Maximizing the CC Read Only Role

This guide helps you maximize your Read-Only Role to search the Harmony Data System (HDS) for important client information. We will explore different areas in HDS to demonstrate what you can see and understand what it means.

Your previous instruction set helped you use your Read Only Role to verify your information in the HDS. Thank you for taking the time report your findings. We encourage you to periodically review your certification information and caseload in Harmony for accuracy during this transitionary period.

This guide will review Harmony features:

- Signing into SDS Harmony using a myAlaska login
- Navigating My Harmony
- How to locate a Consumer Record
- How to read and filter Notes

After this training you will be able to see when:

- Applications have been received
- Assessments are scheduled & completed
- LOC Determination Notices are sent
  - LOC Letter
  - CAT report
- Changes to Consumer Data have been processed
- Plans have been reviewed and approved
- Get copies of Approved Support Plans

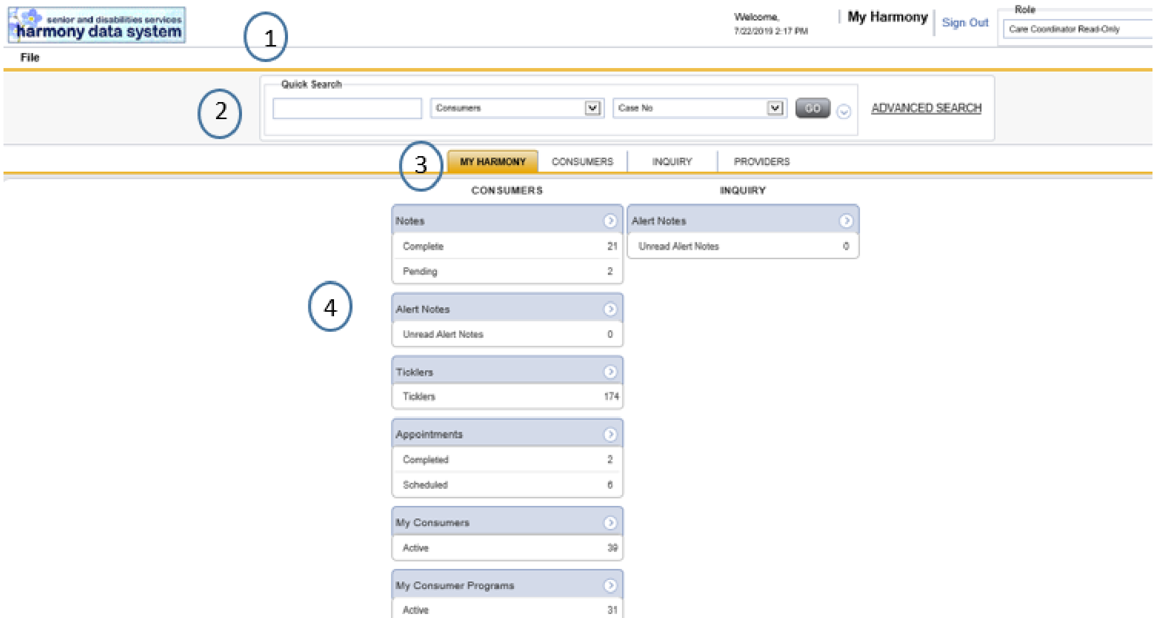
Includes a summary for:

- Note types, Subtypes and what they mean
- Filter to find specifics
- Who to contact when you have questions

Navigating My Harmony

The My Harmony page is the home page for entering the HDS. It provides a summary of information about consumers that you are linked to as a primary worker. From the My Harmony chapter page you can:

- Search for your Consumer's records
- See Notes from SDS about your clients (consumers)
- View your Ticklers list (reminders of upcoming deadlines)
- See a breakdown of your consumer Program Status
- See your Consumer List
- View Assessment Appointments Scheduled
- Review Inquiry information from previous requests to access Consumer records



My Harmony summary page

1. Header, Sign Out, Role, and File Menu Bar

The top of your **My Harmony** screen is a fixed area that will display wherever you navigate to in the HDS. Key features include the **Sign Out** link, **Role,** and **File Menu Bar**. When you are within a consumer file, the individual's name and HDS number are located within this area. The File Menu Bar is the area where you will go to take action. In your current Read Only Role you will not be able to save any actions you make.

