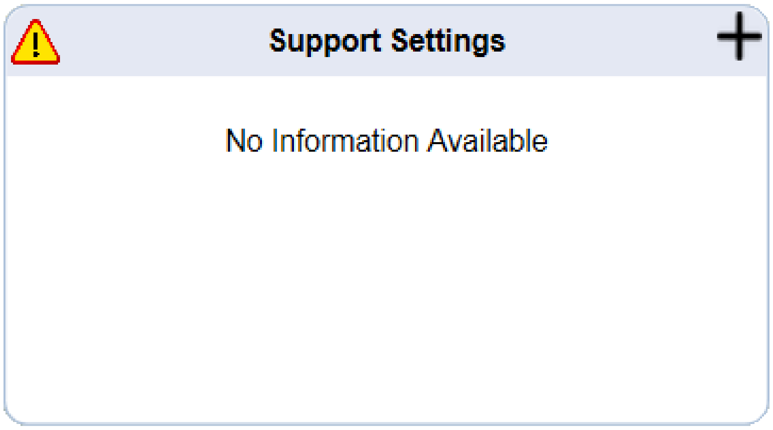
The support settings refer to the support that the participant may require at home, work or within the community. iRecord maintains these needs of the participant on the **Support Settings** tile. Your user role determines the permissions on the tile. Refer to User Privileges for more information.

The figure below displays a sample **Support Settings** tile on the **Safety & Supports** tab.

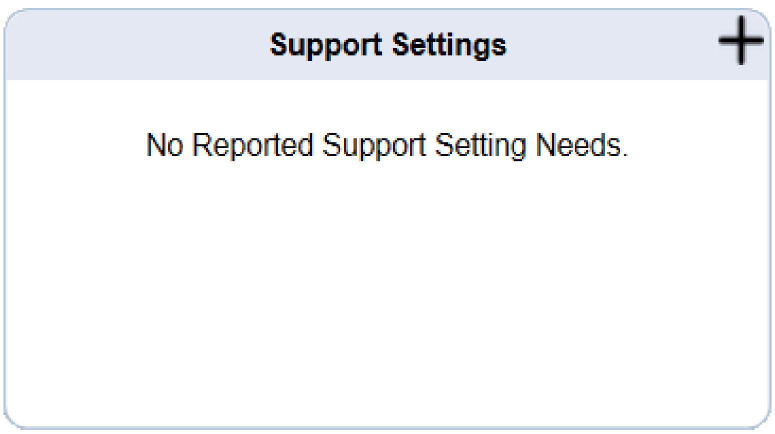


Support Settings Tile

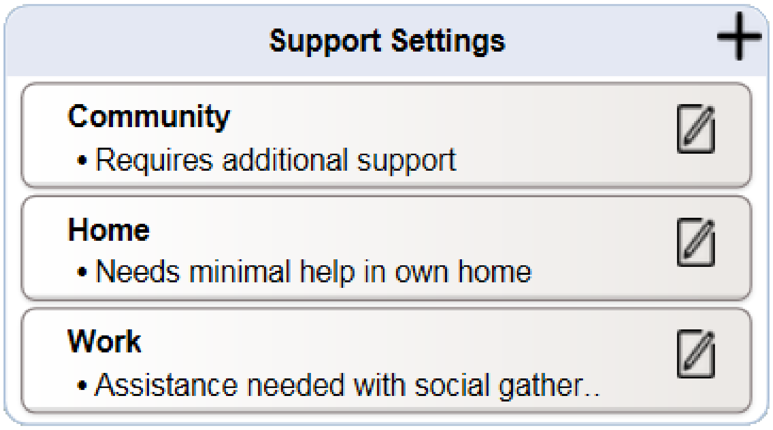
- The **Support Settings** tile displays **No Support Settings Information Available** before you enter the details or with unavailable information. There is a warning icon on the tile header to notify you about this status. You can also view the same status after you delete all support setting records.



- The **Support Settings** tile displays **No Reported Support Setting Needs** for a participant that does not have support needs. You can select this status from the **Type of Need** drop-down list while adding the first support setting record.

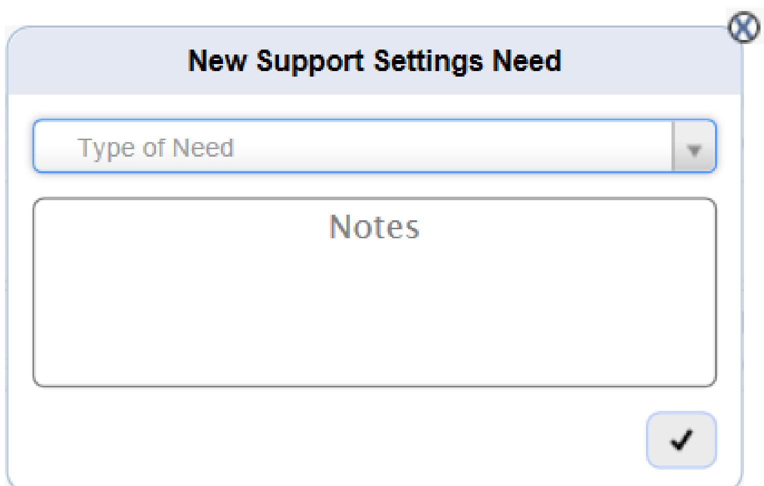


- The **Support Settings** tile may contain a single record or multiple records. For each record, view the type of need and the need-related note.



To add a support settings need

1. On the **Support Settings** tile, click + to add a self-care record. iRecord displays a **New Support Settings Need** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	Description
Type of Need	Select the support settings need of the participant from the drop-down list. The options are: • Community • Home • Work • No Reported Support Settings Needs

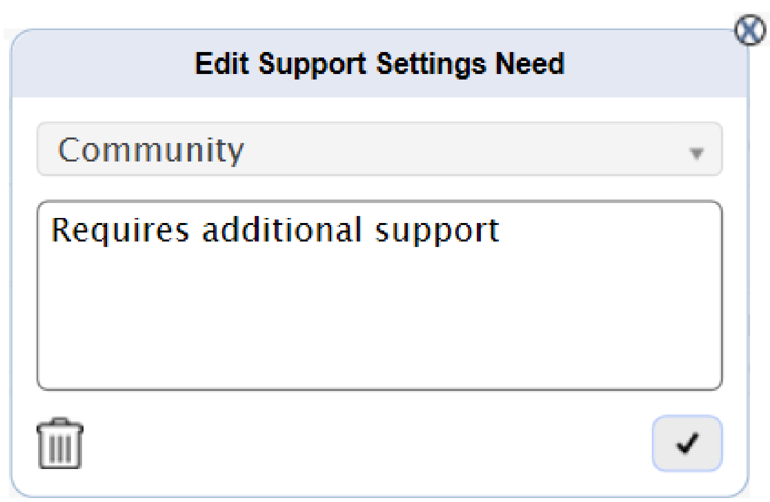
	Select **No Reported Support Settings Needs** for a participant that does not have any needs. Mandatory/Optional: Mandatory
Notes	Enter any appropriate notes for the selected type of need within the text box. You do not have to enter any notes for the **No Reported Support Settings Needs** option. Mandatory/Optional: Mandatory Maximum limit: 1000 characters

3. Click ✓ to save the details and close the **New Support Settings Need** pop-up tile.
4. View the record on the **Support Settings** tile.
5. Repeat the steps from 1 to 4 to add another support settings need.

Note: The **Type of Need** drop-down list will not display **No Reported Support Settings Needs** with an existing need on the tile.

To edit a support settings need

1. On the **Support Settings** tile, locate the record and click . An **Edit Support Settings** pop-up tile appears with the details, as shown below.

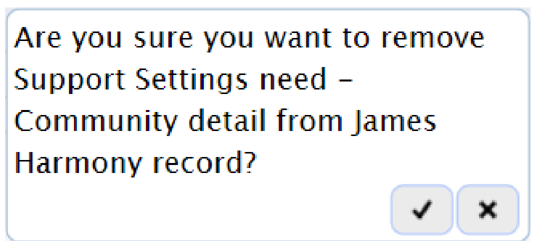


2. Click the **Notes** (user entered) text box and add or modify the notes. You have a maximum limit of 1000 characters.

3. Click to save the changes and close the **Edit Support Settings** pop-up tile.
4. View the edited record on the **Support Settings** tile.

To delete a support settings need

1. On the **Support Settings** tile, locate the record that you want to delete. Click on the record and an **Edit Support Settings** pop-up tile appears.
2. Click . A confirmation message appears as shown below.

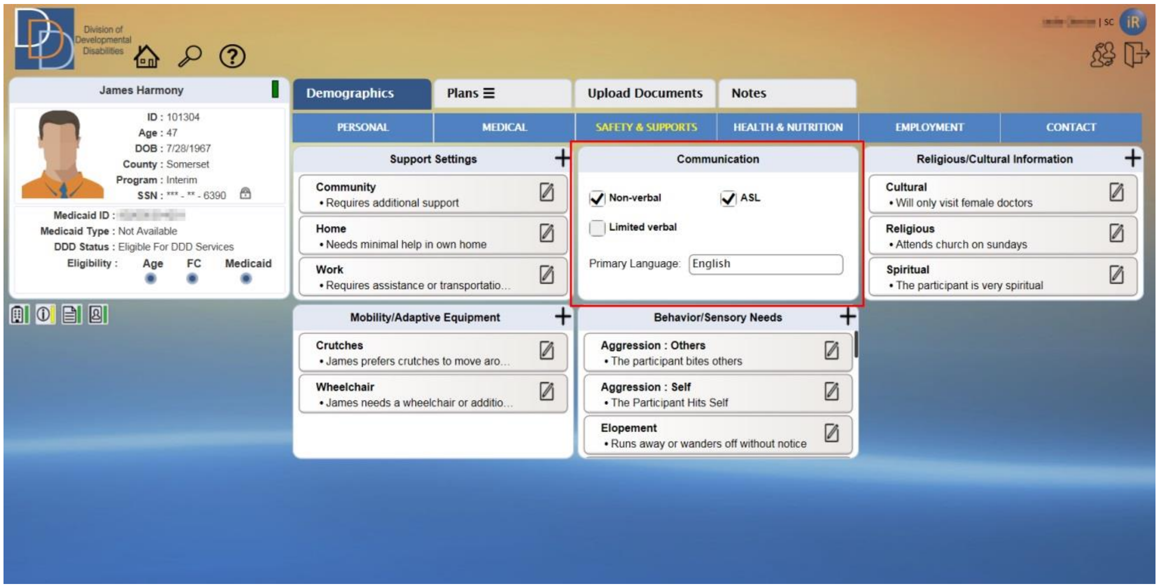


3. Click and confirm delete.

4.4.2 Communication

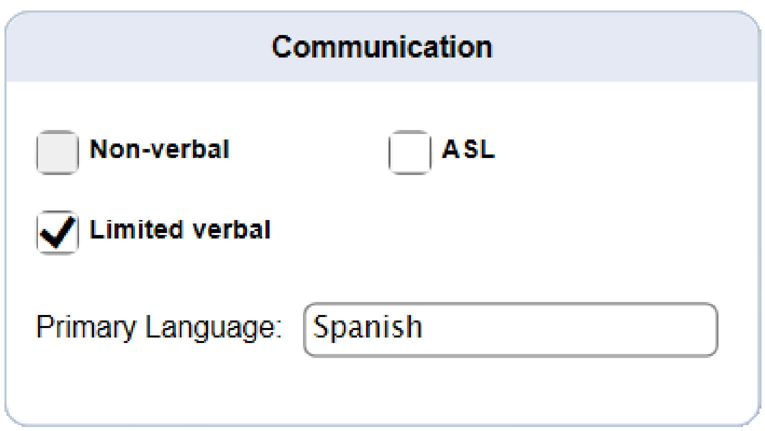
iRecord captures the communication requirements of the participant. Your user role determines the permissions on the tile. Refer to User Privileges for more information.

The figure below displays a sample **Communication** tile on the **Safety & Supports** tab.



Communication Tile

- The **Communication** tile displays ⚠ icon to inform the user that the communication details are required and unavailable.



- The **Communication** tile includes the following information:
  - Non-verbal
  - ASL (American Sign Language)
  - Limited Verbal
  - Primary Language
- The user can select only one of the following two options: **Non-verbal** or **Limited Verbal**. With the selection of one, the other is unavailable.

- NJ CAT responses of a participant populate the information on the tile. There is a system generated note associated with certain responses. For more information, refer to the table below.

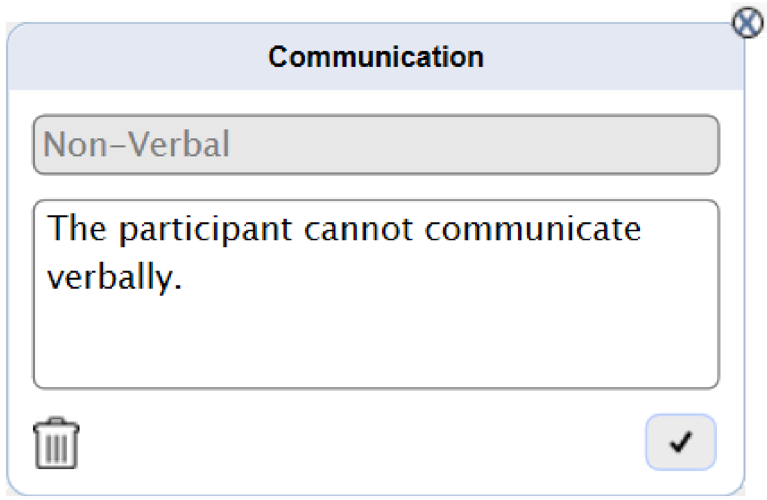
Type of Need	System Notes
NJ CAT reference: #23 A1 Limited Verbal	**NJ CAT response**: Yes <Participant Name> does not use simple words, signs, or picture symbols to communicate.
NJ **CAT reference**: #23 A1 Non-verbal	**NJ CAT response**: No <Participant Name> does not use simple words, signs or picture symbols to communicate.
NJ CAT reference: #23 B1 Primary Language	**NJ CAT response**: Yes <Participant Name>'s primary language is English. **NJ CAT response**: No <Participant Name>'s primary language is <language>.

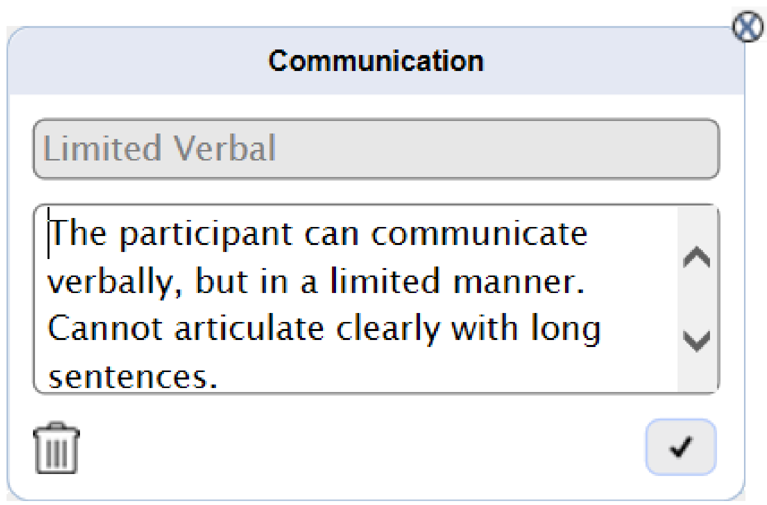
To add communication information

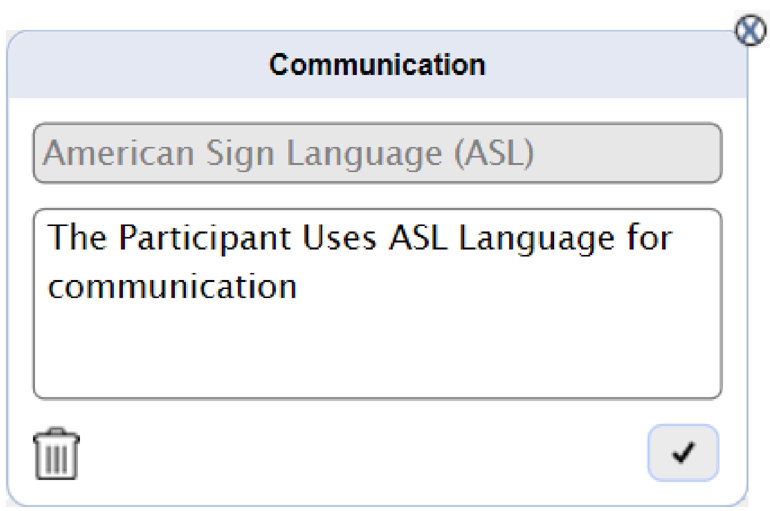
1. On the **Communication** tile, select the appropriate check boxes. For more information, refer to the table below.

Field	Description
Non-verbal	Select the check box to indicate that the participant communicates non-verbally.
Limited verbal	Select the check box to indicate that the participant has a verbal limitation.
ASL	Select the check box to indicate that the participant communicates using ASL (American Sign Language).
Primary Language	Select the primary language of the participant from the drop-down list. You can also enter within the text box and the autocomplete feature narrows the list.

2. For **Non-verbal**, **Limited verbal** or **ASL**; a **Communication** pop-up tile appears as shown below. Enter the appropriate notes within the **Notes** box.


Communication
Non-Verbal
The participant cannot communicate verbally.


Communication
Limited Verbal
The participant can communicate verbally, but in a limited manner. Cannot articulate clearly with long sentences.


Communication
American Sign Language (ASL)
The Participant Uses ASL Language for communication

3. Click ✓.

Note: With the selection of **Non-verbal** or **Limited verbal**, the other becomes unavailable.

To edit communication information

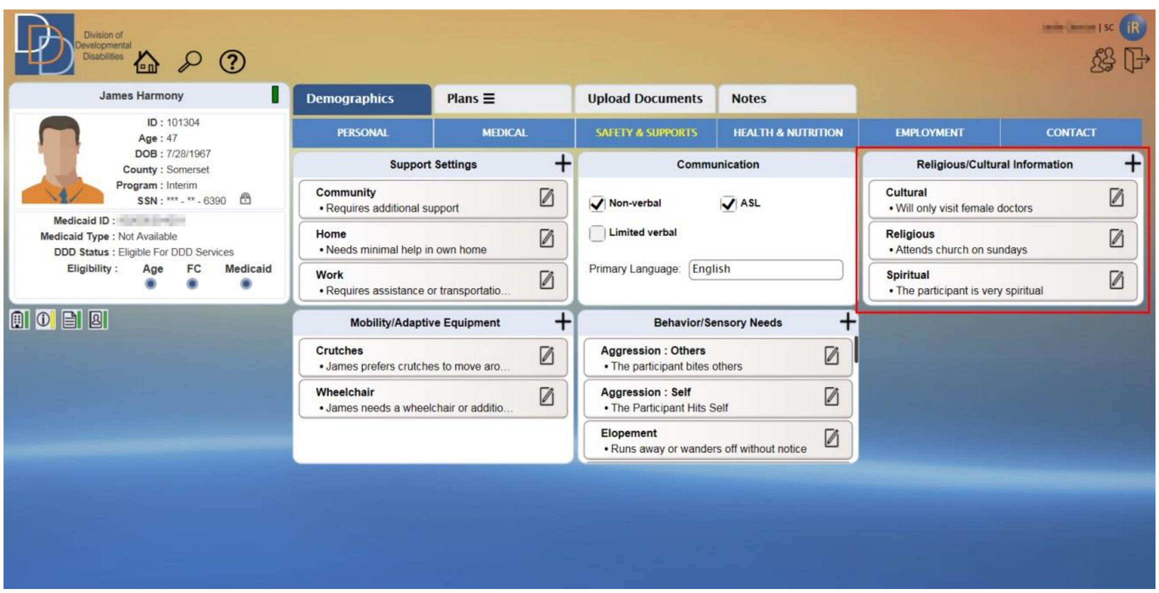
- On the **Communication** tile, edit the notes for the mode of communication or delete (delete icon on the bottom left) the selection entirely.

4.4.3 Religious/Cultural Information

The **Religious/Cultural Information** tile records the religious and cultural preferences/restrictions of the participant.

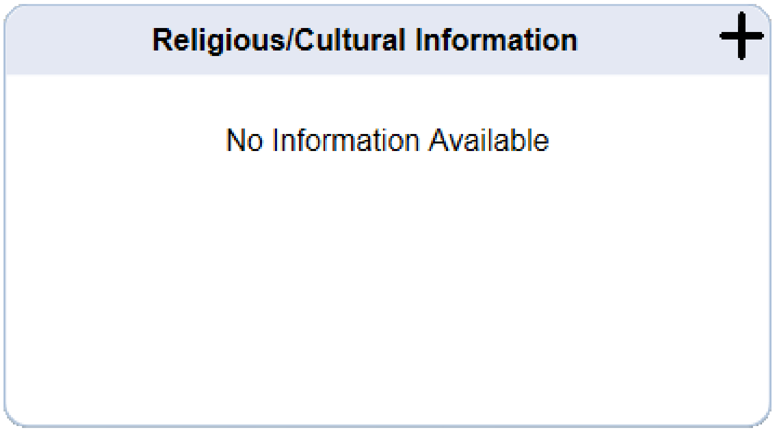
You can add, modify or delete the information on this tile based on your user role. Refer to User Privileges for more information.

The figure below displays the position of the tile on the **Safety & Supports** tab in **Demographics**.

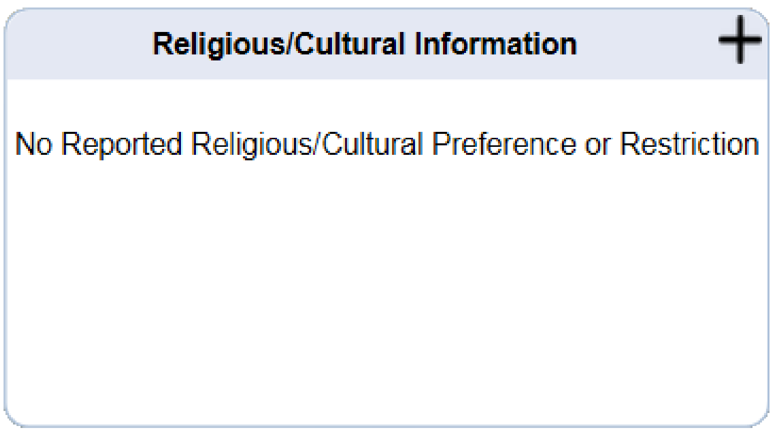


Religious/Cultural Information Tile

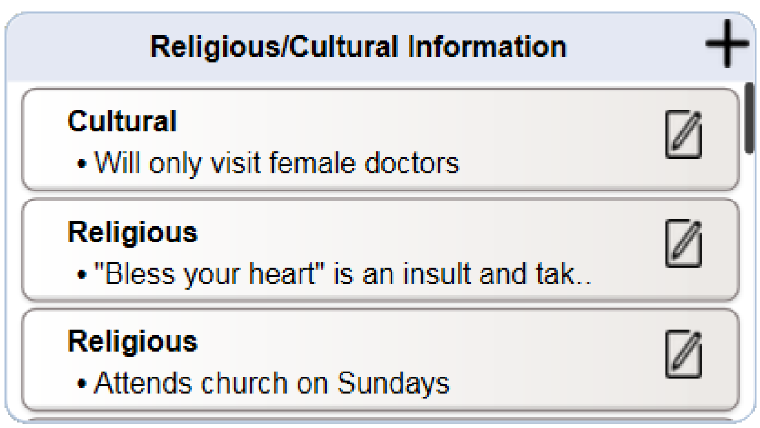
- The **Religious/Cultural Information** tile displays **No Information Available** before you enter the details or with unavailable participant information.



- The **Religious/Cultural Information** tile displays **No Reported Religious/Cultural Preference or Restriction** for a participant that has not reported any preferences or restrictions.

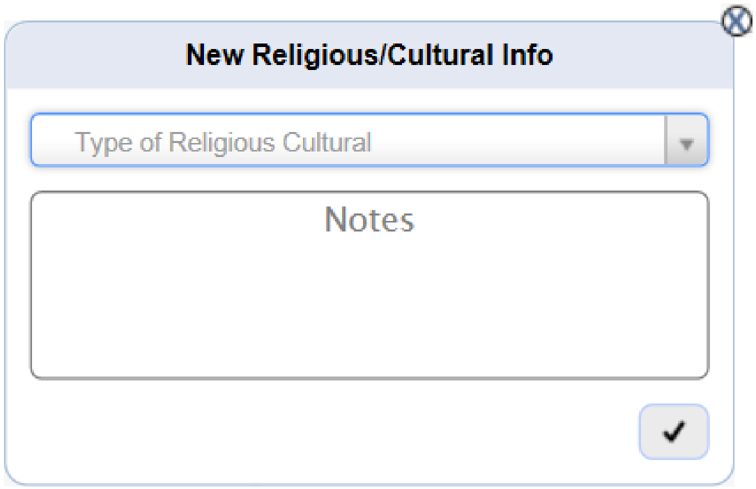


- The **Religious/Cultural Information** tile may contain a single record or multiple records. For each record, view the type of preference or restriction and the note entered by a user.



To add religious or cultural information

1. On the **Religious/Cultural Information** tile, click + to add a religious/cultural preference or restriction. iRecord displays a **New Religious/Cultural Info** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information, refer to the table.

Field	Description
Type of Preference/ Restriction	Select the participant's preference or restriction from the drop-down list. The options are: • Religious • Cultural • Spiritual • Other • No Reported Preference or Restriction Select **No Reported Preference or Restriction** for a participant that has not reported any such criteria. Mandatory/Optional: Mandatory
Notes	Enter any appropriate notes within the text box. Mandatory/Optional: Mandatory Maximum limit: 1000 characters

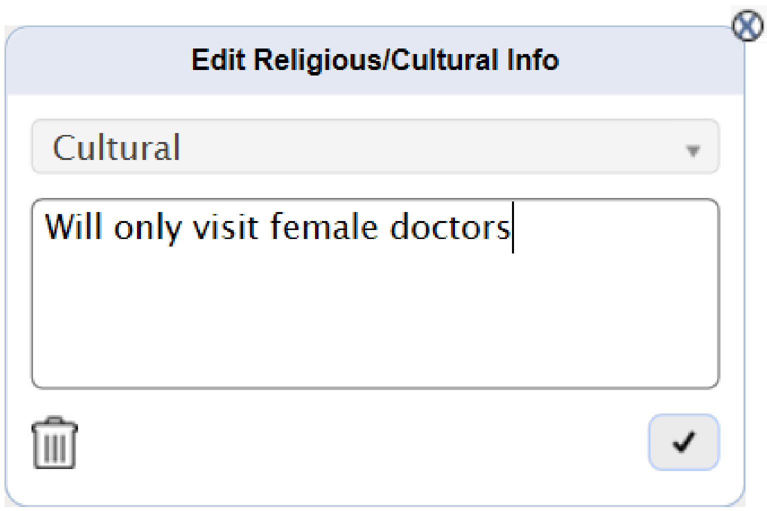
3. Click ✓ to save the details and close the **New Support Settings Need** pop-up tile.
4. View the record on the **Religious/Cultural Information** tile.

5. Repeat the steps from 1 to 4 to add another support settings need.

Note: The **Type of Preference/Restriction** drop-down list does not display **No Reported Preference or Restriction** with an existing record on the tile.

To edit religious or cultural information

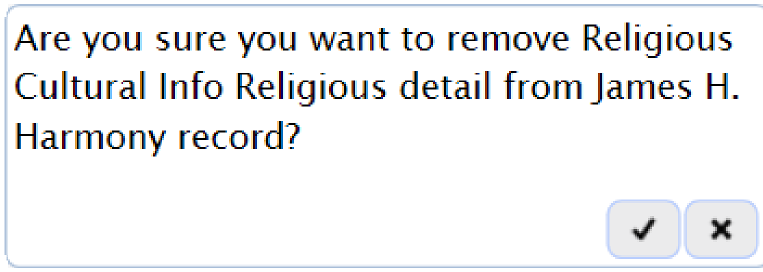
1. On the **Religious/Cultural Information** tile, locate the record and click . An **Edit Religious/Cultural Info** pop-up tile appears with the existing details, as shown below.



2. Click the **Notes** (user entered) text box and edit the notes. You have a maximum limit of 1000 characters.
3. Click to save the changes and close the **Edit Religious/Cultural Info** pop-up tile.
4. View the edited record on the **Religious/Cultural Information** tile.

To delete religious or cultural information

1. On the **Support Settings** tile, locate the record and click . View the **Edit Religious/Cultural Info** pop-up tile.
2. Click (appears on the lower left). A confirmation message appears as shown below.



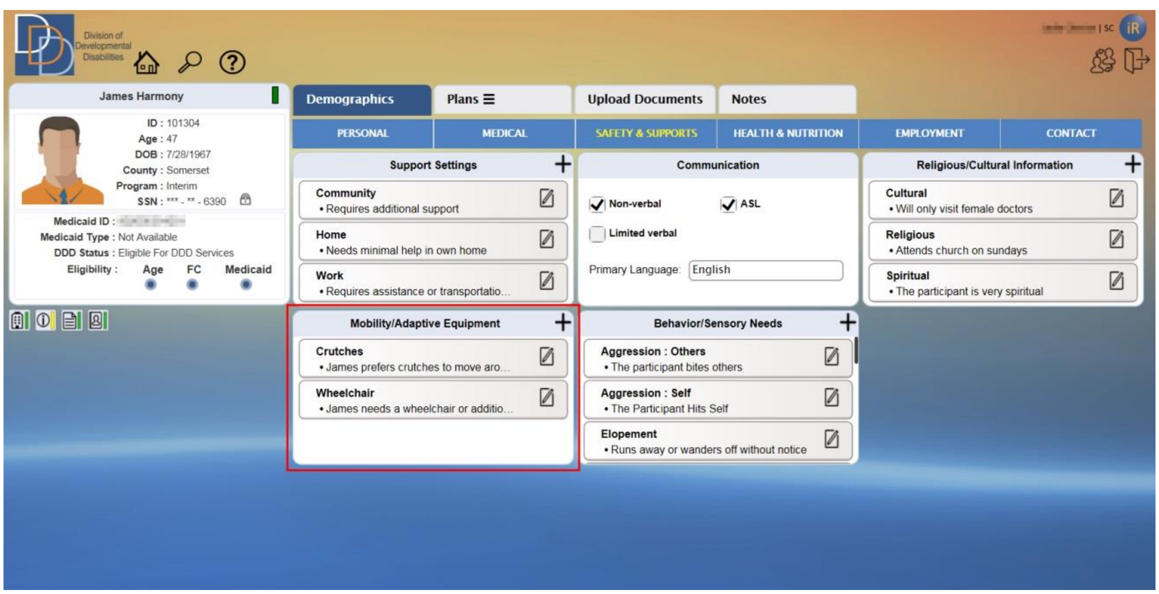
3. Click ✓ and confirm delete.

4.4.4 Mobility/Adaptive Equipment

The **Mobility/Adaptive Equipment** tile records the mobility or adaptive requirements of the participant.

You can add, modify or delete the information on this tile based on your user role. Refer to User Privileges for more information.

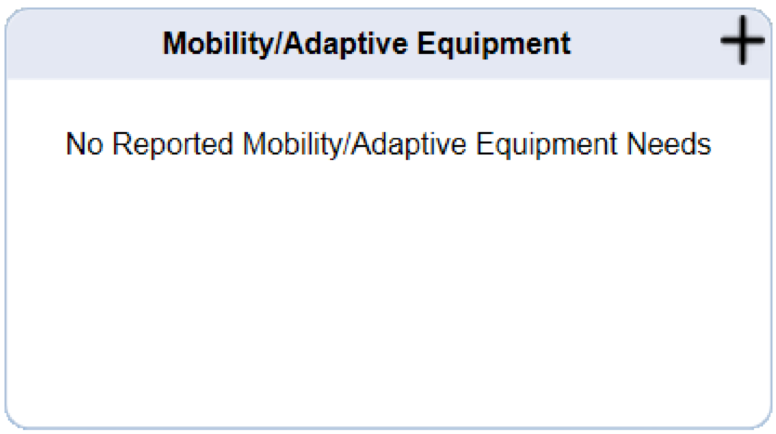
The figure below displays the position of the tile on the **Safety & Supports** tab in **Demographics**.



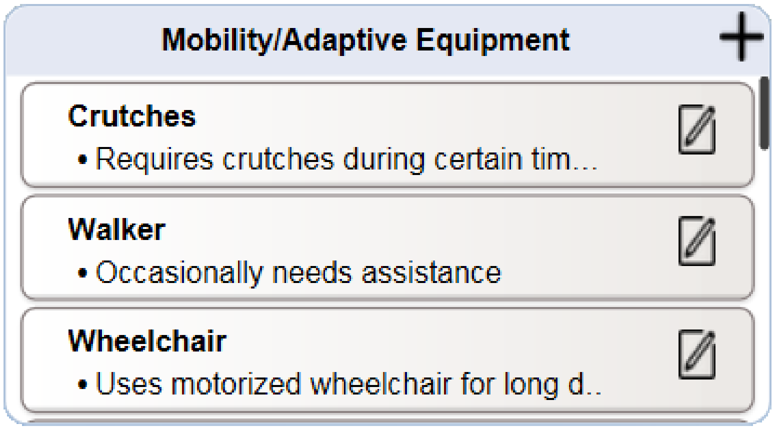
Mobility/Adaptive Equipment Tile

- The **Mobility/Adaptive Equipment** tile displays **No Information Available** before you enter the details or with unavailable participant information. Notice the ⚠ icon on the tile header that informs the user of unavailable information.

- The **Mobility/Adaptive Equipment** tile displays **No Reported Mobility/Adaptive Equipment Needs** for a participant that has not reported any such requirements.



- The records on the **Mobility/Adaptive Equipment** tile may have a system generated note and a user-entered note. The system generated notes are taken from the NJ CAT participant responses. These are known as NJ CAT driven records.
- The **Mobility/Adaptive Equipment** tile may contain any number of records. For each record, view the type of preference or restriction and a note. It is the system generated note that you view on the **Mobility/Adaptive Equipment** tile for a record that includes the two types of notes, system generated and user-entered.

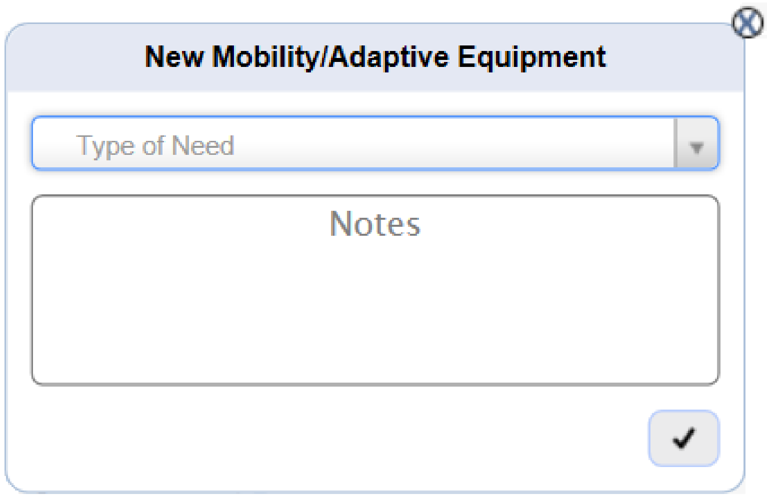


- For an NJ CAT driven record, the user cannot edit or delete the **Type of Need** or the system generated notes.
- NJ CAT responses of the participant populate information on the tile. There is a system generated note associated with such responses. For more information, refer to the table below.

Type of Need	System Notes
NJ CAT reference: #17 Walker/Crutches	**NJ CAT response: 2** <Participant First_Name> <NJ CAT selection for #17>
NJ CAT reference: #18 Wheelchair/Electric Scooter	**NJ CAT response: 1** or **2** <Participant First_Name Last_Name> uses <NJ CAT selection for #19> or electric scooter at all times.
NJ CAT reference: #31 Walker/Crutches/Other	**NJ CAT response: b** or **c** or **d** <NJ CAT selection for #31> - adaptive equipment has been used by <Participant First_Name Last_Name> at any time in the last three months.

To add a mobility or an adaptive equipment need

1. On the **Mobility/Adaptive Equipment** tile, click + to add a mobility or adaptive need. iRecord displays a **New Mobility/Adaptive Equipment Need** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information, refer to the table.

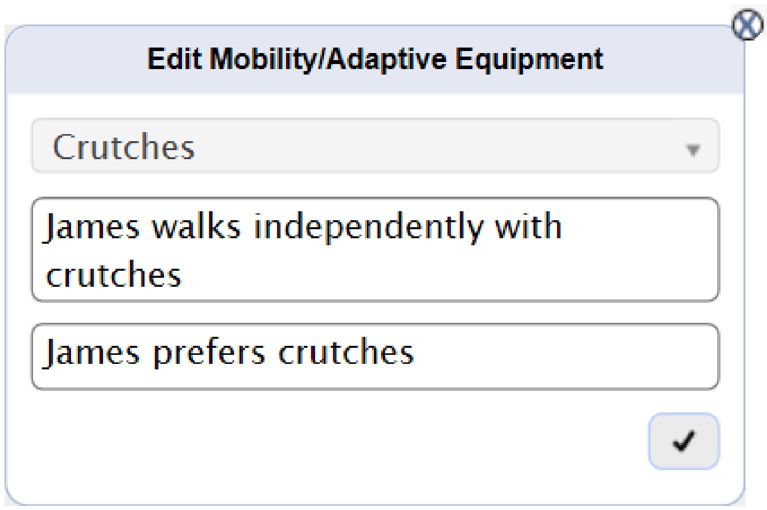
Field	Description
Type of Need	Select the participant's mobility or adaptive equipment need from the drop-down list. The options are: • Crutches • Other • Walker • Wheelchair • No Reported Needs Select **No Reported Needs** for a participant that has not reported any such criteria. Mandatory/Optional: Mandatory
Notes	Enter any notes within the text box. Mandatory/Optional: Mandatory Maximum limit: 1000 characters

3. Click ✓ to save the details and close the **New Mobility/Adaptive Equipment** pop-up tile.
4. View the record on the **Mobility/Adaptive Equipment** tile.
5. Repeat the steps from 1 to 4 to add another record. The records are placed on the tile in the alphabetical order of the type of need and then by the reverse chronological order.

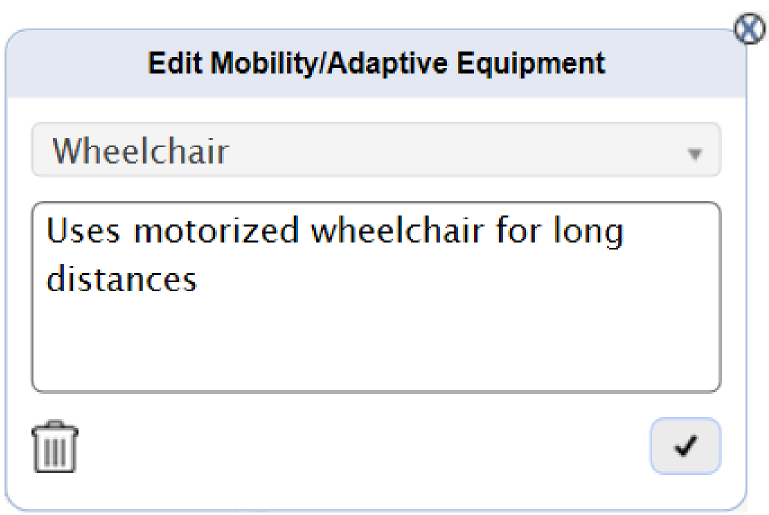
Note: The **Type of Need** drop-down list will not display **No Reported Needs** with an existing record on the tile.

To edit a mobility or adaptive equipment need

1. On the **Mobility/Adaptive Equipment** tile, locate the record and click . An **Edit Mobility/Adaptive Equipment** pop-up tile appears with the existing details, as shown below.
   - NJ CAT driven record



   - Not driven by NJ CAT record

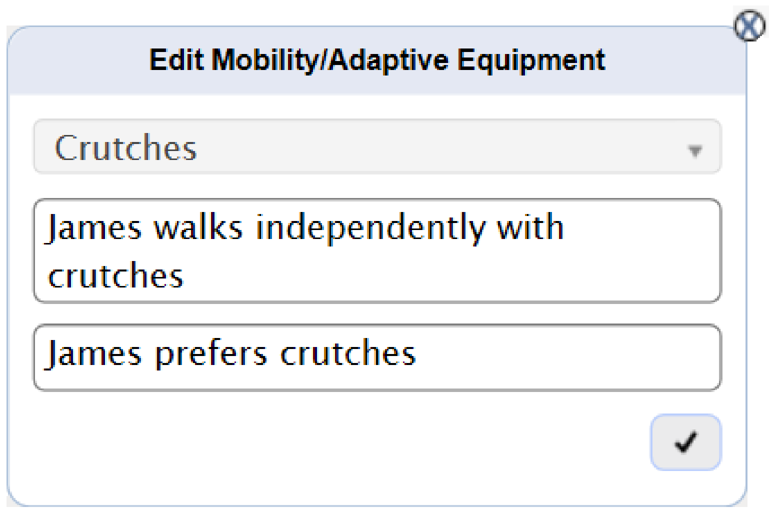


2. Click **Notes** (user entered) text box to edit the notes (maximum limit of 1000 characters).

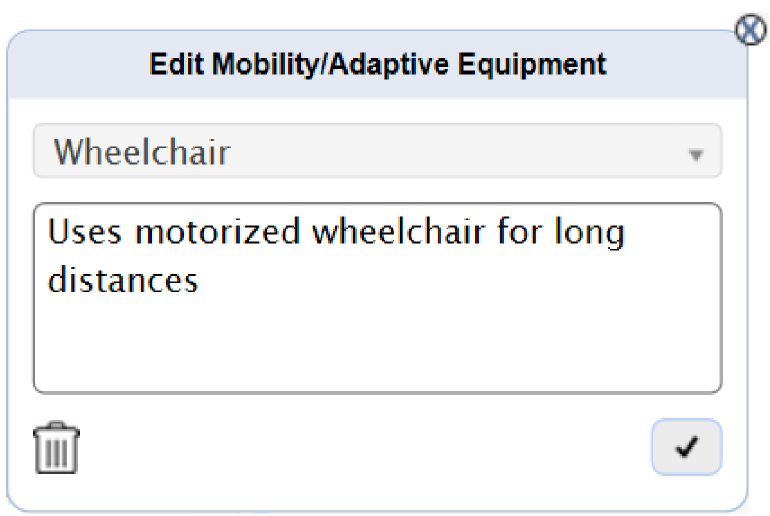
3. Click to save the changes and close the **Edit Mobility/Adaptive Equipment** pop-up tile.
4. View the edited record on the **Mobility/Adaptive Equipment** tile.

To delete a mobility or adaptive equipment need

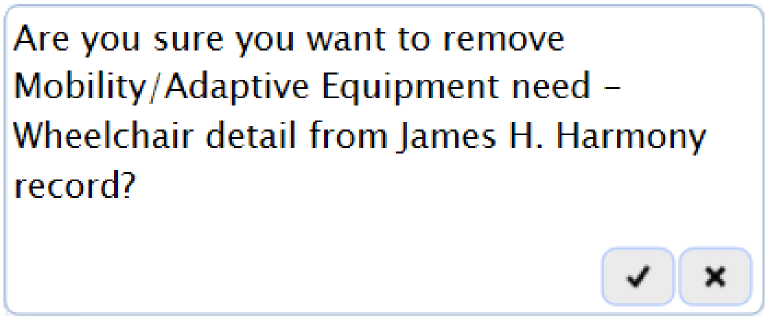
1. On the **Mobility/Adaptive Equipment** tile, locate the record and click . View the **Edit Mobility/Adaptive Equipment** pop-up tile.
    - NJ CAT driven record



    - Not driven by NJ CAT record



2. Click . A confirmation message appears as shown below.



Note: You cannot delete an NJ CAT driven record.

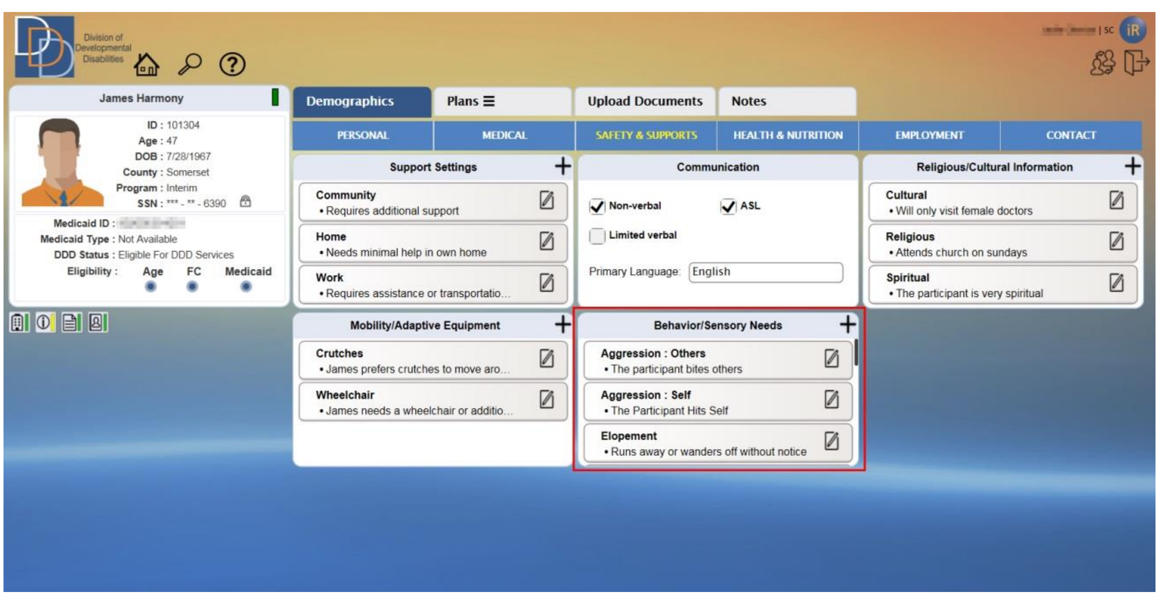
3. Click and confirm delete.

4.4.5 Behavior/Sensory Needs

The **Behavior/Sensory Needs** tile records needs based on the participant's behavior or any sensory issue.

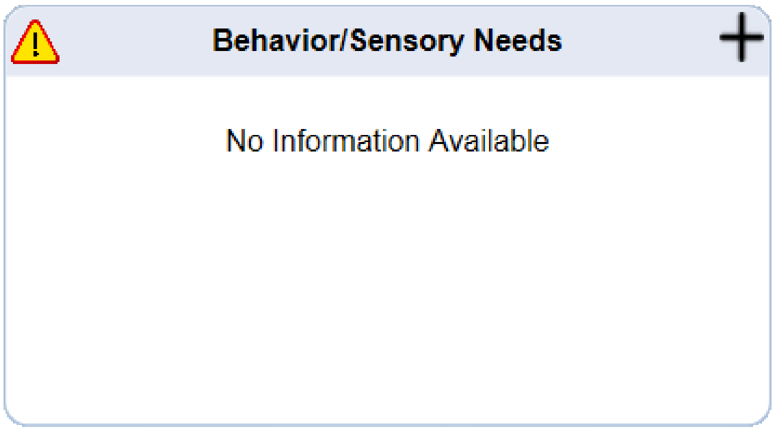
You can add, modify or delete the information on this tile based on your user role. You do not have the permission for an action with disabled or unavailable controls.

The figure below displays the position of the tile on the **Safety & Supports** tab in **Demographics**.

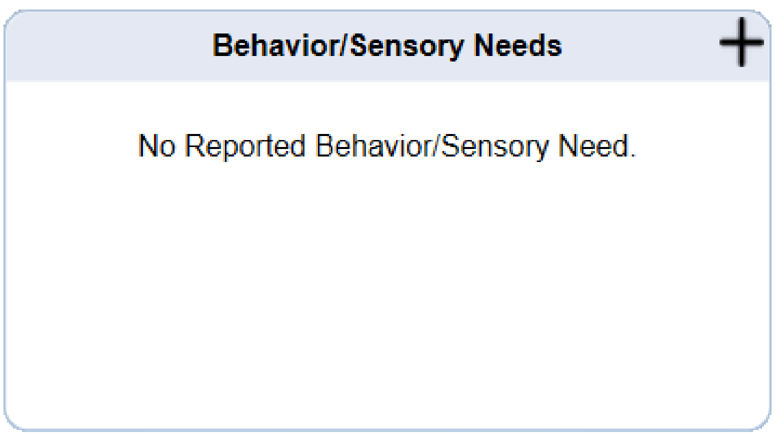


Behavior/Sensory Needs Tile

- The **Behavior/Sensory Needs** tile displays **No Information Available** before you enter the details or with unavailable participant information. Notice the icon on the tile header that informs the user of unavailable information.



- The **Behavior/Sensory Needs** tile displays **No Reported Behavior/Sensory Need** for a participant that has not reported any such requirements.

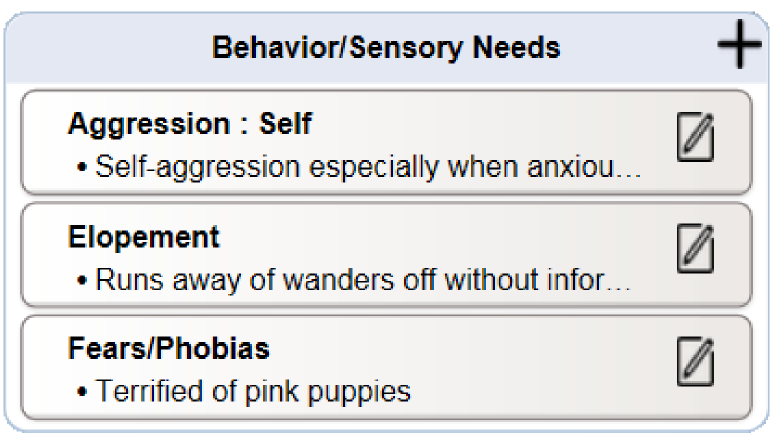


- NJ CAT driven records refer to any record captured on the tile from the response of the participant.
- Certain responses on NJ CAT generate a note, known as system generated notes. For more information, refer to the table below.

Type of Need	System Notes
NJ CAT reference : **#27 A1** Elopement	**NJ CAT response: 1** <Participant Name> runs away or wanders off without you knowing
NJ CAT reference: **#27 A3** Behavior	**NJ CAT response: 1** <Participant Name> eats or mouths inedible objects
NJ CAT reference: **#27 A4** Aggression - Self	**NJ CAT response: 1** <Participant Name> scratches own body to the point of causing harm
NJ CAT reference: **#27 A5** Aggression - Self	**NJ CAT response: 1** <Participant Name> hits his/her own body
NJ CAT reference: **#27 A6** Aggression - Self	**NJ CAT response: 1** <Participant Name> hits his/her own face or head
NJ CAT reference: **#27 A7** Aggression - Self	**NJ CAT response: 1** <Participant Name> bangs his/her head
NJ CAT reference: **#27 A8** Aggression - Self	**NJ CAT response: 1** <Participant Name> bites self
NJ CAT reference: **#27 B3** Aggression - Others	**NJ CAT response: 1** <Participant Name> hits or punches others
NJ CAT reference: **#27 B4** Aggression - Others	**NJ CAT response: 1** <Participant Name> kicks others
NJ CAT reference: **#27 B5** Aggression - Others	**NJ CAT response: 1** <Participant Name> uses objects to harm others

NJ CAT reference: #27 B6 Aggression - Others	**NJ CAT response: 1** <Participant Name> bites others
NJ CAT reference: #27 C3 Behavior	**NJ CAT response: 1** <Participant Name> smears feces
NJ CAT reference: #27 C7 Behavior	**NJ CAT response: 1** <Participant Name> takes clothes off in public
NJ CAT reference: #27 C8 Behavior	**NJ CAT response: 1** <Participant Name> masturbates in public
NJ CAT reference: #27 C9 Behavior	**NJ CAT response: 1** <Participant Name> sexually touches others
NJ CAT reference: #27 C10 Behavior	**NJ CAT response: 1** <Participant Name> displays sexual predatory behavior

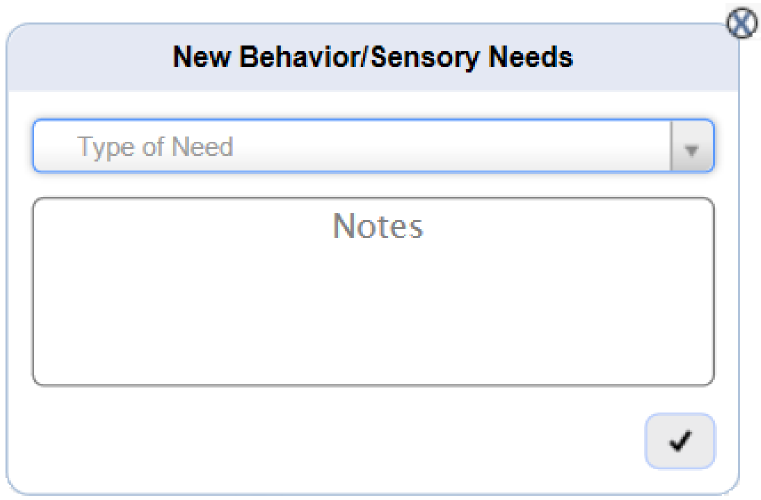
- The **Behavior/Sensory Needs** tile may contain any number of records. It is the system generated note that you view on a record that includes the two types of notes, system generated and user-entered.



