

Appendix I – SRW Edit Check

SRW Edit Check

An **Edit Check** will be implemented on the Services Totals data entry screen that will look at the Functional Status of Clients served and/or the Functional Status of the Caregiver's Care Recipients. The following error message will display when service units are keyed for a client with an incorrect or missing functional status for clients or the care recipient.

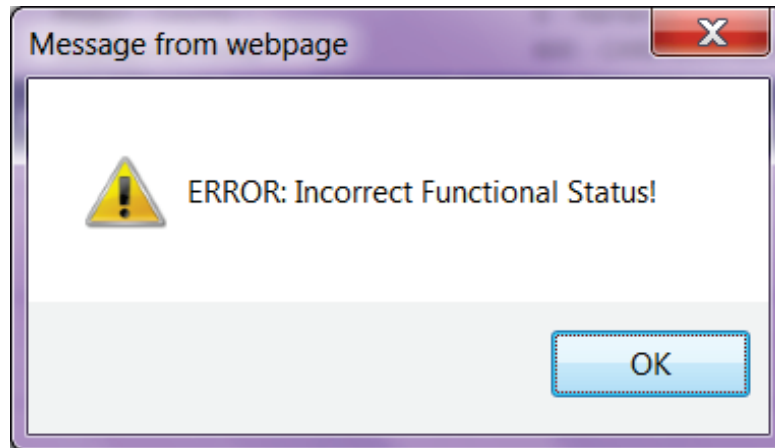


Figure 124 - Error Message Alert

The new edit checks will not allow an Update to Save for a SRW if units from previous months has already been reimbursed for a client(s) with an Incorrect Functional Status.

Users may want to re-check functional status before keying units on SRWs with existing units by first clicking Update on the Services Totals data entry screen. This will alert the User in case the functional status changed during a re-assessment. Units with Incorrect Functional Status will turn **Red**. The units in **Red** will allow Users to see clients and caregivers' care recipient with an Incorrect Functional Status.

Removing units in **Red** from SRW to allow an Update to Save must be re-keyed after updating the functional status. ~~If any units in **Red** from previous months that have been reimbursed, this may cause a reduction in the next reimbursement period.~~

Screen Changes

View Client
Demographics/Status (JONES, DELORES)

To update this client, click "Update" at the bottom of

Last 4 Digits SSN :			
Last Name :	JONES	Suffix :	
First Name :	DELORES		
Middle Initial :	G		
Status:	ACTIVE		
Registration Date	07 / 30 / 2012		
Assessment Last Updated By Provider Code :	Q007		
Assessment Last Update :	8/1/2012		
Functional Status :	Self-reported score: 1 - WELL		
Nutrition Health Score :	High Risk Of Malnutrition		
Date Of Birth :	C: / 1: / 1	<input checked="" type="checkbox"/>	Special Eligibility
Address :			

New items added to the Client Demographic and Provider Client / Care Recipient Screens

Figure 125 - Client Screen Change

Provider Client

Provider Client Details

Provider Code :	Q00
Agency Name :	BEAUFORT COUNTY DSS
Last 4 Digits SSN :	3751
Name :	JONES DELORES
Provider Client Established Date :	08 / 10 / 2012
Provider Client Status :	Active
Provider Client Assessment Date :	8/1/2012
Provider Client Functional Status :	Self-reported score: 1 - WELL
Provider Client Nutrition Health Score :	High Risk Of Malnutrition
Client Status :	A
Date Of Birth :	4 / 1 / 1958
Registration Date	7/30/2012

New items added to the Client Demographic and Provider Client / Care Recipient Screens

Figure 126 - Provider Client Screen

Provider Client Assessment Date

Provider Client Assessment Date will display the most recent Assessment for this Client. N/A will be displayed for services where no Nutrition Health Score is required. The Edit Check will look at the most recent Assessment Date.

Provider Client Services			
Service Code	Service Name	Service Status	Allow Care Recipients
042	IN-HOME LEVEL 2 - PERSONAL CARE	A	No
Add/Update Services			
Provider Client Assessments			
Assessment Date	Functional Status	Nutrition Health Score	
7/18/2012	High Risk	Good Nutrition	Details...
1/25/2011	High Risk	Good Nutrition	Details...
7/27/2010	High Risk	Good Nutrition	Details...
1/5/2010	High Risk	Good Nutrition	Details...
1/12/2009	High Risk	Good Nutrition	Details...

Figure 127 - Assessment Dates

Provider Client Functional Status

In this example, the functional status for this in-home aide client is “Well” with a last assessment date of June 4, 2008.