2. Quick Search and Advance Search

The **Quick Search** allows you to change what area of HDS you are searching in quickly. The **Advanced Search** page is a precise tool for searching for a specific Consumer. Refer to the Introduction to SDS Harmony T01 Guide for more details

3. Chapters

The tabs located below the search bar are called **Chapters**. They each reflect a different area in Harmony. You can see what chapter you are in by the gold highlight. Below is a summary of each chapter in the HDS.

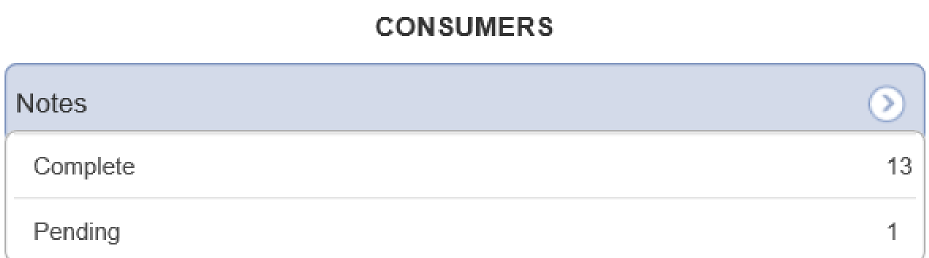
Chapter	Definition
My Harmony	**The home page that displays panels and queues of records in the system that are relevant to the current user, including notes to be read and a summary of the individual CC's consumer caseload.**
Consumers	**Provides access to all consumers associated with CC agency, including individual CC caseload.**
Inquiry	**The system "front door" area to request access to a Consumer record in order to submit an application or represent a consumer.**
Providers	**The Provider chapter tracks certification and licensing credentials, ID numbers, workers, services offered, service areas, and other types of provider information.**

4. Panels

A summary of your information is located below the **My Harmony** chapter within **Panels**. The left hand column displays panels of summarized information related to **Consumers** assigned specifically to you. The right side, **Inquiry** column displays panels that summarize information on the people you have requested access to. Each panel contains one or more links with a count of related items. You can collapse or expand each panel to increase your visibility to relevant information by clicking the > in the top right corner of the panel.

***When there is no information to display the panel will disappear, with the exception of Alert Notes.

In the example below, there are 14 unread notes. 13 are "Completed" and one is "Pending". The Notes will remain in this panel until you mark them as "read". All notes are created and remain in the Consumers record, only notes that have you listed as a Note Recipient will show on this panel. If all the notes are marked as "read" the panel will disappear until a new note is received.



My Harmony Consumer Notes

Notes that are here usually means they are VERY important

And you may need to do something about them ASAP!

How to locate a Consumer Record

There are many ways to locate a consumer's record from your **My Harmony Chapter**: the My Consumers **Panel** and the **Quick Search** area are the most common.

My Consumers Panel

To view your consumer list, click the "Active" line in the **My Consumers Panel** on the My Harmony page. A new window will open

Results from the My Harmony Consumer Panel:

5 My Consumers record(s) returned - now viewing 1 through 5

	Client Name ▲	Fund Code	Case No	Open Date	Gender	Age	
	Test Training, ALI	SDS	65496	01/09/2019	Male	67.4	01/09/1
	Test Training, APDD	SDS	65547	01/16/2019	Female	30.6	11/01/1
	Test Training, CCMC	SDS	65548	01/16/2019	Male	15.6	06/11/2
	Test Training, IDD	SDS	65550	01/16/2019	Male	64.8	08/23/1
	Test Training, ISW	SDS	65549	01/16/2019	Male	26.4	12/11/1