- For an NJ CAT driven record, the user cannot edit or delete the **Type of Need** or the system generated notes.

To add a behavior or sensory need

1. On the **Behavior/Sensory Needs** tile, click + to add a behavior or sensory need. iRecord displays a **Behavior/Sensory Need** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	Description
Type of Need	Select the participant's behavior or sensory need from the drop-down list. The options are: • Aggression • Behaviors • Elopement • Fears/Phobias • Interactions • Sensory Issue • No Reported Behavior/Sensory Need Select **No Reported Behavior/Sensory Need** for a participant that has not reported any such criteria. Mandatory/Optional: Mandatory
Notes	Enter notes for the need within the text box. Mandatory/Optional: Mandatory Maximum limit: 1000 characters

Aggression	
Target of Aggression	Select **Aggression** on the **Type of Need** drop-down list and view this field. Select the target of aggression from the drop-down list. The options are: • Self • Others Mandatory/Optional: Mandatory
Type of Aggression	With the selection of **Target of Aggression**, this field appears. Select the type of aggression from the drop-down list. The options depend on the selection of **Self** or **Others** above. For **Self**, the options are: • Bites Self • Scratches Self • Hits Self For **Others**, the options are: • Bites Others • Grabs/Scratches Others • Hits Others • Kicks Others • Uses Objects against Others Mandatory/Optional: Mandatory
Behaviors	
Type of Behaviors	Select **Behaviors** on the **Type of Need** drop-down list and view this field. The options are: • Eats or mouths inedible objects • Smears Feces • Takes Clothes off in Public • Masturbates in Public • Sexually Touches Others • Sexual Predatory Behavior • Other Mandatory/Optional: Mandatory

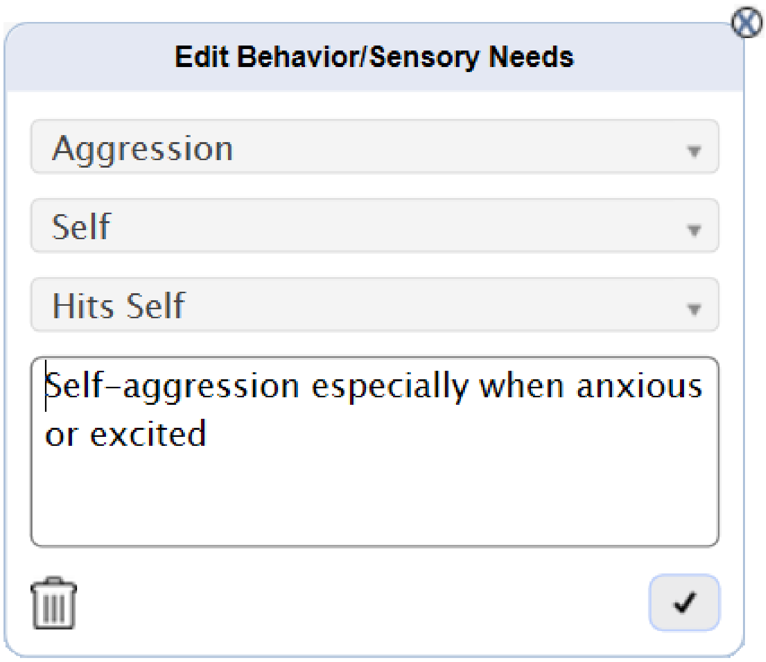
Interactions	
Type of Interactions	Select **Interactions** on the **Type of Need** drop-down list and view this field. The options are: • Adults (Same Sex) • Adults (Opposite Sex) • Children • Pets • Strangers • Other Mandatory/Optional: Mandatory
Sensory Issue	
Type of Sensory Issue	Select **Sensory Issue** on the **Type of Need** drop-down list and view this field. The options are: • Lights • Proximity/Touch • Scent • Sounds • Temperature • Other Mandatory/Optional: Mandatory

3. Click  to save the details and close the **Behavior/Sensory Needs** pop-up tile.
4. View the record on the **Behavior/Sensory Needs** tile.
5. Repeat the steps from 1 to 4 to add another record. The records are placed in the alphabetical order of the type of need and then in a reverse chronological order.

Note: The **Type of Need** drop-down list will not display **No Reported Behavior/Sensory Need** with an existing record on the tile.

To edit a behavior or sensory need

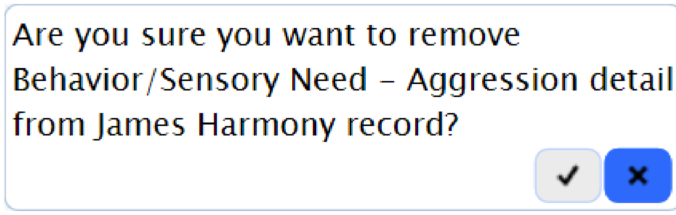
1. On the **Behavior/Sensory Needs** tile, locate the record that you want to edit and click . An **Edit Behavior/Sensory Needs** pop-up tile appears with the existing details (shown below for **Aggression**).



2. Click the **Notes** (user entered) text box and edit the notes. You have a maximum limit of 1000 characters.
3. Click to save the changes and close the **Edit Behavior/Sensory Needs** pop-up tile.
4. View the edited record on the **Behavior/Sensory Needs** tile.

To delete a behavior or sensory need

1. On the **Behavior/Sensory Needs** tile, locate the record that you wish to delete. Click on the same record and an **Edit Behavior/Sensory Needs** pop-up tile appears.
2. Click (bottom left of the pop-up tile). A confirmation message appears as shown below.



3. Click ✓ and confirm delete.

4.5 Nutrition & Health

Nutrition & health tab categorizes the health related information of the participant.

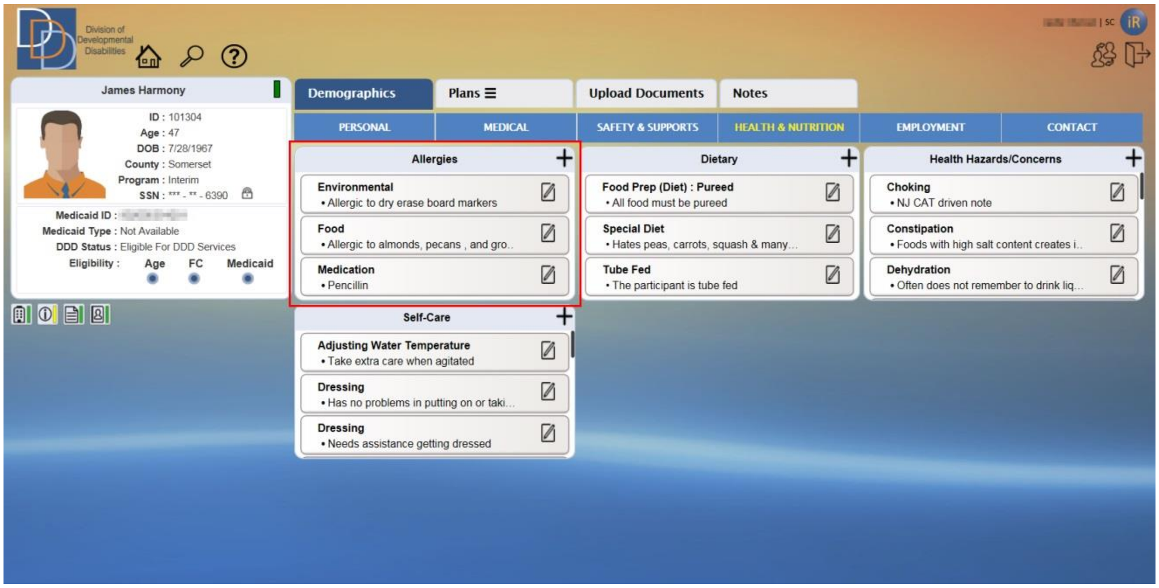
Nutrition & Health displays the following tiles:

- Allergies
- Dietary
- Health Hazards/Concerns
- Self Care

4.5.1 Allergies

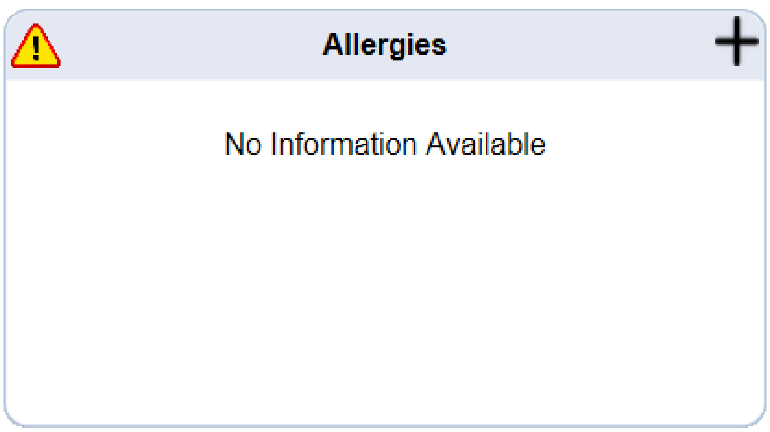
iRecord keeps a record of the participant allergies. It is maintained on **Nutrition & Health** tab, as shown below. Your user role determines the permissions on the tile. Refer to User Privileges for more information.

The figure below displays the **Allergies** tile on the **Nutrition & Health** tab.

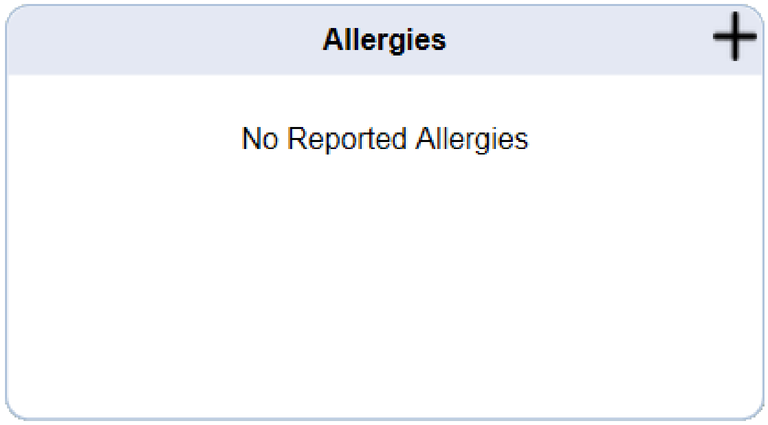


Allergies Tile

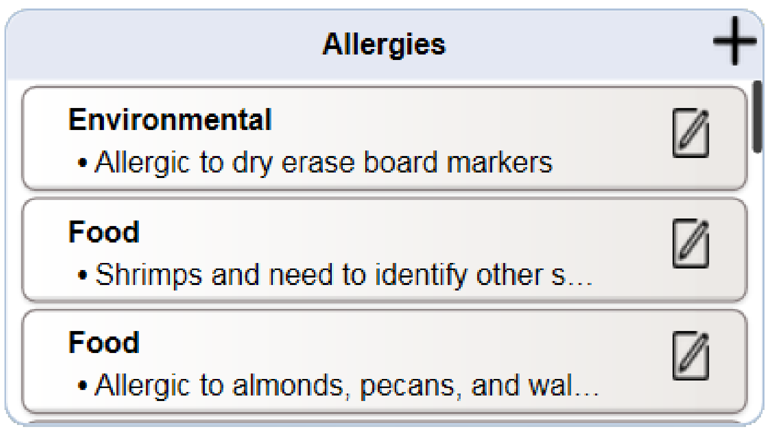
- The **Allergies** tile displays **No Information Available** before you enter the details or with unavailable information. There is a icon on the tile header to notify you about this status. You can also view the same status with the deletion of all participant allergies.



- The **Allergies** tile displays **No Reported Allergies** for a participant that has not reported any allergies. You can select this status from the **Type of Need** drop-down list.

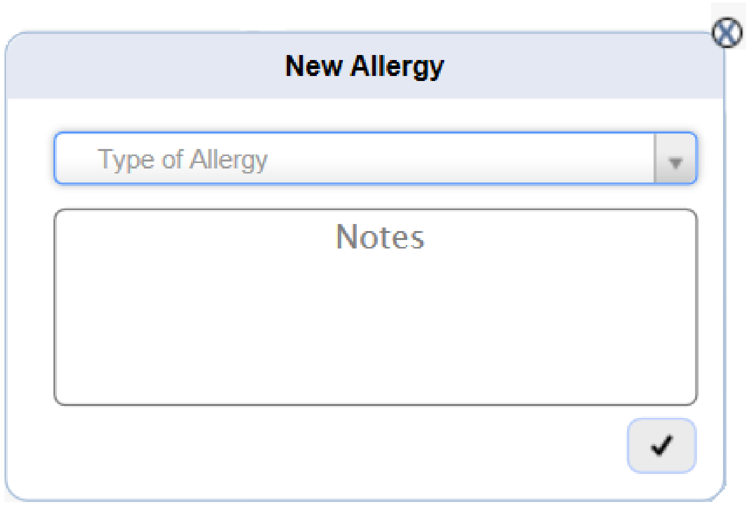


- The **Allergies** tile may contain any number of records. A scroll bar appears on the right with additional records.



To add an allergy

1. On the **Allergies** tile, click + to add a record. iRecord displays a **New Allergy** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

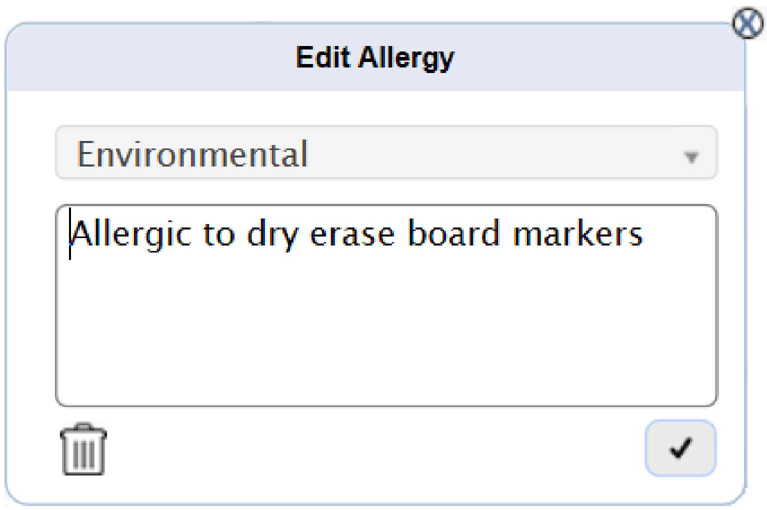
Field	Description
Type of Allergy	Select the participant's type of allergy from the drop-down list. The options are: • Environmental • Food • Medication • No Reported Allergies Select **No Reported Allergies** for a participant that has no allergies or has not reported any allergies. Mandatory/Optional: Mandatory
Notes	Enter notes related to the selected allergy type. You do not have to enter any notes for the **No Reported Allergies** option. Mandatory/Optional: Mandatory Maximum limit: 1000 characters

3. Click ✓ to save the details and close the **New Allergy** pop-up tile.
4. View the record on the **New Allergy** tile.
5. Repeat the steps from 1 to 4 to add another allergy record.

Note: The **Type of Allergy** drop-down list will not display **No Reported Allergies** with an existing record on the tile.

To edit an allergy

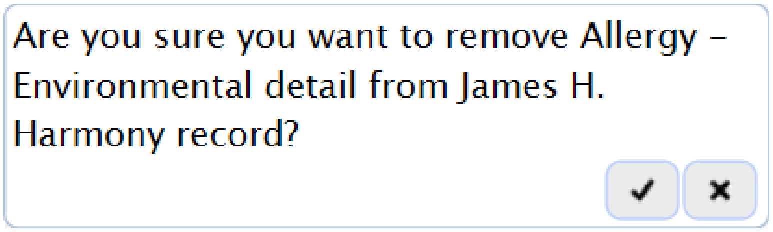
1. On the **Allergies** tile, locate the record that you want to edit and click . An **Edit Allergy** pop-up tile appears, as shown.



2. Click the **Notes** (user entered) text box to modify the allergy related note. You have a maximum limit of 1000 characters.
3. Click to save the changes and close the **Edit Allergy** pop-up tile.
4. View the edited record on the **Allergies** tile.

To delete an allergy

1. On the **Allergies** tile, locate the record that you want to delete. Click and an **Edit Allergy** pop-up tile appears.
2. Click (bottom left of the pop-up tile). A confirmation message appears as shown below.

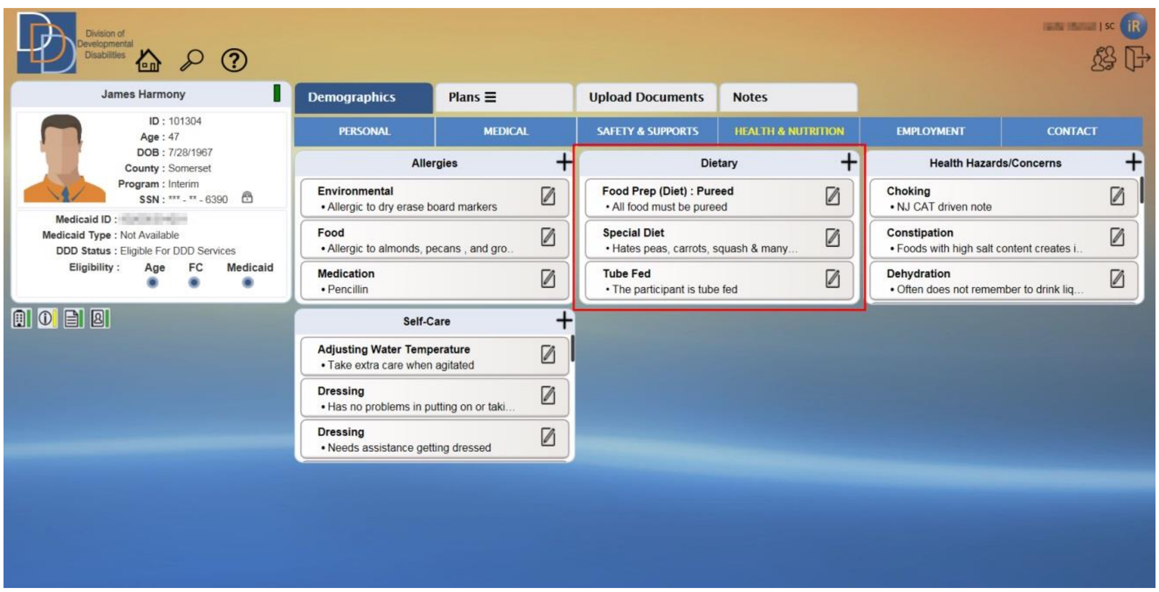


3. Click ✓ and confirm delete.

4.5.2 Dietary

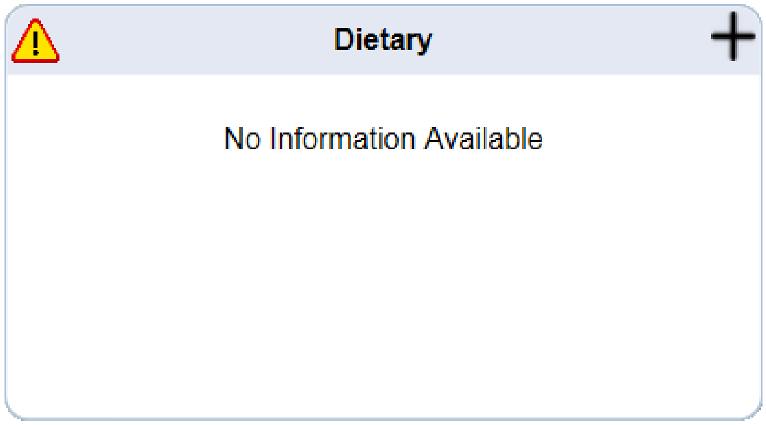
The participant may have dietary preferences or restrictions. The dietary needs of the participant are managed on iRecord through this tile.

The permissions on the tile are based on the user role. Refer to User Privileges for more information. The figure below displays the position of the tile on **Nutrition & Health** tab.

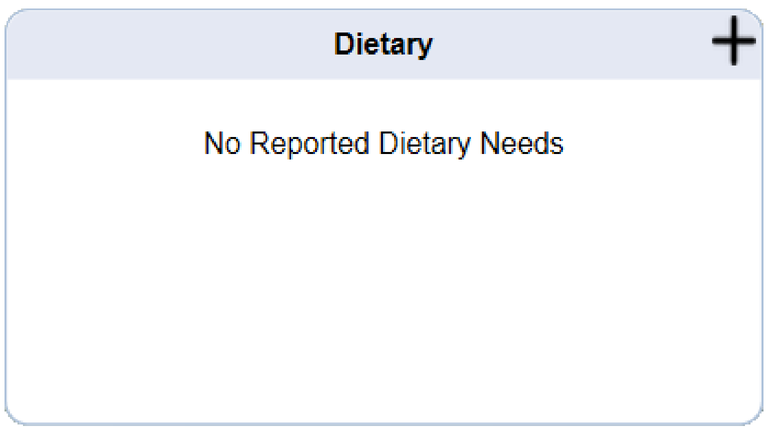


Dietary Tile

- The **Dietary** tile displays **No Information Available** and ⚠ icon on the tile header to inform the user that the participant's dietary information has not been provided.



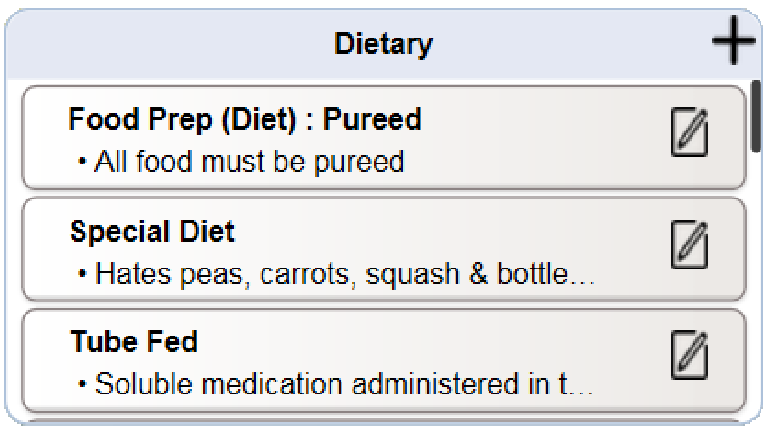
- The **Dietary** tile displays **No Reported Dietary Needs** for a participant that has not reported any dietary requirements.



- NJ CAT driven records refer to any record captured on the tile from the response of the participant.
- Certain responses on NJ CAT generate a note, known as system generated notes. For more information, refer to the table below.

Type of Need	System Notes
NJ CAT reference : #30 (i) Tube Fed	**NJ CAT response: 1** **NJ CAT reference : #30 (j)** and **NJ CAT response: 0** <Participant First_Name> has not eaten any food by mouth in the last 3 months. **NJ CAT reference : #30 (j)** and **NJ CAT response: 1** <Participant First_Name> has eaten some food by mouth in the last 3 months.
NJ CAT reference: #30 (n) Food Prep - Diet	**NJ CAT response: 1** <Participant First_Name> requires special food preparation such as pureed or chopped in the last 3 months.
NJ CAT reference: #30 (o) Special Diet	**NJ CAT response: 1** <Participant First_Name> had some special dietary foods or restrictions in the last 3 months.

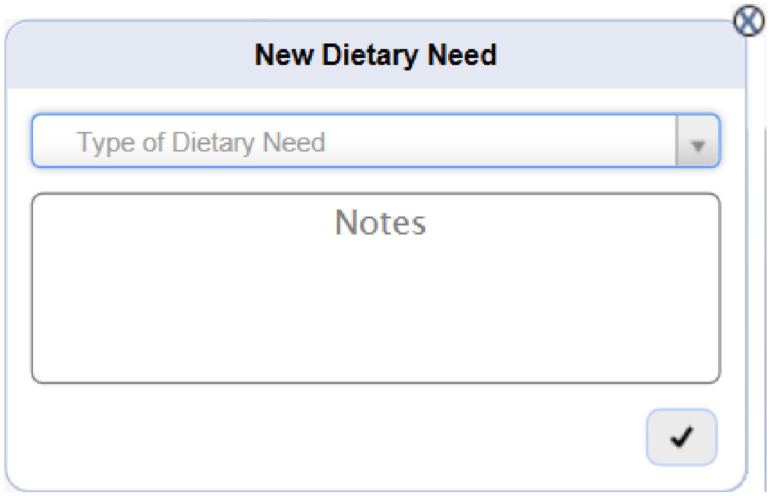
- The **Dietary** tile has a scroll bar to the right, when the records exceed the tile size.



- It is the system-generated note that you view on the tile for a record that has both types of notes (system-generated and user-entered).

To add a dietary need

1. On the **Dietary** tile, click + to add a dietary need. iRecord displays a **New Dietary Need** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	**Description**
Type of Dietary Need	Select the participant's dietary need from the drop-down list. The options are: • Food Prep-Diet • Food Prep-Liquids • Special Diet • Tube Fed • No Reported Dietary Needs Select **No Reported Dietary Needs** for a participant that has not reported any such criteria. Mandatory/Optional: Mandatory
Notes	Enter notes related to the dietary need within the text box. Mandatory/Optional: Mandatory Maximum limit: 1000 characters
Food Prep - Diet	
Type of Preparation	Select **Food Prep - Diet** on the **Type of Dietary Need** drop-down list and view this field. Select the **Type of Preparation** from the drop-down list. The options are: • Chopped • Ground

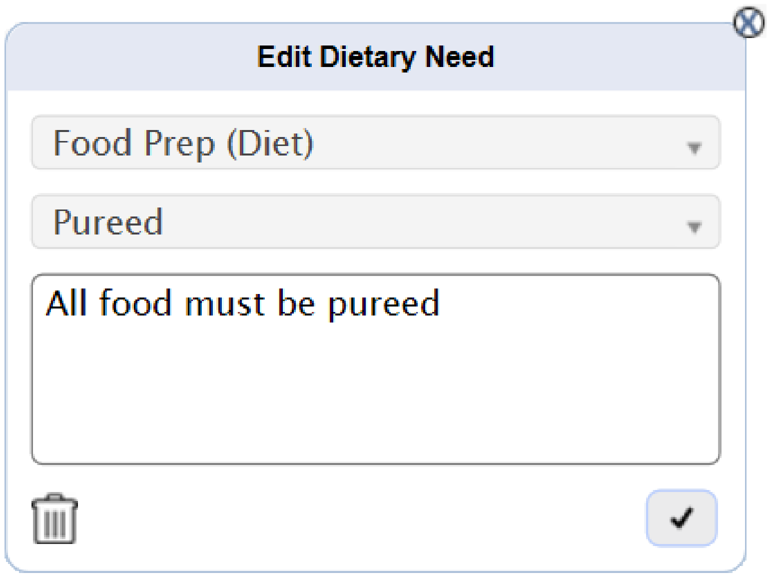
	• Pureed • Regular Mandatory/Optional: Mandatory
Food Prep - Liquid	
Type of Preparation	Select **Food Prep - Liquids** on the **Type of Dietary Need** drop-down list and view this field. The options are: • Honey-Thick • Nectar-Thick • Pudding-Thick • Thin/Regular Mandatory/Optional: Mandatory

3. Click ✓ to save the details and close the **New Dietary** pop-up tile.
4. View the record on the **Dietary** tile.
5. Repeat the steps from 1 to 4 to add another record. The records are placed in the alphabetical order of the type of need, and then by the reverse chronological order.

Note: The **Type of Need** drop-down list will not display **No Reported Dietary Needs** with an existing record on the tile.

To edit a dietary need

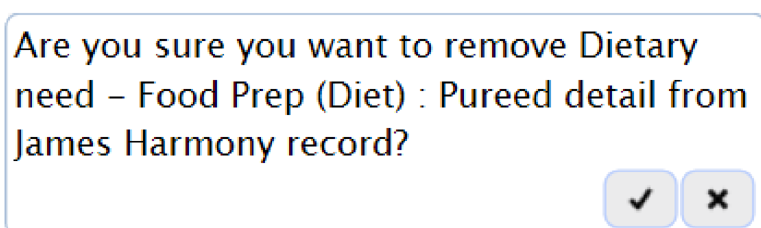
1. On the **Dietary** tile, locate the record and click . An **Edit Dietary** pop-up tile appears with the existing details.



2. Click the **Notes** text box and edit the notes. You have a maximum limit of 1000 characters.
3. Click ✓ to save the changes and close the **Edit Dietary Need** pop-up tile.
4. View the edited record on the **Dietary** tile.

To delete a dietary need

1. On the **Dietary** tile, locate the record that you wish to delete. Click and an **Edit Dietary** pop-up tile appears.
2. Click (bottom left of the pop-up tile). A confirmation message appears as shown below.



3. Click ✓ and confirm delete.

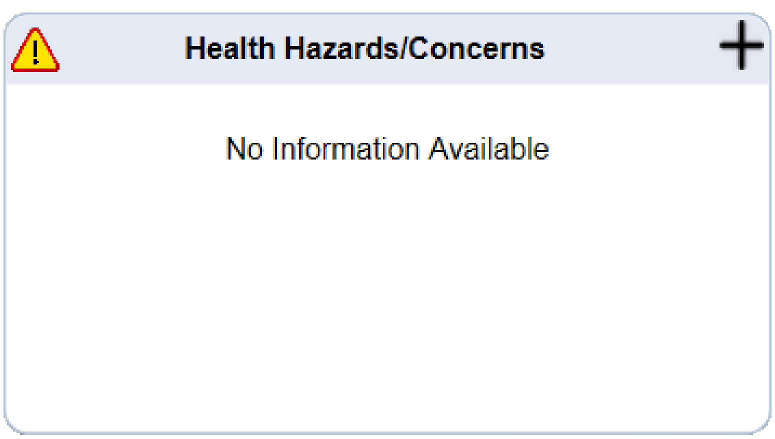
4.5.3 Health Hazards/Concerns

iRecord captures the health hazards or concerns of the participant.

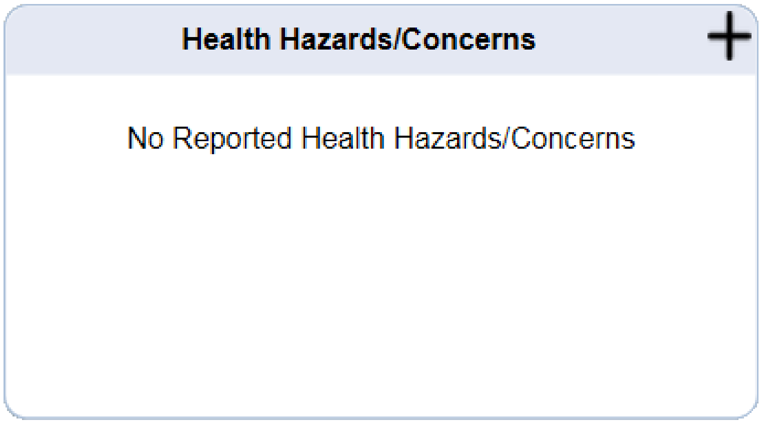
The user role determines the permissions on the tile. Refer to User Privileges for more information. The figure below displays the position of the tile on **Nutrition & Health** tab.

Health Hazards/Concerns Tile

- The **Health Hazards/Concerns** tile displays **No Information Available** and icon on the tile header to inform the user that the participant's health hazards or concerns have not been provided.



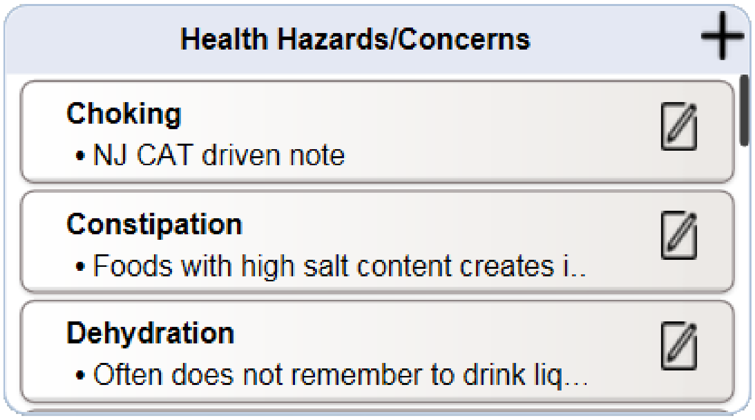
- The **Health Hazards/Concerns** tile displays **No Reported Health Hazards/Concerns** for a participant that has not reported any health hazards or concerns.



- NJ CAT driven records are those hazards or concerns captured directly on iRecord from the participant's assessment response.
- Certain responses on NJ CAT generate a note, known as system generated notes. For more information, refer to the table below.

Type of Need	System Notes
NJ CAT reference : #30 (l) Choking	**NJ CAT response: 1** <Participant First_Name> <NJ CAT Answer> <Participant First_Name> has eaten some food by mouth in the last 3 months.
NJ CAT reference: #10 (j) Seizures	**NJ CAT response: 1** <Participant First_Name> <NJ CAT Answer of #10(j)> and <NJ CAT Answer of #10(k)>. <Participant's First_Name> <NJ CAT Answer of #10(l)>
NJ CAT reference: #28 (d) Swallowing Disorder	**NJ CAT response: 1** <Participant First_Name> <NJ CAT Answer>
NJ CAT reference: #28 (c) Bowel Impaction	**NJ CAT response: 1** <Participant First_Name> <NJ CAT Answer>

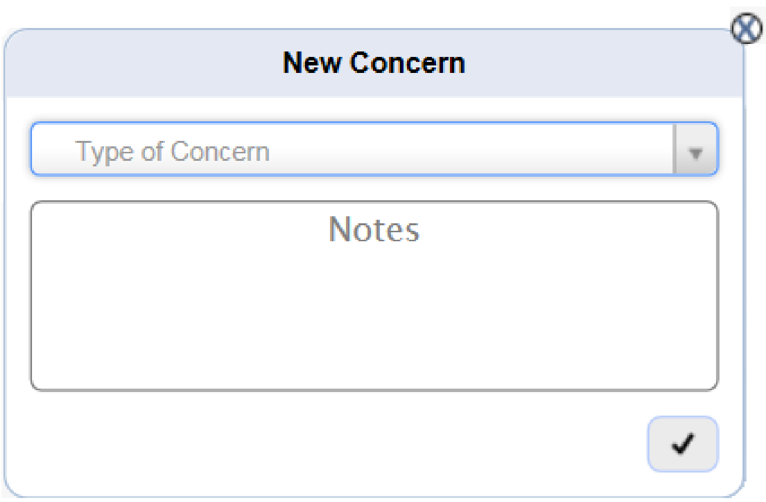
- The **Health Hazards/Concerns** tile has a scroll bar to the right, when the records exceed the tile size.



- It is the system-generated note that you view on the tile for a record that has both types of notes (system-generated and user-entered).

To add a health hazard or concern

1. On the **Health Hazards/Concerns** tile, click + to add a health hazard or concern. iRecord displays a **New Concern** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	Description
Type of Concern	Select the participant's concern from the drop-down list. The options are: • Choking

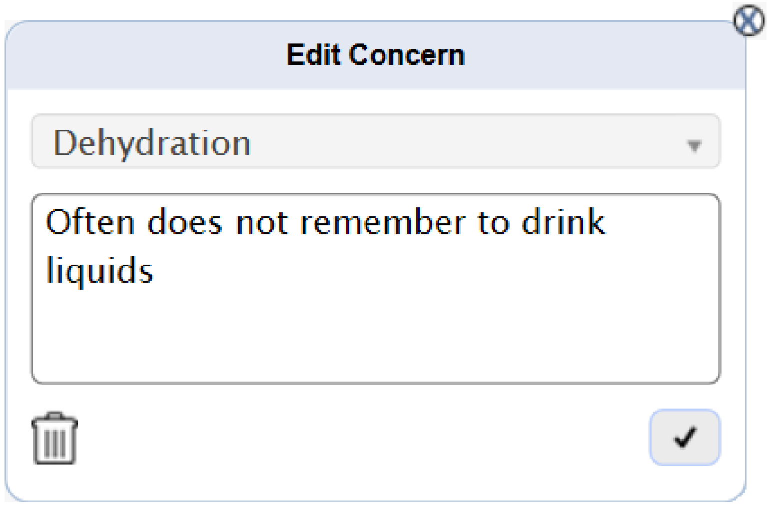
	• Constipation • Dehydration • Falling • Seizures • Swallowing Disorder • Other • None Select **None** for a participant that has not reported any such criteria. Mandatory/Optional: Mandatory
Notes	Enter notes related to the hazard or concern within the text box. With selection of **None** for **Type of Concern**, the box displays **No Reported Health Hazards/Concerns**. Mandatory/Optional: Mandatory Maximum limit: 1000 characters

3. Click ✓ to save the details and close the **New Concern** pop-up tile.
4. View the record on the **Health Hazards/Concerns** tile.
5. Repeat the steps from 1 to 4 to add another record. The records are placed in the alphabetical order of the type of need, and then by the reverse chronological order.

Note: The **Type of Need** drop-down list will not display **None** with an existing record on the tile.

To edit a health hazard or concern

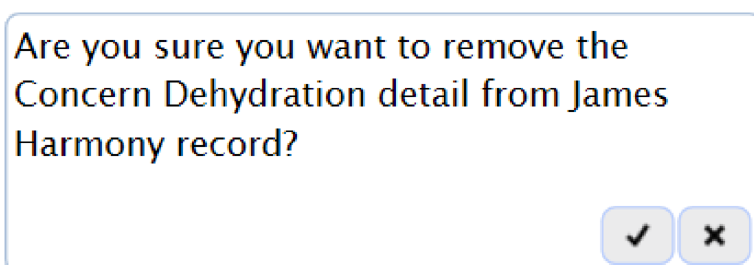
1. On the **Health Hazards/Concerns** tile, locate the record and click . An **Edit Concern** pop-up tile appears with the existing details.



2. Click the **Notes** text box and edit the notes. You have a maximum limit of 1000 characters.
3. Click ✓ to save the changes and close the **Edit Concern** pop-up tile.
4. View the edited record on the **Health Hazards/Concerns** tile.

To delete a health hazard or concern

1. On the **Health Hazards/Concerns** tile, locate the record that you wish to delete. Click to display the **Edit Concern** pop-up tile with the existing information.
2. Click (bottom left of the pop-up tile). A confirmation message appears as shown below.



3. Click ✓ and confirm delete.

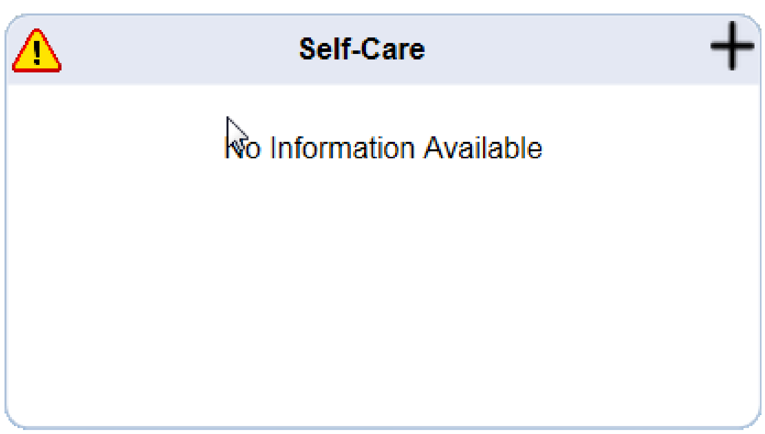
4.5.4 Self-Care

Self-care refers to the needs for the general well-being of an individual. iRecord manages the self-care needs of the participant on the **Self-Care** tile. Your user role determines the permissions on the tile. Refer to User Privileges for more information.

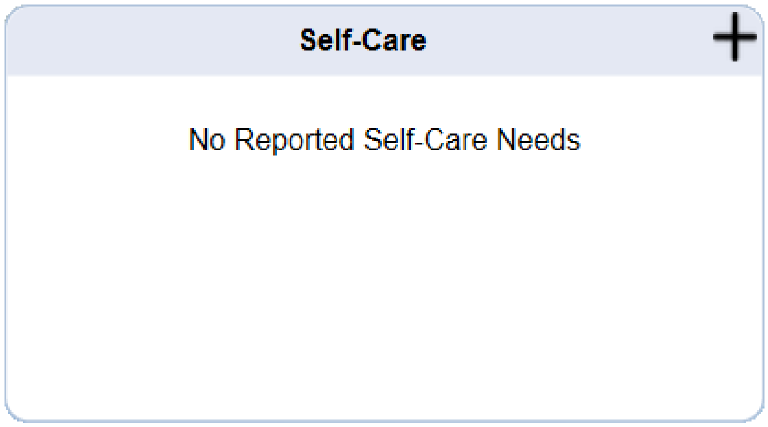
The figure below displays a sample **Self-Care** tile on the **Nutrition & Health** tab.

Self-Care Tile

- The **Self-Care** tile displays **No Information Available** and icon on the tile header before the user enters any details or with unavailable self-care information. The tile reverts to the same status with delete of all the self-care needs.



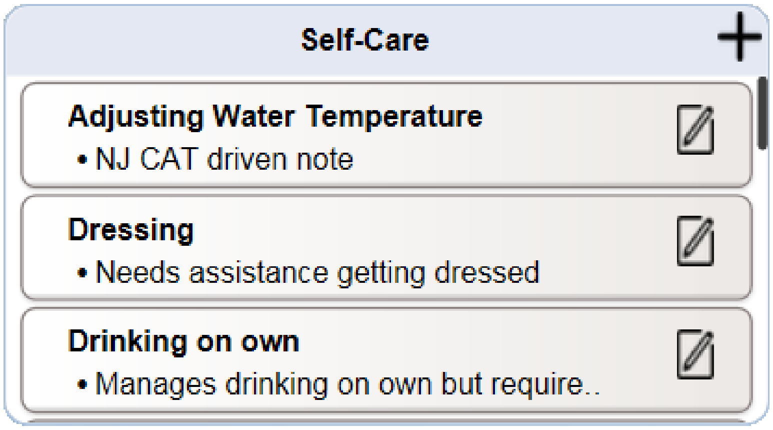
- The **Self-Care** tile displays **No Reported Self-Care Needs** for a participant that does not have any self-care needs. The user must select this status from the **Type of Need** drop-down for a participant that has not reported any self-care needs.



- The records on the **Self-Care** tile may have a system generated note and a user-entered note. The system generated notes are taken directly from the NJ CAT participant responses. These are known as NJ CAT driven records.
- Certain responses on NJ CAT generate a note, known as system generated notes. For more information, refer to the table below.

Type of Need	System Notes
NJ CAT reference : #26 A (12) Adjusting Water Temperature **NJ CAT reference : #26 A (11)** Blowing Nose **NJ CAT reference : #26 A (3)** Chewing & Swallowing **NJ CAT reference : #26 A (2)** Drinking on Own **NJ CAT reference : #26 A (1)** Feeding Self **NJ CAT reference : #26 A (4)** Toileting –Bladder **NJ CAT reference : #26 A (5)** Toileting – Bowel **NJ CAT reference : #26 C (5)** Using Microwave **NJ CAT reference : #26 C (4)** Using Stove **NJ CAT reference : #26 A (8)** Washing Hands	**NJ CAT response: 0** <Participant First_Name> <NJ CAT Answer> : <Type of Need> Example: James has not done (had no opportunity or is not able): Blowing Nose. **NJ CAT response: 1** <Participant First_Name> needs <NJ CAT Answer> for <Type of Need> Example: James needs lot of assistance (requires lots of hands on) for Using Stove. **NJ CAT response: 2** <Participant First_Name> needs <NJ CAT Answer> for <Type of Need> Example: James needs Mainly supervision (requires mainly verbal prompts) for Washing Hands. **NJ CAT response: 3** <Participant First_Name> is <NJ CAT Answer> while <Type of Need> Example: James is independent (starts and finishes without prompt or help) while Feeding Self.

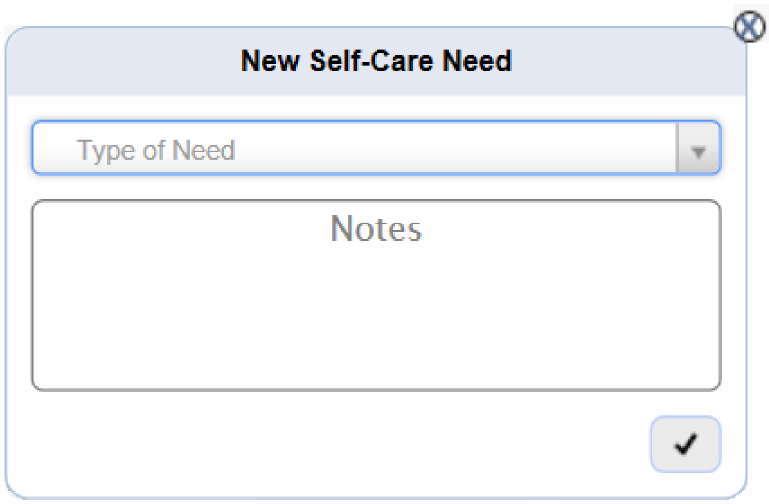
- The **Self-Care** tile may contain a single record or multiple records. For each record, view the type of need and the need-related note. It is the system generated note that you view on the **Self-Care** tile for a record that includes both types, system generated and user-entered notes.



- For an NJ CAT driven self-care record, you cannot edit or delete the **Type of Need** and/or system generated notes.

To add a self-care need

1. On the **Self-Care** tile, click + to add a self-care record. iRecord displays a **New Self-Care Need** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer the following table.

Field	Description
Type of Need	Select the appropriate need of the participant from the drop-down list. The options are: • Adjusting Water Temperature

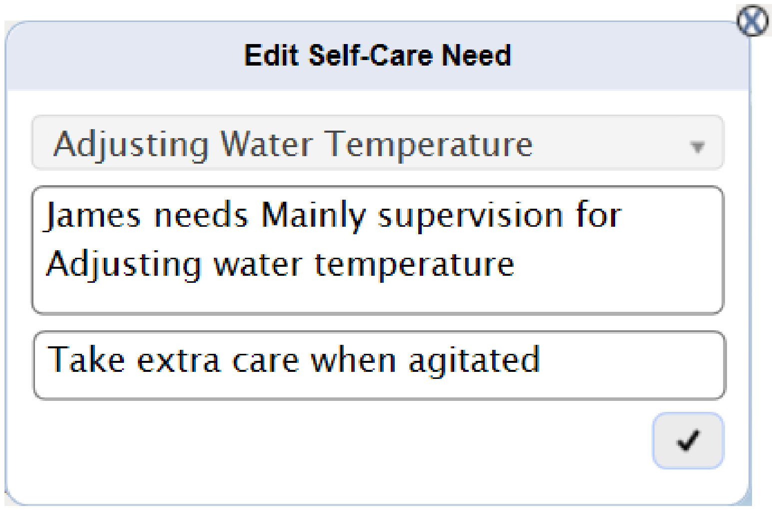
	• Blowing Nose • Chewing & Swallowing • Dressing • Drinking on own • Feeding Self • Toileting - Bladder • Toileting - Bowel • Using Microwave • Using Stove • Washing Hands • No Reported Self-Care Needs Select **No Reported Self-Care Needs** for a participant that does not have any self-care needs. Mandatory/Optional: Mandatory
Notes	Enter any appropriate notes for the selected type of need within the text box. You do not have to enter any notes for the **No Reported Self-Care Needs** option. Mandatory/Optional: Mandatory Maximum limit: 1000 characters

3. Click ✓ to save the details and close the **New Self-Care Need** pop-up tile.
4. View the record on the **Self-Care** tile.
5. Repeat the steps from 1 to 4 to add another self-care need.

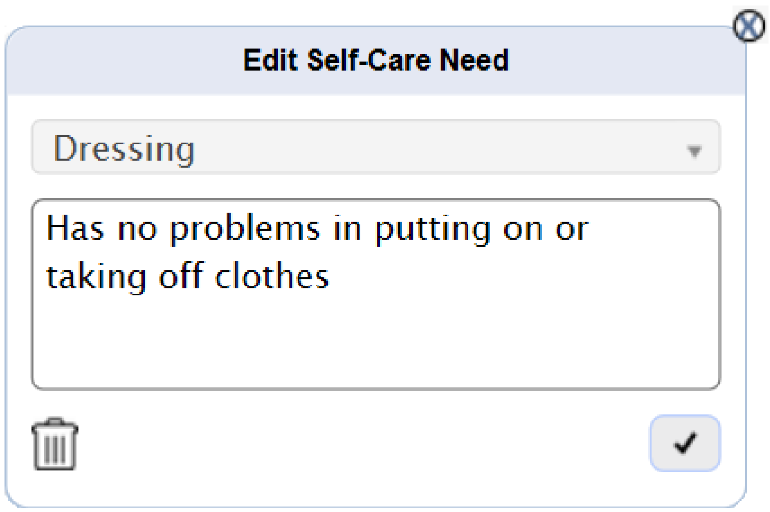
Note: The **Type of Need** drop-down list will not display **No Reported Self-Care Needs** with an existing need on the tile.

To edit a self-care need

1. On the **Self-Care** tile, locate the record that you want to edit and click . An **Edit Self-Care Need** pop-up tile appears according to the following two conditions:
   - NJ CAT driven record



- Not driven by NJ CAT record



2. Click the **Notes** (user entered) text box and add or modify the notes. You have a maximum limit of 1000 characters.

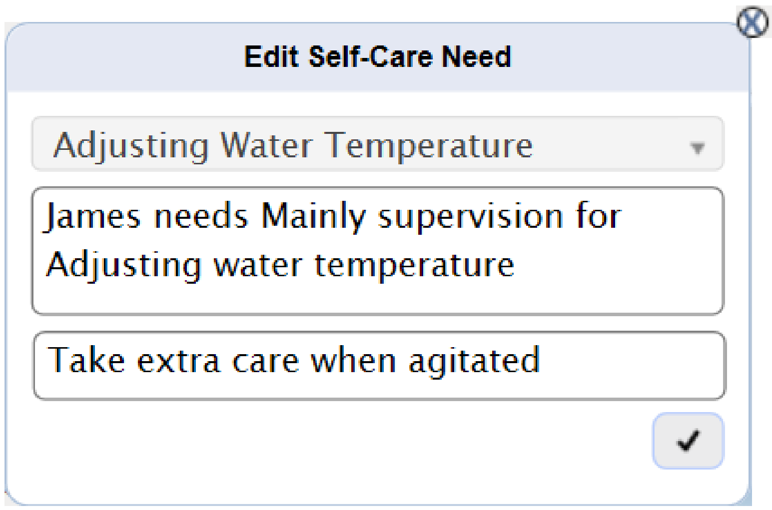
Note: You cannot edit the **Type of Need** or the system generated **Notes**. You cannot leave the user entered **Notes** blank for a record not driven by NJ CAT.

3. Click ✓ to save the changes and close the **Edit Self-Care Need** pop-up tile.
4. View the edited record on the **Self-Care** tile.