Provider Client Details

Provider Code : 1031
 Agency Name : DAVIE CO HOME HEALTH AGENCY
 Last 4 Digits SSN : ..14
 Name : BURTON SADIE
 Provider Client Established Date : 06 / 04 / 2008
 Provider Client Status : Active
 Provider Client Assessment Date : 6/4/2008
 Provider Client Functional Status : Well
 Provider Client Nutrition Health Score : N/A
 Client Status : A

State : NC Update

Provider Client Services

Service Code	Service Name	Service Status	Allow Care Recipients
043	IN-HOME LEVEL 2 - HOME MANAGEMENT	A	No
Add/Update Services			

Provider Client Assessments

Assessment Date	Functional Status	Nutrition Health Score	
6/4/2008	Well	N/A	Details...

The functional status for this In-Home Level 2 service should not be “Well”
 This assessment must be updated to allow an Update to Save units on SRW

Figure 128 - Provider Client Functional Status

Check Functional Status - Existing Clients

Provider Site/Route/Worker Service Totals

Provider: DAVIE CO HOME HEALTH AGENCY(1031) Region - County : G - Davie
 Service : IN-HOME LEVEL 2 - HOME MANAGEMENT(043) [Maximum monthly units: 200] Site/Route/Worker : 309 - HOME MANAGEMENT

ERROR: Incorrect Functional Status.

SSN#	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
10	ARMSWORTHY BARRY	A	12/1/1923 12:00:00 AM	7												7
5	BURTON SADIE	A	7/1/1927 12:00:00 AM	7												7
---	LEQUIRE MYRTLE	A	10/1/1910 12:00:00 AM	3												3
--	WHITAKER MARTHA	A	5/1/1927 12:00:00 AM	8												8
				25	0	0	0	0	0	0	0	0	0	0	0	25

If service units have been keyed for previous months, click Update to view Clients with incorrect functional status before new service units are added. Update Client Assessments before you key additional service units. You will not be able to save the SRW if any Client on the SRW has an incorrect functional status. You will have to remove existing service units in Red before an Update will allow a Save.

Figure 129 - SRW Data Entry Screen

The functional status for this In-Home Level 2 service should not be **“Well”**

The assessment must be updated to allow an Update to Save units on SRW

Note: This only applies to SRWs with existing service units. If no service units have been keyed for a Client or the SRW is not required

Provider Site/Route/Worker Service Totals

Provider: DAVIE CO HOME HEALTH AGENCY(1031) Region - County : G - Davie
 Service : IN-HOME LEVEL 2 - HOME MANAGEMENT(043) [Maximum monthly units: 200] Site/Route/Worker : 309 - HOME MANAGEMENT

SSN#	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
1	ARMSWORTHY BARRY	A	12:00:00 AM	7												7
5	BURTON SADIE	A	12:00:00 AM	7												7
1	LEQUIRE MYRTLE	A	12:00:00 AM													
5	WHITAKER MARTHA	A	12:00:00 AM													

Provider Site/Route/Worker Service Totals

Provider: DAVIE CO HOME HEALTH AGENCY(1031) Region - County : G - Davie
 Service : IN-HOME LEVEL 2 - HOME MANAGEMENT(043) [Maximum monthly units: 200] Site/Route/Worker : 309 - HOME MANAGEMENT

ERROR: Incorrect Functional Status.

SSN#	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
1	ARMSWORTHY BARRY	A	12:00:00 AM	7												7
5	BURTON SADIE	A	12:00:00 AM	7												7
1	LEQUIRE MYRTLE	A	12:00:00 AM				3									3
5	WHITAKER MARTHA	A	12:00:00 AM				8									8
				25	0	0	0	0	0	0	0	0	0	0	0	25

Figure 130 - SRW Screen

In this example, the units in **Red** must be removed to allow an Update for this SRW. Clicking Ok will continue to allow units keyed, but User will not be able to **Update** this SRW until all units in **Red** are removed. Therefore, it is important to make sure that existing Clients on SRW have a correct functional status before keying by clicking the Update button to show you Clients with units in **Red**. This will allow the Users to note Clients that have Incorrect Functional Status. User should click Cancel and update Provider Clients' assessments before keying units on SRW. Clicking **OK** only clears the error message and allow Users to continue keying service units.

With the implementation of edit check by service code, Clients without an assessment will not allow Users to key service units on the SRW.

The Edit Check is checking the functional status of the most recent assessment date.