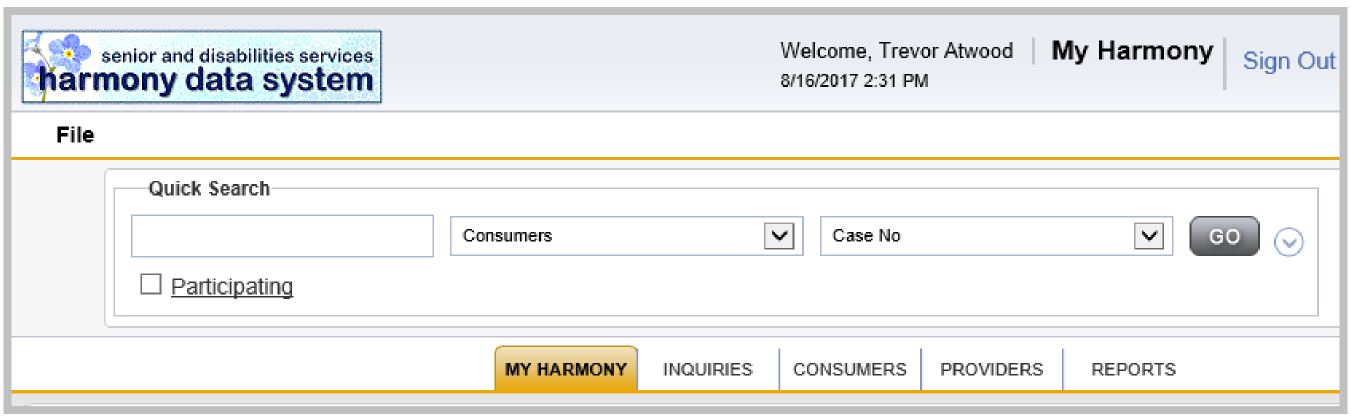
Remember that you can sort any list by clicking the header box. Most lists have a predetermined sort order but you can change them to meet your current need.

Quick Search

Quick Search works best when you're looking for a specific record and you have a search filter value, such as a Consumer's Case No or Last Name.

The Quick Search bar displays above the Chapter bar and contains three parts:

1. Value (Name or Number)
2. Chapter (Consumers, Inquiry or Providers)
3. Filter Field (Case No, Last Name, Medicaid ID)



Quick Search Bar

Bonus Info: If you would like to see a list of **all** the Clients served by your agency, go to the Consumers Chapter and do an unfiltered search.

- Remember to clear any previous search results you just click the ADVANCED SEARCH link in the quick search area.

Consumer Records

A **Consumer Record** contains all the information about your client within organized tabs, such as their name and address, medications, diagnosis and their Certified Providers and Support Plan details.

- Search for your consumer case records
- View Assessment appoint Scheduled
- Review information from Inquiries seeking access to Consumer records

Demographics

In Harmony, a consumer record includes a demographics tab representing the person along with numerous other associated records for different types of information captured in different tabs.

Division

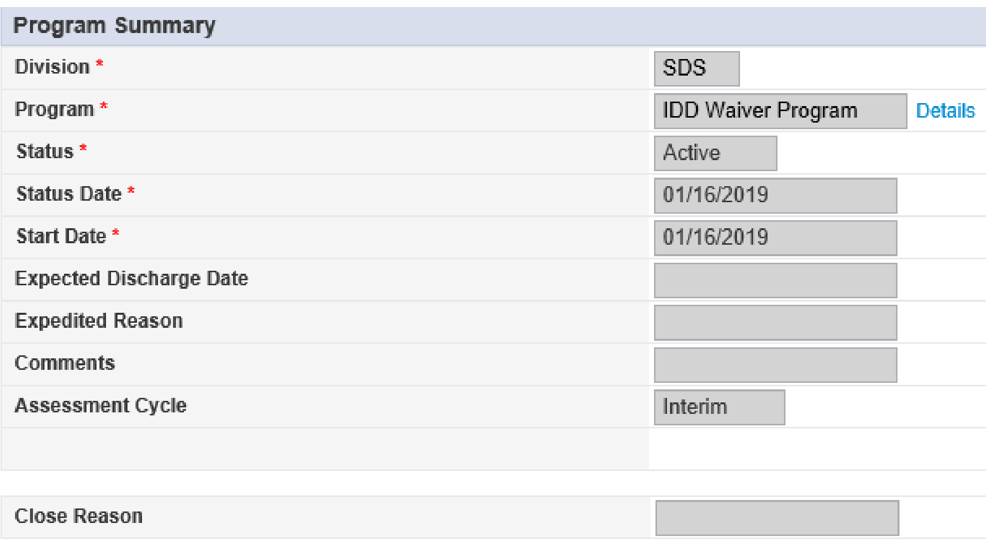
The **Division** tab is used to identify who is the primary worker (CC) or a secondary worker (PCA Admin). Sometimes you may see a SDS staffer as a worker.

Programs

The **Programs** tab associates a consumer with an SDS program. Each consumer will have at least one program record. “Combo clients” will have a separate program record for each program in which they are involved. Program history also displays here. For example, if a person was involved with the CCMC Waiver and then transitioned to the APDD Waiver, the past involvement in the CCMC Waiver program will continue to display as a program record that’s now closed.