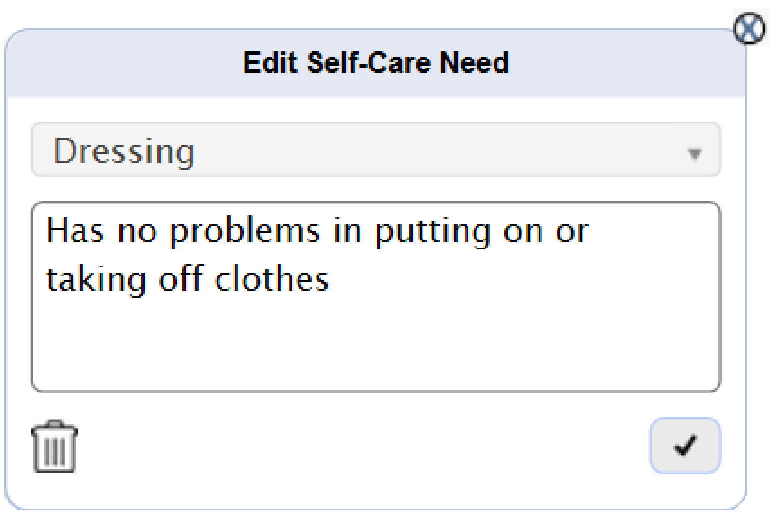
To delete a self-care need

1. On the **Self-Care** tile, locate the record and click . An **Edit Self-Care Need** pop-up tile appears according to the following two conditions:

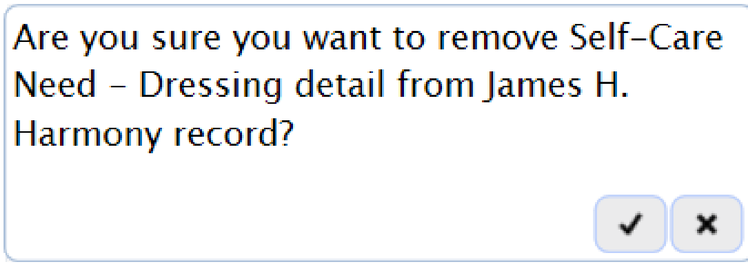
    - NJ CAT driven record



    - Non-NJ CAT driven record



2. For a record not driven by NJ CAT, click . A confirmation message appears as shown below.



Note: You cannot delete an NJ CAT driven record.

3. Click ✓ and confirm delete.

4.6 Employment

Employment tab categorizes the employment related information of the participant.

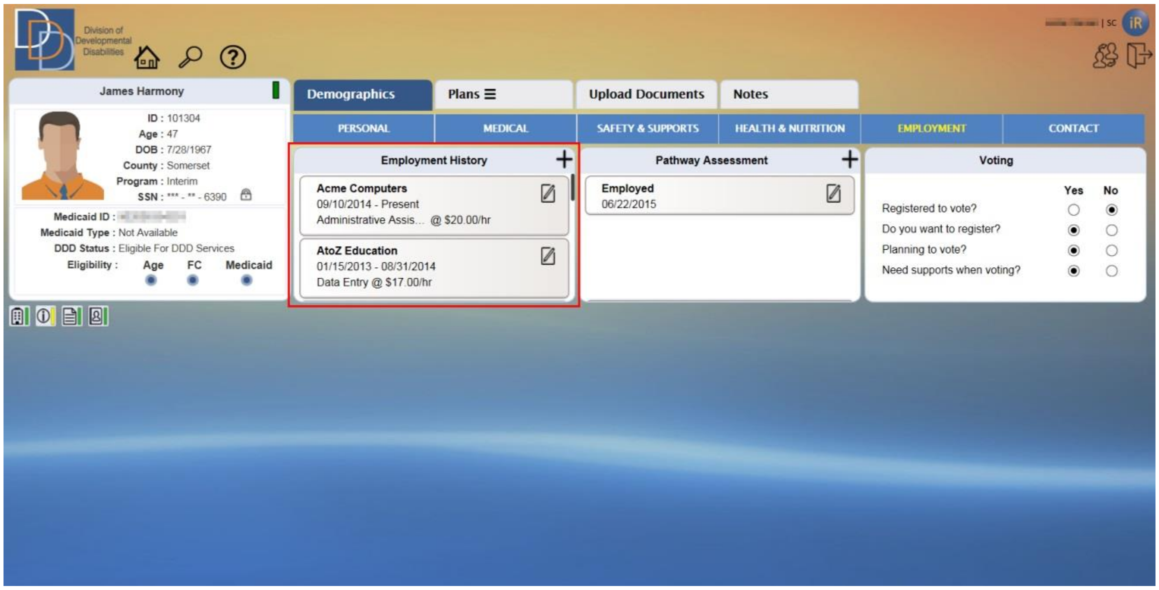
Employment displays the following tiles:

- Employment History
- Pathway Assessment
- Voting

4.6.1 Employment History

iRecord has an option that captures the participant's current employment and the employment history, if applicable. Your user role determines the permissions on the tile. Refer to User Privileges for more information.

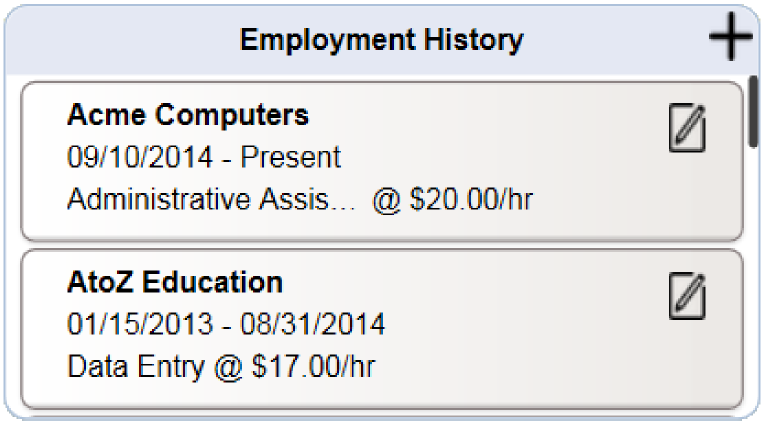
The figure below displays the **Employment History** tile on the **Employment** tab.



Employment History Tile

- The **Employment History** tile displays **No Reported Employment History** for a participant that does not have any employment records or unavailable information, as shown.

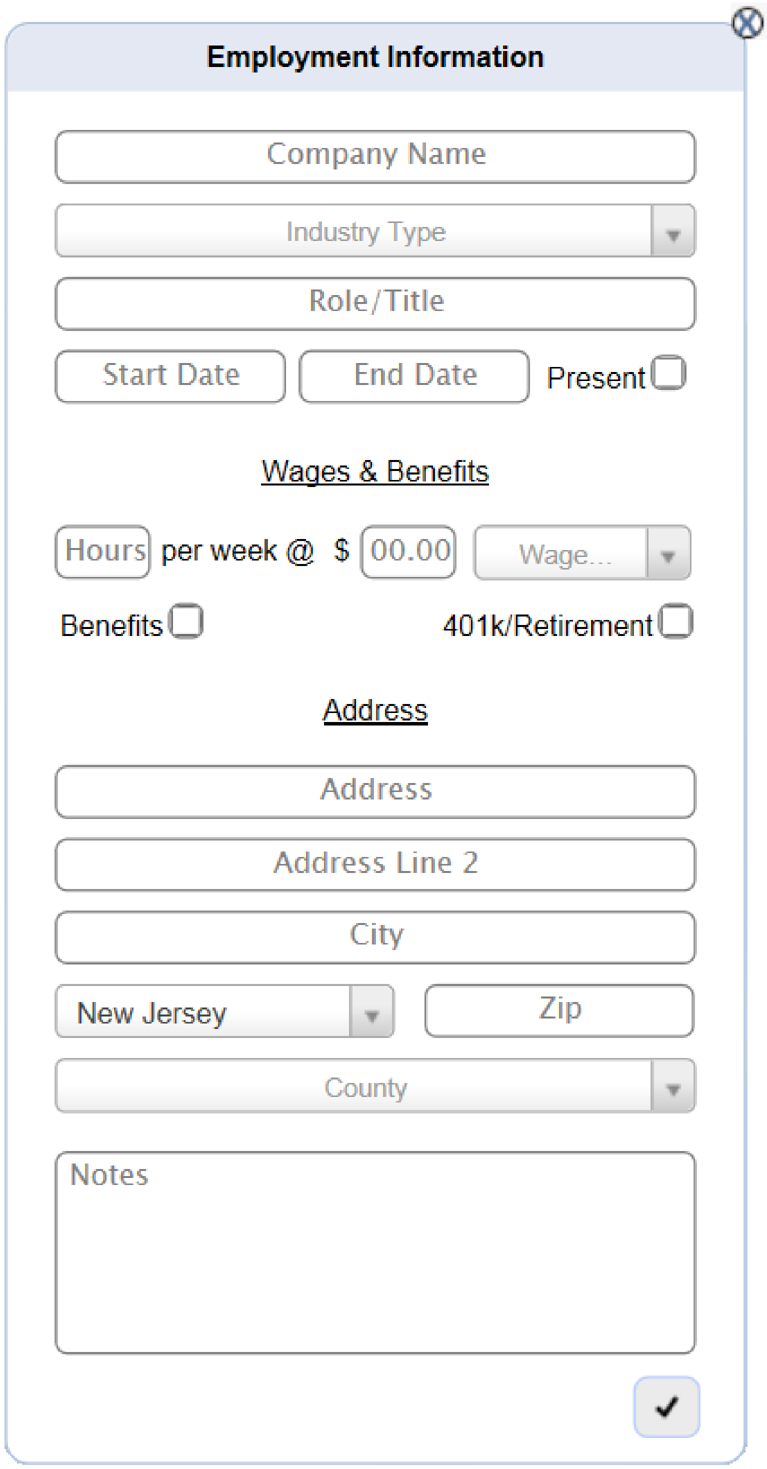
- The **Employment History** tile displays each employer as an individual record.



- With multiple employment records, the employers are listed in chronological order of their end dates.

To add an employment record

1. On the **Employment History** tile, click +. iRecord displays an **Employment Information** pop-up tile, shown below.

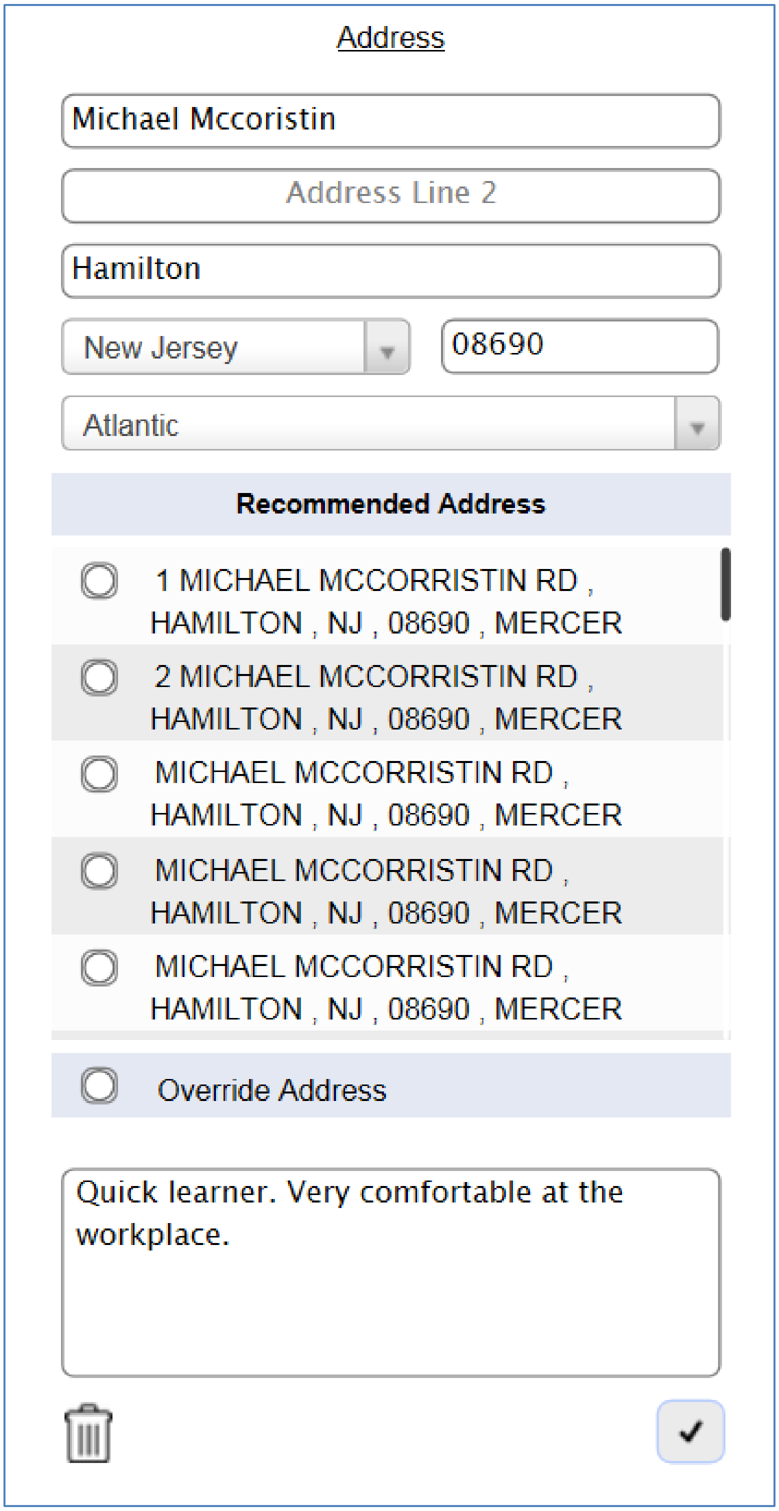


2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	Description
Company Name	Enter the name of the company or individual employing the participant. Mandatory/Optional: Mandatory
Industry Type	Select the appropriate industry of the company or individual from the drop-down list. You can also filter the list by entering search criteria within the text box. Mandatory/Optional: Mandatory
Role/Title	Enter the role or job title of the participant at the company. Mandatory/Optional: Mandatory
Start Date	Enter the start date of employment. or Select the start date from the pop-up calendar controls. Mandatory/Optional: Mandatory
End Date	Enter the end date of employment or Select the end date from the pop-up calendar controls. Leave the field blank for current employment. In all other cases, this field is mandatory.
Present	Select the check box to indicate that the participant is currently employed at this position. For current employment, it is mandatory to select the check box.
Wages & Benefits	
Hours	Enter the total number of hours worked per week within the text box. Mandatory/Optional: Mandatory
$	Enter the wages in dollars within the text box. The format allows up to two decimal units. Mandatory/Optional: Mandatory
per unit	Select the wage units from the list box. The options are: • per hour

	• per week • per month • per year Mandatory/Optional: Mandatory
Benefits	Select the check box to indicate that the employment included health benefits.
401K/Retirement	Select the check box to indicate that the employment included 401K or retirement benefits.
Address	
Address	Enter the first line of the employer's address within the text box. Mandatory/Optional: Mandatory
Address Line 2	Enter the second line of the employer's address within the text box. Mandatory/Optional: Optional
City	Enter the city of the employer's location within the text box. Mandatory/Optional: Mandatory
State	Enter the state of the employer's location within the text box. By default, New Jersey is selected. Mandatory/Optional: Mandatory
ZIP	Enter the ZIP of the employer's location within the text box. Mandatory/Optional: Mandatory
County	Select the county for an NJ location of the employer. Select **Out of State** for a location outside NJ.
Notes	Enter any employment-related notes for the participant. Mandatory/Optional: Optional Max limit: 5000 characters

3. Click ✓. iRecord verifies the address with the USPS web server and displays the address options. A sample is shown below.


Address
Michael Mccoristin
Address Line 2
Hamilton
New Jersey
08690
Atlantic
Recommended Address
1 MICHAEL MCCORRISTIN RD , HAMILTON , NJ , 08690 , MERCER
2 MICHAEL MCCORRISTIN RD , HAMILTON , NJ , 08690 , MERCER
MICHAEL MCCORRISTIN RD , HAMILTON , NJ , 08690 , MERCER
MICHAEL MCCORRISTIN RD , HAMILTON , NJ , 08690 , MERCER
MICHAEL MCCORRISTIN RD , HAMILTON , NJ , 08690 , MERCER
Override Address
Quick learner. Very comfortable at the workplace.

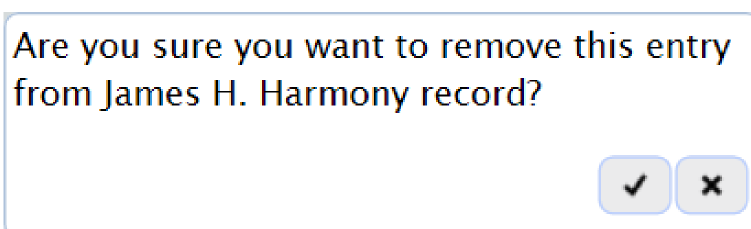
4. Select the appropriate address from the **Recommended Address** options.
   or
   Select the **Override Address** option to retain the entered address.
5. Click ✓.
6. View the record on the **Employment History** tile.

To edit an employment record

1. On the **Employment History** tile, locate the record that you want to edit and click . An **Employment Information** pop-up tile displays with the existing details.
2. Edit the field on the pop-up tile. For more information, refer to the preceding table.
3. Click ✓.
4. View the edited record on the **Employment History** tile.

To delete an employment record

1. On the **Employment History** tile, locate the record that you want to delete and click . An **Employment Information** pop-up tile displays with the existing details.
2. Click on the bottom left of the tile. A confirmation message appears as shown below.

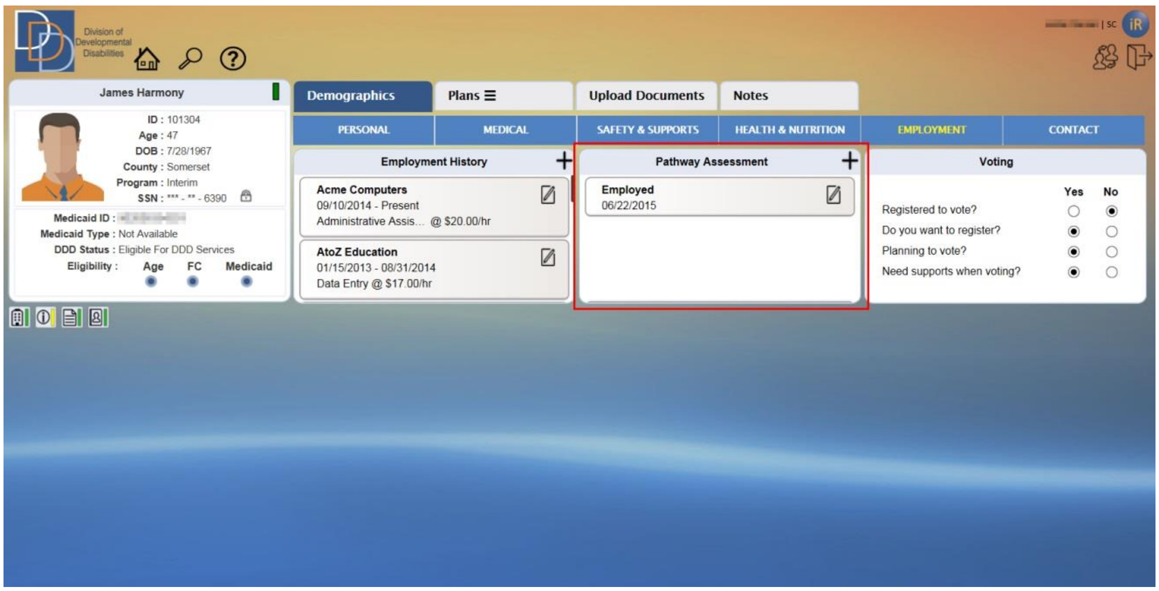


3. Click ✓ and confirm delete.

4.6.2 Pathway Assessment

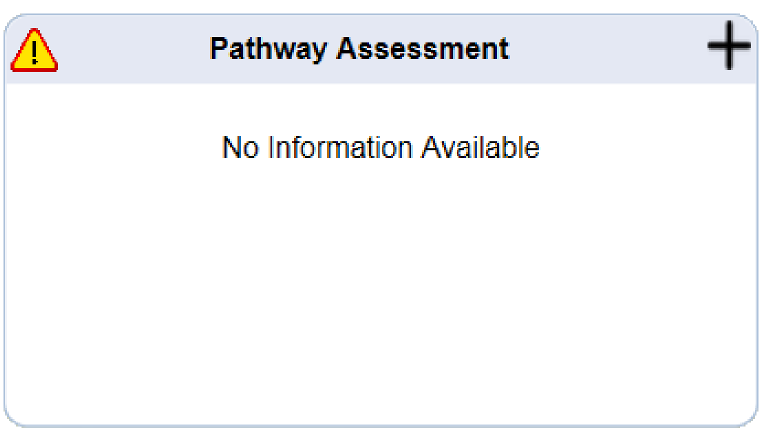
The **Pathway Assessment** tile is used to determine where a participant is on their pathway to employment. The pathway information needs to be captured before plan approval. Your user role determines the permissions on the tile. Refer to User Privileges for more information.

The figure below displays the position of the **Pathway Assessment** tile on the **Employment** tab.

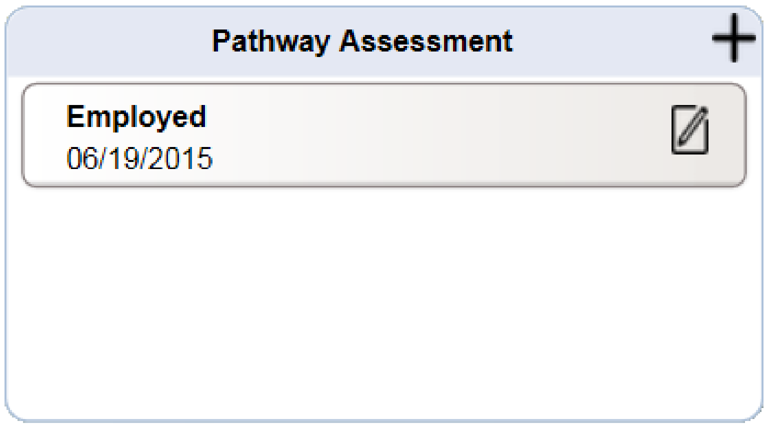


Pathway Assessment Tile

- The **Pathway Assessment** tile displays **No Reported Pathway Assessment** and ⚠ icon (on tile header) when information is unavailable, as shown below.



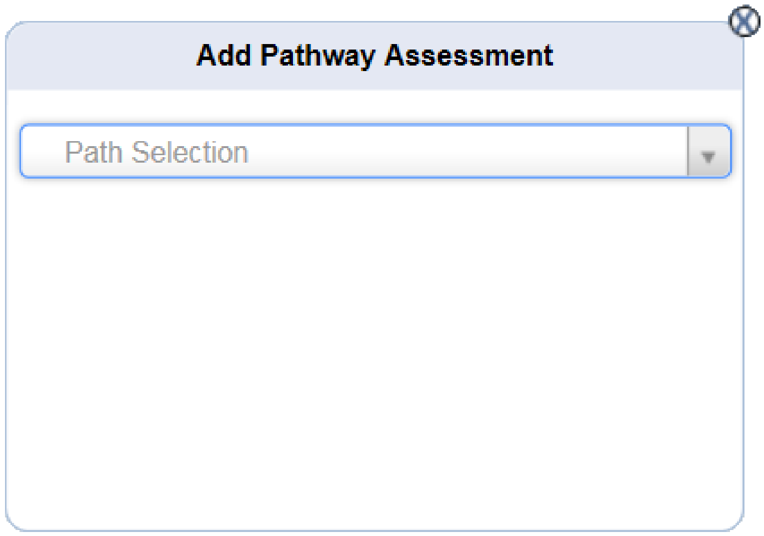
- Prior to approving any plan, it is required to complete the pathway assessment. You cannot change a plan status to R (Review) without completing a Pathway Assessment within the last 30 days (approximately once a year).
- The **Participant** tile on **Left Navigation** displays a red status indicator for a plan in W (Work-in-Progress) or RV (Revision) status and pathway assessment that has not been completed within the last 30 days.
- The **Pathway Assessment** tile displays the pathway name and the completion date, as shown.



- When there are multiple pathway assessment records, they are displayed in the reverse chronological order.

To add pathway assessment

1. On the **Pathway Assessment** tile, click +. iRecord displays an **Add Pathway Assessment** pop-up tile, shown below.



2. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	**Description**
Path Selection	Select the pathway assessment from the drop-down list. The options are: • Employed • Unemployed - Experience/Training • Unemployed - No Experience/Training • Unemployed - Not Pursuing Mandatory/Optional: Mandatory
Employed	
Select **Employed** on **Path Selection** and view the following fields.	
Queries	Select the appropriate **Yes** or **No** radio button for the following queries: • Making enough money...? (Are you making enough money to meet your living expenses?) • Working the hours you want...? (Are you working the amount of hours you want to work during the week?) • Satisfied with the job...?

	(Are you happy/satisfied with the job you have?) • Want to stay with this job...? (Do you want to stay where you are working now?) • Get to try different tasks...? (Do you get the opportunity to try all the different jobs/tasks you'd like at work?) • Happy with employment services...? (Are you happy with the employment services you are currently receiving/SE provider?) • Happy with the job coach...? (Are you happy with the job coach?) Hover displays the complete query, in the parentheses above for each. Mandatory/Optional: Mandatory
Select from jobs currently employed at:	Select the current employer(s) via the check box(es) on the drop-down list options. You may have more than one selection. Mandatory/Optional: Mandatory
Or add new employer information	Click + to add new employer information. The **Employment Information** pop-up appears. Follow the steps in To add an employment record.
Notes	Enter any notes that add information to the selected path. Mandatory/Optional:-Optional
Unemployed - Experience/Training	
Select **Unemployed - Experience/Training** on **Path Selection** and view the following fields.	
Queries	Select the appropriate **Yes** or **No** radio button for the following queries: • Know what kind of desired job...? (Do you know what kind of job you want?) • Applied for jobs...? (Have you applied for any jobs?) • Has a resume...? (Do you have a resume?)

	Hover displays the complete query, in the parentheses above for each. Mandatory/Optional: Mandatory
Notes	Enter any notes that add information to the selected path. Mandatory/Optional: Optional
Unemployed - No Experience/Training	
Select **Unemployed - No Experience/Training** on **Path Selection** and view the following fields.	
Queries	Select the appropriate **Yes** or **No** radio button for the following queries: • Want to learn a new skill...? (Do you want to learn a new skill?) • Thought about what you're good at...? (Have you thought about something you are really good at and how that could become a job or business for you?) • Know what you need for employment...? (Have you thought about what information you need in order to help you consider employment?) • Will life change if you have more money...? (Have you thought how your life might change if you had more money to spend on things you want?) • Will life change if you're more involved...? (Have you thought how your life might change if you were more involved with the community?) • Would you like to get paid to work...? (Would you like to get paid to do work in the community?) • Taken work-related training or classes...? (Have you ever taken work-related training, education, or classes?) • Had any job experiences...? (Have you had any job experiences in school or as an adult?) Hover displays the complete query, in the parentheses above for each. Mandatory/Optional: Mandatory
Notes	Enter any notes that add information to the selected path.

	Mandatory/Optional: Optional
Unemployed - Not Pursuing	
Select **Unemployed - Not Pursuing** on **Path Selection** and view the following fields.	
Reason for Not Pursuing	Select the reason for not pursuing employment from the drop-down list. The options are: • Retirement (65+): This option is available once a participant is above 65. • Medical • Behavioral • Other Mandatory/Optional: Mandatory
Notes	Enter any notes that add information to the selected path. Mandatory/Optional: Mandatory

3. Click .
4. View the path selected on the **Pathway Assessment** tile.

To edit pathway assessment

1. On the **Pathway Assessment** tile, click and view the **Edit Pathway Assessment** pop-up tile with the populated details.

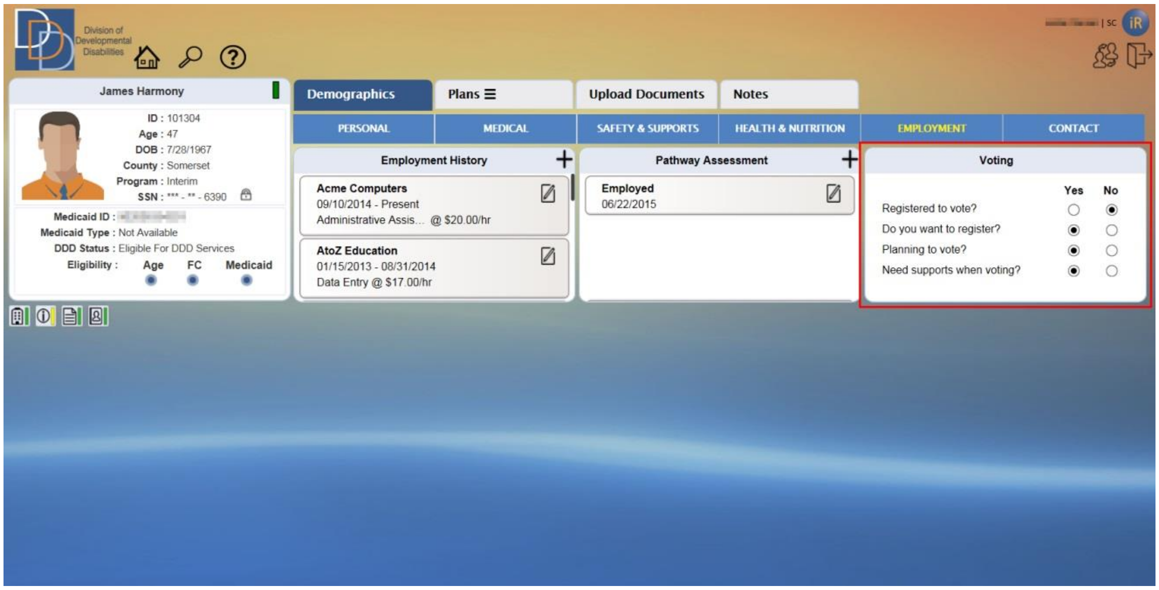
Note: The icon appears only on the most recent pathway assessment.

2. Edit the field on the pop-up tile. For more information, refer to the table in add pathway assessment.
3. Click .

4.6.3 Voting

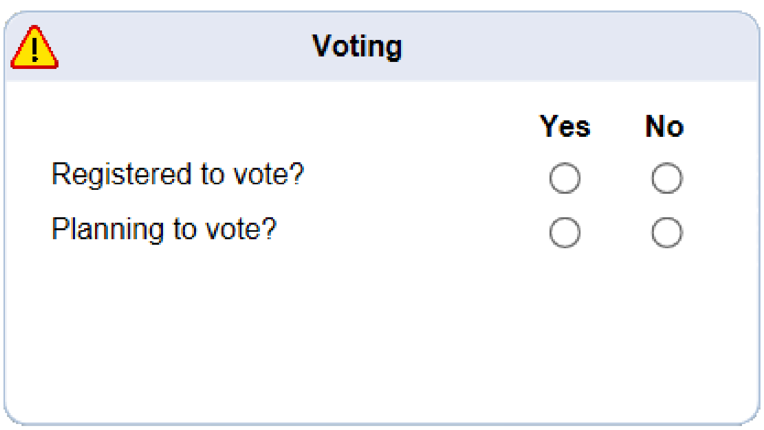
iRecord captures the voting preferences of the participant.

You can view the **Voting** tile on the **Employment** tab. Your user role determines the permissions on the tile. Refer to User Privileges for more information.



Voting Tile

- **Voting** displays  icon on the tile header when information is unavailable, as shown. This informs the user with the appropriate permission that the voting preferences of the participant need to be recorded.



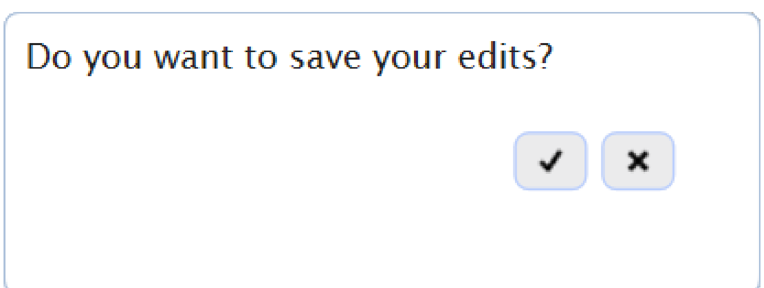
- Hover on the label to view the complete question on a tooltip.

To add or modify voting preferences

1. On the **Voting** tile, select the appropriate radio button(s) using the following table for reference.

Field	Description
Registered to vote?	Select the appropriate radio button that indicates the participant's voting registration. Mandatory/Optional: Mandatory
Do you want to register?	This field appears with the **No** option for **Registered to vote?** Select the appropriate radio button that indicates the participant's willingness to register to vote. Mandatory/Optional: Mandatory
Planning to vote?	Select the appropriate radio button that indicates whether the participant plans on voting. Mandatory/Optional: Mandatory
Need supports when voting?	This field appears with the **Yes** option for **Planning to vote?** Select the appropriate radio button that indicates whether the participant needs supports for voting. Mandatory/Optional: Mandatory

2. A confirmation message appears, as shown, after the selection of the available radio buttons.



3. Click ✓ to save.

Note: The ⚠ icon clears with record of voting information.

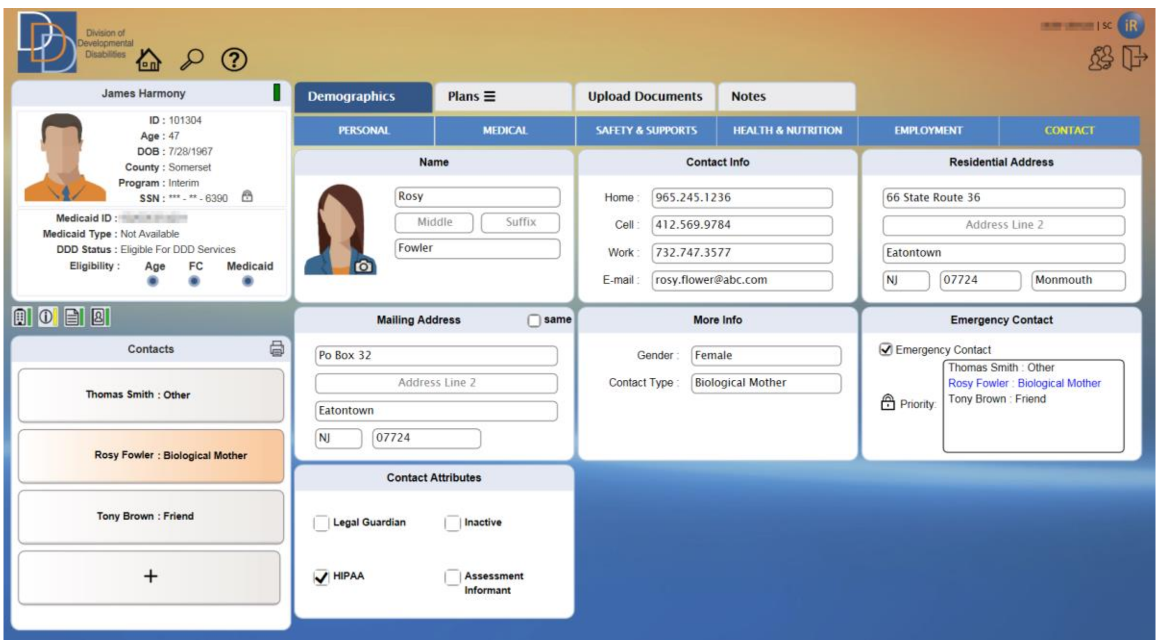
4.7 Contact

Contact tab categorizes the contact related information of the participant.

Contact displays the following tiles:

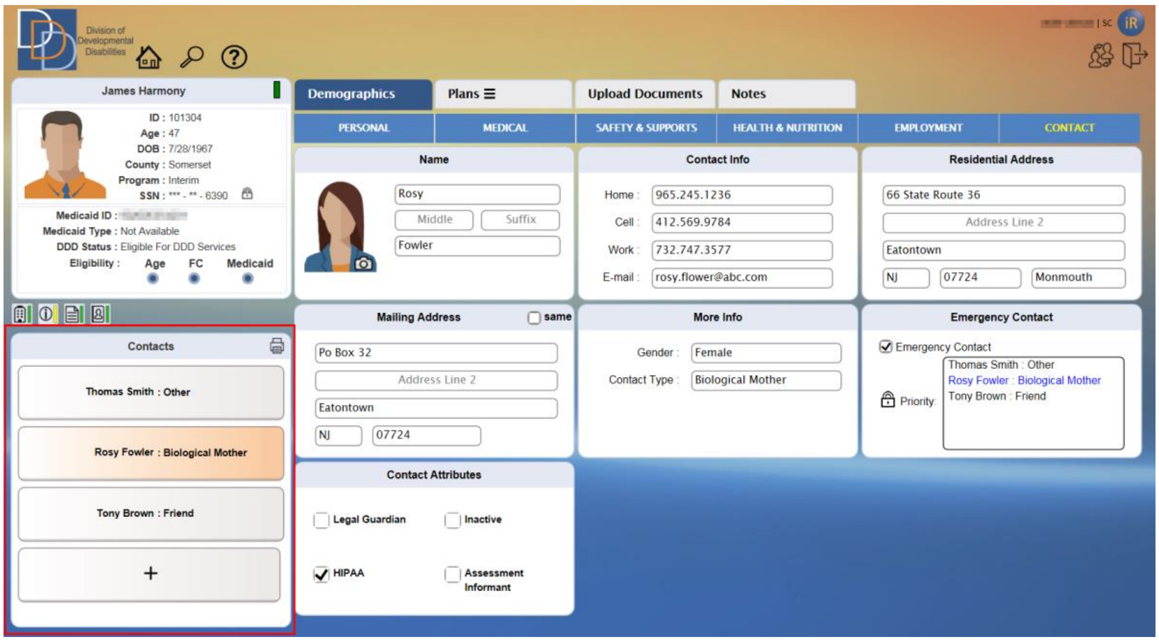
- Contacts (on Left Navigation)
- Name
- Contact Info
- Residential Address
- Mailing Address
- More Info
- Emergency Contact
- Contact Attributes

The following figure displays the Contact tab.



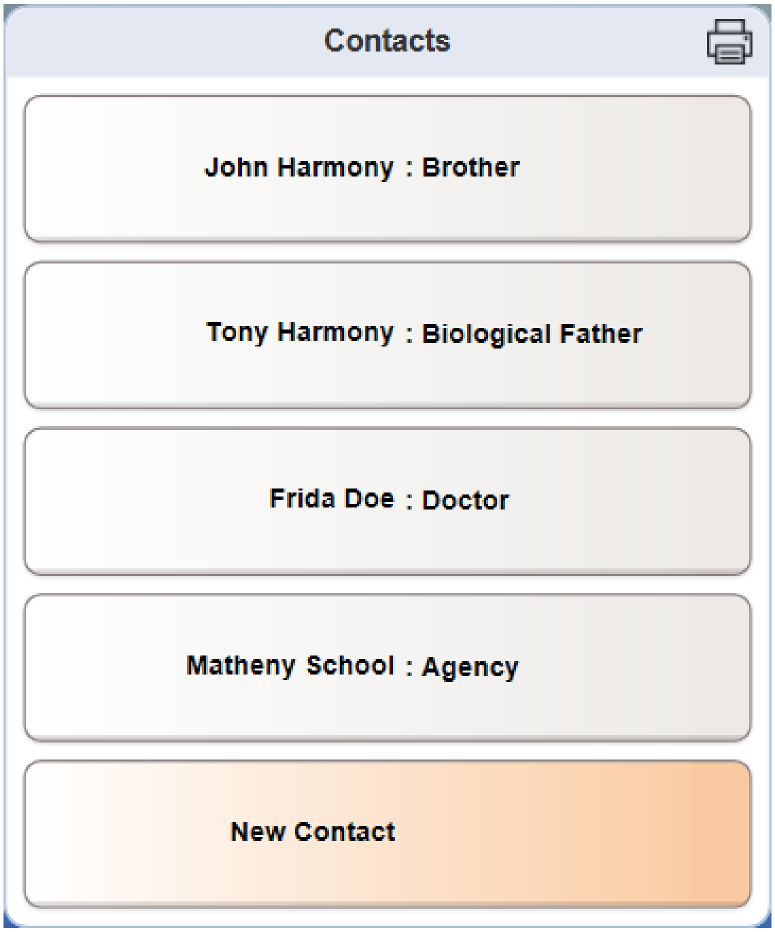
4.7.1 Contacts Navigation

iRecord maintains a tile interface for quick navigation of the contacts of the participant. It appears on the left navigation of the **Contacts** tab with the **Contacts** tile header. The permissions on the tile depend on your user role.



Contacts Tile

- The **Contacts** tile displays each contact and their relationship with the participant. View the emergency contacts before the other contacts. The tile lists the emergency contacts in their priority order followed by the other contacts in the alphabetical order of their last name.



- Click the appropriate contact and view the details on the **Contacts** tab.
- Click button to add a new contact for the participant. The button now displays **New Contact**. Save the name and the button changes to the name of the contact. Once you save the **Contact Type**, the relationship also appears on the button.

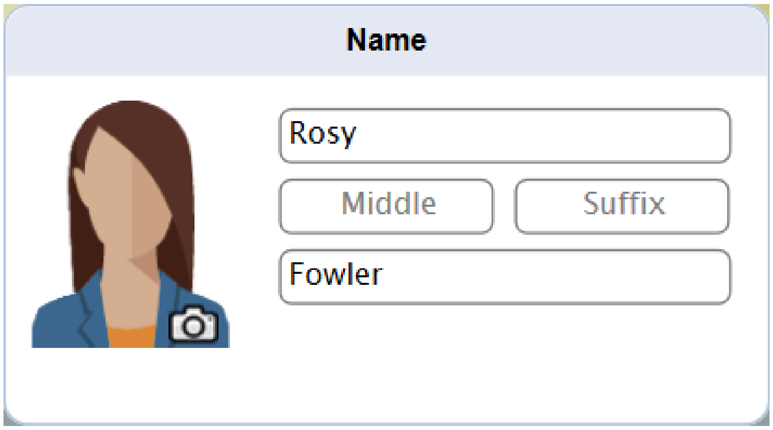
Note: You cannot add a new contact when the tile displays a **New Contact** button.

- Click to print a report that contains the details of all the contacts for the participant.

4.7.2 Name

The **Name** tile records the name of the contact

The figure below displays a blank **Name** tile. By default, you will always find the name details of the contact on this tile. The following table discusses the controls on the **Name** tile.



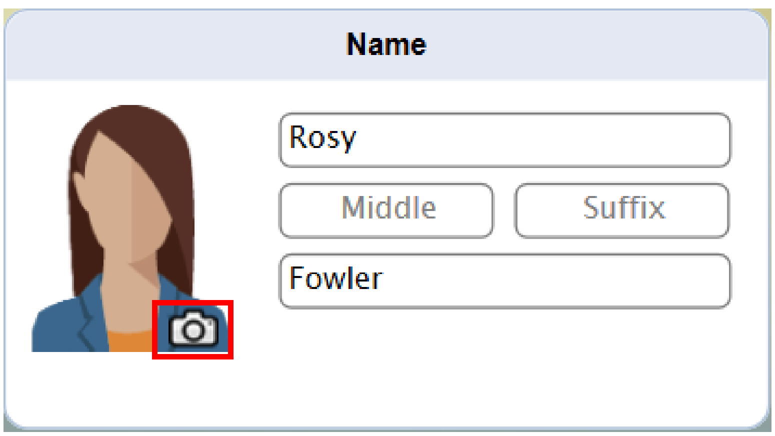
Field	Description
	Add, view or modify the photograph of the contact. View a default image without a photograph. Click the icon on the bottom right of the default image or photograph to add or modify a photograph. Mandatory/Optional: Optional
First Name	View or modify the first name of the contact. Click the text box and the controls appear for you to modify the first name of the contact. Mandatory/Optional: Mandatory
M.	Add, view or modify the middle name of the contact. Click the text box and the controls appear for you to modify the middle name of the contact. Mandatory/Optional: Optional
Suffix	Add, view or modify the suffix of the contact. Jr. represents Junior and Sr. represents Senior. Click the box and view the controls with the suffix options. The options are: • Junior • Senior Mandatory/Optional: Optional

Last Name	View or modify the last name of the contact. Click the text box and the controls appear for you to modify the last name of the contact. Mandatory/Optional: Mandatory

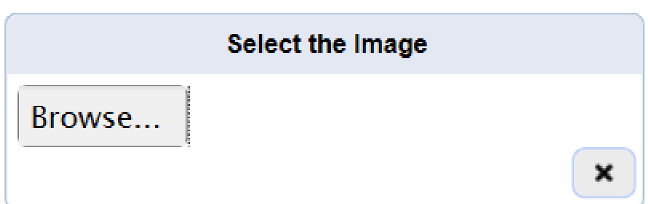
To add a photograph

The instructions below discuss the procedure for adding a photograph for a contact. The procedure is the same for changing the photograph. Here, we discuss the scenario for the Windows desktop OS (Operating System). The procedure is not very different, if using a different system.

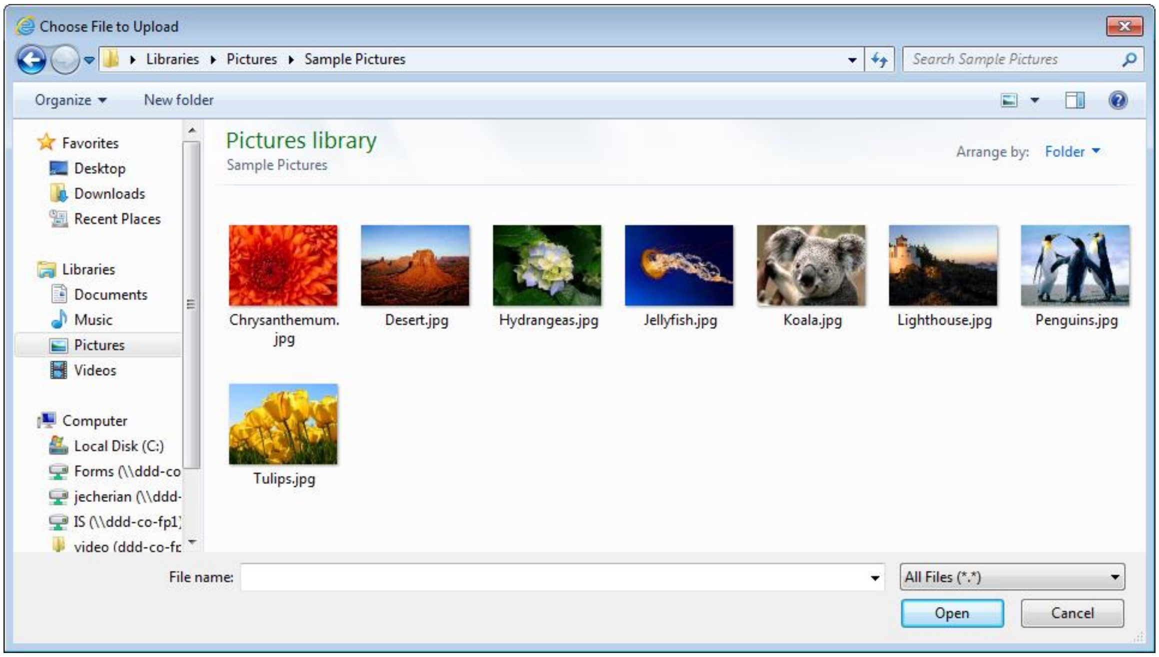
1. Click the icon on the bottom right of the default image or photograph, as shown, to add or modify a photograph.



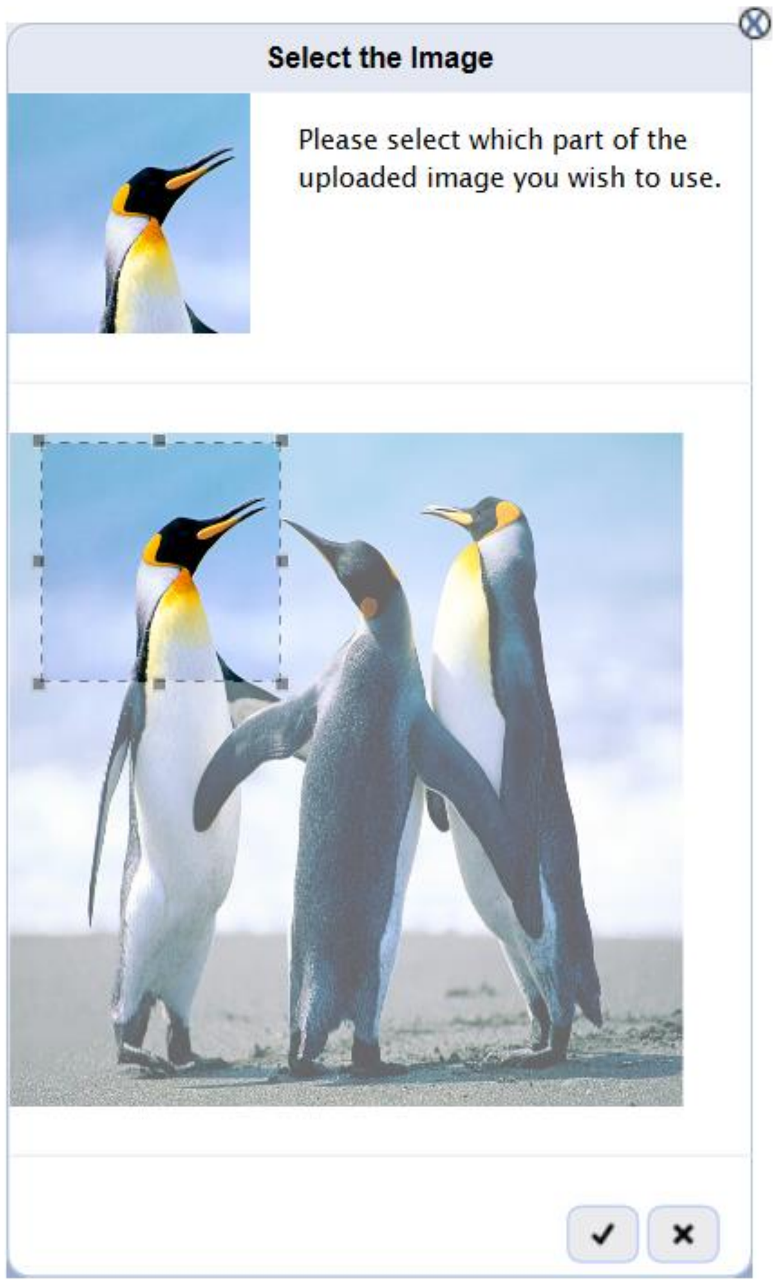
2. The controls appear to upload a photograph, as shown below. Click the **Browse...** button.



3. **Choose File to Upload** dialog box appears (Windows desktop OS) for you to upload the appropriate photograph file.
   For other systems, the appropriate upload controls appear for you to select the picture file.



4. View **Select the Image** controls shown below. The controls include a simple editing tool that allows you to crop the image. By default, the selection is 100 * 100 pixels from the top left of the image. Click and drag the square selection to the choice of area on the photograph. You can also drag the corners for a larger square.

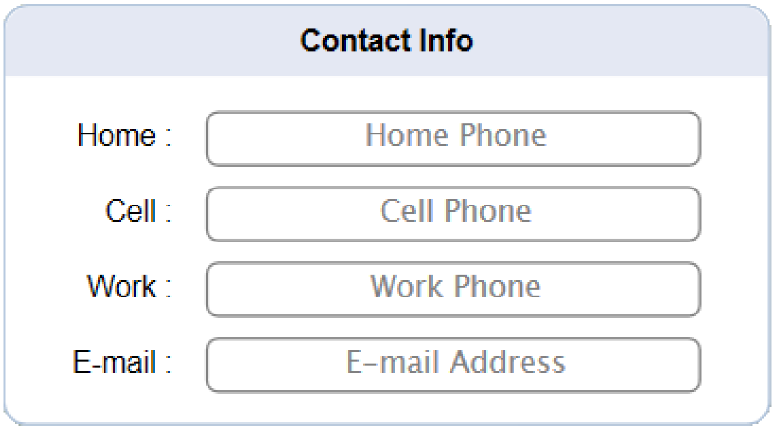


5. Click . iRecord resizes the photograph to 250 Kb, when greater.
6. View the new photograph on the **Name** tile.

4.7.3 Contact Info

The **Contact Info** tile records the contact phone numbers of the contact.

The figure below displays the **Contact Info** tile. The following table discusses the fields within the tile.

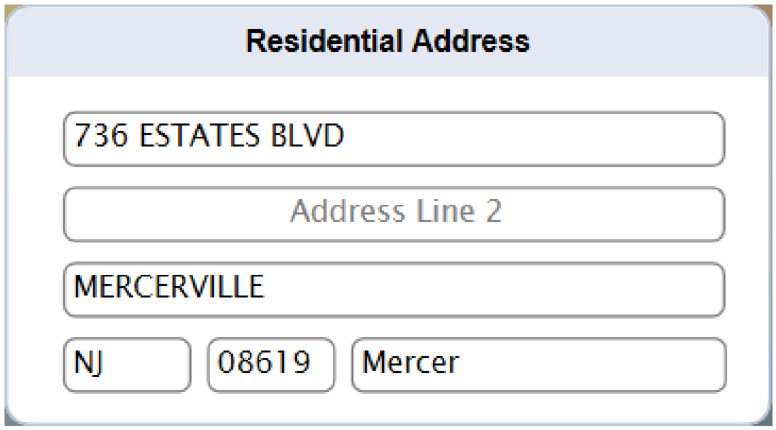


Field	Description
Home	Add, view or modify the home phone number of the contact. Click the text box and the controls appear for you to add or modify the home phone number of the contact. Mandatory/Optional: Mandatory
Cell	Add, view or modify the cell phone number of the contact. Click the text box and the controls appear for you to add or modify the cell phone number of the contact. Mandatory/Optional: Optional
Work	Add, view or modify the work phone number of the contact. Click the text box and the controls appear for you to add or modify the work phone number of the contact. Mandatory/Optional: Optional
E-mail	Add, view or modify the email address of the contact. Click the text box and the controls appear for you to add or modify the e-mail address of the contact. Mandatory/Optional: Mandatory

4.7.4 Residential Address

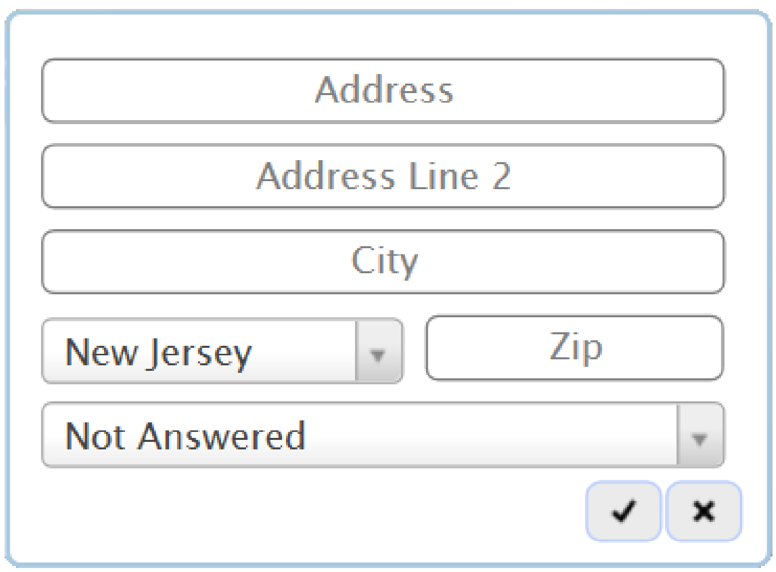
The **Residential Address** tile records the home address of the contact.

The figure below displays the **Residential Address** tile. The following table discusses the fields within the tile.



To add the residential address

1. Click any of the text boxes within the **Residential Address** tile and the controls appear, as shown below.



2. Enter the details within the respective fields. For more information, refer to the table below.

Field	Description
Address	Enter the first line of the contact's address. Mandatory/Optional: Mandatory

Address Line 2	Enter the second line of the contact's address. Mandatory/Optional: Optional
City	Enter the city of the contact's address. Mandatory/Optional: Mandatory
State	New Jersey is the default state. For any other state, select the state from the drop-down list. Mandatory/Optional: Mandatory
ZIP	Enter the ZIP of the contact's address. Mandatory/Optional: Mandatory
County	Select the county from the drop-down list. Mandatory/Optional: Mandatory

3. Click . An address verification process takes place with the USPS web service. Based on this verification, view the suggested options or an **Override Address** option.
4. Select the appropriate address from the **Recommended Address** option(s).
   or
   Select the **Override Address** option to retain the entered address.
5. Click .
6. View the address on the **Residential Address** tile.

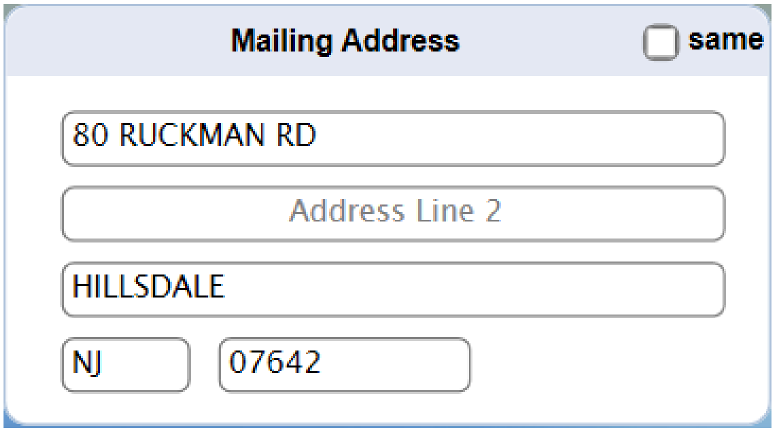
To edit the residential address

1. Click any text box and the inline controls appear.
2. Modify the field that you wish to modify and/or any other associated field(s).
3. Follow the steps from 3 to 6 for addition of a residential address.

4.7.5 Mailing Address

The **Mailing Address** tile records the mailing address of the contact. It is possible that the mailing address is the same as the residential address. In such a case, the mailing address is a duplicate of the residential address.

The figure below displays the **Mailing Address** tile.



To add the mailing address

- For a mailing address identical to the residential address, click the **Same** check box on the right of the tile header. The fields are populated with the respective details of the **Residential Address** tile.
  To enter an address, follow the instructions for addition of the residential address.

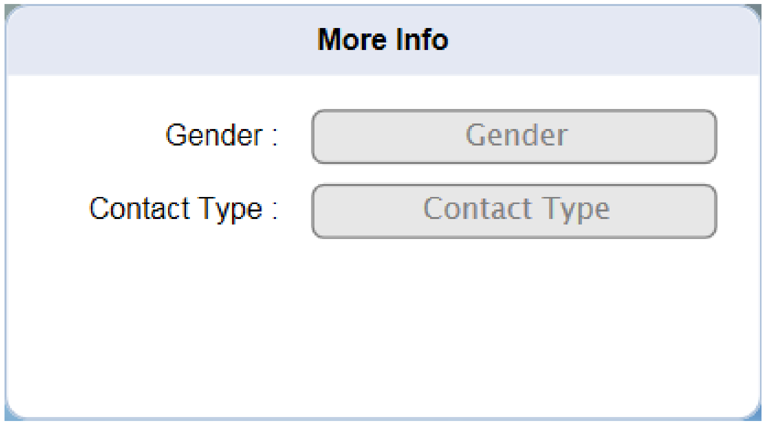
4.7.6 More Info

The **More Info** tile records any additional details of the contact.

The figure below displays the **More Info** tile. The following table discusses the fields within the tile.

To add more information of the contact

- Enter the details for the respective fields using the table below, for reference.

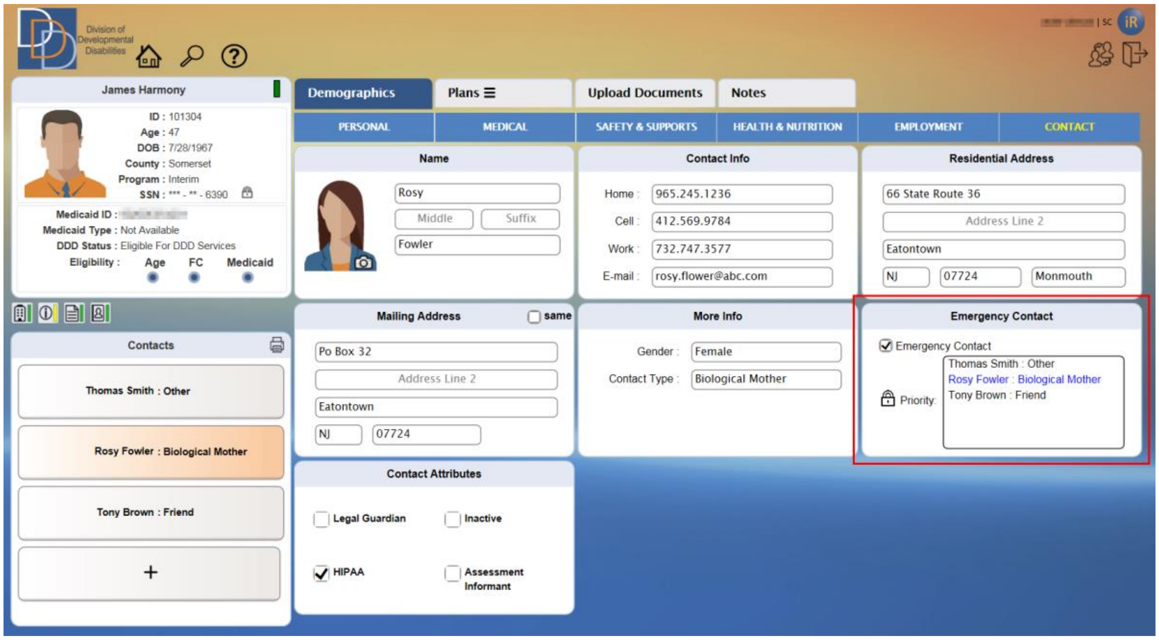


Field	Description
Gender	Select the gender of the contact from the drop-down list. Mandatory/Optional: Optional
Relationship	View the relationship of the contact to the participant from the drop-down list. Mandatory/Optional: Optional

4.7.7 Emergency Contact

iRecord maintains the emergency contact(s) of each participant. In case of more than one emergency contact, a priority number is assigned to them. The highest priority contact has a priority number of 1. On all tiles, the emergency contacts are listed with the highest priority on top of the list and then in decreasing priority.

The figure below displays the **Emergency Contact** tile on the **Contacts** tab.



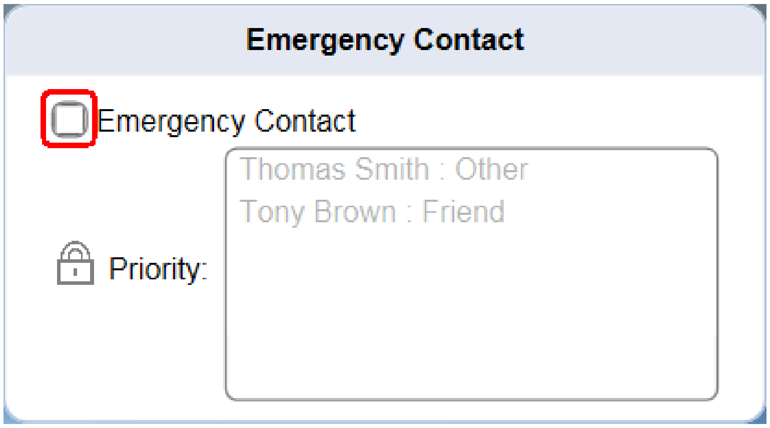
Emergency Contact Tile

- A selected **Emergency Contact** check box indicates that the contact is an emergency contact.
- The display box lists the active emergency contacts in decreasing priority order.

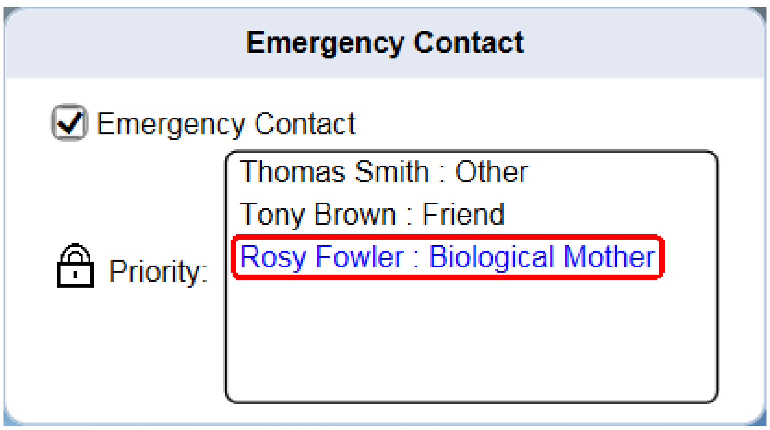
Note: An emergency contact with the **Inactive** contact attribute is not listed in the display box.

To add an emergency contact

1. For an existing contact, select the appropriate contact from the **Contacts** tile on the left navigation.
   For a new contact, add the **Name** tile details.
2. Select the **Emergency Contact** check box on the **Emergency Contact** tile.



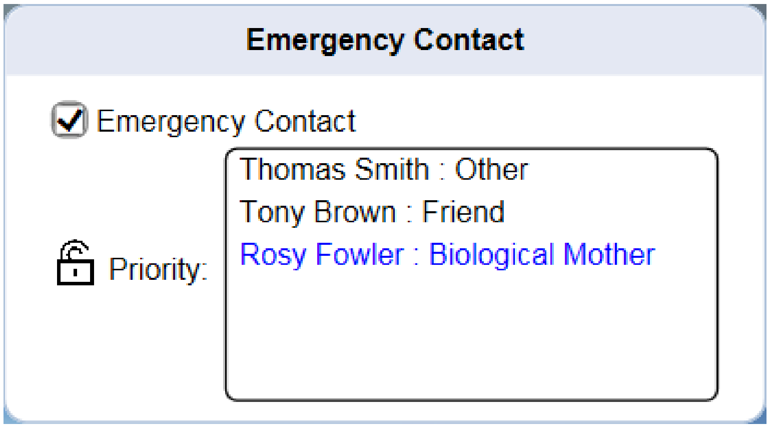
3. The contact is now an emergency contact of the participant. The contact appears at the bottom of the list within the box that displays the emergency contacts, as highlighted in the below figure.



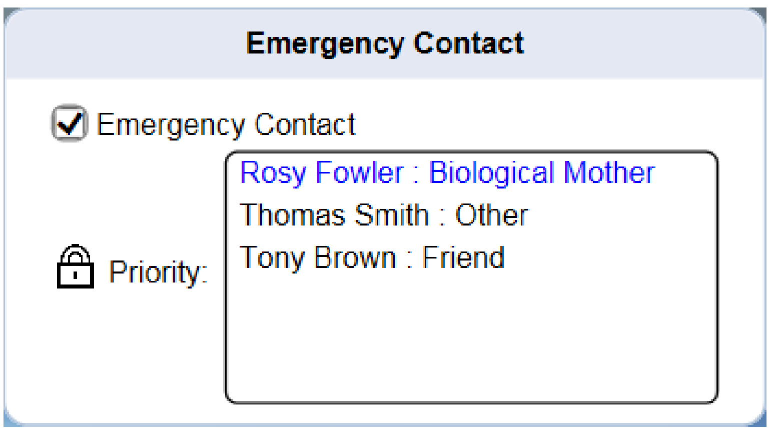
To change the priority order

1. Select the appropriate emergency contact from the **Contacts** tile on the left navigation.

2. On the **Emergency Contact** tile, click . The tile appears as shown in the below figure.



3. You can now change the priority order of any of the contact within the box that displays the emergency contacts. Drag the contact(s) and to the appropriate priority.
4. Click . The figure below displays the contacts with the changed priority order.



5. The icon indicates that the new priority of the emergency contact has been saved.

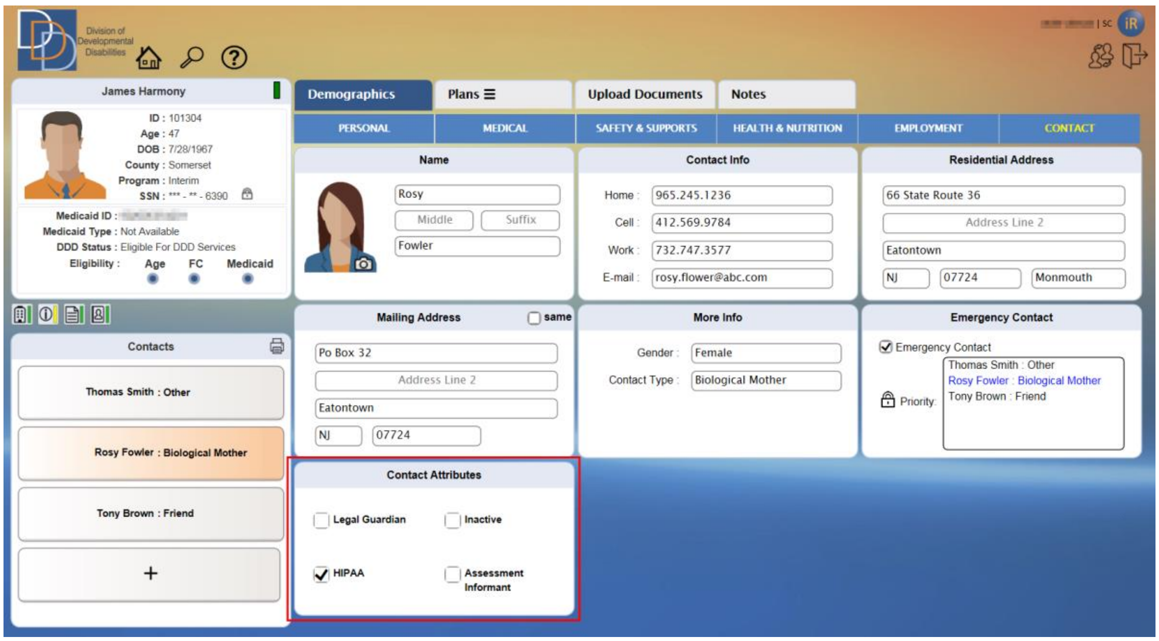
To remove an emergency contact

1. Select the appropriate emergency contact from the **Contacts** tile on the left navigation.
2. On the **Emergency Contact** tile, clear the **Emergency Contact** check box.
3. The box that displays the emergency contacts removes the contact. The option to change the priority order is also unavailable.

4.7.8 Contact Attributes

The contact attributes tile consists of:

- Legal Guardian
- HIPAA
- Inactive
- Assessment Informant



Legal Guardian

A Legal Guardian is a contact with legal authority to manage the affairs of the participant.

HIPAA

HIPAA stands for the Health Insurance Portability and Accountability Act. HIPAA mandates the protection and confidential handling of certain health information. This attribute represents that the contact has HIPAA authorization for the participant.

Inactive

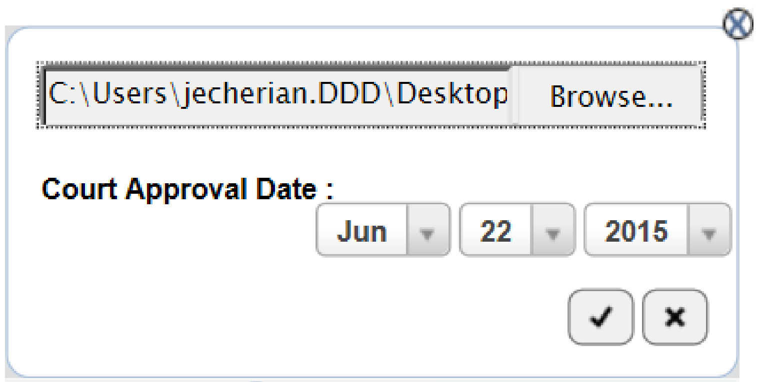
Inactive are contacts that do not interact with the participant any more.

Assessment Informant

An informant is a contact that manages the participant's assessment information.

To add Legal Guardian status

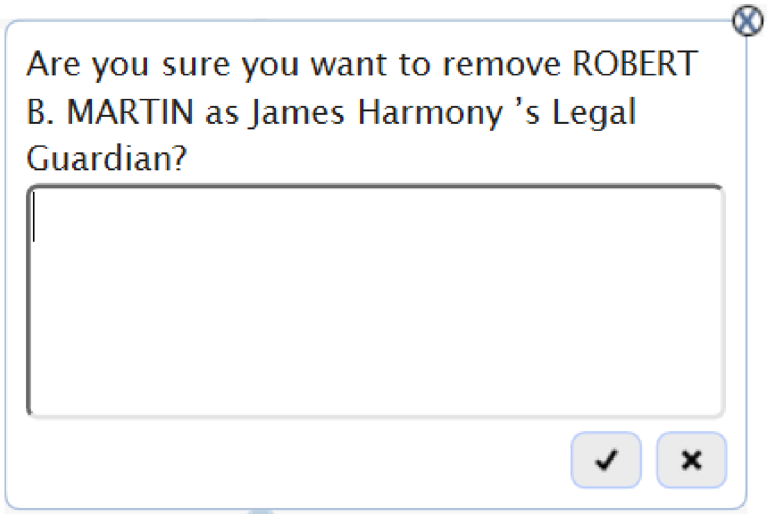
1. On the **Contact Attributes** tile, select the **Legal Guardian** check box. A dialog box appears, as shown.



2. Click or tap the **Upload** button to locate and select the appropriate document, which shows the contact as a court appointed legal guardian.
3. Select the date of approval of legal guardianship from the court, using the **Court Approval Date** check boxes. You cannot select a future date of approval.
4. Click  to save the contact as a legal guardian. The **Contact Attributes** tile, now, shows the **Legal Guardian** check box selected.

To remove Legal Guardian status

1. On the **Contact Attributes** tile, clear the **Legal Guardian** check box. A confirmation dialog box appears, as shown.



2. Click ✓ to remove the contact as a legal guardian.

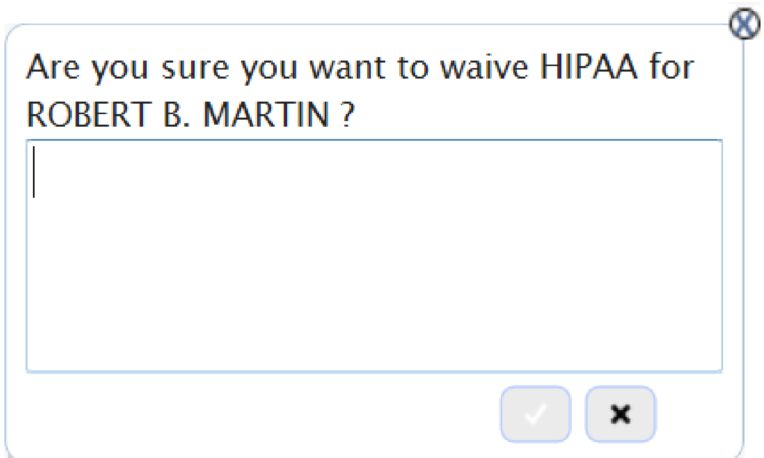
To add HIPAA authorization status

1. On the **Contact Attributes** tile, select the **HIPAA** check box. A dialog box appears, as shown.

2. Click the **Upload** button to locate and select the appropriate document, which shows the HIPAA authorization for the contact.
3. Select the HIPAA authorization document date, using the **Document Date** check boxes. You cannot select a future date.
4. Click or tap ✓ to save the HIPAA authorization of the contact. The **Contact Attributes** tile, now, shows the **HIPAA** check box selected.

To remove HIPAA authorization status

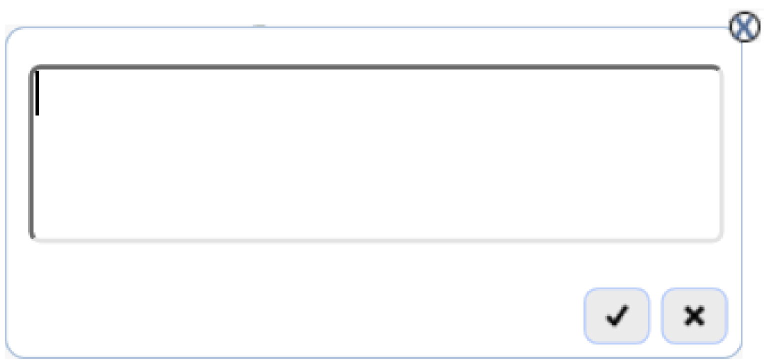
1. On the **Contact Attributes** tile, clear the **HIPAA** check box. A dialog box appears, as shown.



2. Click or tap ✓ to remove the HIPAA authorization of the contact.

To add Inactive status

1. On the **Contact Attributes** tile, select the **Inactive** check box. A dialog box appears, as shown.



Note: When the contact is an assessment informant, you cannot select **Inactive** before another contact becomes an assessment informant.

2. Enter notes for changing the status of the contact to an inactive contact.

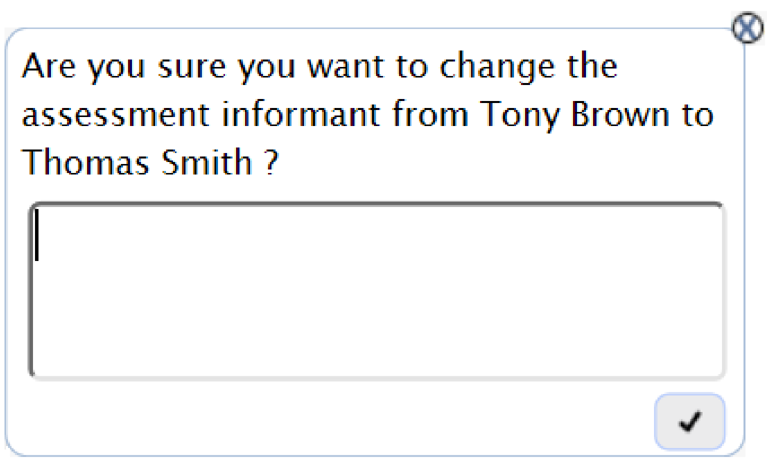
3. Click or tap ✓ to confirm inactive status. The **Contact Attributes** tile, now, shows the **Inactive** check box selected.

To remove Inactive status

1. Add the contact as a new contact.
2. iRecord then prompts you with a message that the contact exists as an inactive contact.
3. You have to confirm that the contact is the same.
4. The contact then becomes an active contact.

To add Assessment Informant status

1. On the **Contact Attributes** tile, select the **Assessment Informant** check box. A dialog box appears, as shown.



Note: When you change the assessment informant, view an appropriate message confirming the change from the previous assessment informant to this contact.

2. Enter notes to change the assessment informant.
3. Click or tap ✓ to save the contact as an assessment informant. The **Contact Attributes** tile, now, shows the **Assessment Informant** check box selected.

To remove Assessment Informant status

1. On the **Contact Attributes** tile, clear the **Assessment Informant** check box. You have to select a different assessment informant before clearing the attribute.
2. Click or tap ✓ to remove the contact as an assessment informant.

5 Plans

Plans on the **Main Toolbar** manage the plan related information of the participant.

Once a participant is assigned to an SC Agency, view the ☰ icon. Click to view the Plans menu options, which are:

- Enroll
- SC Agency Assignment
- View Change Log
- Plan History

There are two tabs, which are:

- Plans
- Actions

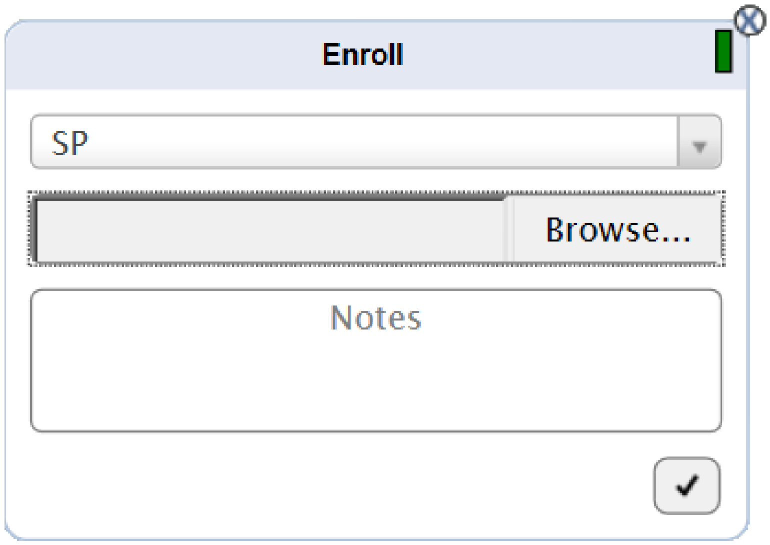
View the **Outcomes** tile on left navigation, which displays a list of the obligated outcomes for the current plan.

5.1 Enroll

The iRecord interface handles enrolling consumers into programs. You, based on user permissions, can enroll a participant to a program provided the participant is assigned to an SC Agency and the eligibility conditions have been met.

For permissions, refer to User Privileges.

The tile below displays a typical **Enroll** interface on the iRecord application.



Field	Description
Program Name	Select the program name from the drop-down list. These are the only two options that appear based on the eligibility: • Supports Program • CCW (Community Care Waiver)
Participant Agreement File	Select the participant agreement file signed by the participant. The signed document is made available electronically by the support coordination agency and uploaded to DDD. Select the signed document to begin the upload.
Notes	Enter the notes about the enrollment.
Status Indicator (right side of tile header)	The status indicator indicates the status of enrollment. Hover on status indicator displays the conditions for enrollment on a tooltip.

5.2 SC Agency Assignment

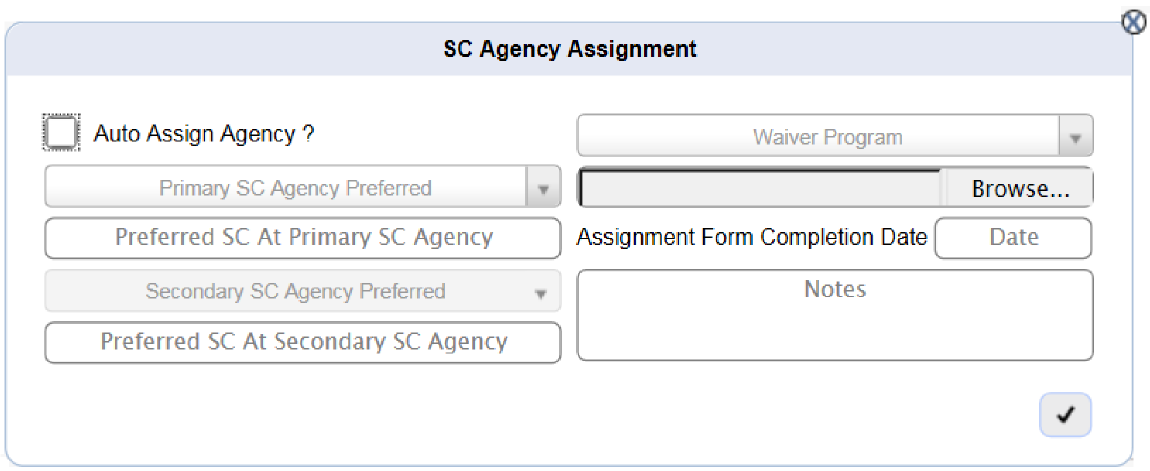
Each participant is assigned to an SC agency. iRecord assigns a participant to a Support Coordinator with the SC Agency Assignment interface. The interface is available only to the SWAC user role.

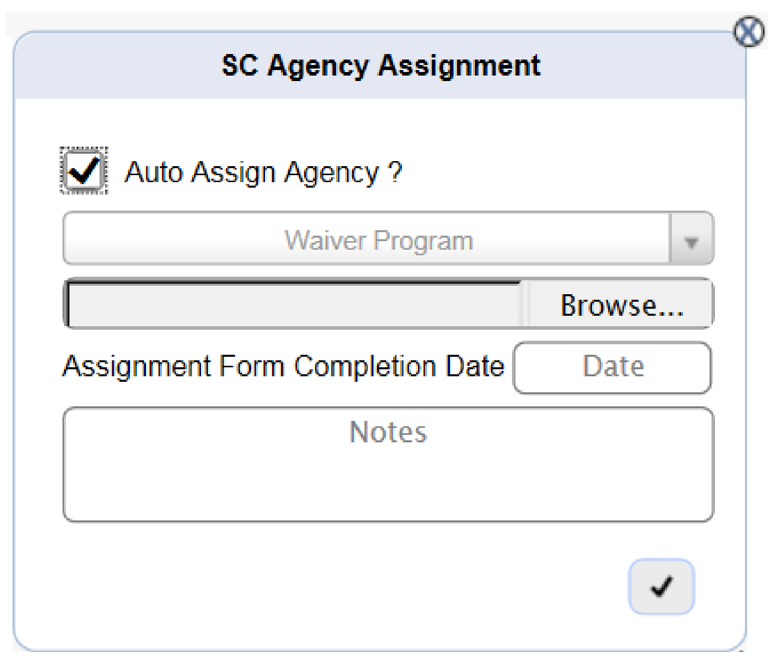
In addition to assigning an SC agency, it is also possible to reassign a participant to another agency.

iRecord allows agency assignment or reassignment once the following conditions are satisfied:

- Participant has a valid county of residence.
- Participant has an assessment with FCA as 1 or has an override date.
- Participant has an ICD10 with supporting documentation
- Participant is Medicaid eligible.

Refer to the following table for the fields within the **SC Agency Assignment** tile. The two figures below display the **SC Agency Assignment** with **Auto Assign Agency** check box clear and selected.





Field	Description
Auto Assign agency	Select the check box for an automatic agency assignment. iRecord displays Preferred Agency Assignment view with a clear check box. iRecord displays Auto Agency Assignment view with a selected check box.
Primary Agency Preferred	Select an SC agency as a participant's primary preference from the drop-down list.
Preferred SC at Primary SC Agency	Enter the preferred SC at the primary SC agency within the text box.
Secondary Agency Preferred	Select an SC agency as a participant's primary preference from the drop-down list.
Waiver Program	Select a waiver program from the drop-down list.
Preferred SC at Secondary SC Agency	Enter the preferred SC at the secondary SC agency within the text box.
Browse	Click the button and select the file using the **Choose File to Upload** dialog box.
Assignment Form Completion Date	Select assignment form completion date using the calendar controls or enter the date. Format: MM/DD/YYYY
Notes	Enter any relevant notes for agency assignment. Mandatory/Optional: Optional Max limit: 1000 characters

Conditions

- iRecord verifies the conditions on the tile for agency assignment as follows:
    - In the event of primary SC agency meeting the assignment requirements, participant is assigned to the primary SC Agency.
    - In the event of primary SC agency not meeting all of the assignment requirements and a secondary SC Agency has been selected by the user, iRecord verifies whether

the secondary SC Agency meets the assignment requirement. The participant is then assigned to the secondary SC Agency if it meets the assignment requirement.
  - In the event of secondary SC agency that does not meet the assignment requirements; participant is assigned to the next available SC agency by using an auto assign algorithm.
  - In the event of primary SC Agency that does not meet all of the assignment criteria and not selected a secondary agency, participant is then assigned to the next available SC agency by using an auto assign algorithm.

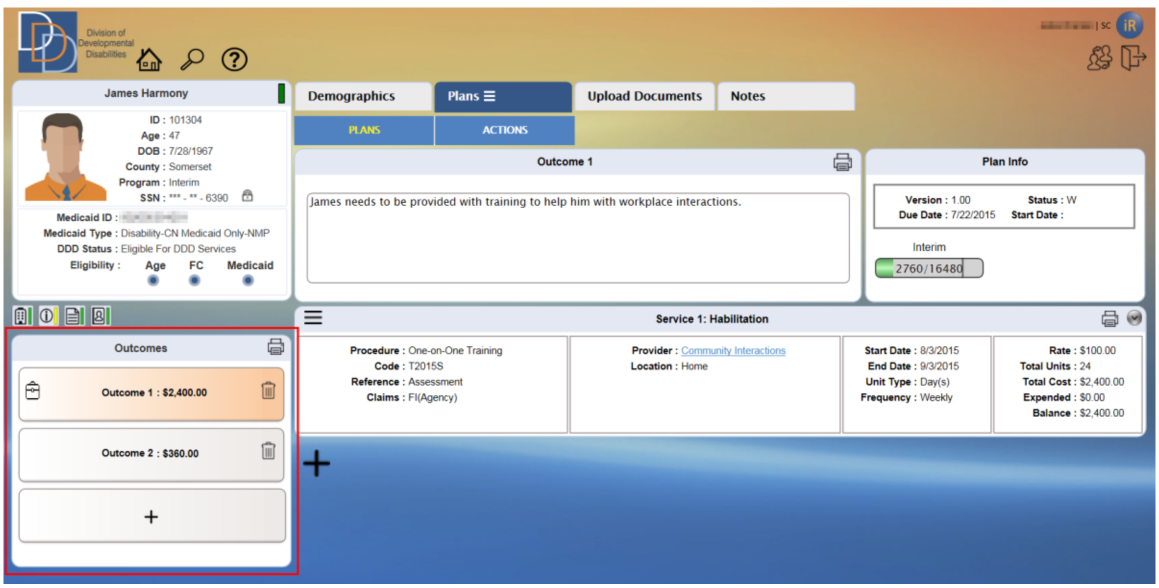
- iRecord displays a confirmation message with successful assignment or reassignment.
- An adequate system generated note includes the condition for a successful assignment or reassignment to a particular agency.
- With agency reassignment, iRecord performs the following functions based on the status of a plan and the future plan cycle.

Plan Status	Function
W	iRecord reassigns the participant to the new agency under Plan ID 1.00 and W status in the new agency with the outcome and services written by the previous SC, if any.
R, RV	iRecord reassigns the participant to the new agency with the same plan version in W status. A Plan Note is generated when a plan in W status is reassigned to another agency: Plan Status changed to Work In Progress as a result of agency reassignment.
RI, SR1, SR2	iRecord reassigns the participant to the new agency with the same plan version under W status and update the related event status to Plan Work In Progress (PW) status that closes the event. A Plan Note is generated: Plan Status changed to Work In Progress as a result of agency reassignment.
RR	iRecord reassigns the participant to the new agency with the same plan version under RR status with the outcome and services written by the previous SC, if any.

A	iRecord assigns the participant to the new agency and generate a new micro plan under W status.
AI	iRecord assigns the participant to the new agency and generate a new macro plan under W status.

5.3 Outcomes Obligated

iRecord maintains a tile interface for quick navigation to the obligated outcomes on the current plan. It appears on the left navigation of **Plans** with **Outcomes** on the tile header. Your user role determines the permission on the tile.

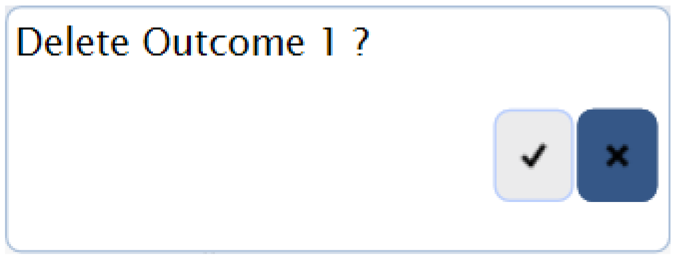


5.3.1 Outcomes Tile

- The **Outcomes** tile lists the outcomes in increasing numerical order with their obligated amounts. Click an outcome to view the details of the outcome on the workspace.
- The icon on an outcome indicates that it is an employment related outcome.
- You can add an outcome only when the plan is in W or RV status. With this status, view the + button on the tile. Click + for the add outcome pop-up tile to appear on the workspace.
- The icon displays on an outcome when you have the option of deletion. The option depends on these conditions:

- For an approved outcome, the plan must be in W or RV status and the services in the outcome must have a future approved date.
- For an unapproved outcome, the plan must be in W or RV status.

- Click and a confirmation message appears, as shown. Click and delete the outcome.



- View icon on the tile header. This is unavailable with no outcomes. Click to print a report that contains the details of all the outcomes on the current plan.

5.4 Outcomes

An outcome represents the change that the participant hopes to achieve within a plan. A plan may have multiple outcomes; each outcome working towards implementing positive action steps for the participant. In order to add an outcome to a plan, it is mandatory for the plan to be either in Work-In-Progress (W) or Revision (RV) status. These are the main points that should be kept in mind while adding an outcome:

- Note the participant's desired achievement
- Write in future tense
- Add one outcome per outcome
- Include at least one employment related outcome
- Individualize the outcomes

5.4.1 Exceptions

Exceptions are a term that refers to the participant requiring a change in the service from the normal pattern for any particular week during the course of the plan. The Exceptions follow these rules:

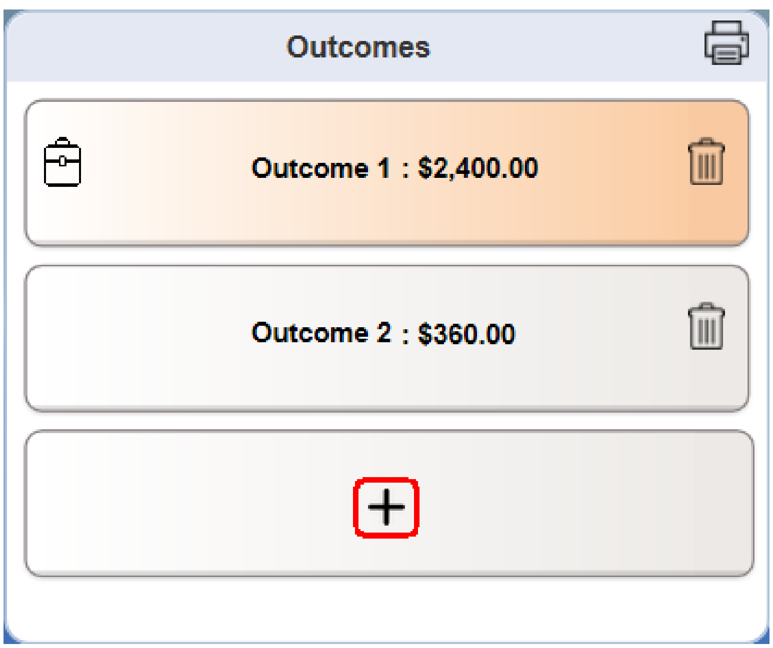
- The week starts on a Sunday and ends on a Saturday, irrespective of the start or end date, for all weeks in the exception calendar.

- For a start date or end date that falls in between the week range, you have a system enforced exception. In both these cases, iRecord calculates the units based on the percentage of available days in that week range. The same percentage is then applied to the average units and then rounded off to the higher value.
- For an exception with the selection of **Exclude Weekends** and the start of the service on a Monday or end of the service on a Friday, you do not have a system enforced exception.
- With the selection of the **Exclude State Holidays** check box, the **Average Units** may not fit into a particular week. In this case, you have a system enforced exception.
- You can edit a system enforced exception, but only to a lower unit.
- You cannot delete a system enforced exception.

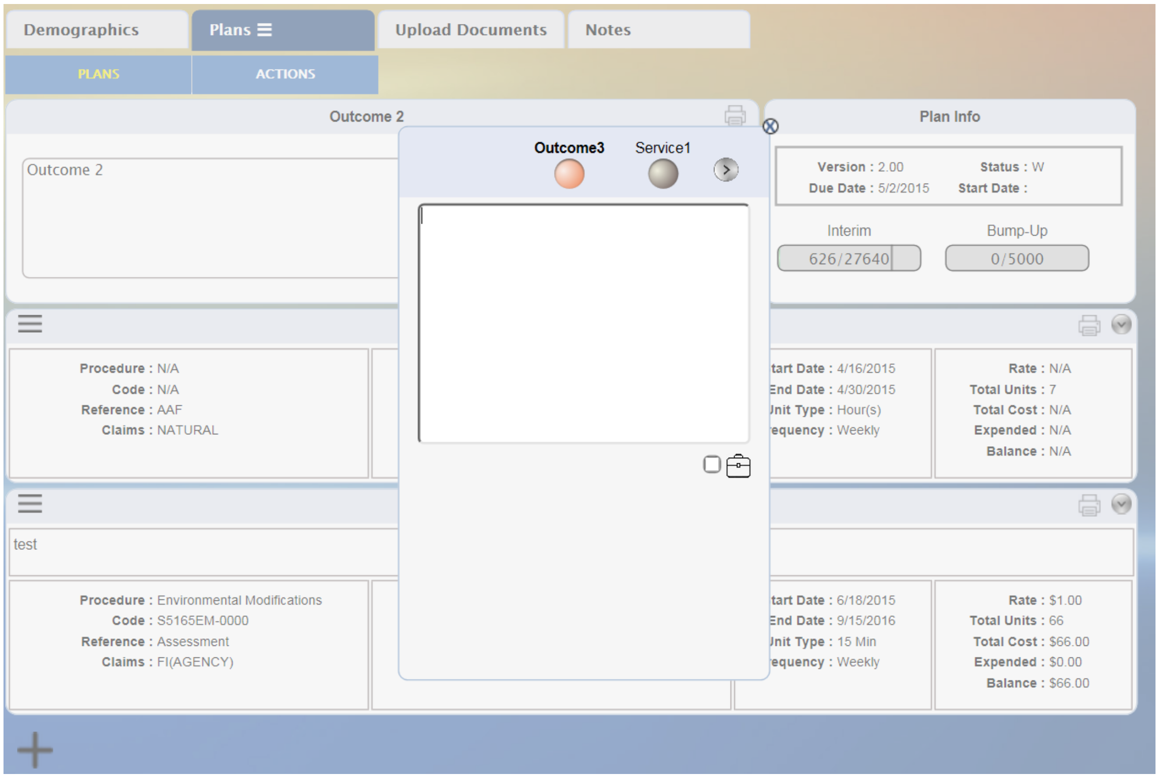
To add an Outcome

1. Click the + button on the **Outcomes** tile displayed on the left navigation of the **Plan** tab, indicated in the figure below.

Note: To add an Outcome, the Plan status must be either in W (Work-In-Progress) or RV (Revision).

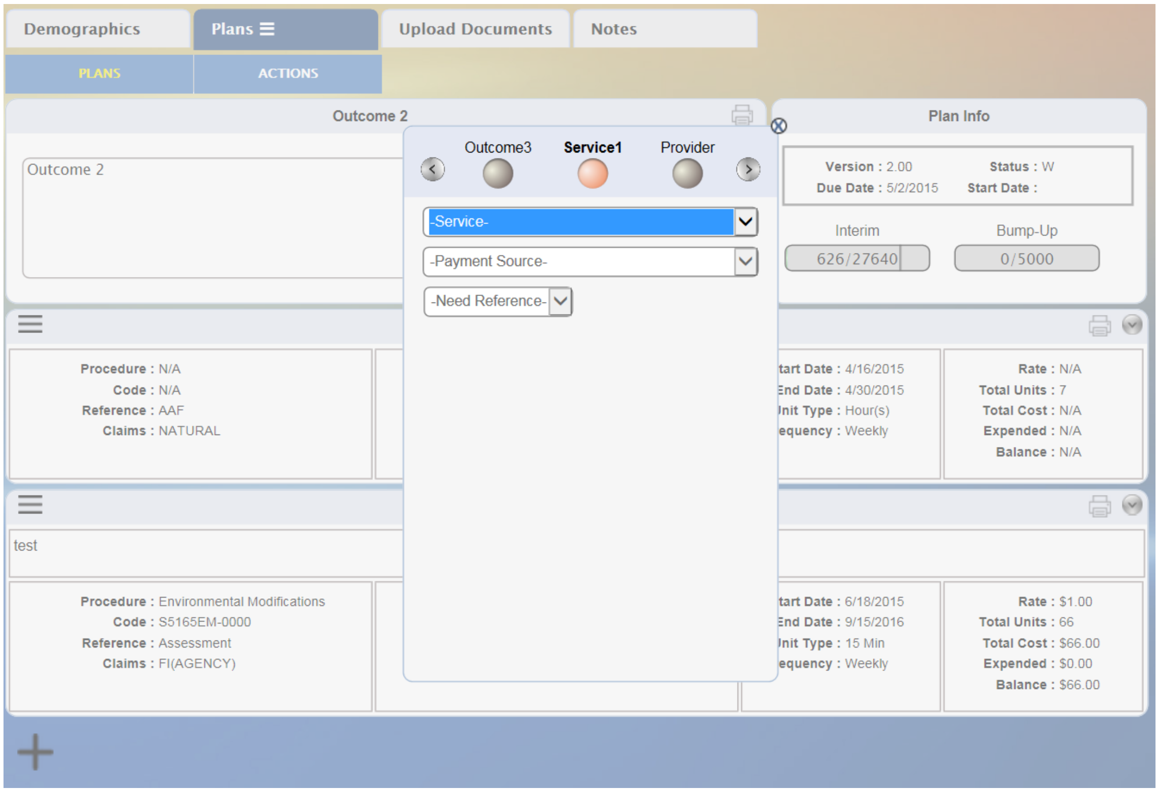


2. A pop-up tile appears, as shown below, to add the outcome details. View the appropriate outcome number on the header. Enter the details on this tile. For more information, refer to the following table.



Field	Description
Enter outcome description	Enter an appropriate description for the outcome. It is important to note that the description must be written in future tense. Mandatory/Optional: Mandatory Maximum limit: 500 characters
	Select the check box to indicate that the outcome is an employment related outcome.

3. Click and the service controls appear on the tile, as shown below. The header displays **Service 1**, since it is the first service for a new outcome. For subsequent services, the service number takes the numerical order.



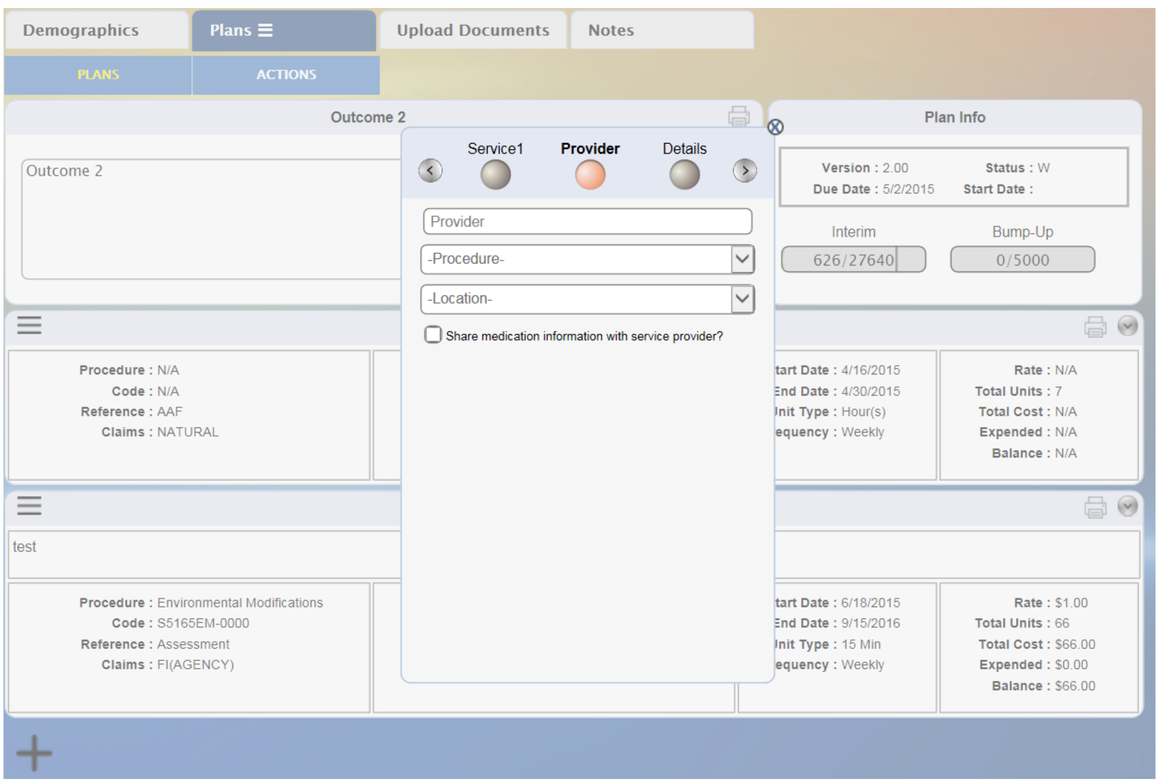
Note: Click  on the tile header to edit the previous controls.

4. Enter the appropriate details of the service. For more information, refer to the following table.

Field	Description
Service	Select the service from the drop-down list. The service options are based on the participant's program type. Mandatory/Optional: Mandatory
Payment Source	Select the payment source from the drop-down list. The options that appear depend on the particular service. The complete list of options are: • DDD Contract • FI (Agency) • Natural • Generic • Medicaid • DVRS

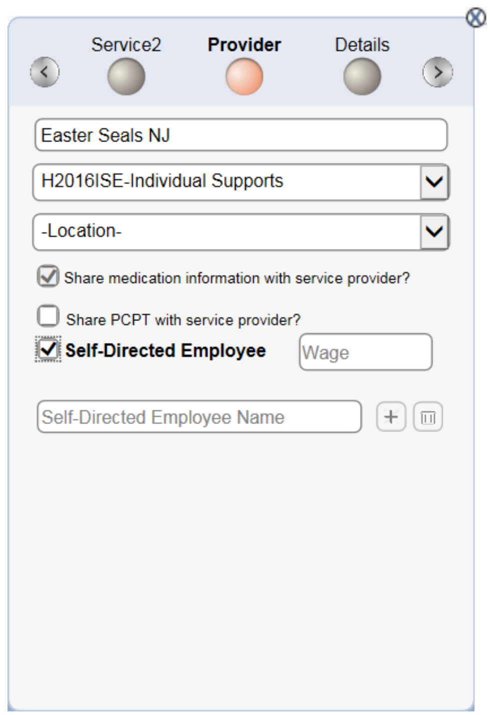
	Mandatory/Optional: Mandatory
Need Reference	Select the reference document for the particular service. The options are: • Assessment • PCPT • Other Mandatory/Optional: Mandatory
Reference Document	This field appears only with **Other** for **Need Reference**. Select the reference document from the drop-down list. Mandatory/Optional: Mandatory

5. Click and the **Provider** controls appear on the tile, as shown below.

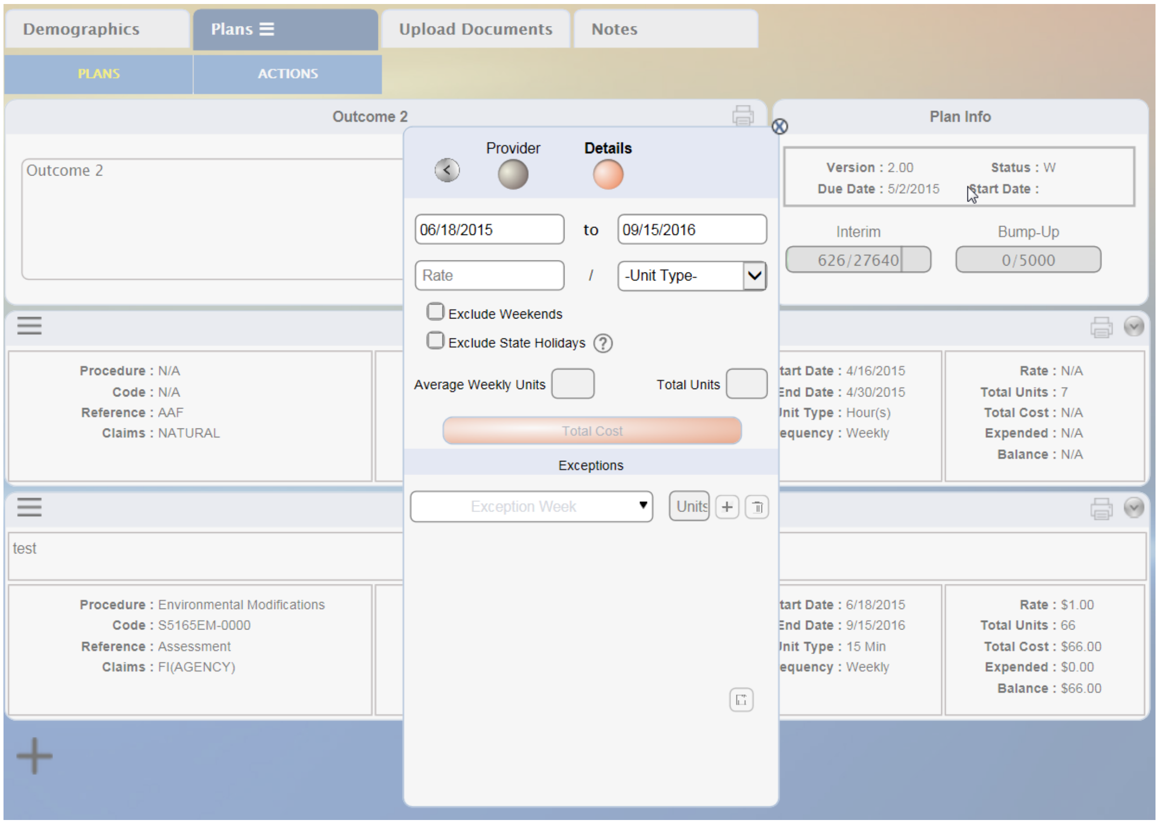


6. Enter the appropriate details of the provider. For more information, refer the following table.

Field	Description
Provider	Enter the provider within the text box. You can also select the provider from the list that appears as you type into the box. Mandatory/Optional: Mandatory
Procedure	Select the procedure from the drop-down list. The options that appear depend on the selected service, payment source and provider. Mandatory/Optional: Mandatory
Location	Select the location from the drop-down list. The options shown are the locations provided by the service provider for the approved services. Mandatory/Optional: Mandatory
Share medication information with service provider?	This field provides the participant an option to share the medication information with the provider. Select the check box to indicate that the participant permits sharing the medication information with the provider.
Share PCPT with service provider?	This field provides the participant an option to share the PCPT information with the provider. Select the check box to indicate that the participant permits share of PCPT with the provider.

Self-Directed Employee	To view this field, the following conditions need to be met: • Payment source is FI • Provider is Easter Seals • Self-directed employee available for the procedure The provider has to meet certain conditions to be hired as a self-directed employee. Select the check box for self-directed employee. In case the procedure has been already identified to a self-directed employee, the check box is automatically selected and unavailable to the user. 
Wage	This field appears with the selection of the **Self-Directed Employee** check box. Enter the wage for the self-directed employee provider.
Self-Directed Employee Name	This field appears with the selection of the **Self-Directed Employee** check box. Enter the name of the provider hired by the participant. Click + to add a self-directed employee provider. The provider is then shown below. Select the self-directed employee provider and click for deletion.

7. Click  and the **Details** controls appear on the tile, as shown below.



8. Enter the appropriate details on the provided screen controls. For more information, refer to the following table.

Field	Description
Start Date	Select the start date of the service from the calendar that appears when you click within the box. Mandatory/Optional: Mandatory
End Date	Select the end date of the service from the calendar that appears when you click within the box.
Rate	Enter the rate of the selected service. For a self-directed employee with **Wage**, iRecord calculates the rate based on a formula and the field cannot be edited. Mandatory/Optional: Mandatory
Unit Type	Select the unit type from the drop-down list for defining the rate of

	the selected service. The options are: • 15 min • 30 min • Hour • Day • Service • Trip • Mile Mandatory/Optional: Mandatory
Exclude Weekends	Select the check box to exclude weekends for the selected service.
Exclude State Holidays	Select the check box to exclude state holidays for the selected service between the start and end dates. This field is available only with the selection of **Day** for the **Unit Type**. Click ? to view the list of state holidays between the start and end dates of the service.
Average Weekly Units	Enter the number of weekly units planned for the service. You cannot exceed a number beyond the total number of available units.
Total Units	View the total number of units for the service. This field takes into account of the regular weekly units and the exception units.
Total Cost	View the total cost of the service.
Exceptions	
Exception Week	Select the weeks that the participant plans to have an exception for the service. The exception includes any change in the service for a particular week. The week starts on a Sunday and ends on a Saturday, irrespective of the start or end date. The drop-down list displays the weeks extending from the current date to the end of the plan term. For a plan term that is not set, the week range extends from the current date up to 455 days. Select the check box adjacent to the displayed week to include the same week for the exception. For identical units, you may either add the exception week one at a time or together. With different units, you have to add those exception weeks separately.

Units	Enter the appropriate units for the selected exception week(s). Click and add the selected exception details. Each exception week and the respective units are then displayed below in a grid in the chronological order. The grid displays the week number, the start and end date of the week, and the number of units. Locate and click the exception on the grid. The week and the units appear within the **Exception Week** and **Units** box. To edit, enter the new units and then click . To delete, click . You cannot delete a system enforced exceptions.

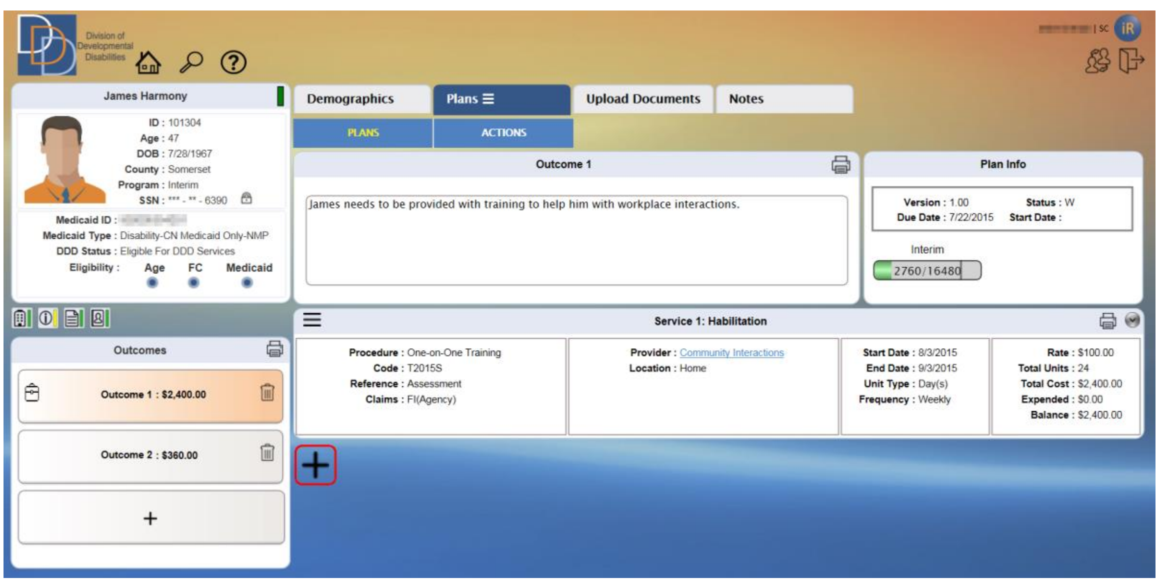
Note: Use or on the tile header to browse through **Outcome**, **Service**, **Provider** and **Details** information. You can edit the fields before saving the outcome.

9. Click to save the Outcome.

Note: You cannot save the outcome once the budget exceeds the total allocated budget.

10. To add another service, click the new outcome on the **Outcomes** tile on the left navigation. The Outcome information appears on the workspace.

11. Click , indicated in the figure below.

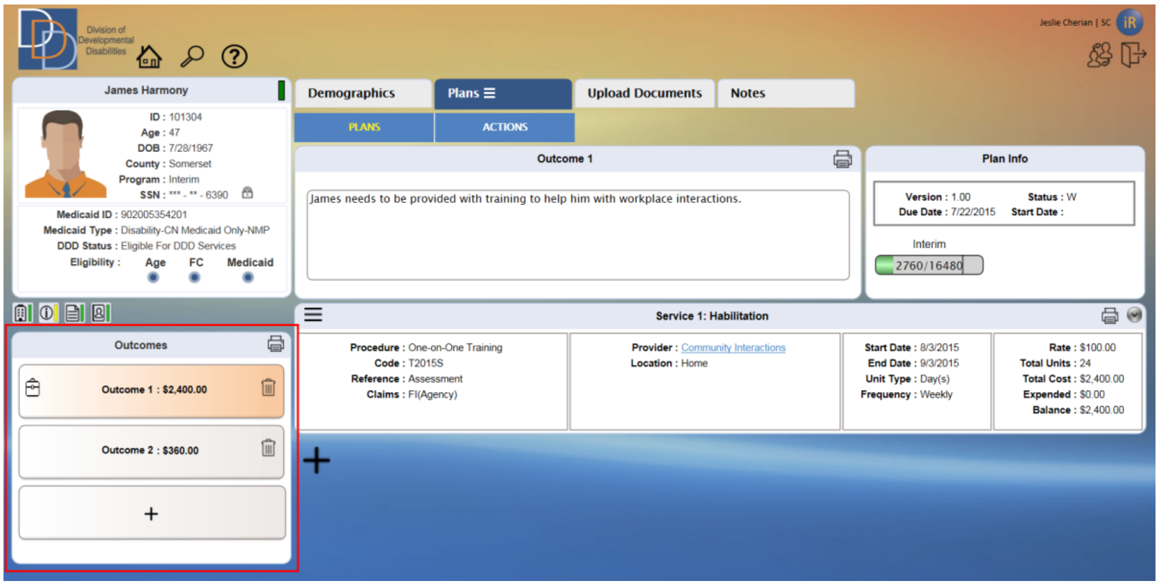


12. The service controls for the appropriate outcome appears as a pop-up tile. The header displays **Service 2**. Follow the steps from 4 to 9.

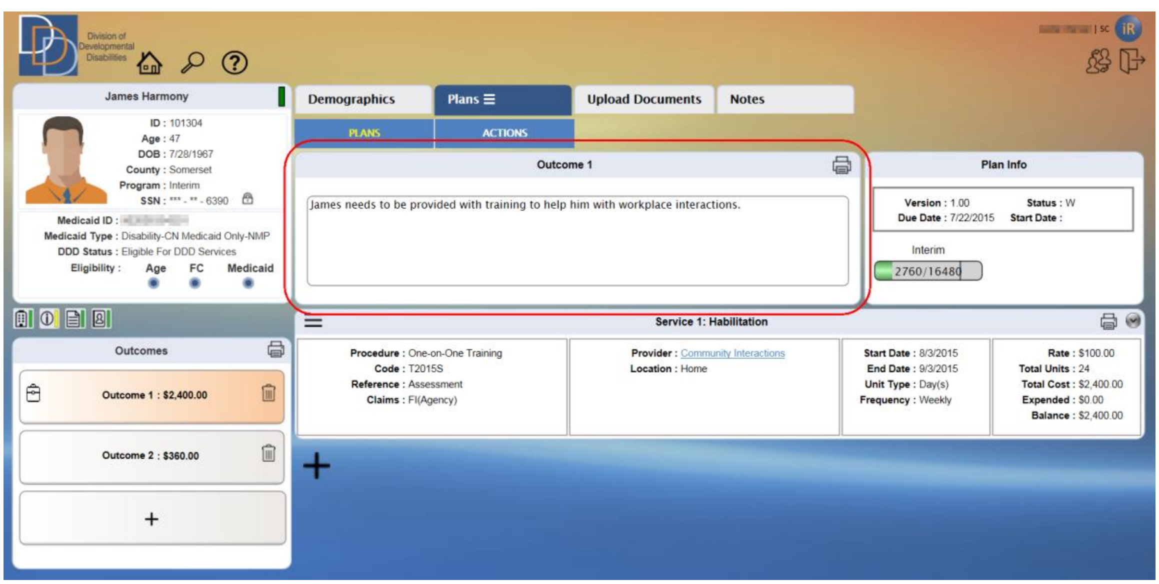
To edit an Outcome

1. Click the appropriate outcome on the **Outcomes** tile on left navigation, indicated in the figure below. The information for the selected outcome appears on the workspace.

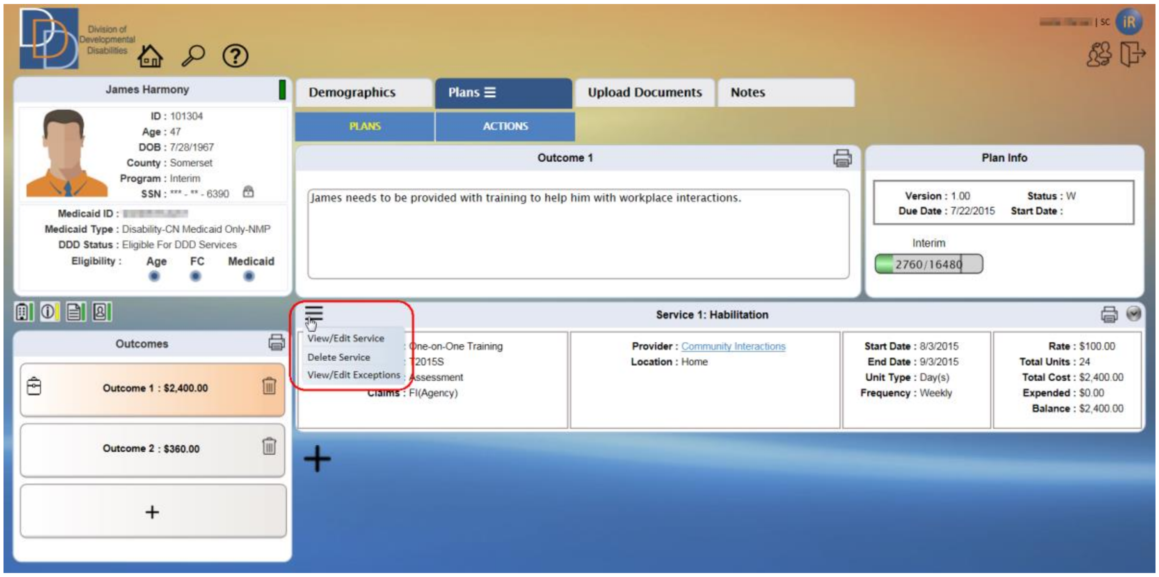
Note: To edit an Outcome, the Plan status must be either in W (Work-In-Progress) or RV (Revision).



2. You can edit the **Outcome Description** by clicking within the box, indicated below, and then make change.



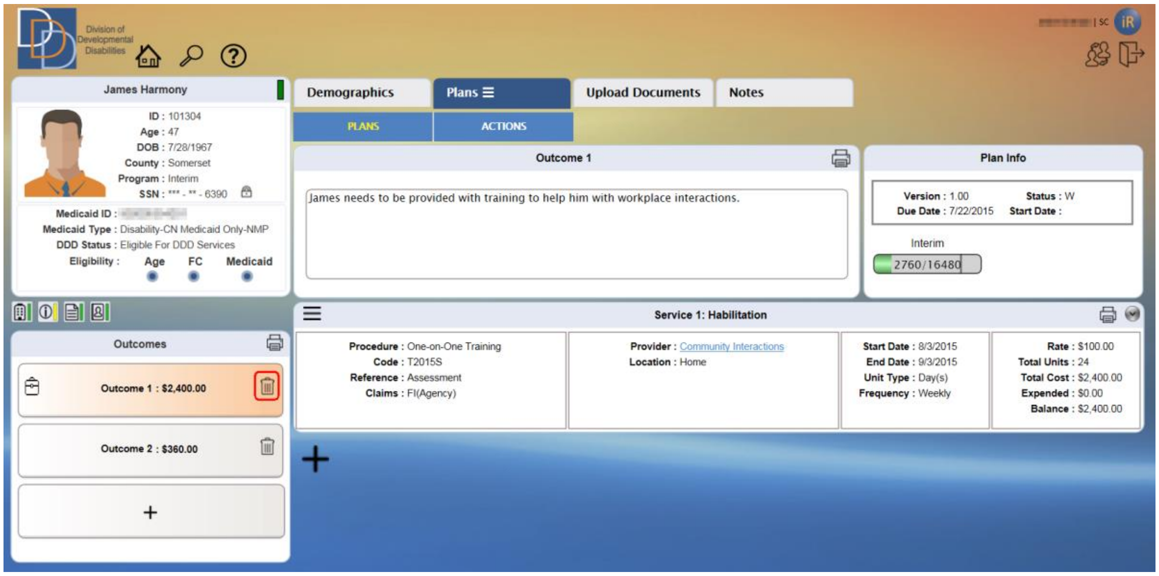
3. Click on the tile header of the appropriate service, indicated below, and then click the **View/Edit Service** option.
   To edit only the exceptions within the service, click the **View/Edit Exceptions** option.



4. For the View/Edit Service option, the pop-up tile appears with the relevant information. Use or on the tile header to browse through **Outcome**, **Service**, **Provider** and **Details** information and edit the appropriate details.
   For the **View/Edit Exceptions** option, the pop-up tile displays the **Details** of the service.
   For more information on the fields, refer to the appropriate section in [To add an Outcome](#).
5. Click on **Details** to save the edited information.

To delete an Outcome

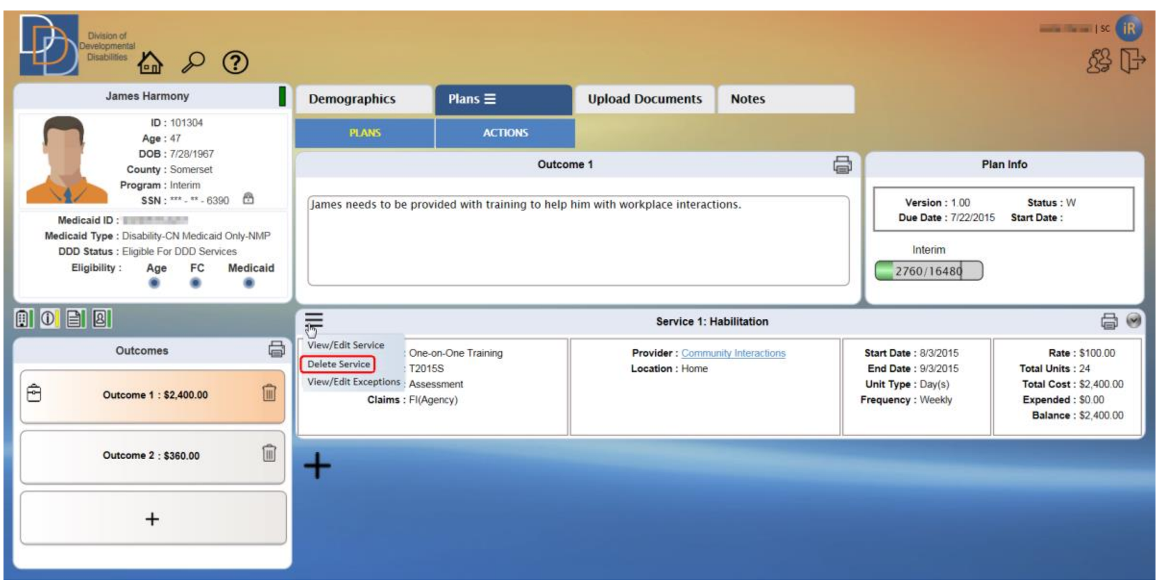
- Click adjacent to the Outcome, as shown in the example below, on the **Outcomes** tile on the left navigation.



Note: To delete an Outcome, the Plan status must be in W (Work-In-Progress) or RV (Revision). An additional condition with an approved outcome is that all services must have a future start date.

To delete a Service

- Click ☰ on the tile header of the appropriate service, indicated below, and then click the **Delete Service** option.



Note: To delete a Service, the Plan status must be in W (Work-In-Progress) or RV (Revision). An additional condition with an approved outcome is that the service must have a future start date.

5.5 Expenditure

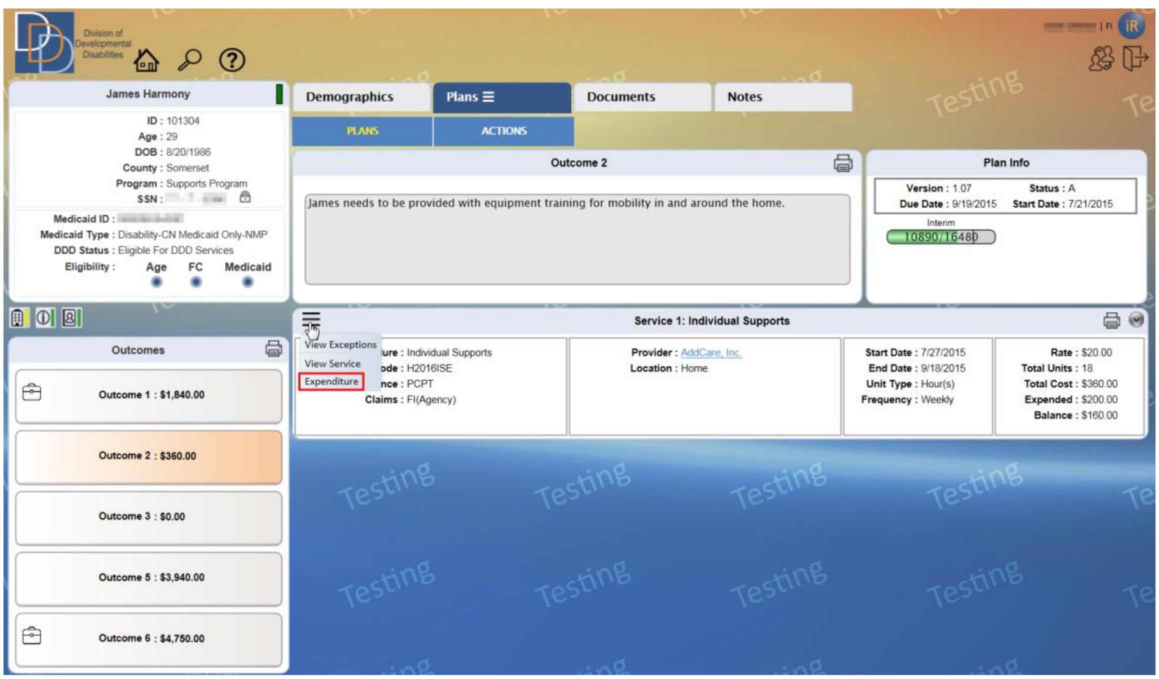
Expenditure is a new feature on iRecord. It provides the FI or SFI to post expenditure for a service. The option to post expenditure depends on the status of the plan and the payment source of the service. Expenditure is available for an approved plan (most recent macro plan and any of its approved revisions) and a service with the Fiscal Intermediary payment source.

Refer to User Privileges to view the available permissions for your user role.

5.5.1 Expenditure Tile

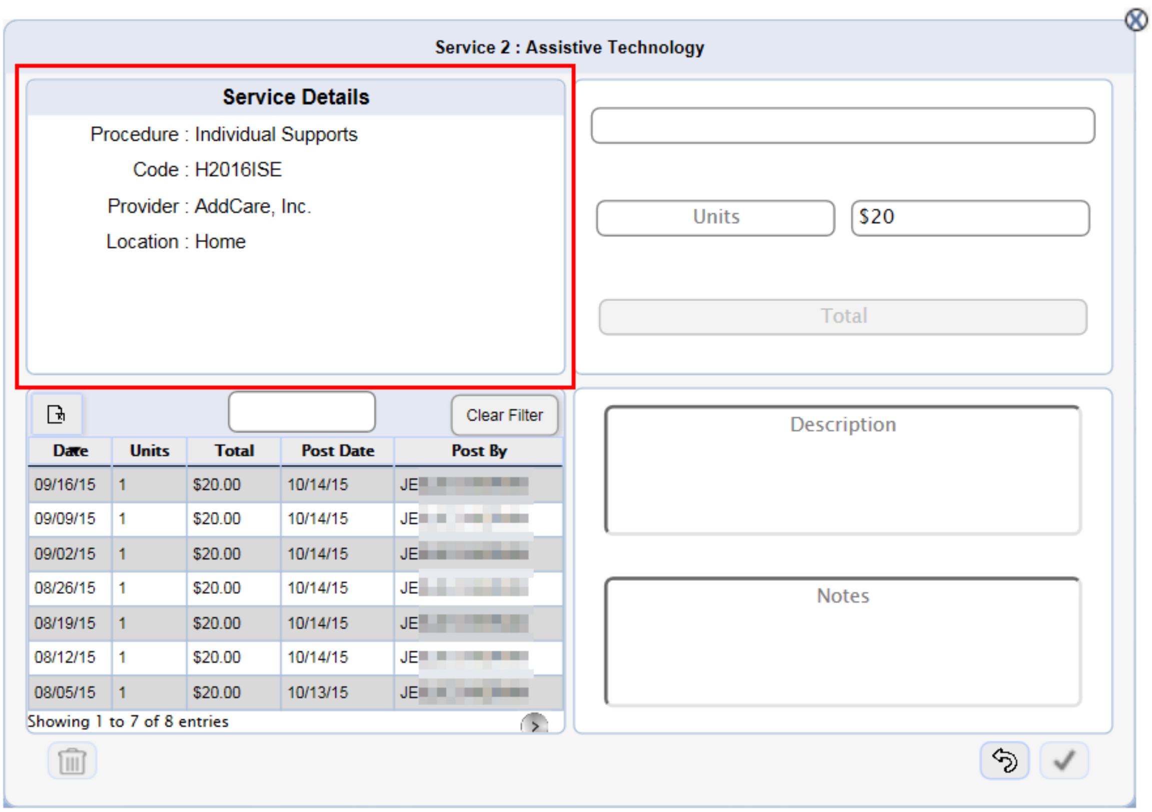
The Expenditure pop-up tile is available from the menu options of the appropriate service on an approved plan, shown in the following figure.

The tile is divided into 3 sections.



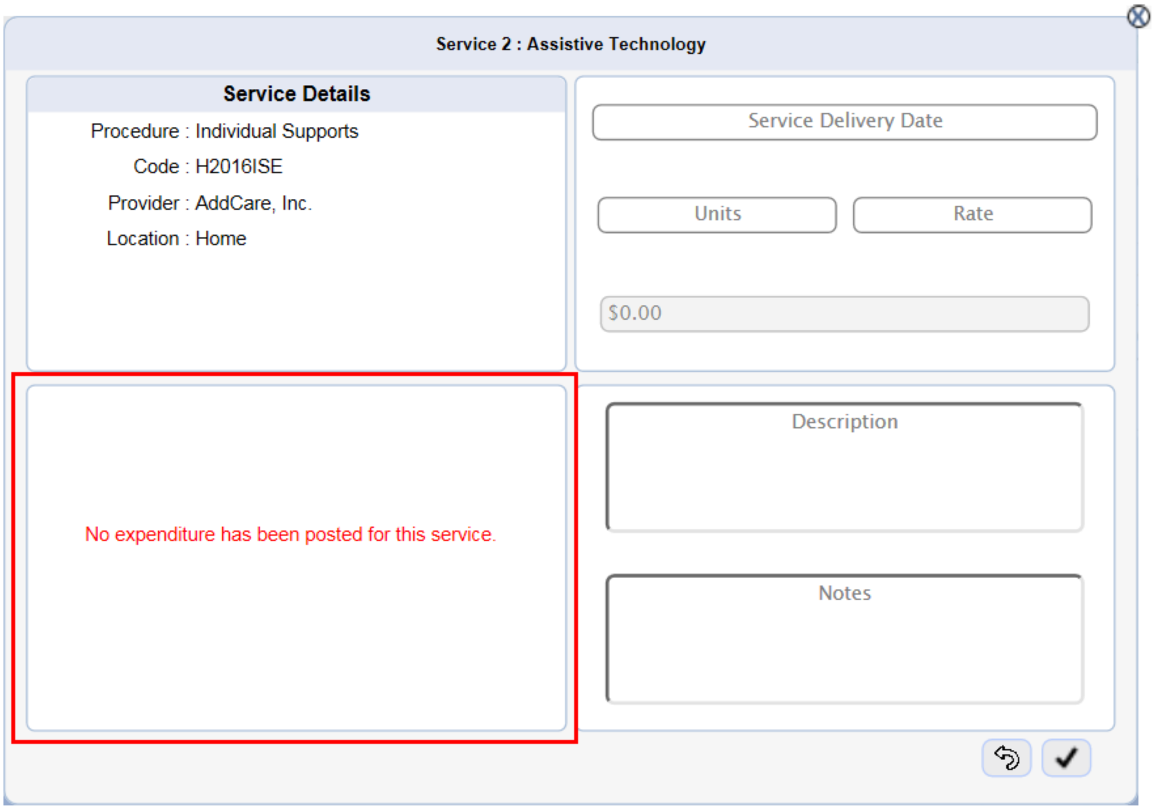
Service Details

- The **Service Details** is self-explanatory and lists the basic information of the service, as shown in the following figure. For a service provided by an SDE (Self-Directed Employee), this section also displays the name of the provider.

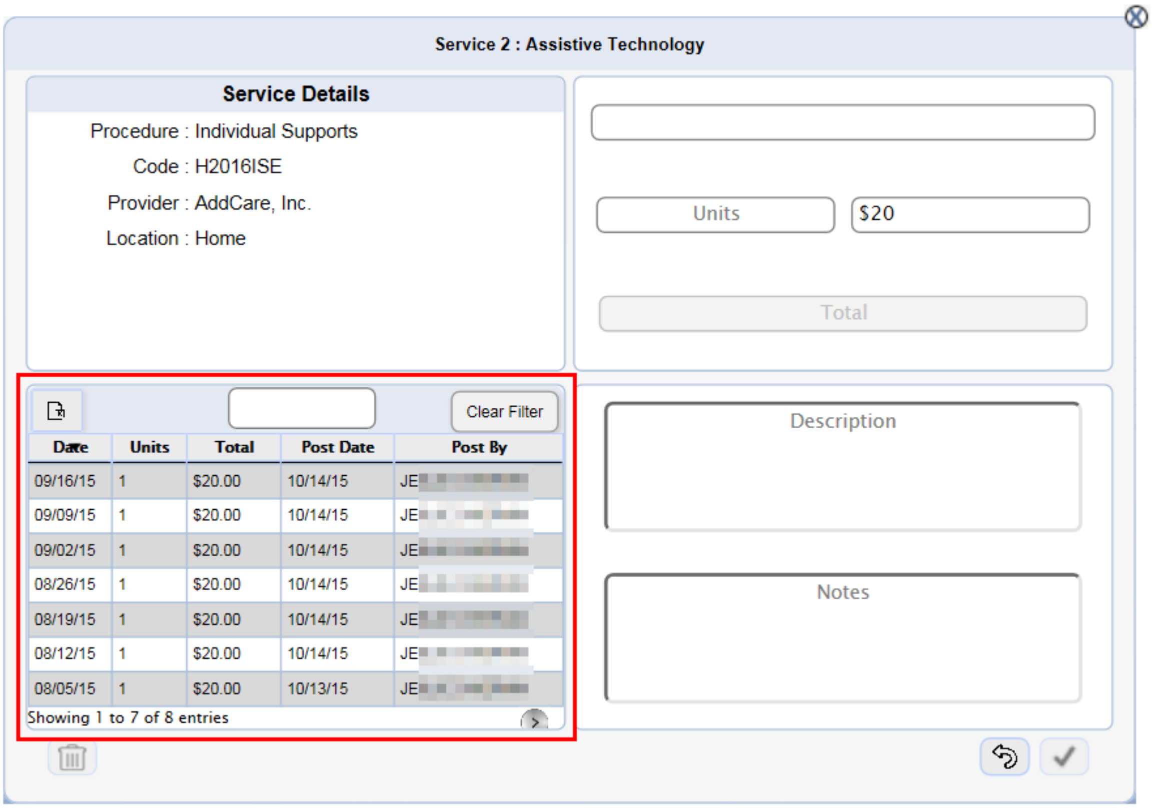


Expenditure Grid

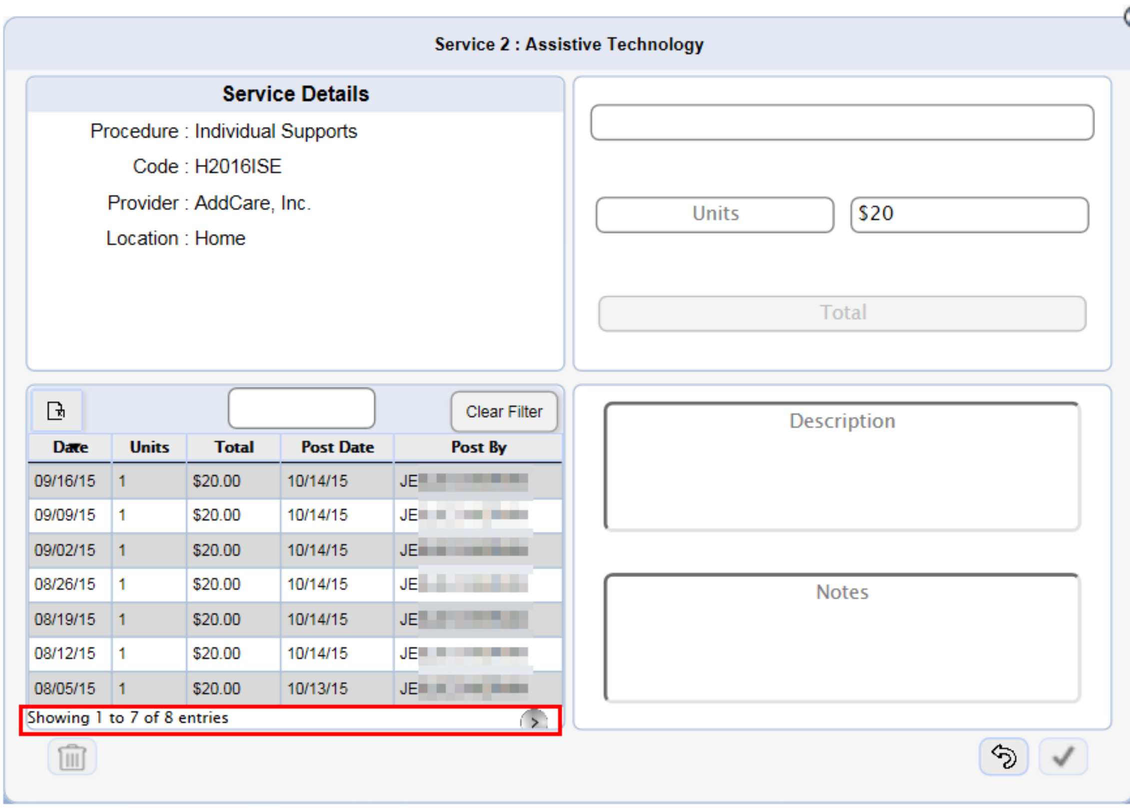
- View the message, shown in the following figure, for a service that does not have any posted expenditure.



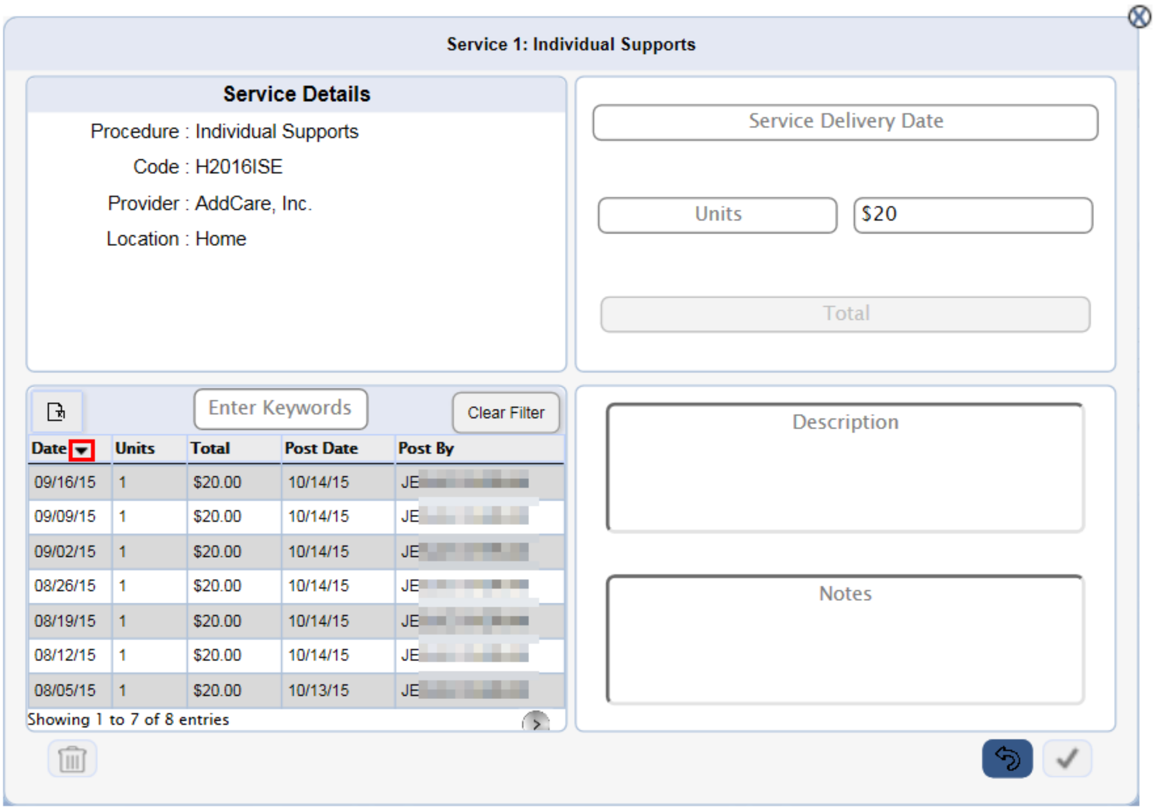
- For a service with posted expenditure details, view the grid as shown in the following figure.



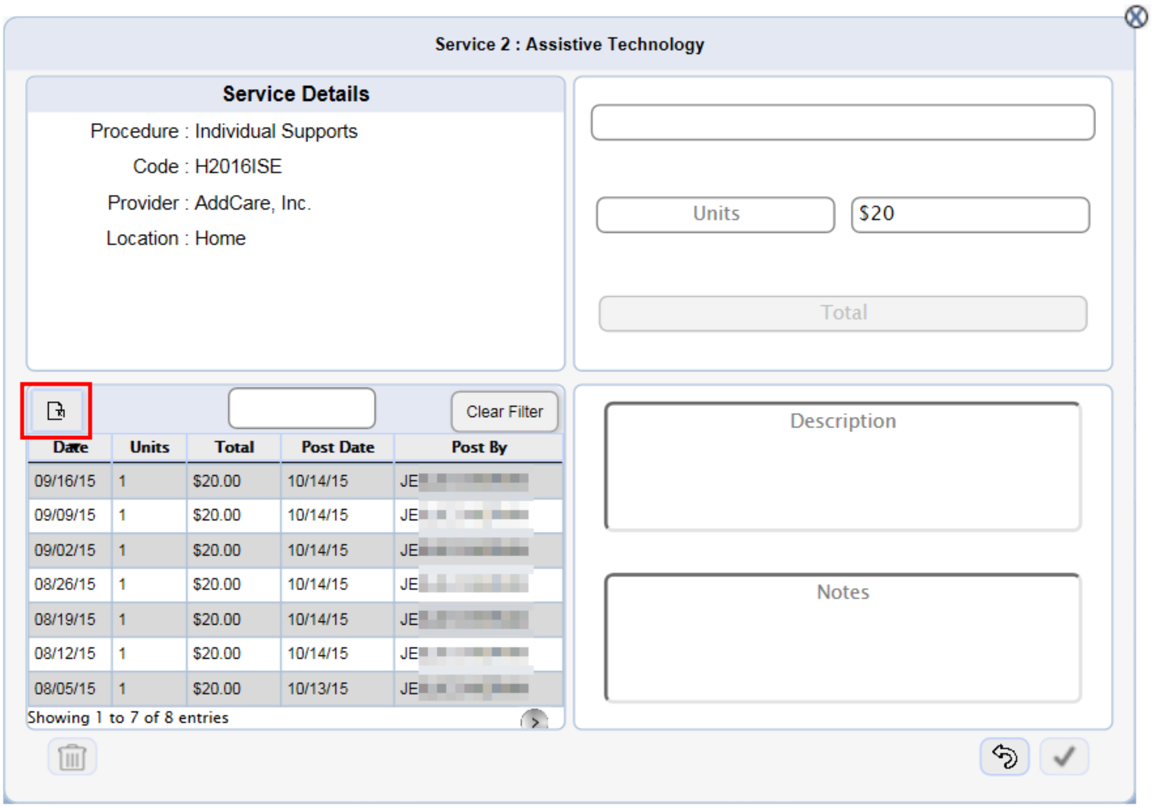
- By default, the grid displays a maximum of 7 rows. At the bottom of the grid, view the total number of entries. Click (>) to view the next 7 entries. Click (<) to view the previous 7 entries (when applicable).



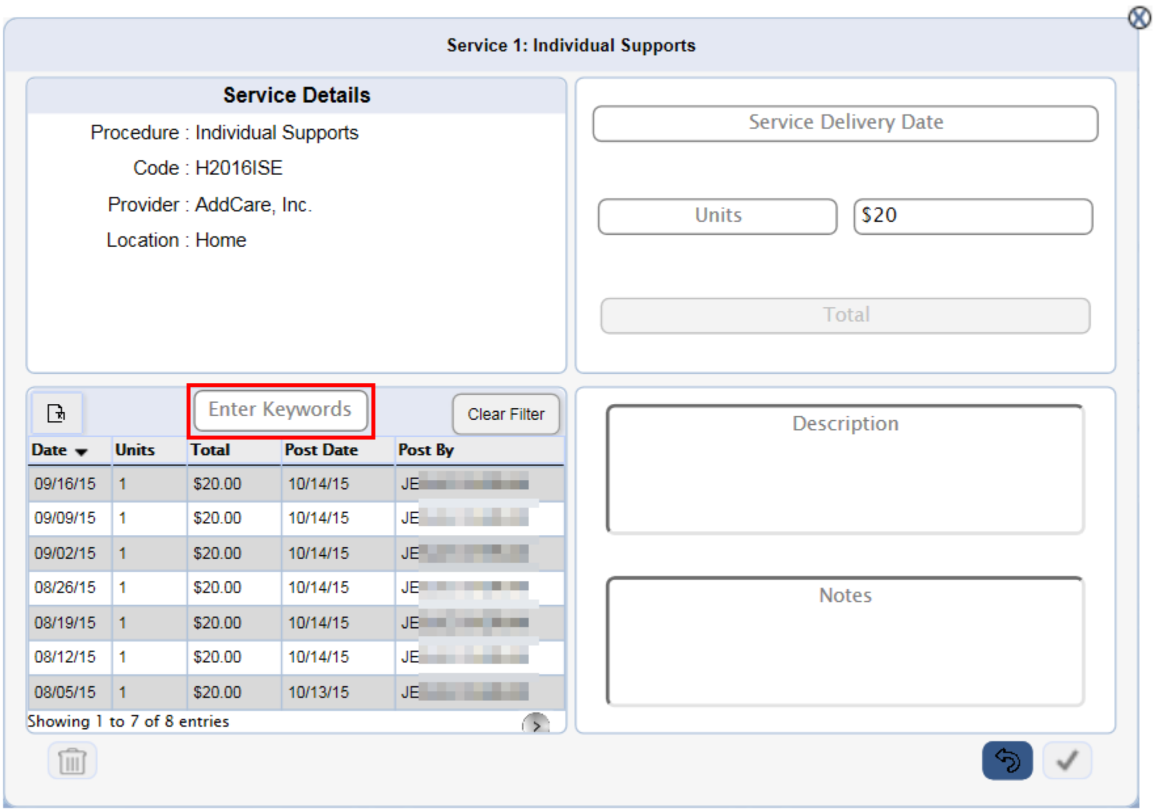
- Sort the grid from any column in ascending or descending order. By default, the grid is sorted in the descending order of **Date**. View ▼ or ▲ adjacent to the column header that sorts the grid (the grid is sorted according to the column that displays the icon). ▼ represents a descending order sort and ▲ denotes an ascending order sort.



- Export the grid details to an Excel file using the icon. Click and iRecord opens the **Save As** dialog box on your device.

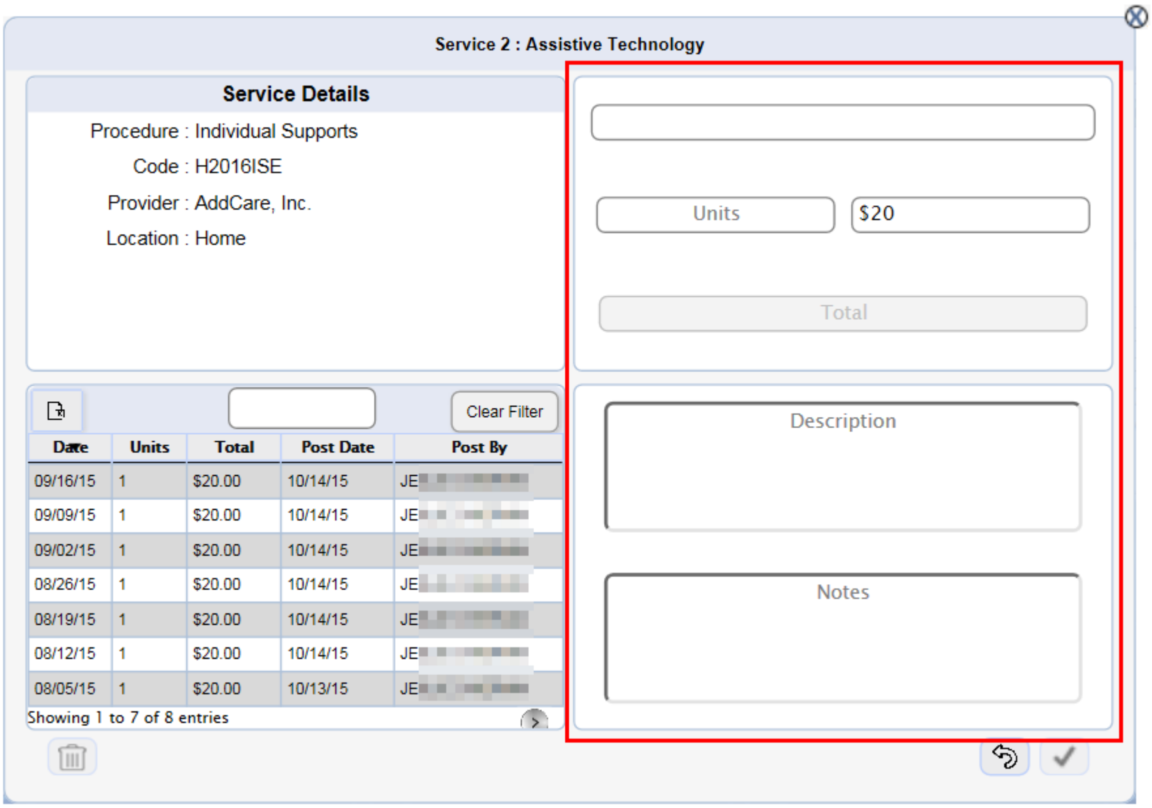


- Filter the grid using the text box. The grid displays the line items containing the characters entered within the box. Click the Clear Filter Button to clear the text box and the filter.



View or Post Expenditure

- To view the expenditure details, select a line item on the grid and it is available in the section shown in the following figure.



- Click to remove the selection and/or clear the expenditure details within the section.
- Post the expenditure details (by the appropriate role) within this section.

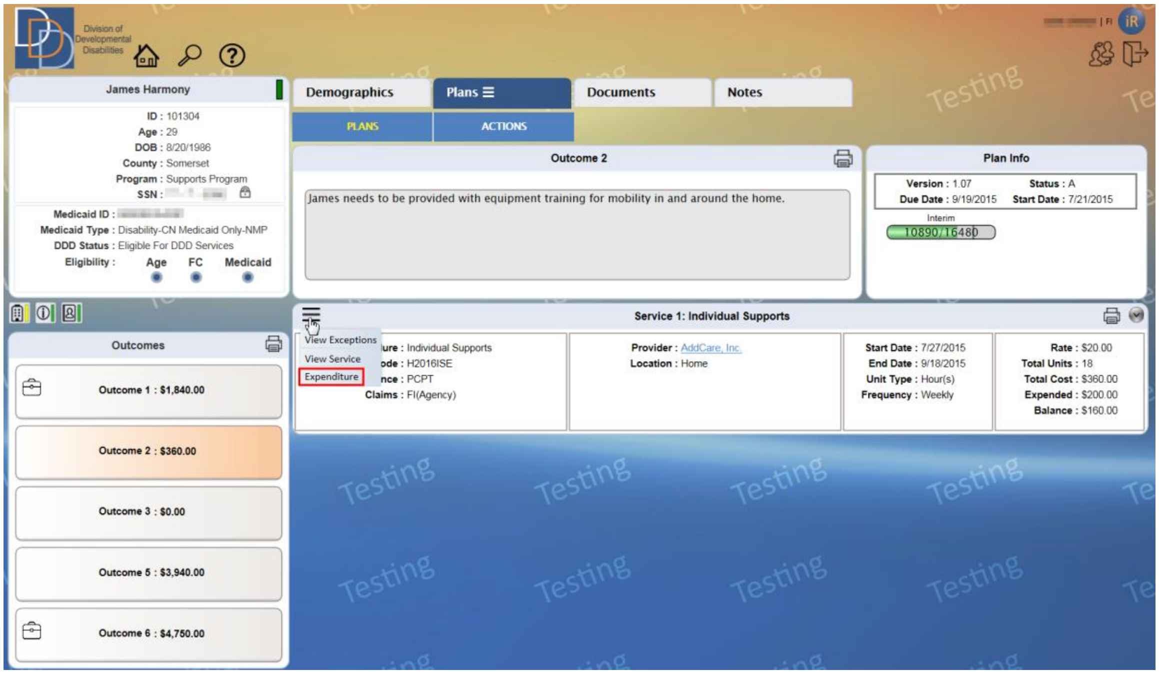
5.5.2 Post Expenditure

Post expenditure is permitted for FI and SFI user roles of the most recently approved macro plan and any of its approved revisions. You can post expenditure only for services with the Fiscal Intermediary payment source.

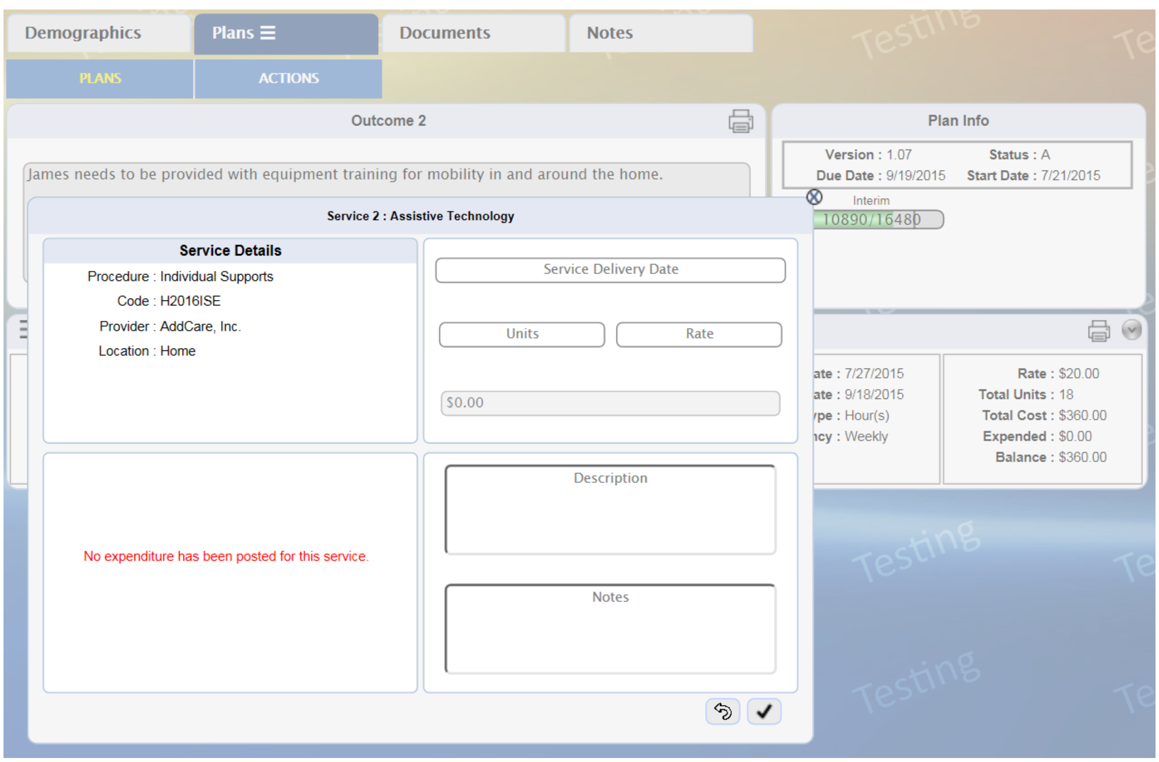
The instructions below discuss the procedure to post expenditure for a service.

To post expenditure

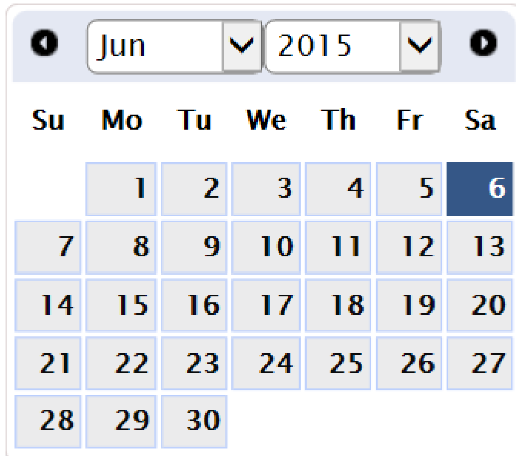
1. Click ☰ for an appropriate service and view the menu options, shown in the following figure.



2. Click **Expenditure** and view the expenditure pop-up tile, as shown in the following figure.

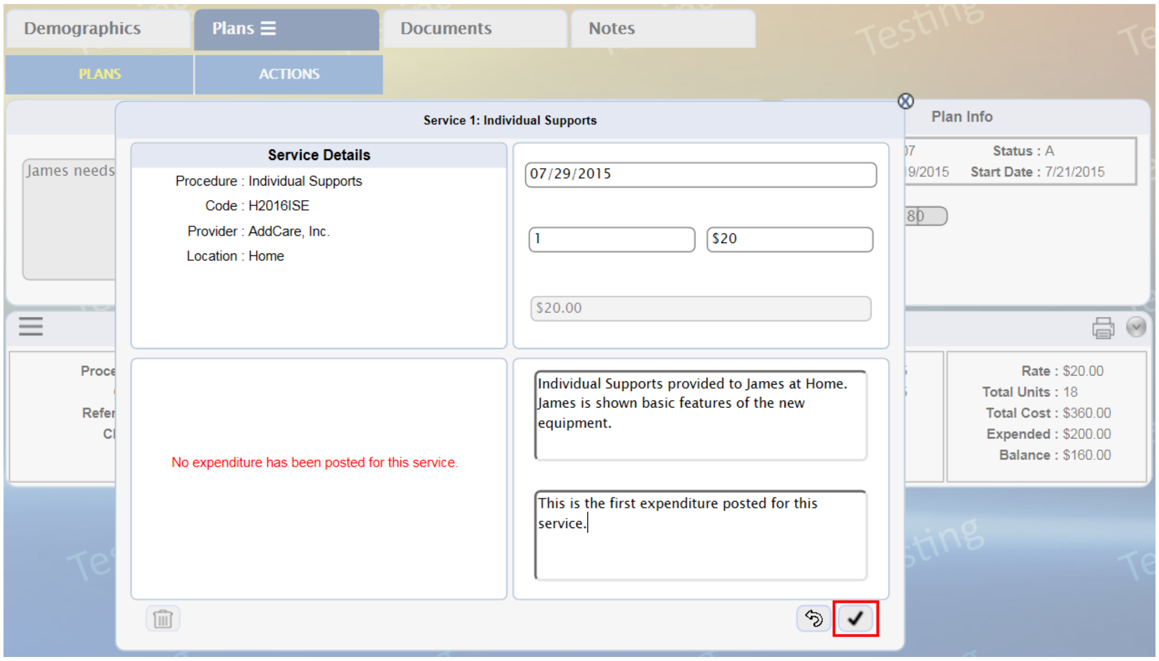


3. Enter the details within the fields. For more information, refer to the following table.

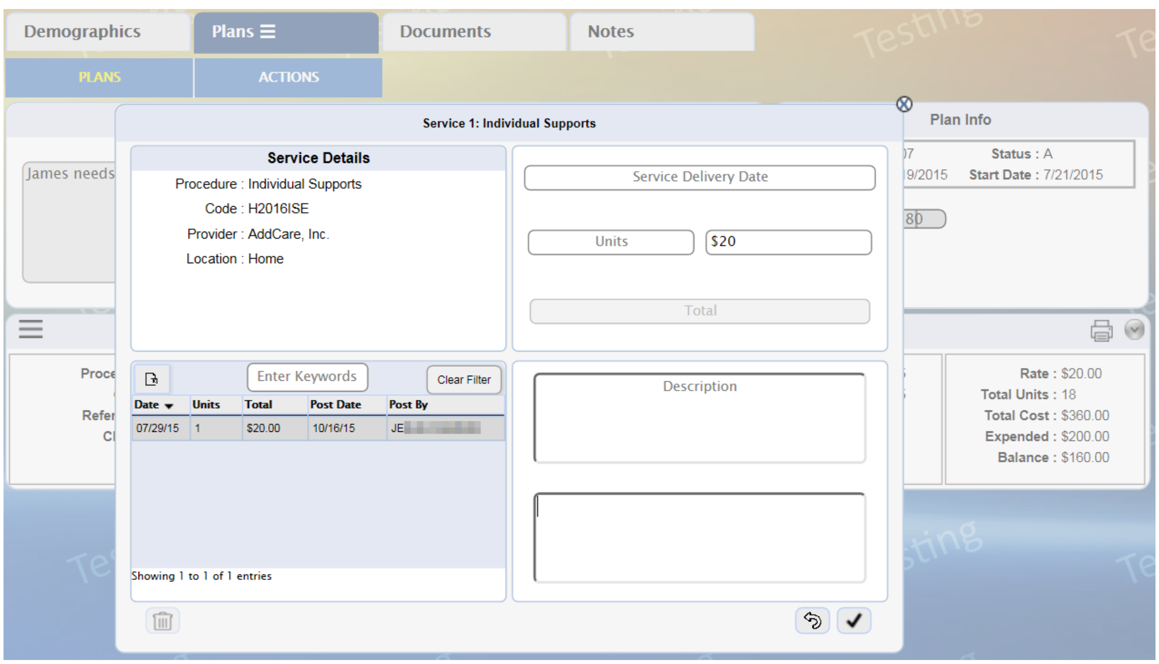
Field	Description
Service Delivery Date	Select the date that the service was delivered to the participant.  Select the month and year from the drop-down lists on the top section. Click and select the date. Mandatory/Optional: Mandatory Date format: MM/DD/YY
Units	Enter the number of units provided on the selected date. The units cannot exceed the number planned for the service on that particular week. For a day service, this field displays 1 and it is disabled. Mandatory/Optional: Mandatory
Rate	The unit rate of service is either defined or does not exceed a maximum value. For a service with a defined rate, the field displays the appropriate value and it is disabled. For a service with a maximum value, enter the unit rate below the maximum value. Mandatory/Optional: Mandatory

Field	Description
Time In	This field appears when the service is provided by an SDE. Select the time that the service started on the selected date. Mandatory/Optional: Optional
Time Out	This field appears when the service is provided by an SDE. Select the time that the service ended on the selected date. Mandatory/Optional: Optional
Parking	This field appears for the **Transportation** service. Enter the amount paid for parking. Mandatory/Optional: Optional
Tolls	This field appears for the **Transportation** service. Enter the amount paid for tolls. Mandatory/Optional: Optional
Public Trans	This field appears for the **Transportation** service. Enter the amount paid for public transportation. Mandatory/Optional: Optional
Total	View the total amount for the service delivered on the selected date. Total = Units * Rate + Parking + Tolls + Public Trans
Description	Enter the description of service delivery on the selected date. Mandatory/Optional: Optional Max limit: 500 characters
Notes	Enter any relevant notes related to service delivery on the selected date. Mandatory/Optional: Optional Max limit: 500 characters

4. Click ✓, shown in the following figure, to save and post the expenditure.



5. View the posted expenditure on the grid.



Note: Select the line item on the grid and edit the fields to modify the expenditure detail.

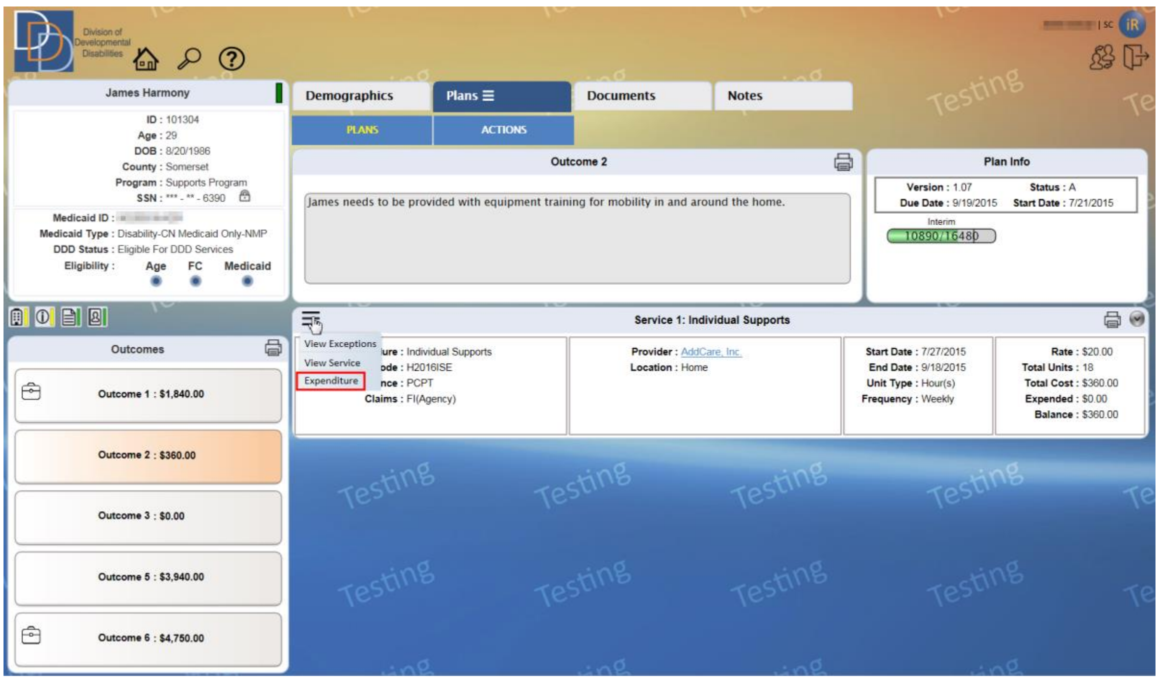
5.5.3 View Expenditure

All user roles are allowed to view the expenditures of an approved service. Many of the features of the grid are mentioned in the Expenditure Grid.

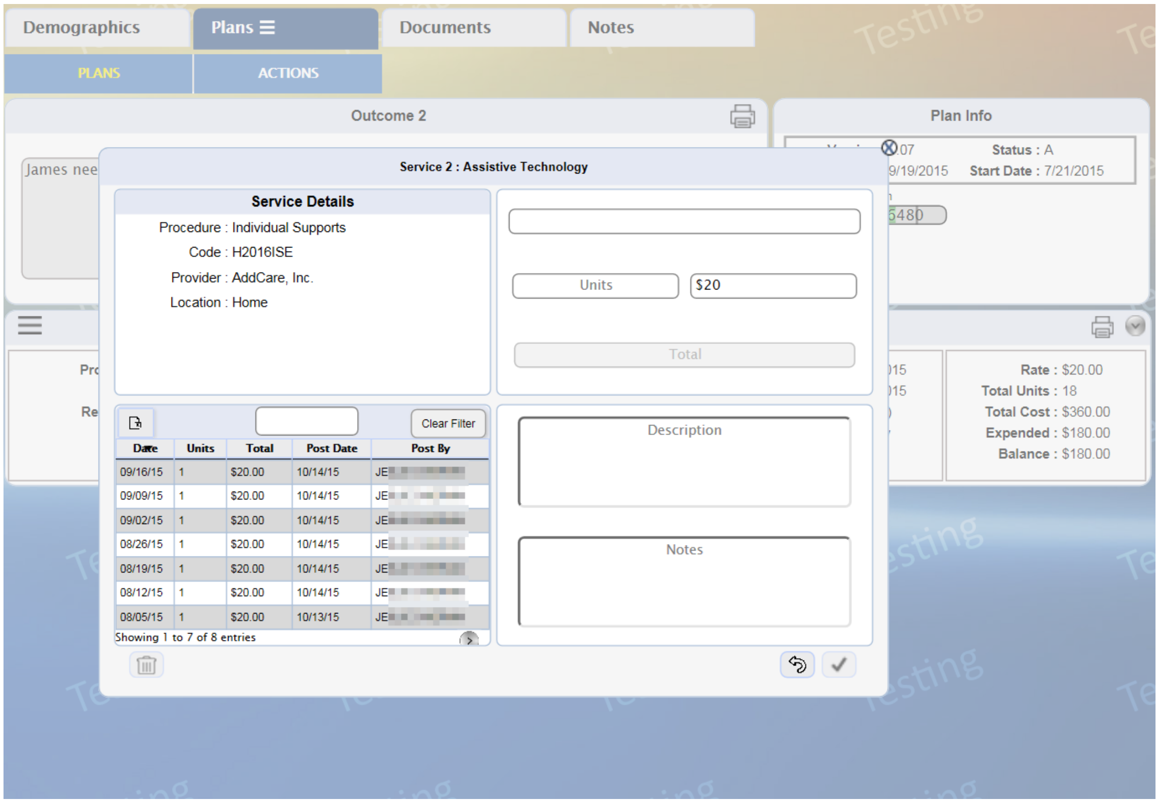
The following instructions discuss the procedure to view an expenditure entry.

To view an expenditure entry

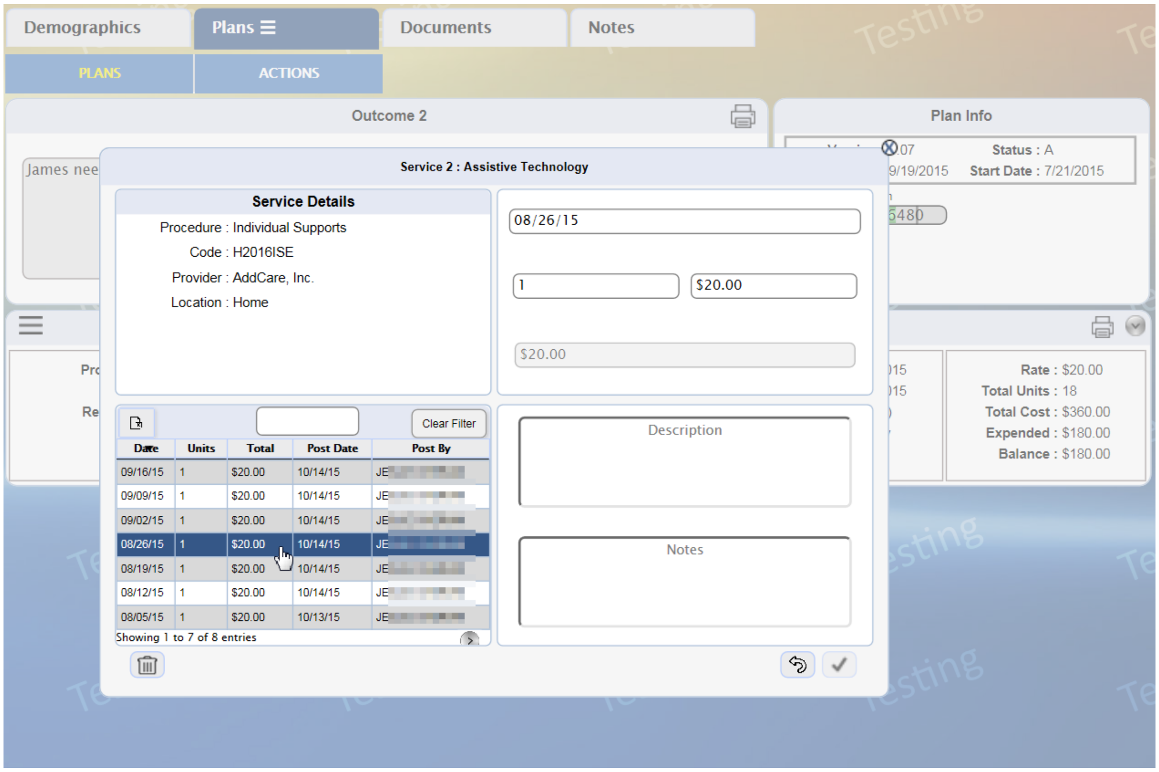
1. Click ☰ for an appropriate service and view the menu options, shown in the following figure.



2. Click **Expenditure** and view the expenditure details of the service, as shown in the following figure.



3. Locate and click the appropriate line item to view the details of the posted expenditure.



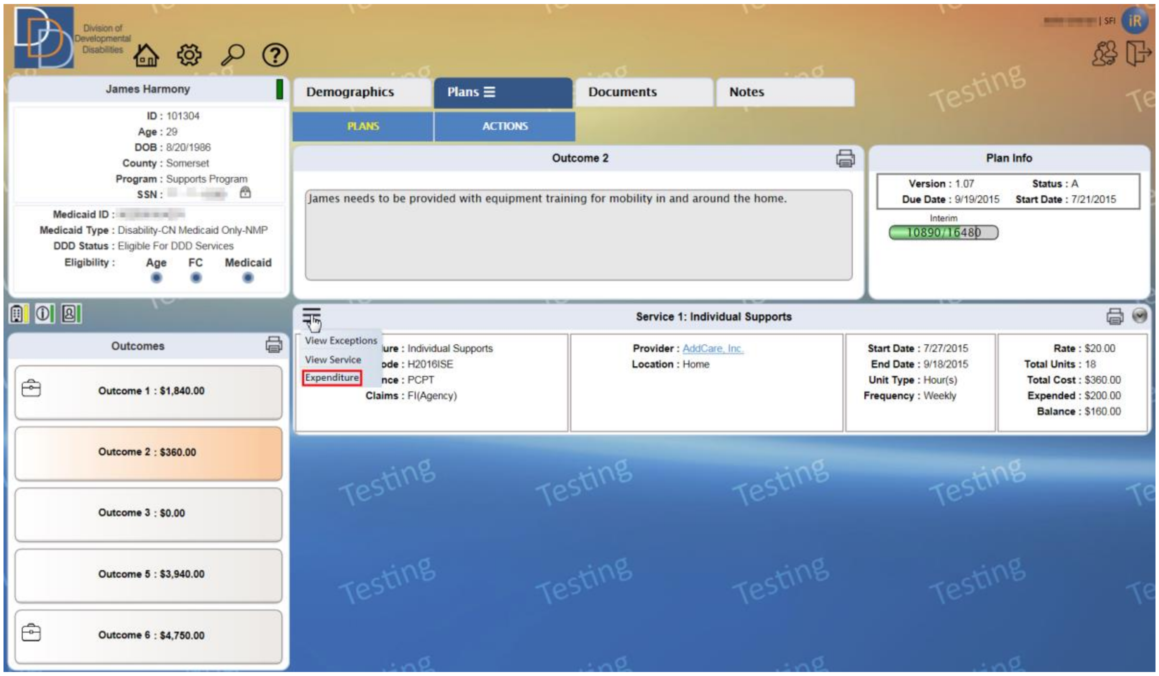
5.5.4 Delete Expenditure

The SFI user role has the permission to delete an expenditure entry.

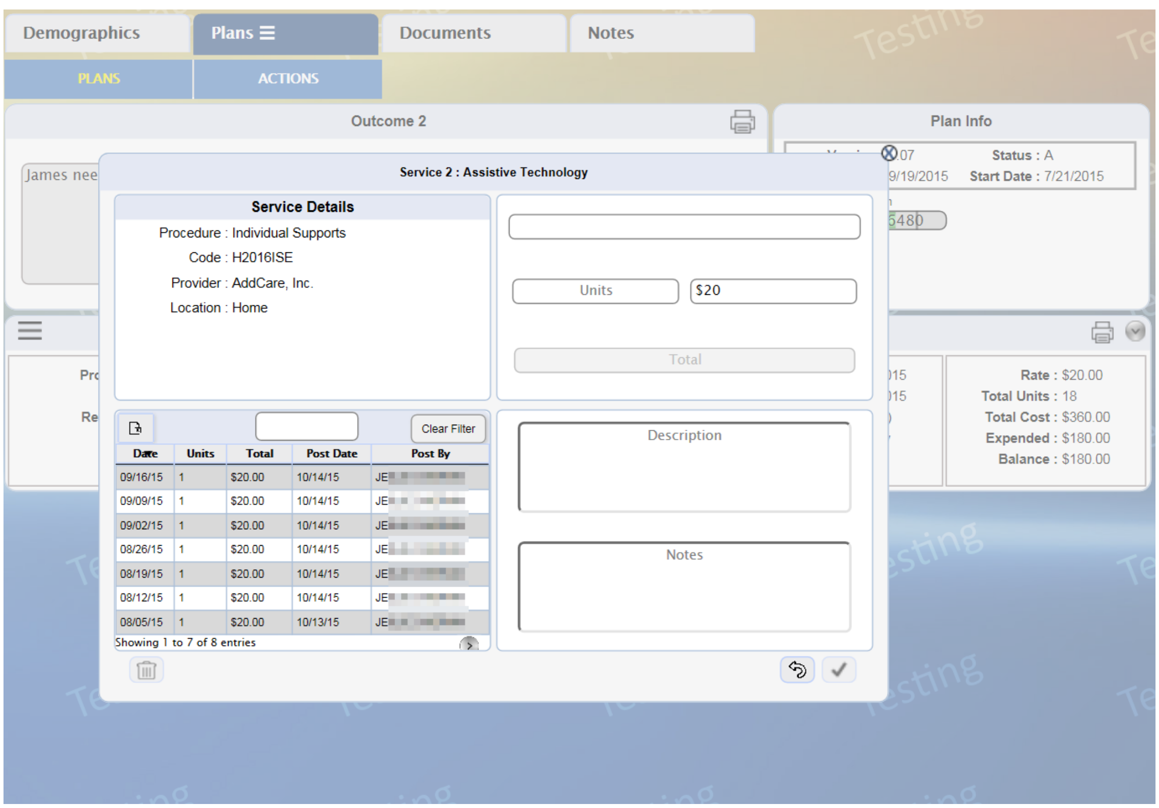
The following instructions discuss the procedure for deletion.

To delete an expenditure entry

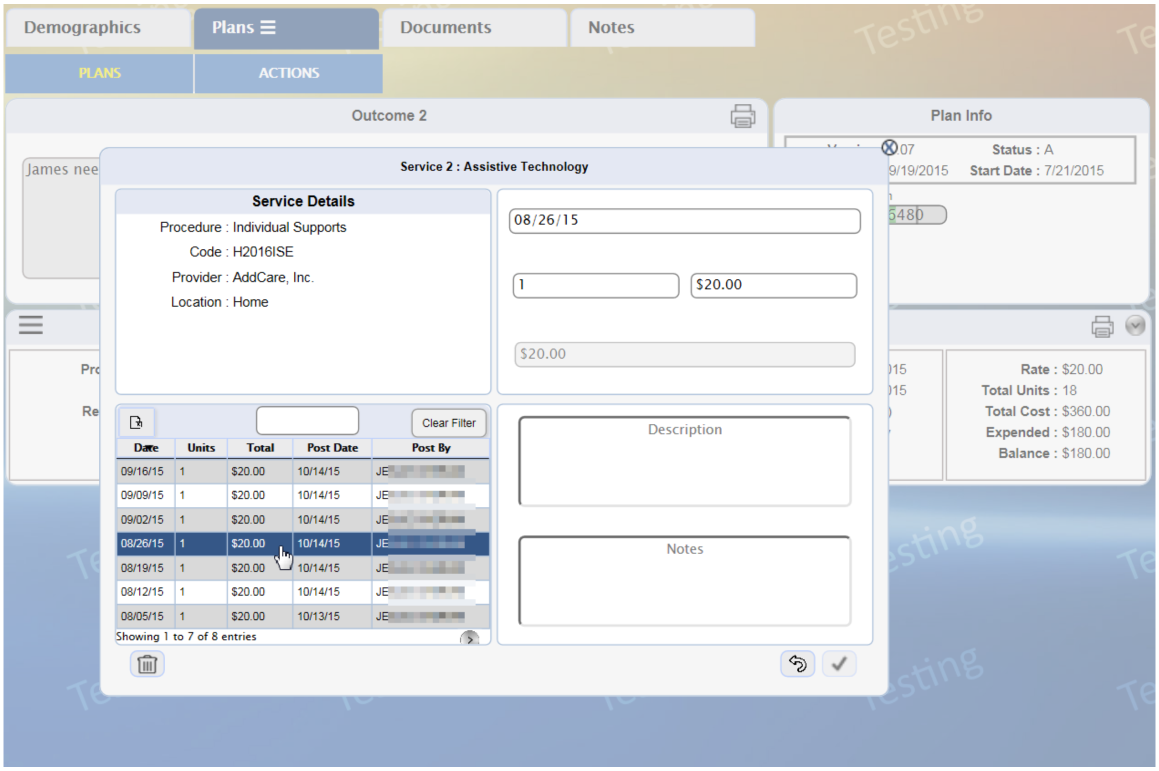
1. Click ☰ for an appropriate service and view the menu options, shown in the following figure.



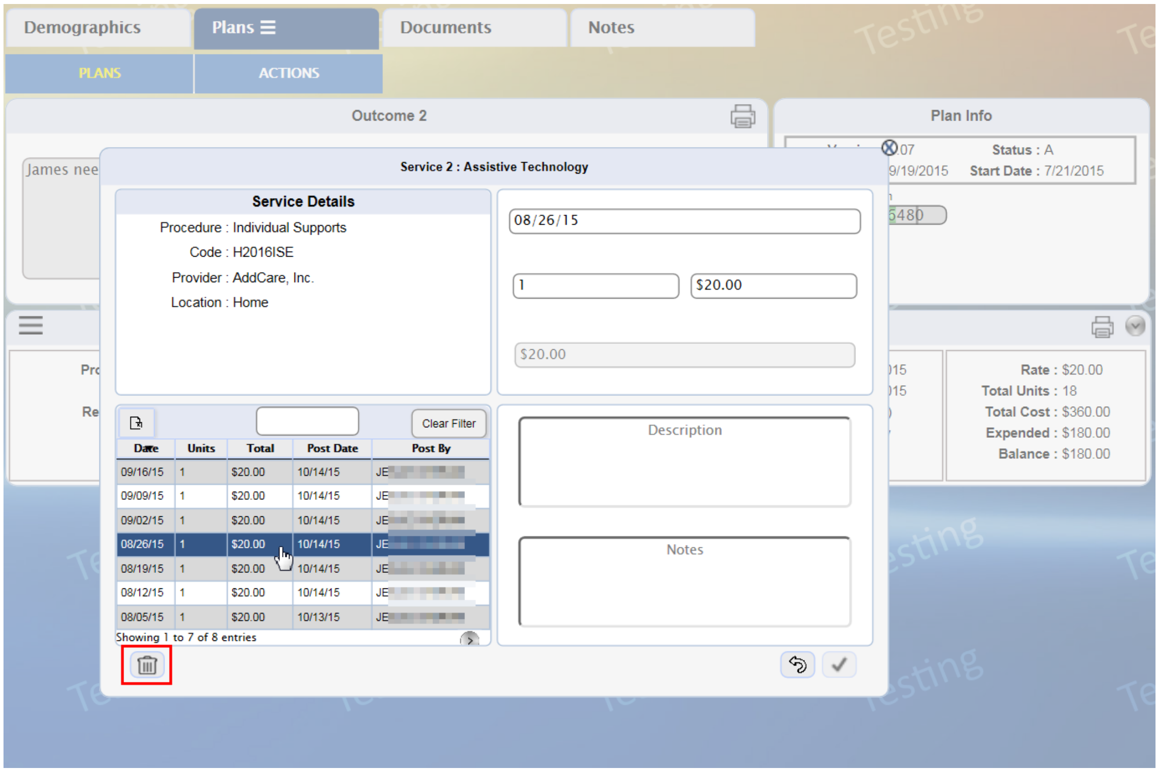
2. Click **Expenditure** and view the expenditure details of the service, as shown in the following figure.



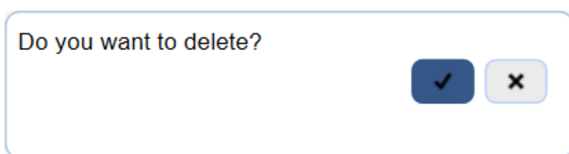
3. Locate and click the appropriate line item for deletion.



4. Click (available only for the SFI) to delete the expenditure entry, highlighted in the following figure. The entry is now removed from the grid.



5. A confirmation message appears, as shown below. Click ✓ to confirm deletion of the expenditure entry.



5.6 Actions

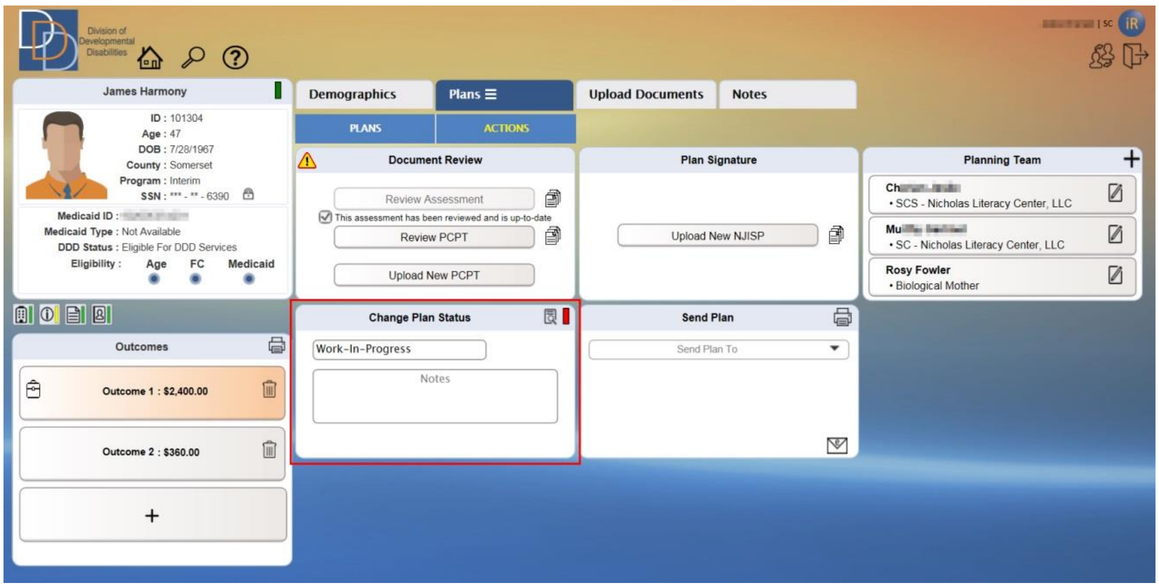
The Actions tab has the following three pages within the application:

- Change Plan Status
- Update/Review Documents
- Planning Team
- Send Plan

5.6.1 Change Plan Status

Plans are an integral part of iRecord. The plans may have multiple statuses from initiation to approval.

The figure below displays the tile on **Actions** tab in iRecord. There are certain conditions to change the status, which is described in the next section.



Conditions

Current Plan Status: W (Work-in-Progress)

Prior Status: none

Change to: R, RI

Controller: SC

E-mail Alert: SC, SCS

Due-List: SC

Conditions:

- Initial Plan Status for plans automatically assigned to active participants with no active plan within the last year, or a new plan is auto-generated for an active participant in W status 30 days prior to the end of the plan term of an approved plan.
- Plans may not leave from W to R status unless the following condition(s) have been met:

  - Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red.
  - Current Plan Info card tool status indicator is red (The following requirement for Current Plan Info card status indicator is ignored for change status to status indicator: plan is overdue)
  - Assessment is reviewed.
  - PCPT is reviewed
  - Pathway to Employment has been completed within the last 30 days.
  - NEW signed NJISP to be uploaded or retrieved electronically.
  - At least one outcome in the plan is employment related

- When these conditions have not been met, the following message is displayed when user attempts to change the plan status from W to R status:
  Change Plan Status criteria(s) not met.
- Plan status can be changed from W to RI upon entering notes.

Current Plan Status: R (Review)

Prior Status: W, RV

Change to: A, SR1, RV

Controller: SCS

E-mail Alert: SCS

Due-List: SCS

Conditions:

- Any plan completed by an SC must be submitted first for approval through the SCS in this status.
- SCS of an agency with Self Approval authority has the ability to approve the plans.
- Plans may not leave from R to A status unless:
  - Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red.
  - Current Plan Info card tool tip is red (The following requirement for Current Plan Info card status indicator is ignored for change status to status indicator: plan is overdue)
  - System verifies that the budget is not over obligated (for micro plan)

- Plan status can be changed from SR1 to RV by entering notes.

Current Plan Status: RV (Revision)

Prior Status: R, SR1, SR2, RR

Change to: R, RI

Controller: SC

E-mail Alert: SC

Due-List: SC

Conditions:

- Any plan returned by an SCS, WAC or SWAC or SU requiring changes prior to status-change approval have this status.
- Plans may not leave from RV to R status unless:
  - Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red.
  - Current Plan Info card tool tip is red (The following requirement for Current Plan Info card status indicator is ignored for change status to status indicator: plan is overdue)
  - NEW signed NJISP to be uploaded or retrieved electronically.
  - Pathway to Employment has been completed within the last 30 days.
  - At least one outcome in the plan is employment related.
  - System verifies that the budget is not over obligated (for micro plan)
- When these conditions have not been met and the following message is displayed when user attempts to change the plan status from RV to R status:
  Change Plan Status criteria(s) not met.
- Plan status can be changed from RV to RI by entering notes.

Current Plan Status: A (Approved)

Prior Status: R, SR1, SR2

Change to: RI, RV

Controller: SC

E-mail Alert: SC, FI

Due-List: none

Conditions:

- Any plan that is approved to be carried out will have this status
- When a plan status changes from A to RV or RI, it will generate a new micro plan.
- User can change the status of an approved plan when the plan end date is in the future.

Current Plan Status: RI (Review-to-Inactive)

Prior Status: A, RV, W

Change to: AI, RV, SR2

Controller: WAC, SWAC

E-mail Alert: SC, SCS

Due-List: WAC

Conditions:

- Participants who will be ineligible to receive services, expired, or are not expected to receive service delivery for 90 days or more should be placed into this status by a support coordinator.
- Participants who are confirmed to be inactive.
- Plan status can be changed from RI to RV, AI or SR2 by entering notes.

Note: SWAC can change plans in this status when the WAC is not present.

Current Plan Status: AI (Approved-to-Inactive)

Prior Status: RI, SR2

Change to: RR

Controller: SC

E-mail Alert: SC, SCS, FI

Due-List: none

Conditions:

- Participants who are confirmed to be inactive.
- Plan status can be changed from AI to RR by entering notes.

Current Plan Status: SR1 (State Review 1)

Prior Status: R

Change to: RV, A, SR2

Controller: WAC, SWAC

E-mail Alert: WAC

Due-List: WAC

Conditions:

- Plans requiring state review receive this status.
- Plans may not leave from SR1 to A status unless:
    - Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red.
    - Current Plan Info card tool tip is red (The following requirement for Current Plan Info card status indicator is ignored for change status to status indicator: plan is overdue.)
    - System verifies that the budget is not over obligated (for micro plan)
- Plan status can be changed from SR1 to RV or SR2 by entering notes.

Note: SWAC can change plans in this status when the WAC is not present.

Current Plan Status: SR2 (State Review 2)

Prior Status: SR1, RI, RR

Change to: A, RV, AI, W

Controller: SWAC

E-mail Alert: SWAC

Due-List: SWAC

Conditions:

- Plans requiring high-level state review by an SWAC receives this status (i.e. Bump-ups)
- Plans may not leave from SR2 to A status unless:
    - Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red.
    - Current Plan Info card tool tip is red (The following requirement for Current Plan Info card status indicator is ignored for Change status to status indicator: plan is overdue.).
    - System verifies that the budget is not over obligated (for micro plan).
- Plan status can be changed from SR2 to RV or AI or RR by entering notes.
- System generates a new macro plan when the status changes from SR2 to W.
- System closes the events associated when the plan leaves SR2 status.

Current Plan Status: RR (Review-to-Reinstate)

Prior Status: AI

Change to: W, AI, SR2

Controller: WAC, SWAC

E-mail Alert: WAC

Due-List: WAC

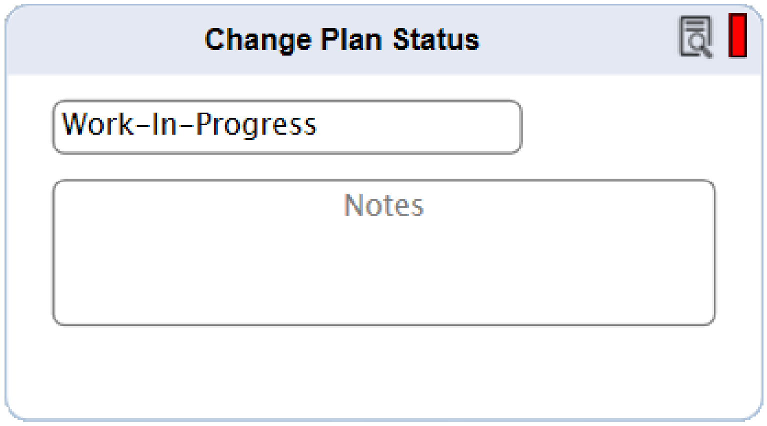
Conditions:

- Plans which have been made inactive and require Reinstatement because the individual has returned for service
- When a plan status changes from RR to W, system creates a new macro plan and closes the associated event.
- Plan status can be changed from RR to W, AI, or SR2 by entering notes.

Note: SWAC can change plans in this status when the WAC is not present.

Change Plan Status Tile

- View the **Change Plan Status** tile, which is as shown below. The tile does not display the  icon for a macro plan. The table below describes the available controls on the tile.



Control	Description
	This icon is unavailable with a macro plan (the initial plan drawn out for each plan cycle). With a micro plan (revisions to the plan within the plan cycle), view the icon. Hover on the icon and tooltip displays **View Change Log**. Click the icon and view a report that shows all the changes within the plan cycle.
	The status icon displays green when the following conditions are satisfied for a plan in a particular status. The conditions for Plan in W status are: • Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red. • Current Plan Info card tool tip is green (The following requirement for Current Plan Info card status indicator is ignored for change status to status indicator: plan is overdue.) • Assessment is reviewed. • PCPT is reviewed. • Pathway to Employment has been completed within the last 30 days. • NEW signed NJISP to be uploaded or retrieved electronically. • At least one outcome in the plan is employment related. • Allocated budget of a plan is greater than or equal to the obligated budget. The conditions for Plan in W status are: • Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red. • Current Plan Info card tool tip is green (The following requirement for Current Plan Info card status indicator is ignored for change status to status indicator: plan is overdue) • NEW signed NJISP to be uploaded or retrieved electronically. • Pathway to Employment has been completed within the last 30 days. • At least one outcome in the plan is employment related. • Allocated budget of a plan is greater than or equal to the

	obligated budget of a micro plan. The conditions for Plan in other than W and RV are: • Status indicator on Participant card, Support Coordination, Assessments and Contacts is not red. • Current Plan Info card tool tip is green (The following requirement for Current Plan Info card status indicator is ignored for Change status to status indicator: plan is overdue.) • Allocated budget of a plan is greater than or equal to the obligated budget of a micro plan.)
	The status icon displays red when the conditions for green are not met.
Current Plan Status	Select the change to the status from the drop-down list. The drop-down list options depend on the conditions described above for each status.
Notes	Enter any relevant notes for the change in status. Mandatory/Optional: Mandatory Max limit: 1000 characters

- With an attempt to change status without meeting the desired conditions, the following message displays **Change Plan Status criteria(s) not met**.
- Hover on the status indicator displays the message according to the following table.

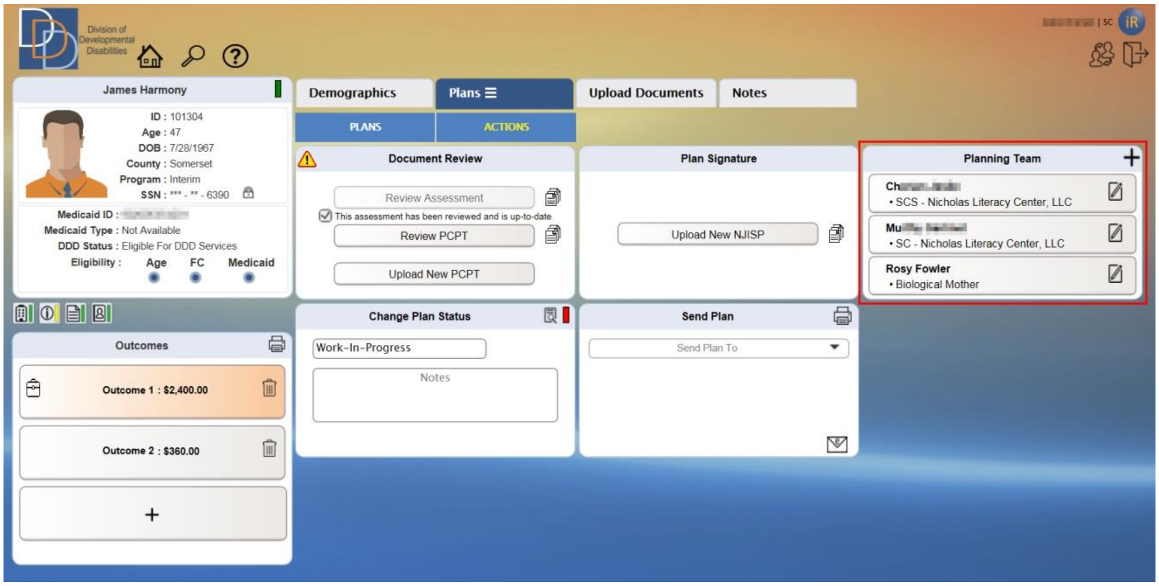
Indicator	Condition	Hover
Green	When all conditions are satisfied.	All pre-conditions for plan approval have been met.
Red	Participant card status indicator is red.	Participant card status indicator is red.
	Support Coordination card status indicator is red.	Support Coordination status indicator is red.
	Assessments card status indicator is red.	Assessments card status indicator is red.
	Contacts card status indicator is red.	Contacts card status indicator is red.

	Current Plan Info card tooltip is red.	Current Plan Info card tooltip is red.
	Assessment has not been reviewed.	Review assessment and confirm it is up-to-date.
	PCPT has not been reviewed.	Review PCPT and confirm it is up-to-date.
	Pathway to Employment has not been completed within the last 30 days.	Pathway to Employment must be updated.
	No NJISP uploaded or retrieved electronically.	Upload signed NJISP before changing status of the plan.
	No employment related outcome in the plan.	No employment related outcome in the plan.
	Obligated budget is greater than the allocated budget of a plan.	Budget is over obligated.

5.6.2 Planning Team

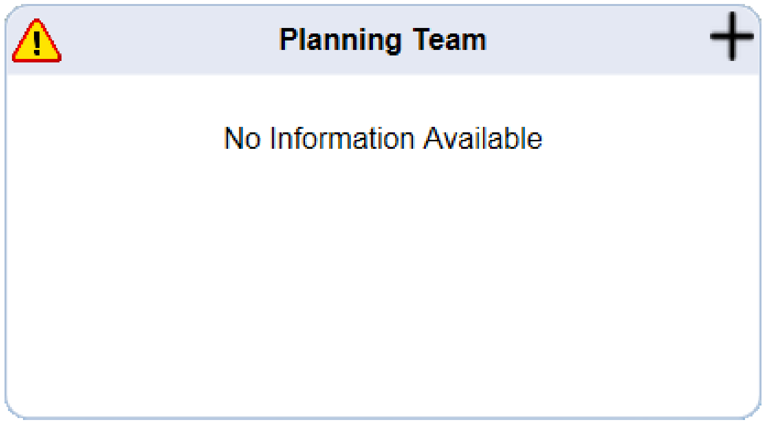
iRecord maintains a **Planning Team** tile, which appears on the **Actions** tab. These are the individuals that helped create the plan.

The permissions on the tile depend on your user role. For more information on the permissions, refer to the User Privileges.



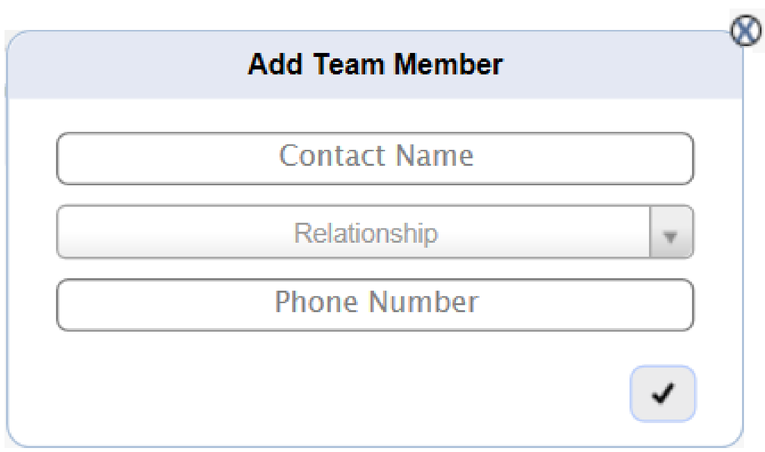
Planning Team Tile

- The **Planning Team** tile displays a record of each individual that helped create the plan. The records are placed on the tile in alphabetical order of their names.
- By default, the tile displays the record of the participant (self) and the SC. The user has the option to edit or delete the default records.
- This tile must be completed before submitting a macro plan for review. To be considered complete, it must have at least three team members.
- A scroll bar appears (on the right) when the records exceed the tile size.
- The option of edit is available only until the macro plan is approved. Once approved, the tile information is locked and the information carries over to all associated micro plans.
- With incomplete information and the plan in W or RV, the status indicator on the **Participant** tile displays red. Hover on status indicator and the tooltip displays **No Planning Team information available**.
- The tile displays **No Information Available** and icon for a blank tile.



To add a team member

6. On the **Planning Team** tile, click +. iRecord displays an **Add Team Member** pop-up tile, shown below.



7. Enter the appropriate details for the given fields. For more information on the fields, refer to the following table.

Field	Description
Contact Name	Enter the name of the contact within the text box. The auto-complete feature is available within this text box, listing up to 10 members that contain the typed characters. You can either select from the list or continue typing the name. Mandatory/Optional: Mandatory

Relationship	Select the relationship of the contact to the participant from the drop-down list. Type within the search box on the drop-down to narrow down the list. This field populates with the required information for a contact already on iRecord. You have the option to change the relationship. Mandatory/Optional: Mandatory
Agency Name	This field appears with selection of **Support Coordinator**, **Support Coordination Supervisor** or **Agency** for the **Relationship** field. Select the agency from the drop-down list. This field automatically populates for a contact already in iRecord. You cannot change the agency name.
Phone Number	Enter the phone number of the contact. Mandatory/Optional: Mandatory

8. Click ✓ to save the details and close the **Add Team Member** pop-up tile.
9. View the record on the **Planning Team** tile.
10. Repeat the steps from 1 to 4 to add another team member.

To edit a team member

1. On the **Planning Team** tile, locate the team member and click . An **Edit Team Member** pop-up tile appears with the existing information.
2. Make the changes within the appropriate field.

Note: With approval of macro plan, this tile cannot be modified.

3. Click ✓ to save the changes and close the **Edit Team Member** pop-up tile.
4. View the edited record on the **Planning Team** tile.

To delete a team member

1. On the **Planning Team** tile, locate the team member and click . View the **Edit Team Member** pop-up tile with the existing details.
2. Click (appears on the lower right of the tile). A confirmation message appears.

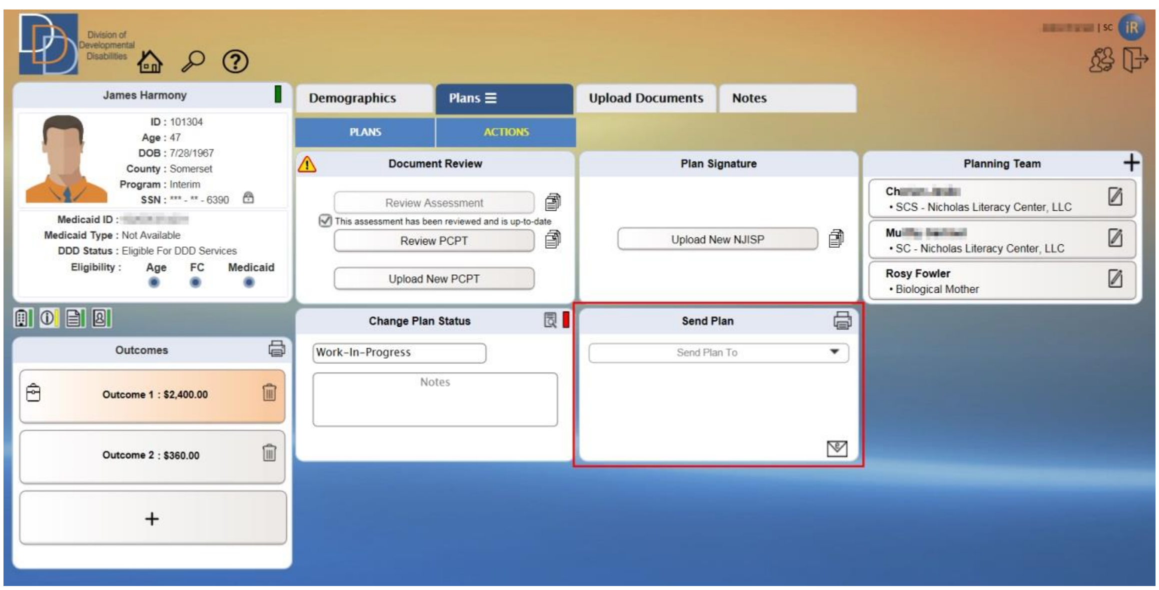
Note: You cannot delete with approval of the macro plan.

3. Click and confirm delete.

5.6.3 Send Plan

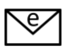
iRecord permits users with the appropriate permissions to print the associated plan's NJISP report. Certain users also have the option to e-mail the report to the concerned service providers, the participant, and the participant's HIPAA contacts. For more information on the permissions, refer to User Privileges.

The **Send Plan** tile is on **Actions** tab.

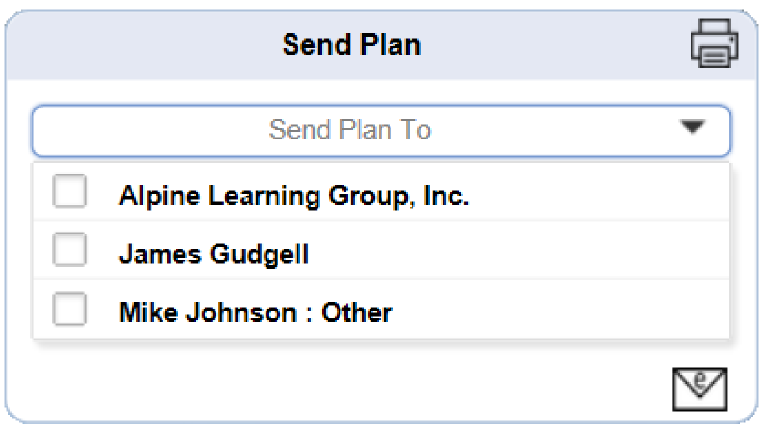


Send Plan Tile

- The tile has a simple interface. The following table serves as a reference to the available functionality on the tile.

Control	Description
	Print the NJISP report.
Send Plan To	Click the box and the drop-down list appears. Select the check box of the entity (or entities) for sending the NJISP report.
Other (available for FI, SFI and VO-TS)	Click the box and view the **Add/Edit E-mail Addresses** pop-up that enables addition of e-mail addresses.
	E-mail NJISP report to the selected entity (or entities). View a confirmation message with successful e-mails.

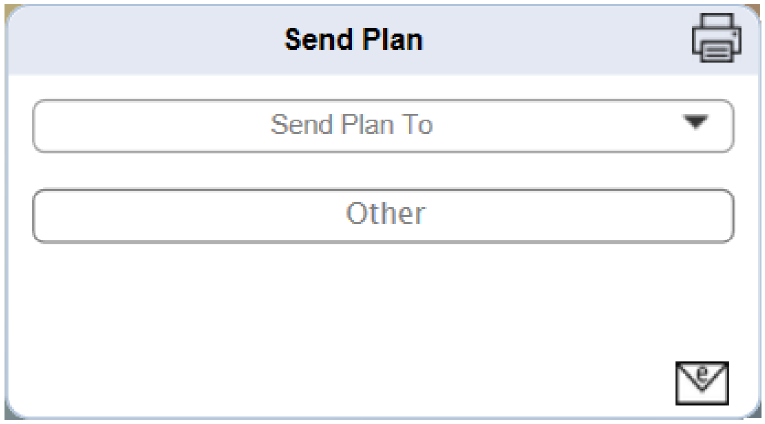
- The **Send Plan To** field displays a drop-down list of the available entities. Each entity has a check box available for selection. The entities are determined by the payment sources for all services in all outcomes of the associated plan. The following table categorizes the drop-down list according to the payment source. The figure below displays a sample expanded drop-down list.



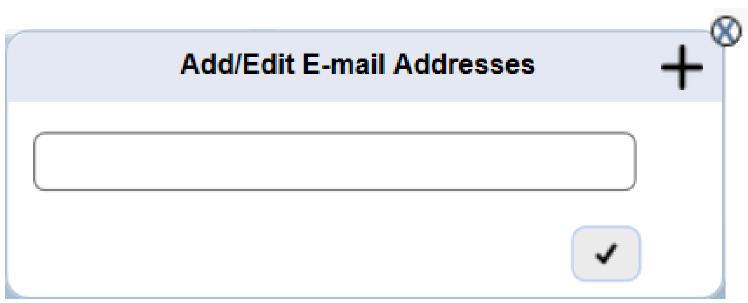
Payment Source	Drop-down List Items
FI, Medicaid, Contract	• Corresponding service provider names • Participant's name • HIPAA contacts of the participant
Natural, Generic, DVRS	• Participant's name • HIPAA contacts of the participant

- For a plan that is not in Approved status, the e-mail or print of the NJISP report displays **DRAFT** watermark on all pages.

- The **Other** field permits addition of e-mail addresses, available for FI and SFI user roles.



- Click the **Other** box and the **Add/Edit E-mail Addresses** pop-up controls appear, as shown below.

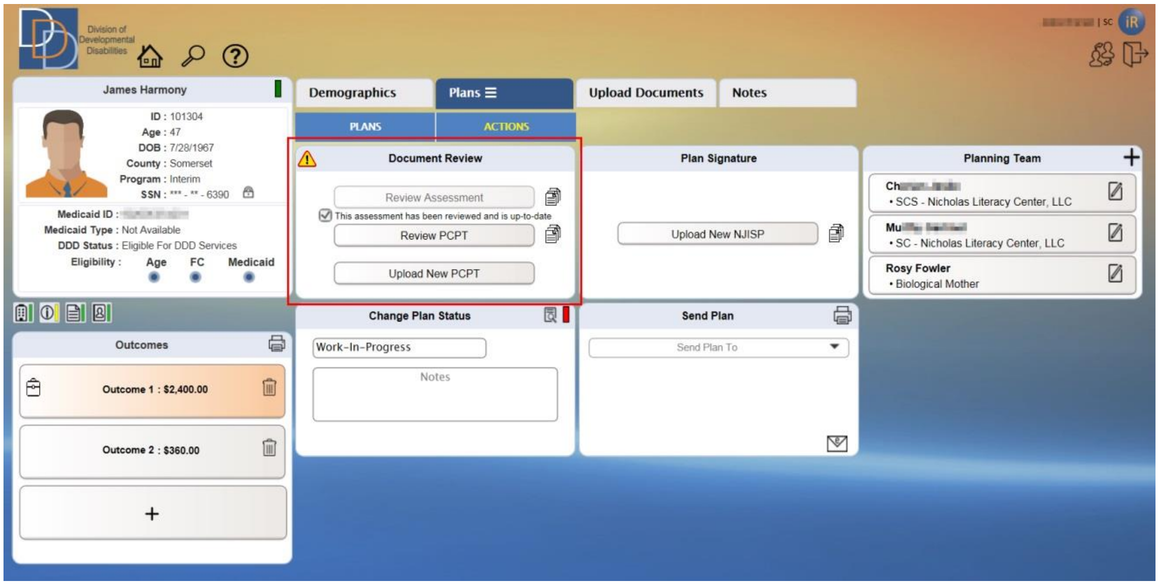


Control	Description
	Click to add an additional e-mail address.
Enter E-mail Address	Add the e-mail address of the entity for sending the NJISP report.
	Click to delete the e-mail address. This icon appears with two or more Enter E-mail Address fields.
	Click to save and close the Add/Edit E-mail Addresses pop-up. View the e-mail addresses within the Other field on the Send Plan tile.

5.6.4 Document Review

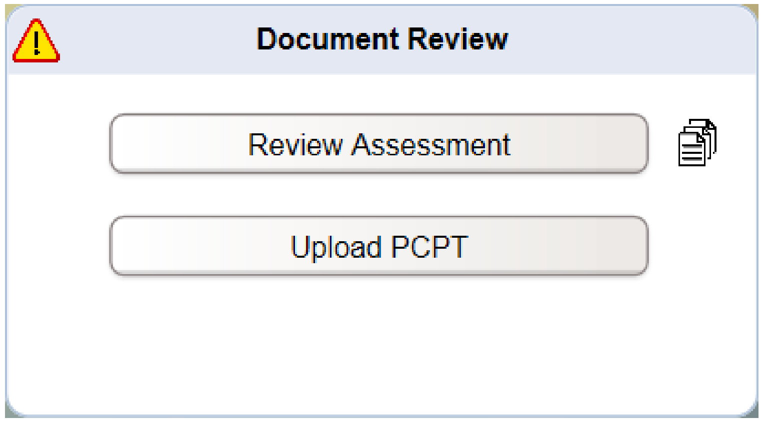
The Assessment and PCPT documents are integral to plans on iRecord. It is necessary to review the Assessment, PCPT and the previous ISP (if available) to write a new ISP.

The **Document Review** tile is on **Actions** tab, as shown below.

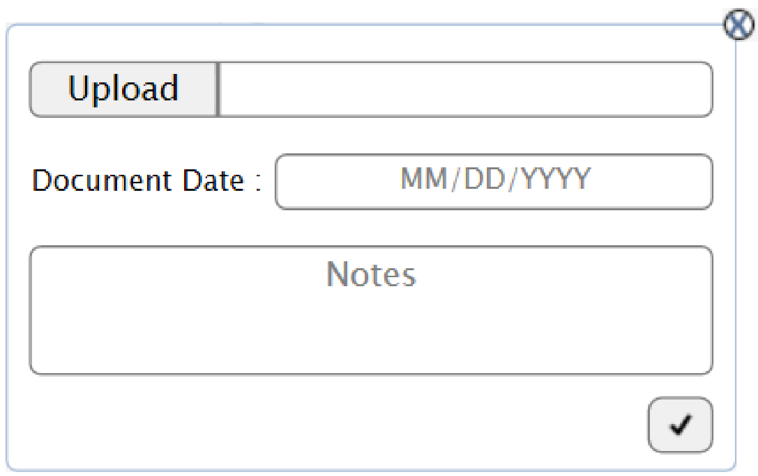


Document Review Tile

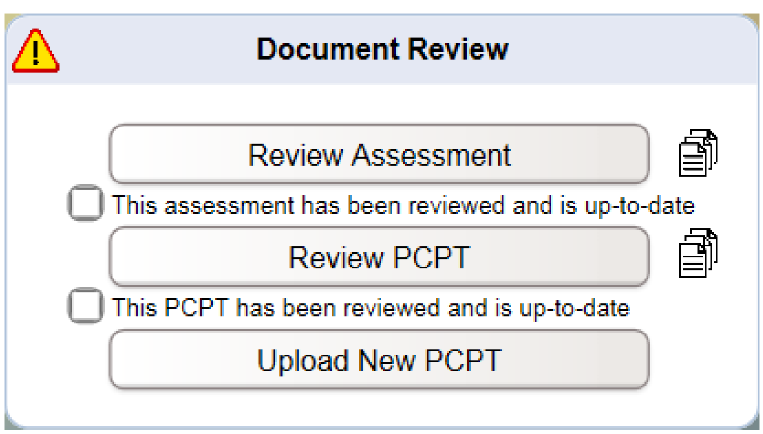
- The **Document Review** tile display icon (on tile header) for a macro plan in W (Work-in-Progress) status until the documents (Assessment and PCPT) have been reviewed by an SC.
- Without any existing documents, the tile displays **Review Assessment** (unavailable) and **Upload PCPT** buttons (for the user role with the permissions).
- View an unavailable **Review Assessment** button without an assessment document or the Plan is other than W (Work-in-Progress) status.
- **Upload PCPT** button changes to **Review PCPT** and **Upload a New PCPT** button appears once an existing PCPT appears in the database.
- With an available document (Assessment and/or PCPT) for a participant in the database, icon appears adjacent to the button. This icon allows the user to view the respective document. Hover on icon displays the message **<Date> of the <assessment/PCPT> document related to the plan ID or if document not available, most recent <assessment/PCPT uploaded> date**.



- Click **Upload PCPT** or **Upload a New PCPT** button opens controls to upload PCPT.



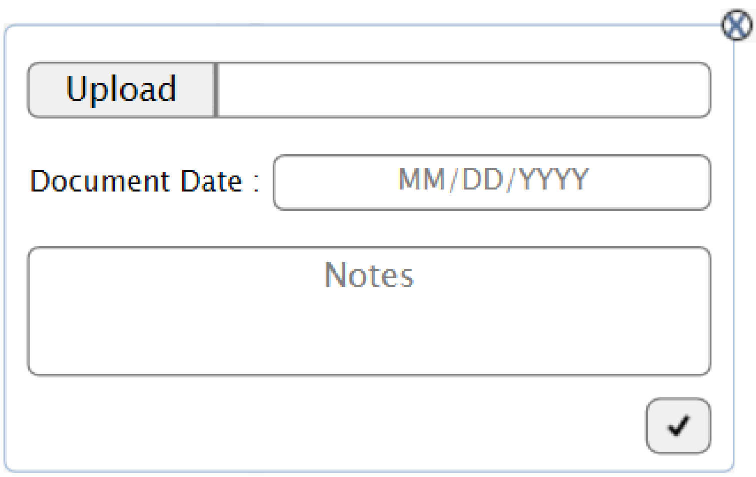
- A check box appears below the button with review of each document by the user (shown below for Assessment and PCPT).



- Select the check box to indicate that the document has been reviewed. Once selected, the user cannot reverse the action and the button becomes unavailable (click to view the document).

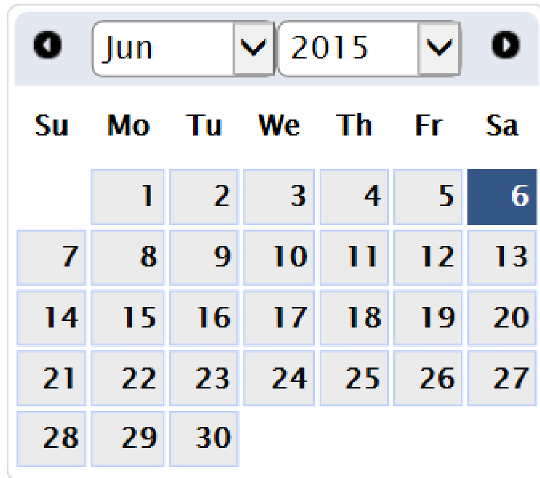
To upload a PCPT document

1. On the **Document Review** tile, click **Upload PCPT** or **Upload New PCPT** (appears with an already existing PCPT) button and view the pop-up controls.



2. Enter the information within the respective fields. For more information, refer to the following table.

Field	Description
Upload	Click the button or the box and the **Choose File to Upload** dialog box opens. Locate and select the file to close the **Choose File to Upload** dialog box. You can view the file within the selection box.
Document Date	Enter the date in the format shown below or select the date on the calendar pop-up, shown below.

	 Select the month and year using the drop-down list on the header. Click and select the date. Date format: MM/DD/YYYY
Notes	Enter any relevant notes for the uploaded document within the text box. Max limit: 1000 characters

3. Click .

To review Assessment/PCPT document

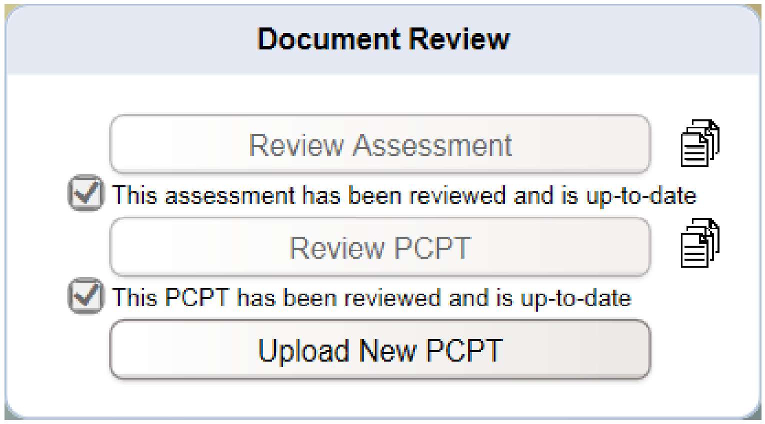
1. On the **Document Review** tile, click the respective button for the document that you choose to review.

Note: View **Review Assessment** and/or **Review PCPT** button(s) with available document(s).

2. The file is in **Downloads** of your respective browser. Use the shortcut key CTRL+J to open the browser's **View Downloads** dialog box.
3. Open the file and review it.
   or
   Save the file to the location of your choice and then review the file.
4. With a click of the review button, a check box control appears below the respective button (the following sample figure displays the check box controls for Assessment and PCPT).

Select the check box for the appropriate document to indicate that the document has been reviewed and it is up-to-date.

Note: It is not possible to reverse the check box selection.



6 Documents

An exciting update is now available on iRecord. As part of an ongoing process, we are pushing forward with a completely redesigned interface to manage the documents relevant to the participant's support coordination services. This is available from **Documents** on the **Main Toolbar**.

The interface offers intuitive navigation and additional features, matching the user experience of the other screens on iRecord. The main feature of **Documents** is the responsiveness, providing a similar interface and a near identical experience on any device. The documents are available on a grid layout, which displays the total number of available documents. The grid layout of the documents provides a cleaner interface and faster navigation.

Some of the new features include:

- Filter grid
- Sort grid
- Export grid to a file
- Upload additional file types
- E-mail documents

6.1 Document Types

iRecord defines the documents based on the document type. The available types are:

- NJISP
- PCPT
- AGRMT
- AAF
- HIPAA
- Legal Guardian
- Monthly Contact
- Other

NJISP

NJISP is an acronym for the New Jersey Individualized Service Plan.

The NJISP is developed through a Person-Centered Planning Process. Once assigned, the Support Coordinator plans with the participant and his/her identified team members through regular contact and communication. Through the use of information provided from the NJ Comprehensive Assessment Tool (NJ CAT), the Person-Centered Planning Tool (PCPT), and any other discovery tools that have been utilized, the Support Coordinator builds an NJISP. Development of the NJISP drives the outcomes and services implemented in order to meet the needs of the individual.

PCPT

The Person-Centered Planning Tool (PCPT) is a mandatory discovery tool used to guide the person-centered planning process and assist in the development of the NJISP. The Support Coordinator facilitates the development of the PCPT with input and guidance from the identified team members.

AGRMT

This is the document type for the participant enrollment agreement. To enroll into a Waiver Program, the Support Coordinator must obtain a signed enrollment agreement from the participant or guardian. The Support Coordinator explains the enrollment agreement before obtaining the signature.

AAF

AAF is an acronym for the Agency Assignment Form.

The participant or one of his/her representative completes the form and sends it to DDD before assigning the participant to an agency. The user at DDD uploads this form with Support Coordination Agency assignment.

HIPAA

The participant's written authorization for release of information must be obtained before any protected health information can be shared. To meet with HIPAA compliance, it is mandatory to obtain this authorization from the participant for a contact. HIPAA type refers to these documents. The document name is appended with the last name of the contact.

Legal Guardian

Legal Guardian is the official documentation required to show that the contact is the legal guardian of the participant.

HIPAA authorization must be obtained separately even for a legal guardian.

Monthly Contact

Monthly Contact is conducted within 30 days of NJISP approval and within every 30 day timeframe thereafter. This involves a personal meeting with the participant or, in certain acceptable cases, a telephone contact. Any other mode of communication is not accepted to meet the mandatory monitoring requirements. Information gathered or observed must be documented.

Other

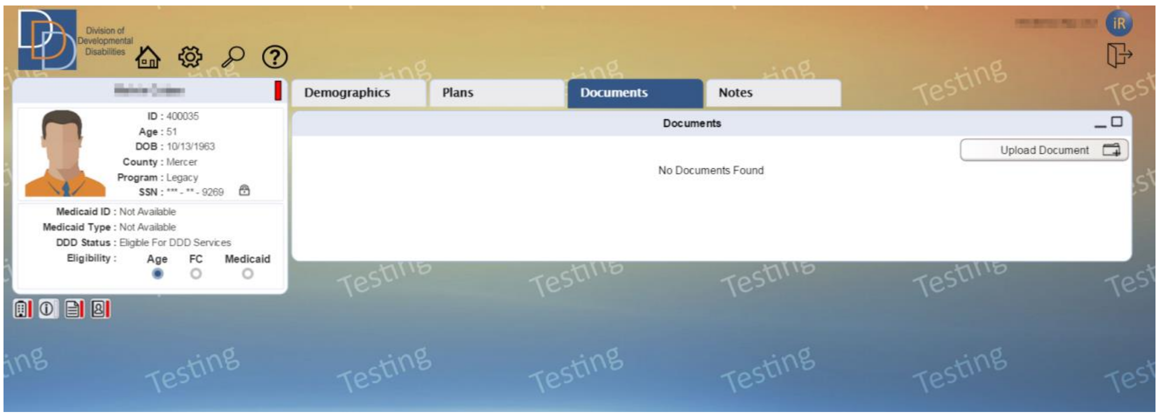
This is the category for any additional documents that are relevant to the participant's support coordination services.

6.2 Documents Screen

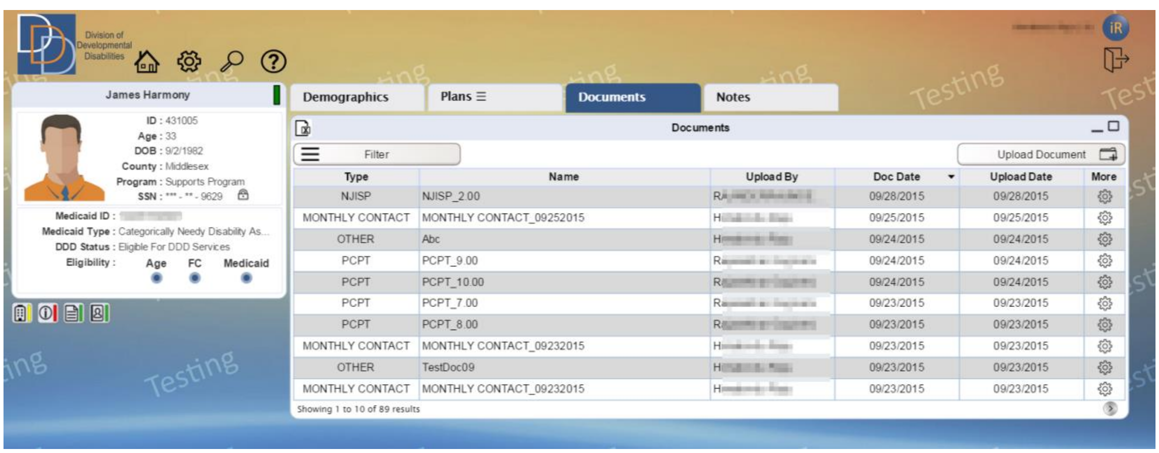
Documents on the **Main Toolbar** provide the options to upload a document and/or view any document that was uploaded previously. There are additional options available with each document as well.

The documents are available on a grid layout. The **Documents** screens are shown in the following figures.

No available documents



Available documents



6.2.1 Grid Columns

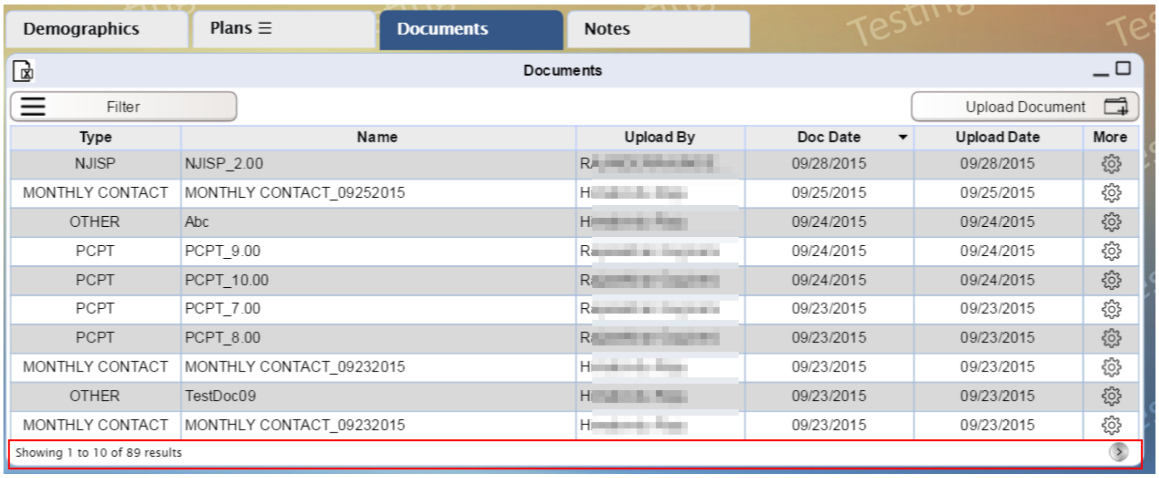
The table below describes the columns on the **Documents** grid.

Column	Description
Type	View the type of uploaded document. The type of document is one of the following: • NJISP • PCPT • AGRMT • AAF • Monthly Contact • Legal Guardian • HIPAA • Other
Name	View the name of the document. The name of the document is the type of document appended with the document identifier. An example of the name for each document type: • NJISP document for Plan 1.00 displays as NJISP_1.00. • PCPT document displays it in the numerical order of the PCPT upload, such as PCPT_2.00 (for the second uploaded PCPT). • Monthly Contact displays the document completion date, such as MonthlyContact_07062015. • Legal Guardian and HIPAA display the last name of the contact, such as HIPAA_Harmony. • AGRMT and AAF are shown likewise, without any identifier. • The user enters the name for the Other document type.
Upload By	View the user that uploaded the document.
Doc Date	View the date of document completion.
Upload Date	View the date that the document was uploaded to iRecord.
More	Click  to view the following options for each document: • View/Download • Send Doc • View Notes

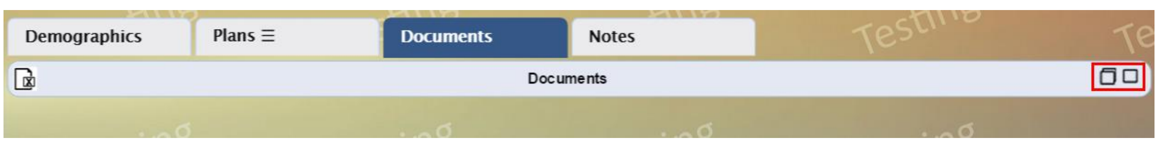
6.2.2 Features

The features available on the grid are:

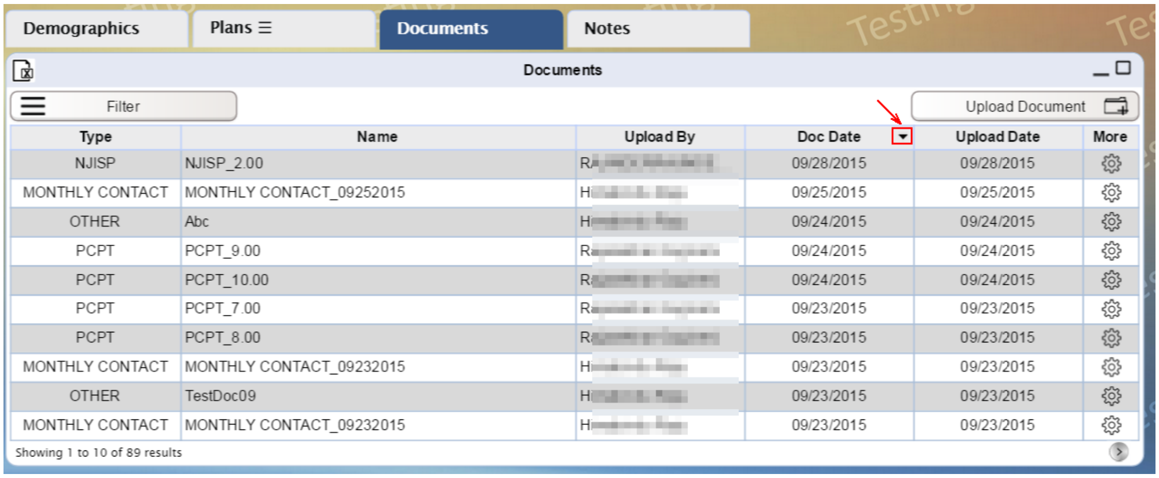
- By default, the grid displays a maximum of 10 rows. At the bottom of the grid, view the total number of results. Click to view the next 10 results. Click to view the previous 10 results (when applicable).



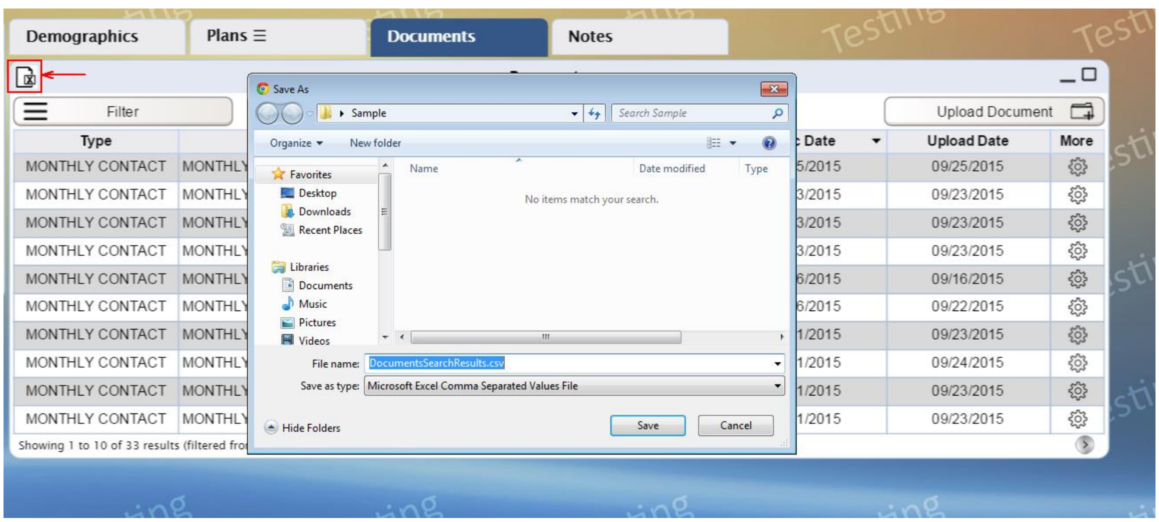
- Click — to minimize the tile or click ☐ to maximize the tile. At the minimized or maximized state, click to restore the tile to the default state. The figure below displays the tile in the minimized state with (restore) and ☐ (maximize) buttons.



- Sort the grid from any column in ascending or descending order. By default, the grid is sorted in the descending order of **Doc Date**. View ▼ or ▲ adjacent to the column header that sorts the grid (the grid is sorted according to the column that displays the icon). ▼ represents a descending order sort and ▲ denotes an ascending order sort.



- Export the grid to an Excel file using the icon. Click and iRecord opens the **Save As** dialog box on your device as shown in the following figure (for the Windows OS).



- Hover over an ellipsis within the grid and view a tooltip that displays the complete details.

6.2.3 Upload Document

There are three types of documents that you can upload using the **Upload Document**:

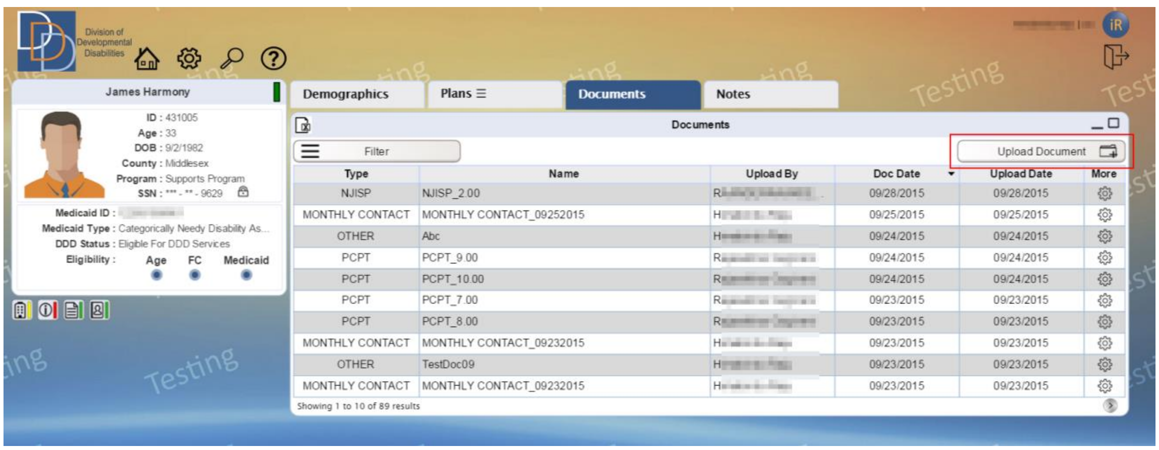
- Monthly Contact
- Other
- PCPT

The remaining document types are uploaded either on **Plans** (NJISP, AGRMT, AAF) or **Demographics** (HIPAA, Legal Guardian).

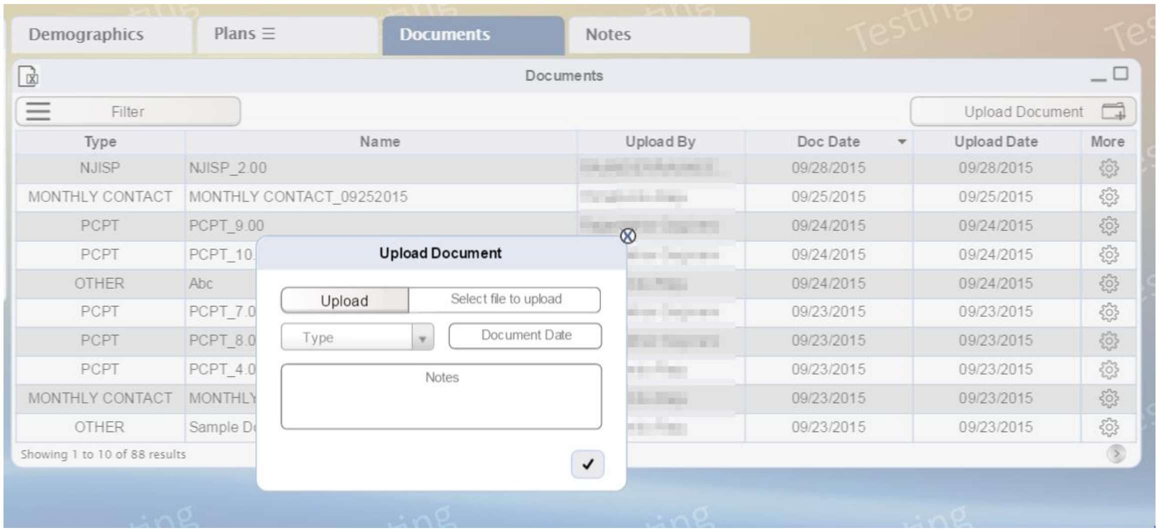
The following instructions detail the procedure to upload Monthly Contact, PCPT or Other.

To upload a document

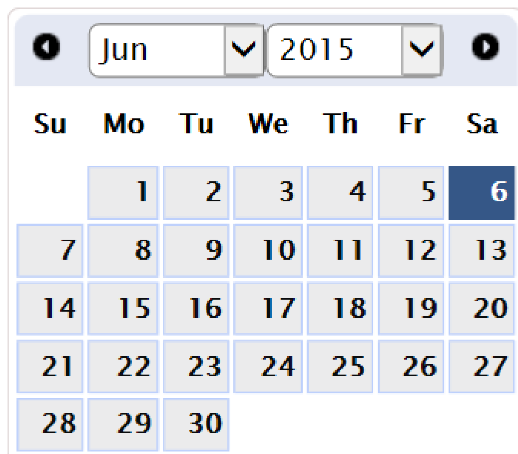
1. Click the **Upload Document** button, shown in the following figure.

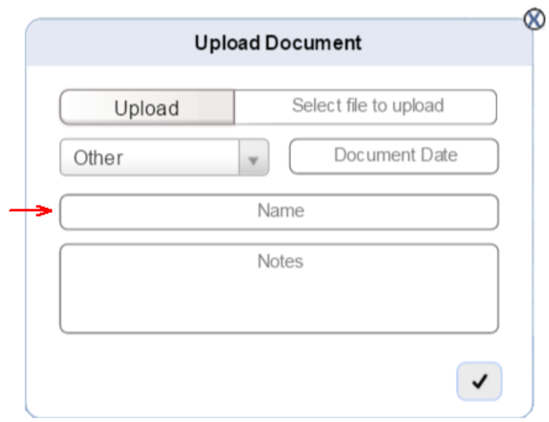


2. The **Upload Document** pop-up controls appear, as shown in the following figure. Enter the details for each field, refer to the next table.



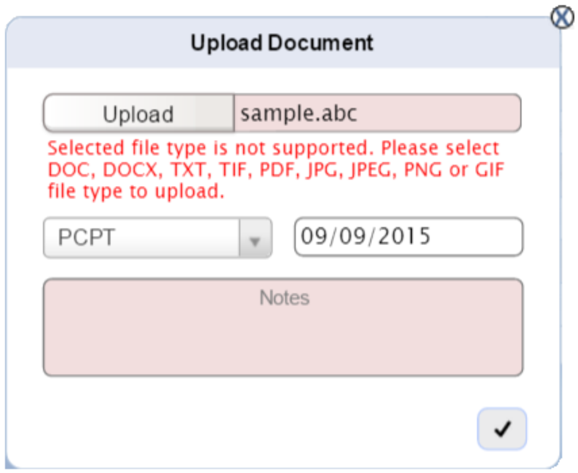
Field	Description
Select file to upload	Click **Select file to upload** box and your system dialog box appears to browse the file. Locate the appropriate file and then select it. The document must have one of the following file extensions: • DOC • DOCX • TXT • TIF • JPG • JPEG • PNG • GIF • PDF iRecord does not permit you to upload the file and displays an error message (while saving) with any of the following conditions: • Incompatible file extension (see aforementioned extensions) • File size exceeds 4 MB • File name exceeds 150 characters Mandatory/Optional: Mandatory

Field	Description
Type	Select the appropriate type of document from the drop-down list. The options are: • PCPT • Monthly Contact • Other Select **Other** and the **Name** field appears on the **Upload Document** pop-up controls. Mandatory/Optional: Mandatory
Document Date	Enter the date of document completion within the text box. or Select the date of document completion using the calendar controls, shown below.  Select the month and year from the drop-down lists on the top section. Click and select the date. Mandatory/Optional: Mandatory Date format: MM/DD/YYYY

Field	Description
Name	This field only appears with the selection of **Other** for the **Type** drop-down list. The **Name** field with the selection of **Other** is shown in the figure below.  Enter an appropriate name for the document within the text box. Mandatory/Optional: Mandatory Max limit: 50 characters
Notes	Enter any relevant notes related to the uploaded document. Mandatory/Optional: Mandatory Max limit: 5000 characters

3. Click ✓ to save and close **Upload Documents**. View the **Documents** screen and the grid displays the saved document.

Note: An error message is shown when you click ✓ without meeting the conditions discussed in **Select file to upload**. An example is shown in the following figure for an unsupported file type.

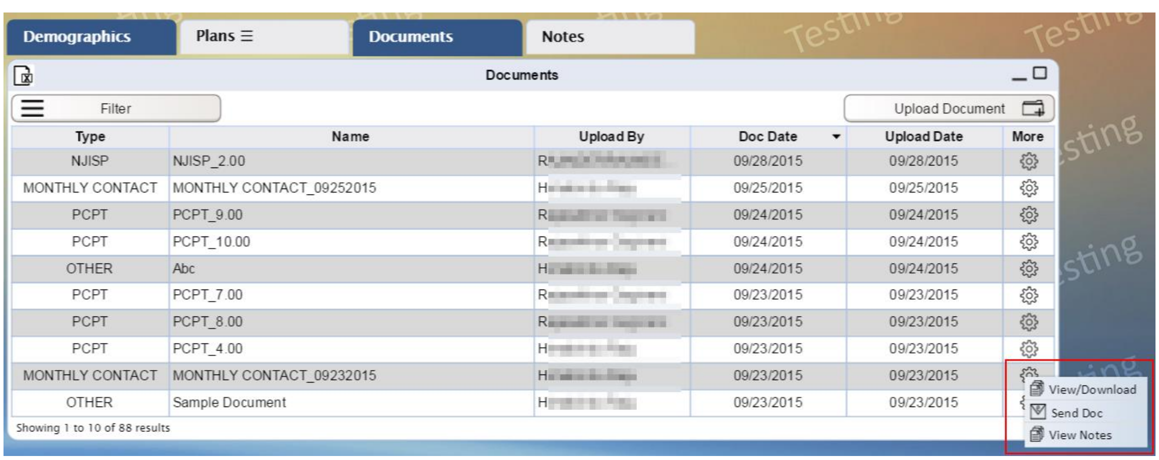


6.2.4 View Document

Once any document is uploaded to iRecord, the document is available for viewing (based on your user role). The grid displays only those documents that your role permits you to view.

To view a document

- You can view a document from the grid in one of the following two methods:
    - Click a line item anywhere on the row and view the document.
    - Click and view additional options. Click **View/Download** to view or download the document.



Note: In most cases, your browser opens a dialog box to open or save the document on your device (however, this depends on your device and browser).

6.2.5 Filter Document(s)

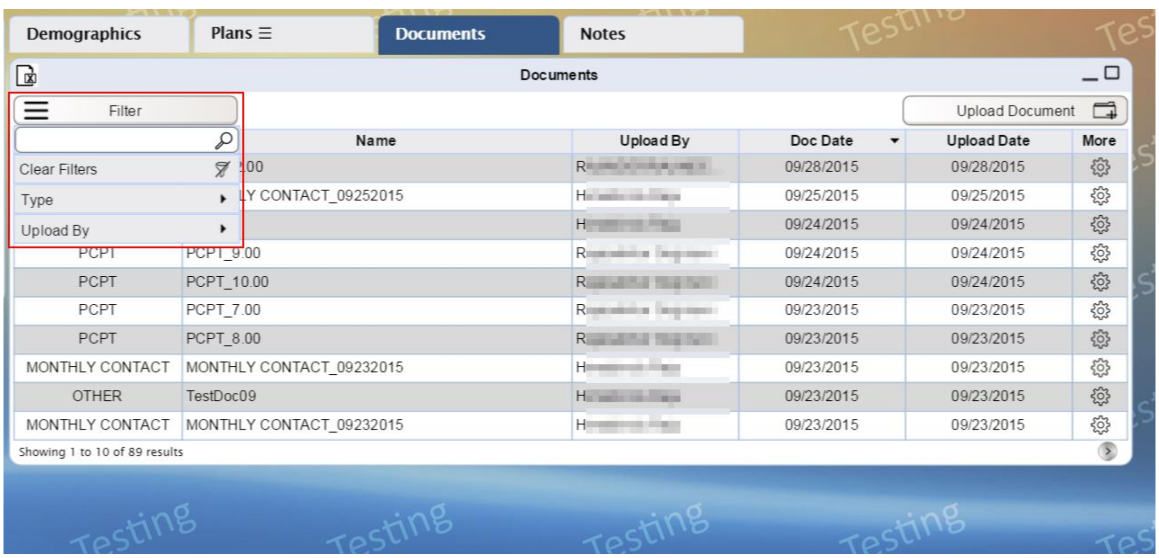
The three available options to filter documents are:

- Type
- Upload By
- User Defined

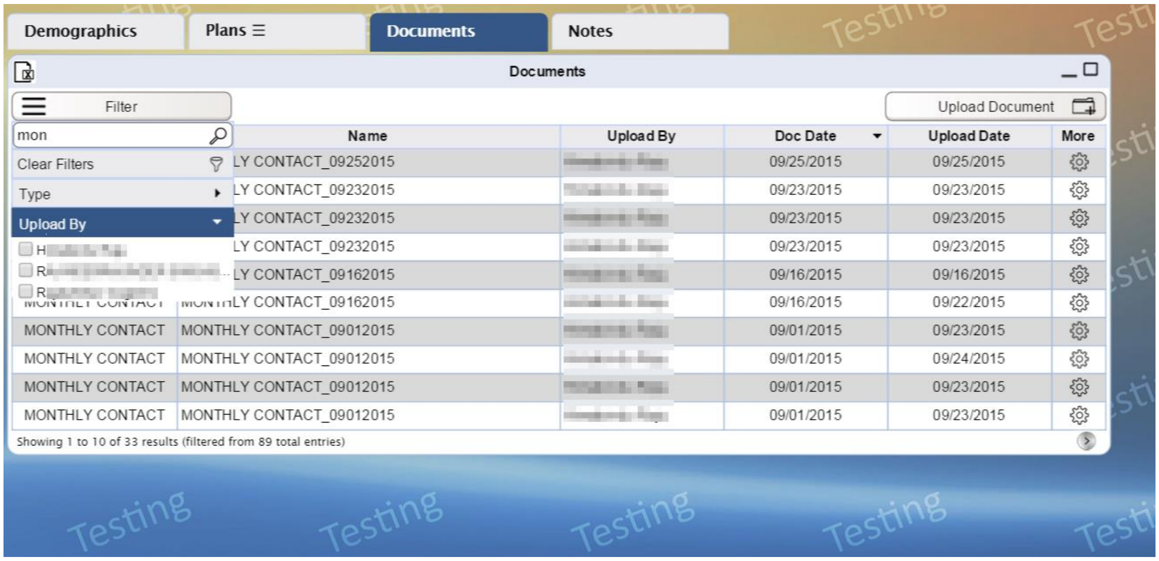
You can either filter by one of the options or use a combination to view the desired results. The grid displays the results instantly.

To filter for document(s)

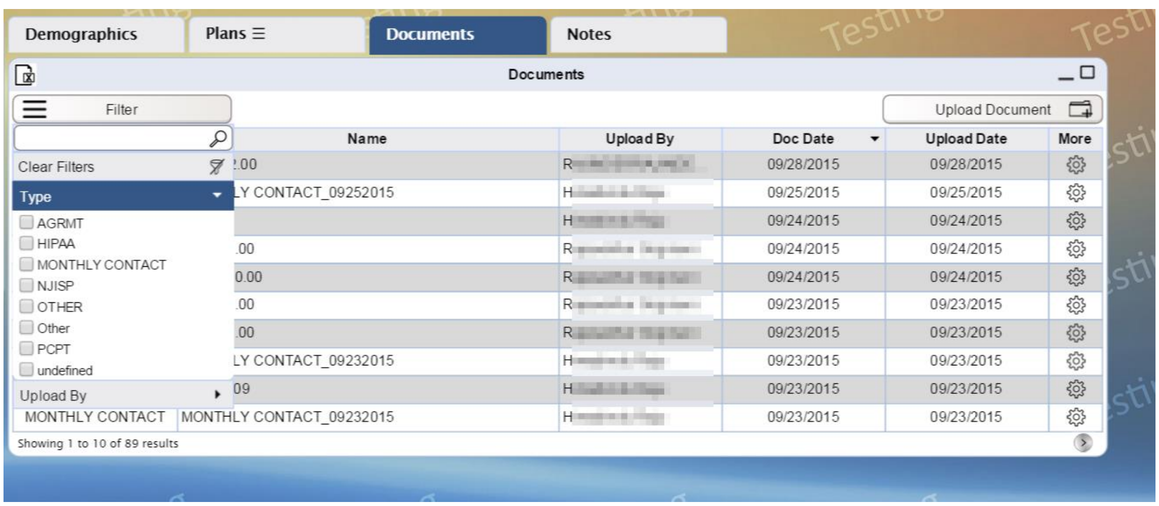
1. Click the **Filter** button and view the available filter options, indicated in the following figure.



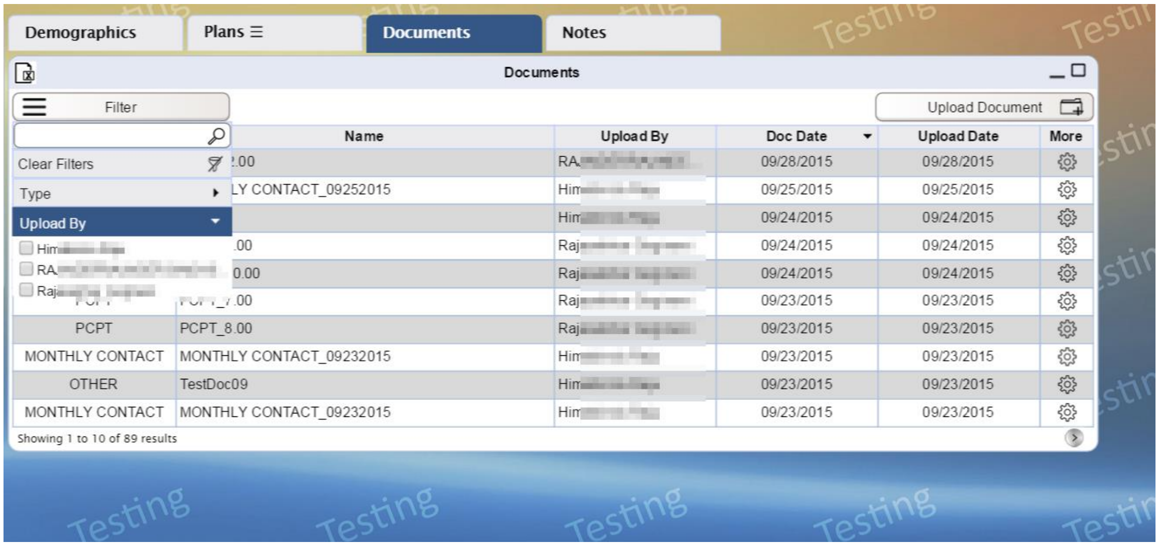
2. You can filter the document(s) in one of the following methods:
   - Enter the characters within the text box. The grid displays the line items containing the characters entered within the box.
     The following figure displays the line items that contain the characters **mon** (irrespective of the case).



- Click **Type** and view the options to filter based on the type of document. Select check box(es) to apply the filter. The grid displays the document(s) with the selected type(s).



- Click **Upload By** and view the options to filter based on the uploaded user. Select check box(es) and the grid displays according to the selected user(s).



- Use a combination of the aforementioned options and apply a custom filter.

Note: You can also export the filtered grid to an excel file with the icon.

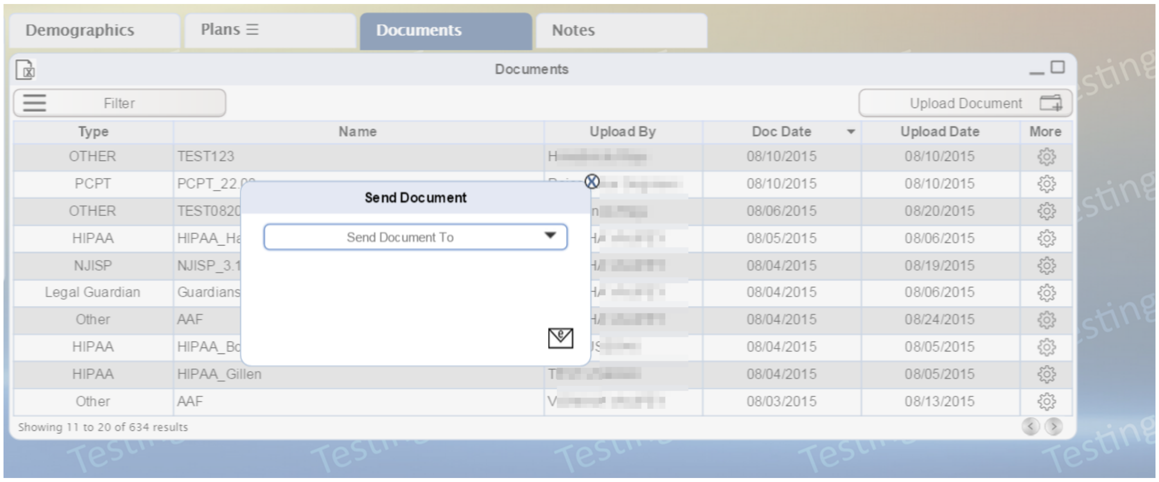
6.2.6 Send Document

iRecord provides the option to e-mail documents to multiple entities. The entities listed in alphabetical order include the participant, HIPAA contacts and the participant's current plan providers.

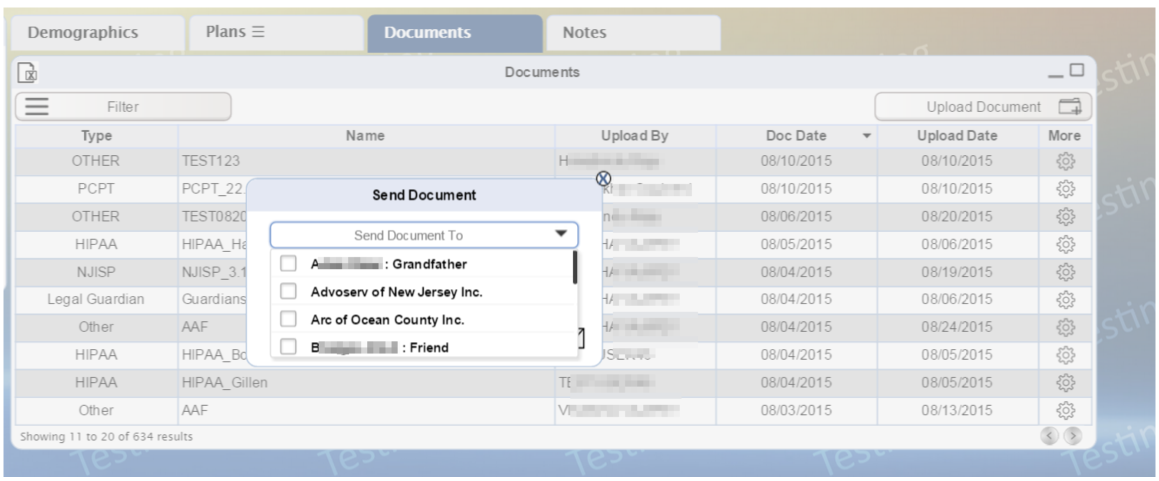
The e-mails are sent out from the following e-mail address:
ddd.irecord@dhs.state.nj.us

To send the document

1. Click of the appropriate document and view additional options:
   - View/Download
   - Send Doc
   - View Notes
2. Click **Send Doc** and iRecord displays the **Send Document** pop-up tile, as shown in the following figure.

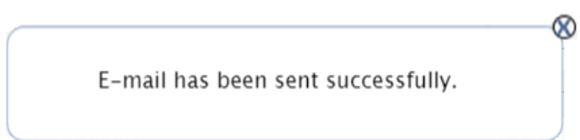


3. Click **Send Document To** and view the list of available options. Scroll down to view additional options, if required.



4. Select check box(es) and then click .

5. View a confirmation message, as shown in the following figure.

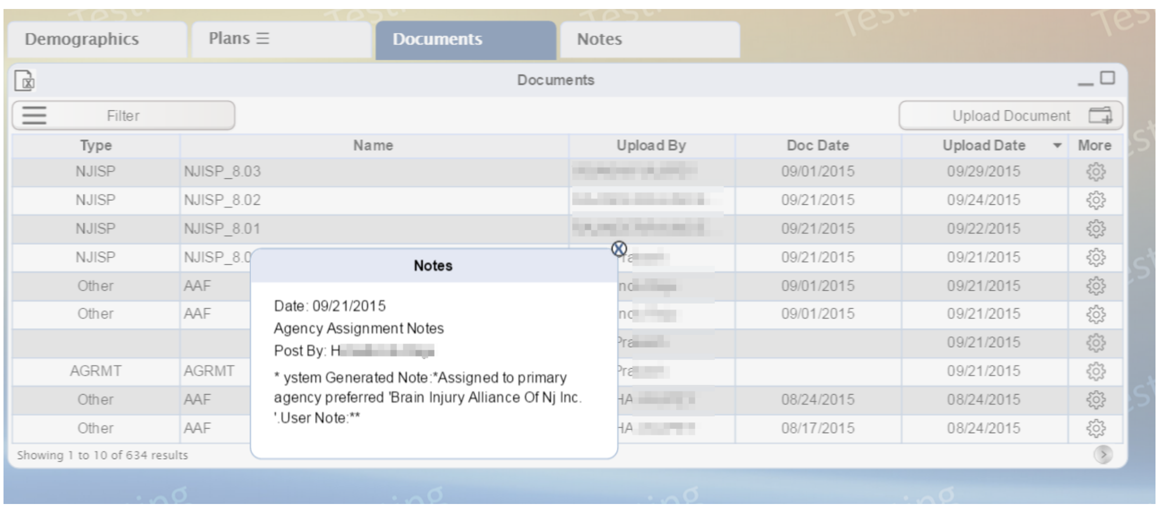


6.2.7 View Notes

There is a system generated note for every uploaded document. It is also possible that the user entered a note during the document upload process. iRecord displays both of these notes with the **View Notes** option.

To view the notes

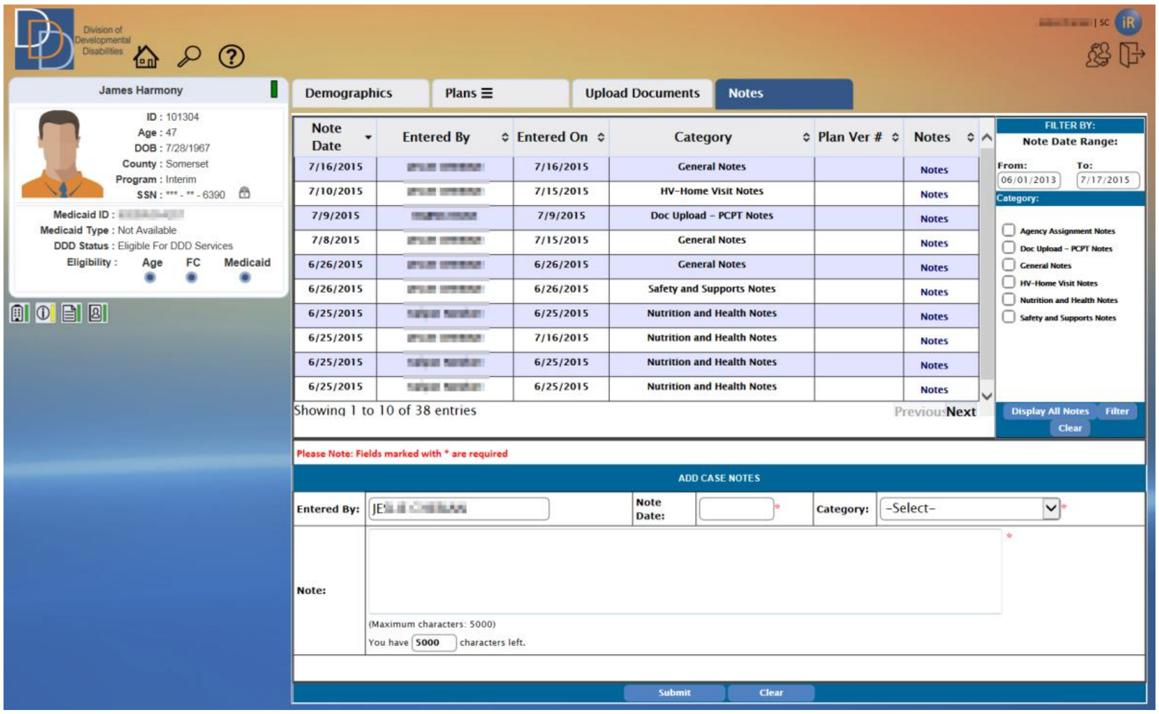
1. Click of the appropriate document and view additional options:
    - View/Download
    - Send Doc
    - View Notes
2. Click **View Notes** and iRecord displays **Notes**, as shown in the following figure.



7 Notes

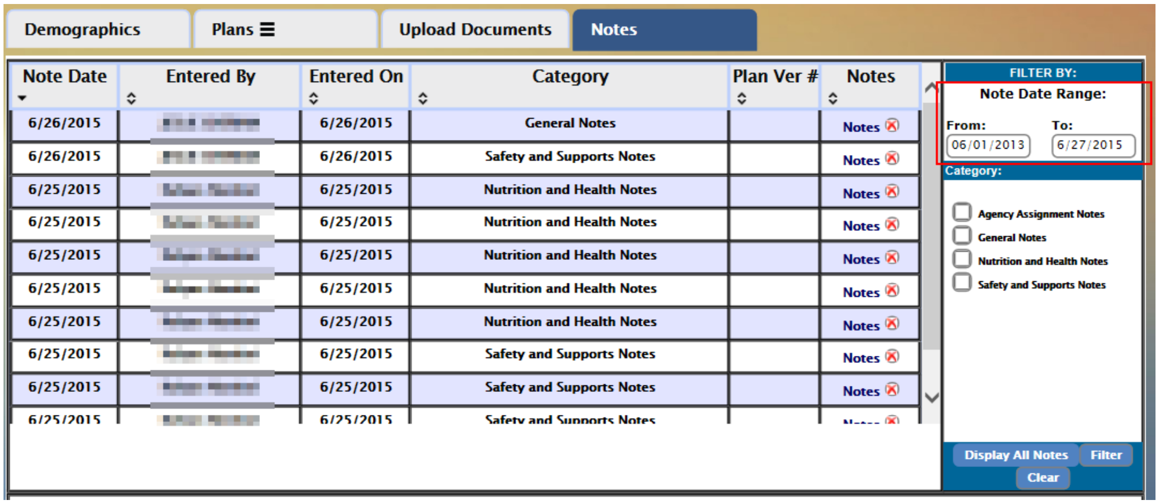
The **Notes** on the **Main Toolbar** display the notes of the participant.

The following figure displays a screenshot of the **Notes** for a participant.

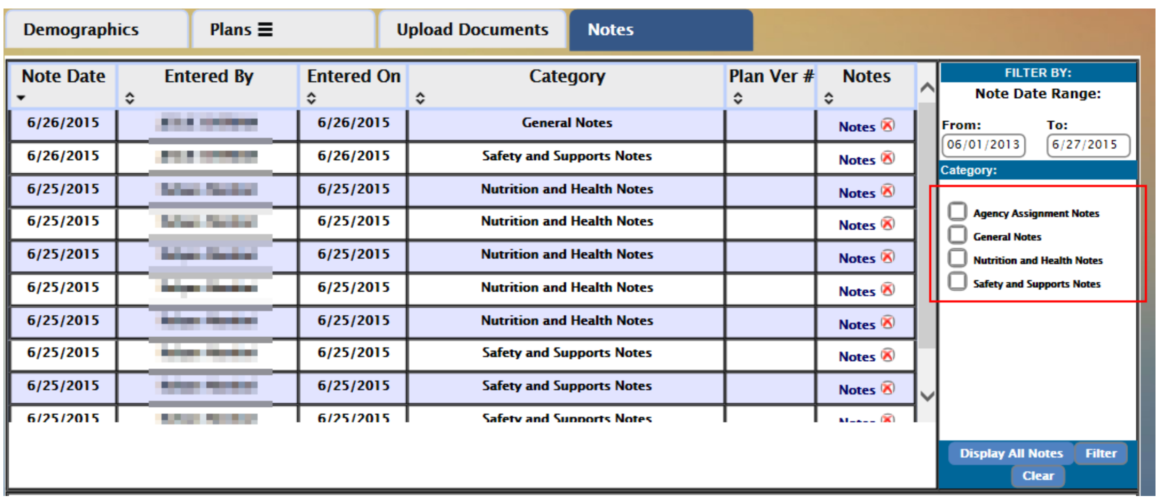


7.1 Filter Notes

- Filter notes for a date range using the section indicated in the following figure.

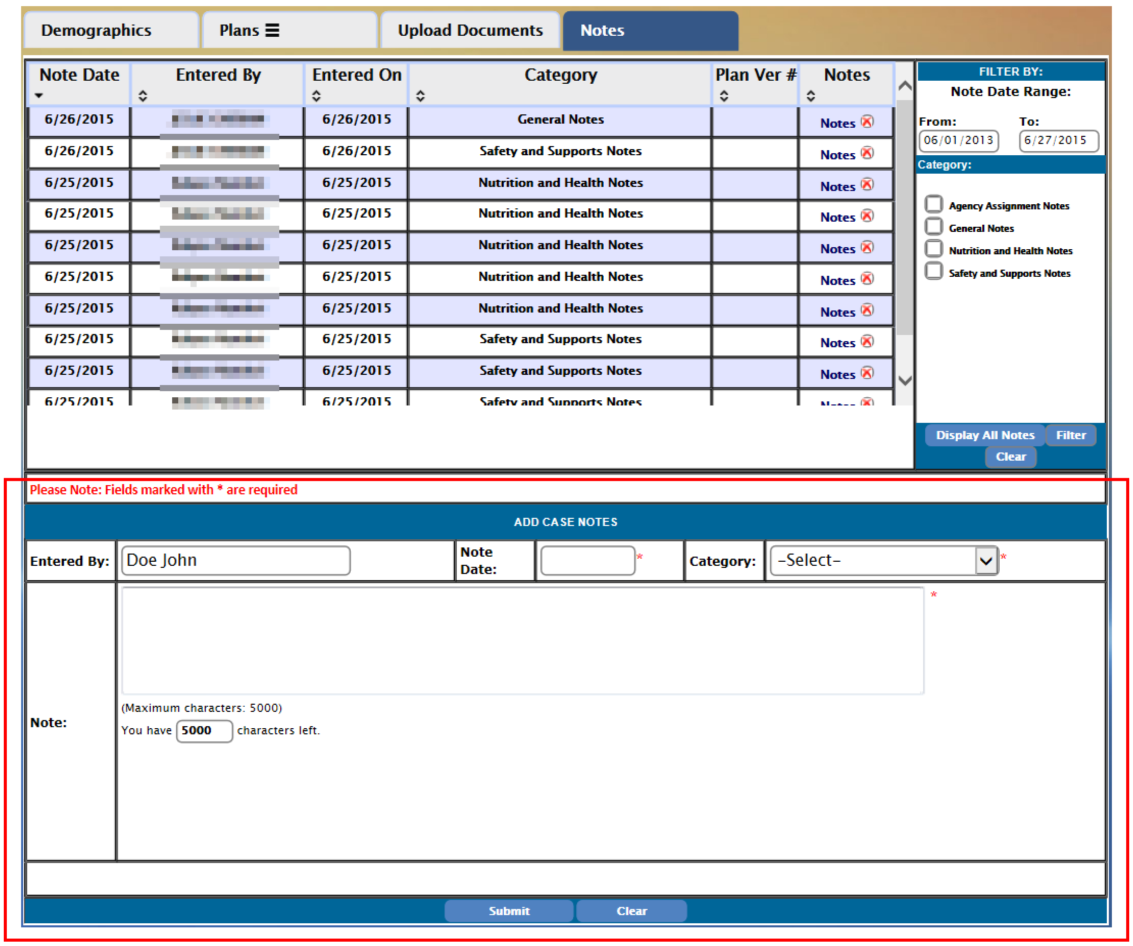


- Filter notes based on type using the section in the in the following figure.

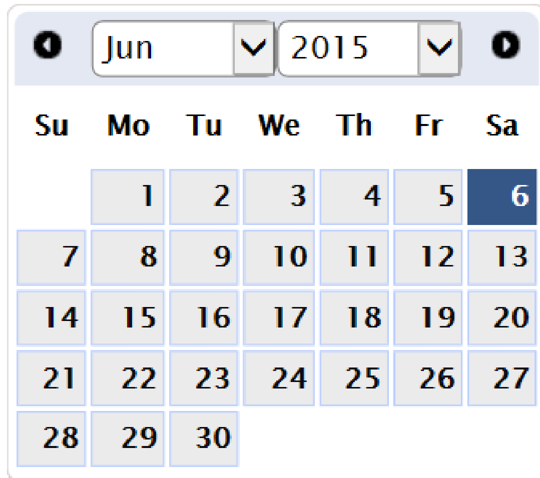


7.2 Add Note

You can add a note using the section indicated in the figure below. For more information, refer to the following table. Once you are done providing the details, click the **Submit** button. View the entered note included as a line item on the grid.



Field	Description
Entered By	View your name within this field.
Note Date	Enter the note date in the format given below, or select the date on the calendar pop-up, shown below.

	 Select the month and year using the drop-down list on the header. Click and select the date. Date format: MM/DD/YYYY Mandatory/Optional: Mandatory
Category	Select the category of **Notes** from the drop-down list options.
Note	Enter the note within this box. Max limit: 5000 characters Mandatory/Optional: Mandatory

8 About iRecord

About iRecord is available on the logo of the application header. Click to view the tile, shown below.

The tile provides the following information:

- Copyright information
- Version number
- Patch Notes link

9 User Privileges

The table indicates the user role permissions on each tile within the interface.

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Dashboard										
Search	√	√	√	√	√	√	√	√	√	√
Due-List	√	√	√	√				√	√	
Alerts	√		√	√				√	√	
Message of the Day	√	√	√	√	√	√	√	√	√	√
Patch Notes	√	√	√	√	√	√	√	√	√	√
Training & Events	√	√	√	√	√	√	√	√	√	√
Caseload Report			√	√	√					
Plan Status Report			√	√	√					
Plan Delivery Report			√	√	√					
Approved Plan Report								√	√	√
Self-Directed Employee Report								√	√	√
Current FI Services Report								√	√	√
Event-Load Report	√	√				√	√			
Current Events Report	√	√				√	√			
Late Event-Load Report	√	√				√	√			

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Left-Navigation										
Participant	√	√	√	√	√	√	√	√	√	√
Unmask SSN	√	√	√	√	√	√	√	√	√	√
Support Coordination	√	√	√	√	√	√	√	√	√	√
Current Plan Info	√	√	√	√	√	√	√	√	√	√
Assessment	√	√	√	√	√	√	√			
Override Assessment										
Contacts	√	√	√	√	√	√	√	√	√	√
Personal										
Name										
View Name	√	√	√	√	√	√	√	√	√	√
Edit Name	√	√	√	√						
Contact Info										
View	√	√	√	√	√	√	√	√	√	√
Add or Edit	√	√	√	√						
Residential Address										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Mailing Address										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Birth Info										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
More Info										
View	√	√	√	√	√	√	√			
Edit (**Gender** excluded)	√	√	√	√						
Medical										
Primary Care Physician (PCP)										
View PCP	√	√	√	√	√	√	√			
Add PCP	√	√	√	√						
Primary Care Physician Address										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Preferred Hospital										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Request to add hospital	√	√	√	√			√			
ASO										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
MCO										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Private Insurance										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Diagnosis										
View	√	√	√	√	√	√	√			
Medication(s)										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Safety & Supports										
Support Settings										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Communication										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Religious/Cultural Information										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Mobility/Adaptive Equipment										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Behavior/Sensory Needs										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Nutrition & Health										
Allergies										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Dietary										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Health Hazards/Concerns										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Self-Care										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Employment										
Employment History										
View	√	√	√	√	√	√	√			

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Add or Edit	√	√	√	√						
Pathway Assessment										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Voting										
View	√	√	√	√	√	√	√			
Add or Edit			√	√						
Contact										
Contacts Navigation										
View	√	√	√	√	√	√	√			
Add	√	√	√	√						
Name										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Contact Info										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Residential Address										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Mailing Address										
View	√	√	√	√	√	√	√			

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Edit	√	√	√	√						
More Info										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Emergency Contact										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Contact Attributes										
View	√	√	√	√	√	√	√			
Add or Edit	√	√	√	√						
Plans										
Enroll	√			√						
SC Agency Assignment	√									
View Provider	√	√	√	√	√	√	√	√	√	√
View Outcomes[1]	√	√	√	√	√	√	√	√	√	√
Add Outcomes[2]				√		√	√			
Add Outcomes/ Service[2]				√		√	√			
Expenditure										
View Expenditure	√	√	√	√	√	√	√	√	√	√
Post Expenditure							√	√	√	
Edit Expenditure							√	√	√	

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Delete Expenditure								√		
Actions										
Document Review										
Review Assessment button	√	√	√	√	√	√	√			
Review Assessment check box				√						
Review Assessment icon	√	√	√	√	√	√	√			
Upload PCPT button				√			√			
Review PCPT button	√	√	√	√	√	√	√			
Review PCPT check box				√						
Review PCPT icon	√	√	√	√	√	√	√			
Upload New PCPT				√			√			
Planning Team										
View	√	√	√	√	√	√	√			
Add or Edit				√						
Change Plan Status										
View	√	√	√	√	√	√	√			
Edit	√	√	√	√						
Send Plan										
Print	√	√	√	√	√	√	√	√	√	√

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
E-mail	√	√	√	√				√	√	
Documents										
View All Documents	√	√	√	√	√	√	√			
View NJISP, PCPT & Other								√	√	√
Upload Monthly Contact, PCPT & Other				√						
Upload Other	√	√	√	√				√	√	

1. SWAC, WAC, SCS, SC, SC-VO can view all plan statuses. SFI, FI, FI-VO can view plans with an Approved status.
2. VO-TS can add, but not save.

Glossary

A

A: Approved

AI: Approve-To-Inactive

ALA: Alternate Living Arrangement

AR: Accounts Receivable

ASO: Administrative Services Organization

B

BRATS: Budget Reconciliation and Tracking System

C

C2C: Contribution to Care

CBS: Client Banking System

CCP: Community Care Provider

CCR: Community Care Residence

CCW: Community Care Waiver

CFAU: Consumer Financial Assessment Unit

CFS: Consumer Financial Services

CIMU: Critical Incident Management Unit

CIS: Consumer Information System

CMIS: Consumer Management Information System

CMS: Centers for Medicare and Medicaid Services

CMW: Comprehensive Medicaid Waiver

COLA: Cost of Living Adjustment

COMPSTAT: Comparative Statistics

CPI: Consumer Price Index

CSR: Consumer Service Recording

CSV: Comma Separated Value

CWA: Communication Workers of America

D

DB: Database

DC: Developmental Center

DCF: Department of Children and Families

DDD: Division of Developmental Disabilities

DDPI: Developmental Disabilities Planning Institute

DDRT: Developmental Disability Resource Tool

DDS: Division of Disability Services

DHS: Department of Human Services

DMAHS: Division of Medical Assistance and Health Services

DMHAS: Division of Mental Health and Addiction Services

DOB: Date of Birth

DOR: Division of Revenue

DP: Day Program

DVRS: Division of Vocational Rehabilitation Services

E

EFT: Electronic Fund Transfer

ELP: Essential Lifestyle Plan

ES: Easter Seals

F

FC: Functional Criteria or Fiscal Conduit

FCA: Functional Criterial Assessment

FEIN: Federal Employer Identification Number

FFS: Fee for Service

FI: Fiscal Intermediary

FMS: Family Maintenance Standard

FTP: File Transfer Protocol

H

HCBS: Home and Community Based Services

HCPCS: Healthcare Common Procedure Coding System

I

ICF/MR: Intermediate Care Facility for Persons with Mental Retardation

ICSS: Individualized Community Supports and Services

IDT: Interdisciplinary Team

IHP: Individualized Habilitation Plan

K

KPI: Key Performance Indicator

L

LRR: Legally Responsible Relative

M

MCO: Managed Care Organization

MCS: Medical Cost Standard

MMIS: Medicaid Management Information System

MR: Mental Retardation

N

NJ CAT: New Jersey Comprehensive Assessment Tool

NJISP: New Jersey Individualized Service Plan

NJIT: New Jersey Information Technology

NPI: National Provider Identifier

O

OT: Occupational Therapy

P

PASS: Plan to Achieve Self Support

PCPT: Person-Centered Planning Tool

PETS: Provider Enrollment Tracking System

PNA: Personal Needs Allowance

POC: Plan of Care

PRT: Personal Review Team

PT: Physical Therapy

PTF: Patient Trust Fund

R

R: Review

R&B: Room and Board

RFP: Request for Proposal

RHCF: Residential Health Care Facility (licensed by Department of Health and Senior Services)

RLC: Real Life Choices

RR: Railroad Retirement Benefits

RV: Revision

S

SC: Support Coordinator

SC-VO: Support Coordinator - View Only

SCR: Special Circumstance Request

SCS: Support Coordination Supervisor

SDDS: Self-Directed Day Service

SFI: Supervising Fiscal Intermediary

SFY: State Fiscal Year (July 1 through June 30)

SP: Supports Program

SPA: Supervisor of Patient Accounts

SPC: Special Program Code

SSA: Social Security Administration

SSDI: Social Security Disability Insurance

SSN: Social Security Number

ST: Speech Therapy

SU: Super User

SVES: State Verification and Exchange System

SWAC: Supervisor of Waiver Assurance Coordinator

U

UIR: Unusual Incident Report

UIRMS: Unusual Incident Reporting and Management System

USPS: United States Postal Service

V

VA: Veteran Affairs

VO: View Only

VO-TS: View Only - Troubleshoot

W

WAC: Waiver Assurance Coordinator

Appendix

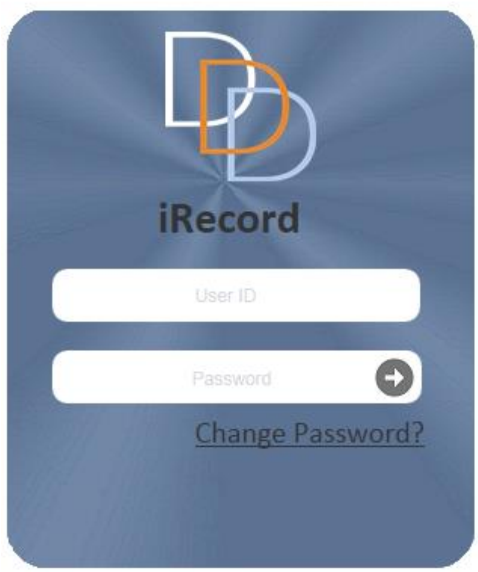
Supports Program Enrollment

The Participant Enrollment interface handles enrollment of the participant into a Waiver program, such as the Supports Program. On iRecord, the interface leads the user through selecting a participant, a program, and assuring all information is available for a successful enrollment. Once validated, iRecord initiates the generation of a participant plan. At this point, the participant is said to be 'soft enrolled' into the program. The soft enrollment is the time period between creating the enrollment in DDD and having the plan approved.

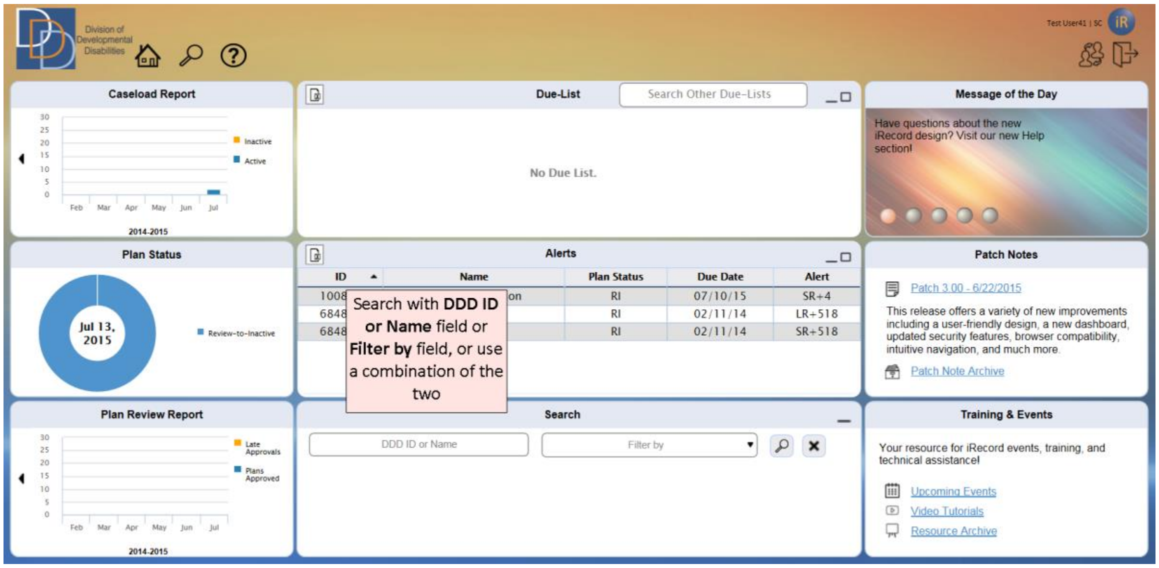
The Support Coordinator facilitates enrollment of the participant on iRecord into the Supports Program. The following procedure demonstrates the steps to enroll a participant on Interim into the Supports Program.

To enroll a Participant into the Supports Program

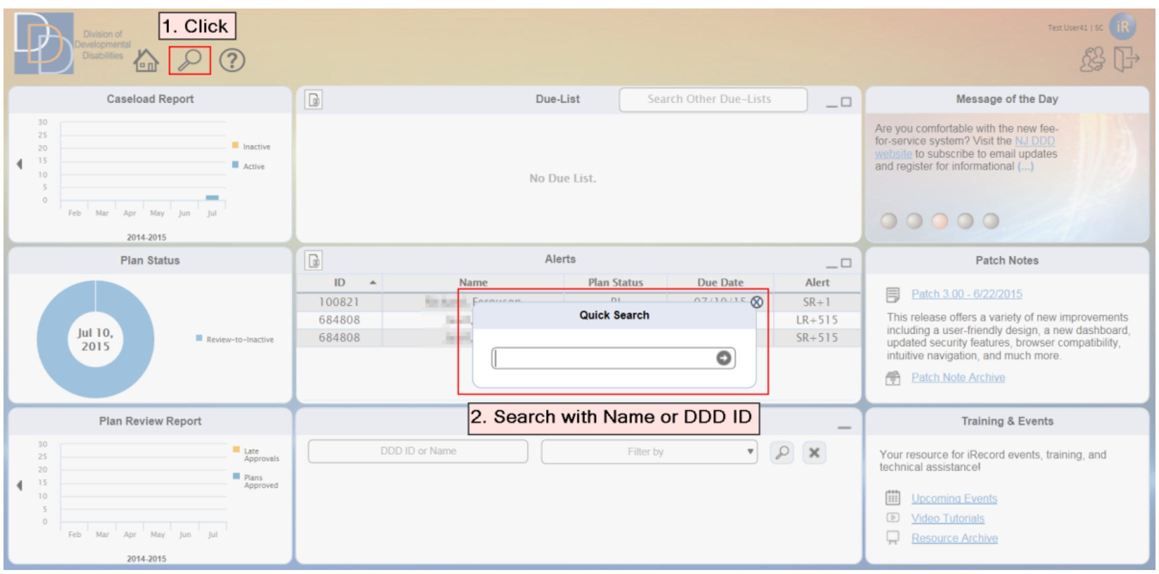
1. Log in to iRecord



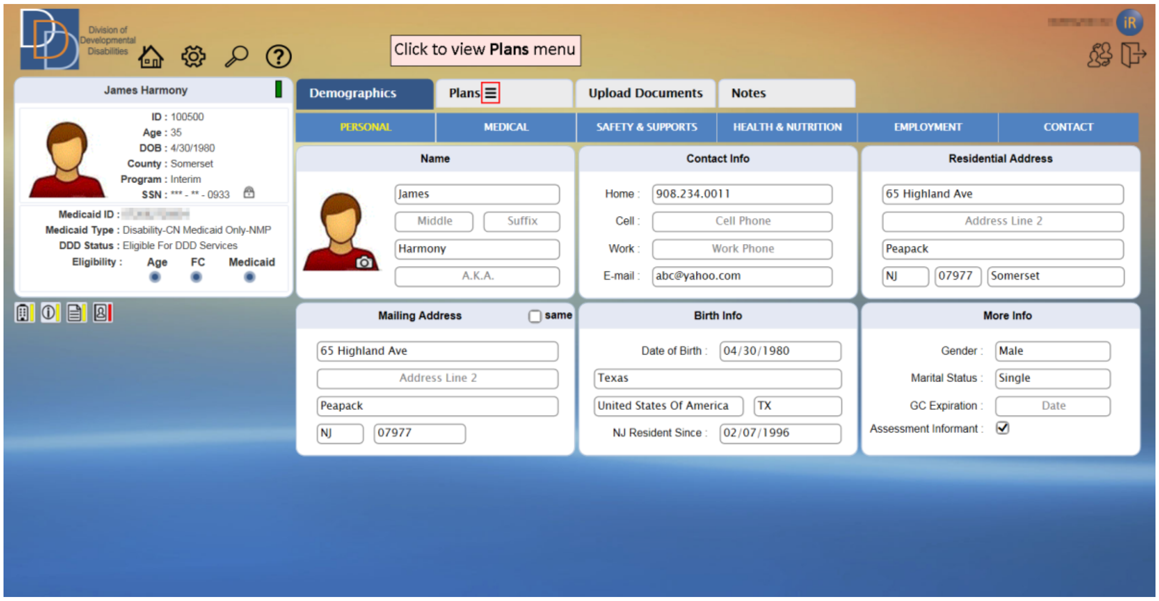
2. Search participant



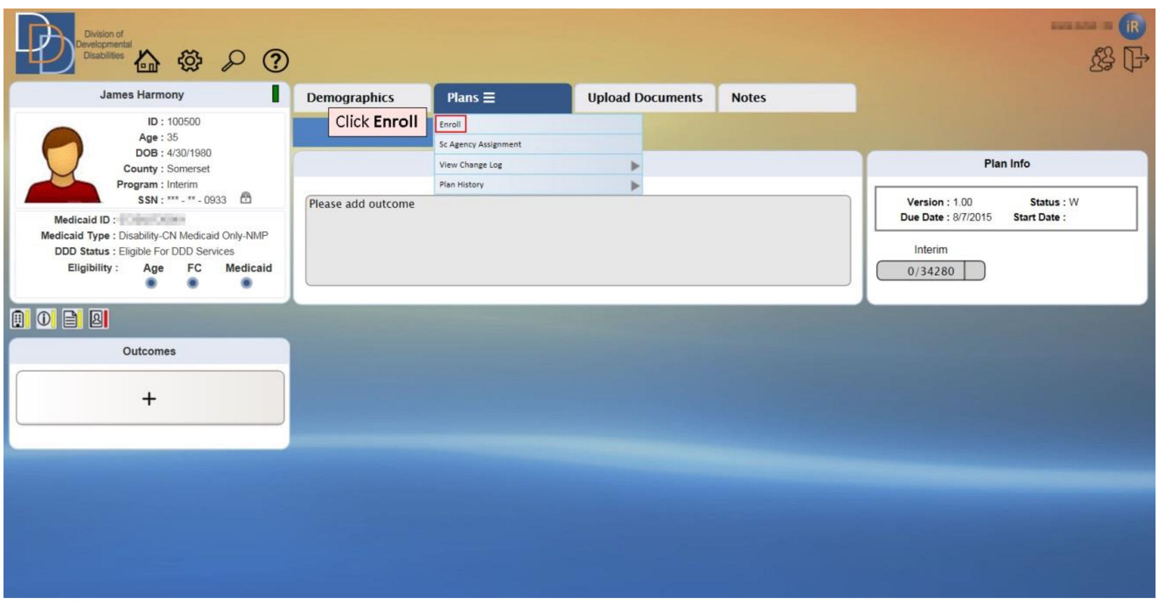
Or



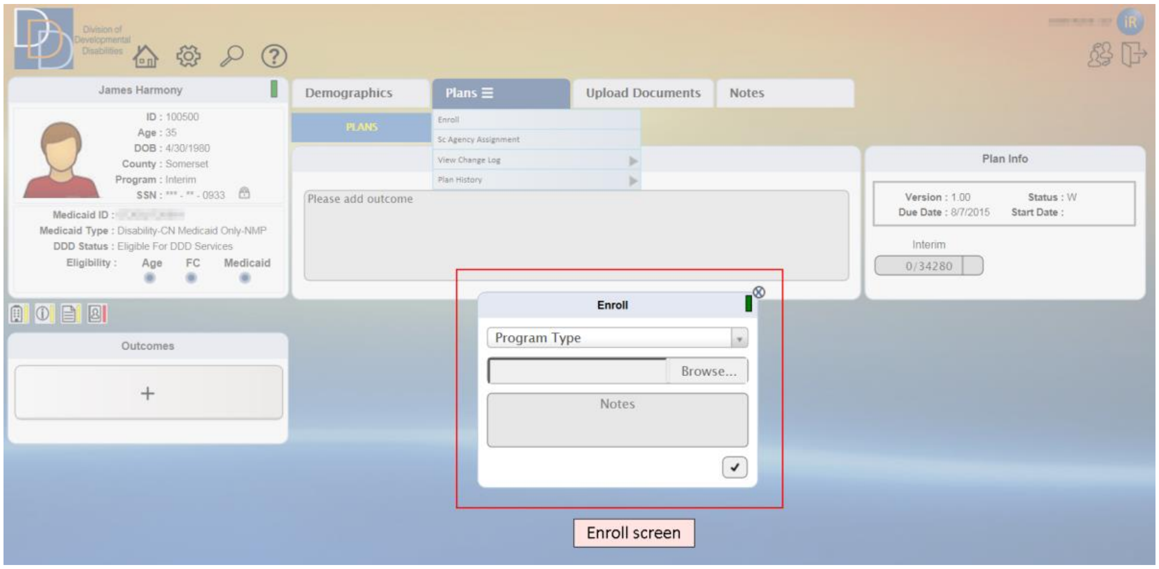
3. View Plans menu options



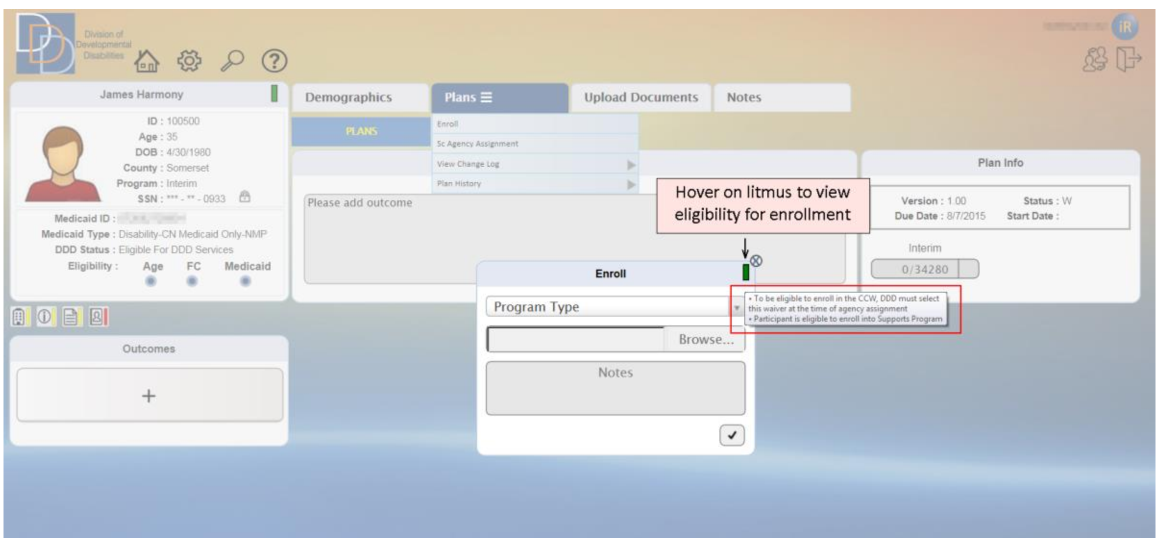
4. Click Enroll on the Plans menu



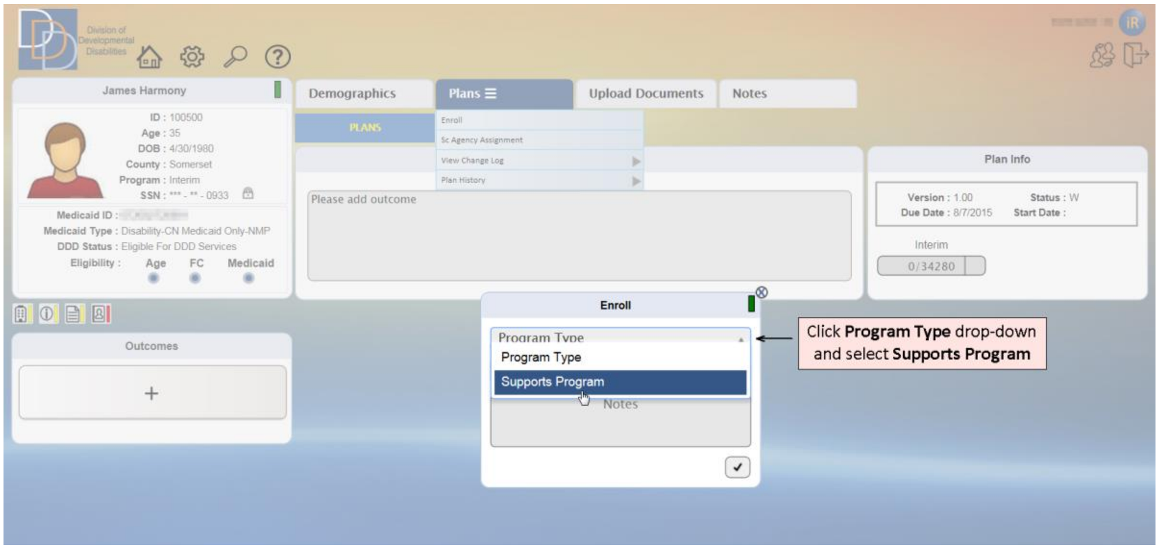
5. View Enroll screen



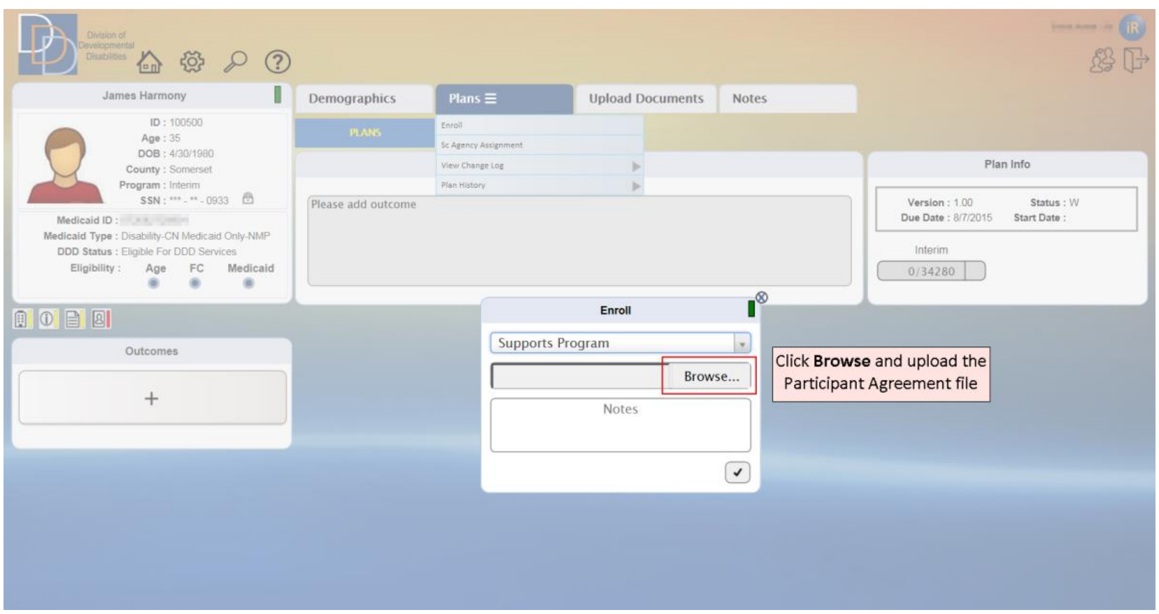
6. Hover status indicator



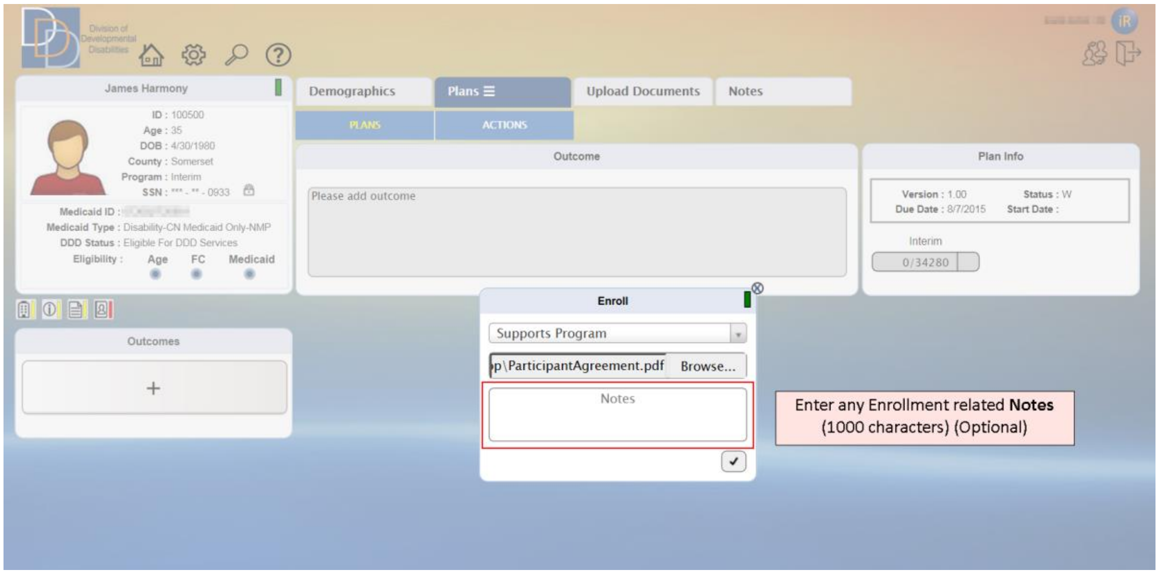
7. Select Program Type



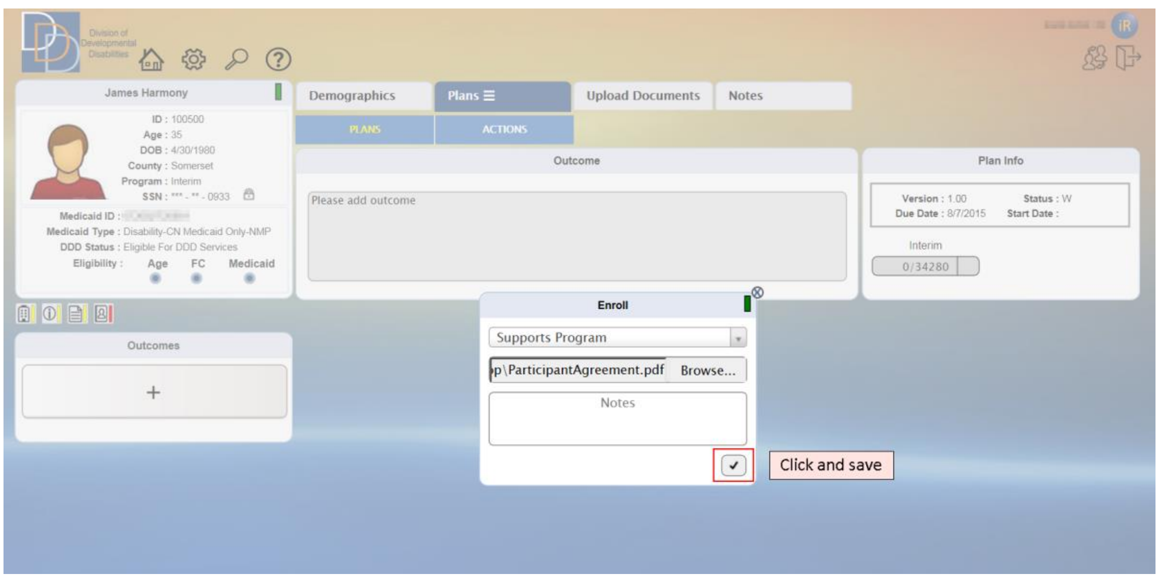
8. Upload Participant Signed Agreement (the file can be in any file format)



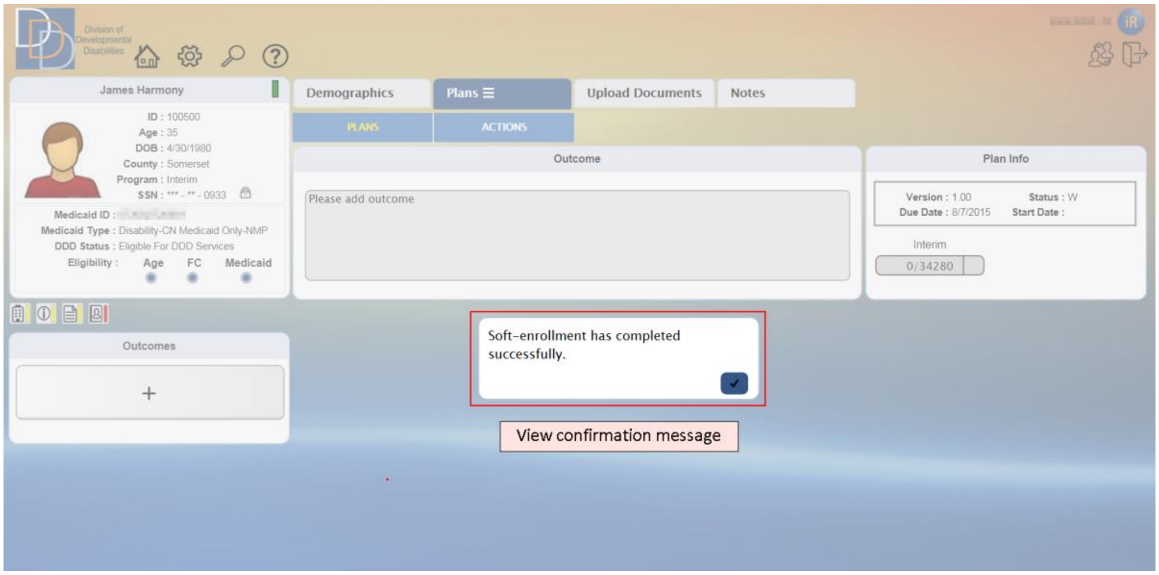
9. Enter Notes (optional) (limit: 1000 characters)



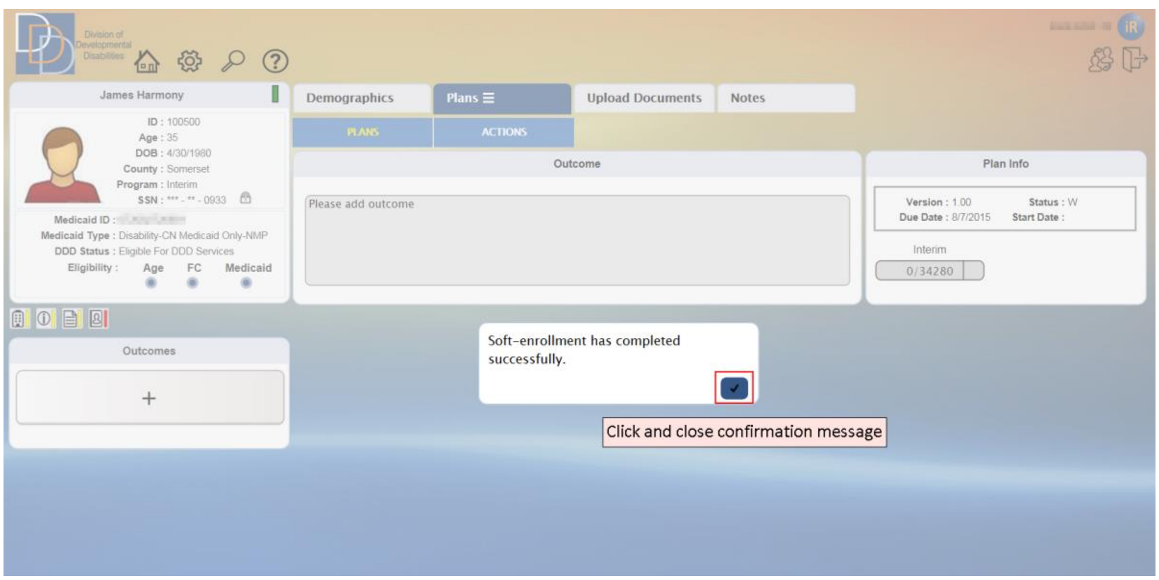
10. Click save



11. View confirmation message



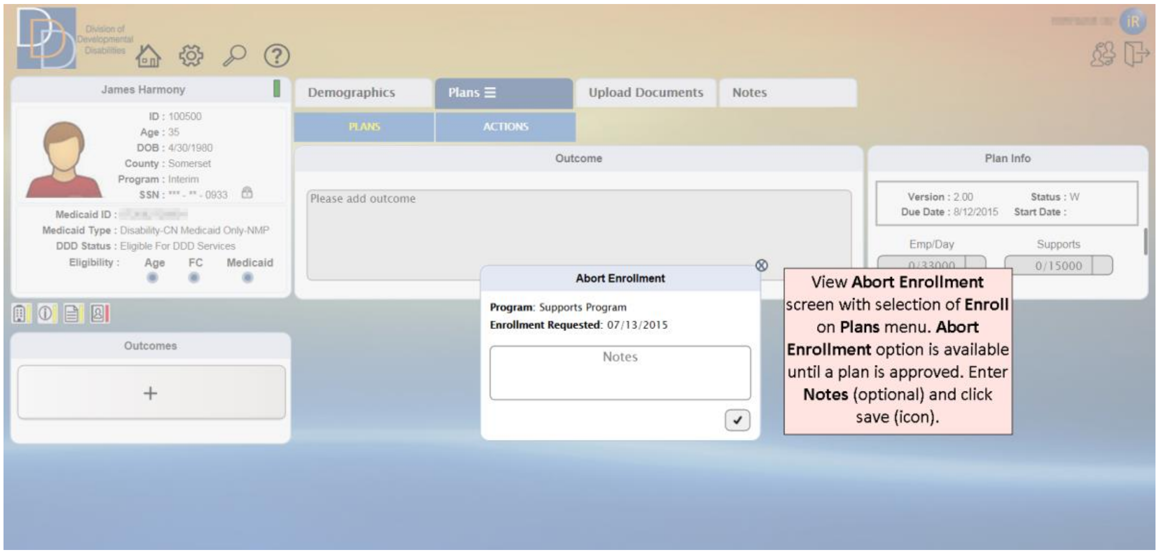
12. Click close



13. The participant is now soft-enrolled into the Supports Program and a plan is generated. On plan approval, the participant is considered to be enrolled into the Supports Program.

Note: Abort Enrollment option is available during the period of soft-enrollment (until plan approval). For the **Abort Enrollment** screen, click **Enroll** on the **Plans** menu.

Abort Enrollment



Abort Enrollment confirmation