The Program status tracks a consumer’s stage in the program life cycle, as they move from application, to assessment, to planning, to authorization, and finally active or approved program involvement as a recipient.

IDD/ISW will see what assessment cycle they are in next. A CC can look here to determine which reapplication type to prepare.



Program Summary	
Division *	SDS
Program *	IDD Waiver Program Details
Status *	Active
Status Date *	01/16/2019
Start Date *	01/16/2019
Expected Discharge Date	
Expedited Reason	
Comments	
Assessment Cycle	Interim
Close Reason	

Notes

This is the most used area of the Consumer Record. Many important actions regarding a client’s services are documented through Notes. Things that you should be able to locate in the consumers note’s tab:

- Submitted Applications
- When Applications have been determined complete
  - or returned as incomplete
- LOC Determination Notices including the:
  - LOC Letter
  - CAT report
- Changes to Consumer Data have been processed

- When Support Plans have been received
- Get a copy of the Approved Plan
- The Service Authorization number
- Approved Amendments
- Approved CFC Travel requests
- Returned mail notices

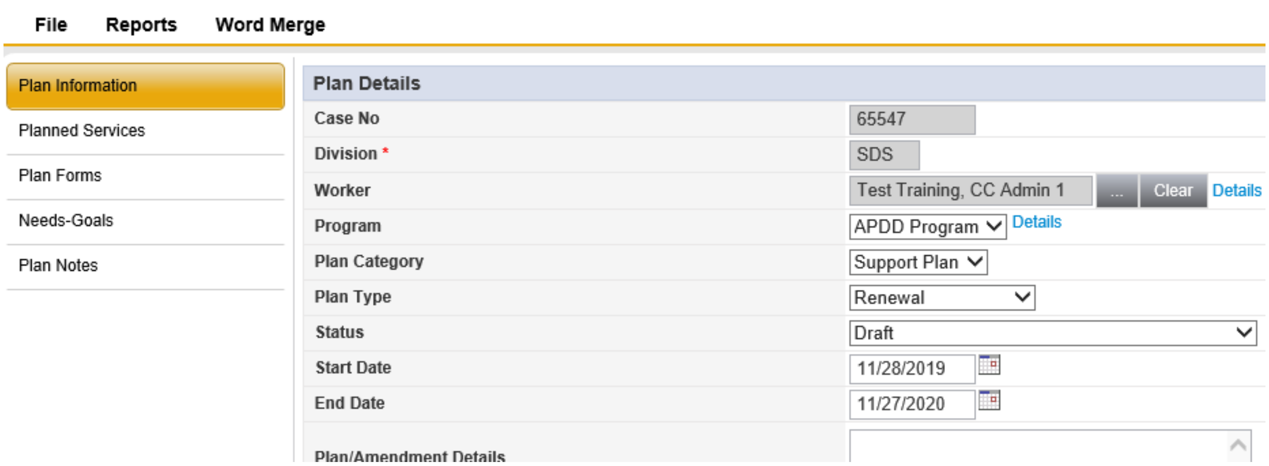
Forms

The **Forms** tab allows users to view, edit, and add system created forms pertaining to a consumer.
Some forms are very large, have complex configuration and can have data pulled into another area or report. The Plan Expedite and/or a Request for Safeguard Funding for ISW forms are completed in the Forms tab of a Consumer Record. Care Coordinators will complete Plan Forms within a Plan record such as the Plan Details form.

Plans

The **Plans** tab is used to track Person Centered Support Plans and PCA Service Plans. A Consumer will have a separate plan record for each plan period (year) and any amended plans. If the Consumer has a PCS and Waiver they'll have a different plan for each.

- The **Plan Information** page defines the Plan Program, Type, Status and Dates.
- The **Plan Forms** page includes the forms for collecting additional details on the plan such as the Support Plan Details, and the Request for Visit Exception.
- Service Goals are tracked under **Needs-Goals**.
- The **Planned Services** subpage contains the services that are authorized within the plan.
- Notes specific to this plan are added in the **Plan Notes** Sub-page (some of these Notes are also available through the Consumer Notes tab)



Plan Information page

Providers

The **Providers** tab is used to track all certified Service Providers associated with the consumer. Once a provider is made 'Active' on the consumer record, all system users assigned to that provider will have access to that consumer's record. Closed Providers remain listed but no longer have access.

Appointments

The **Appointments** tab is used to track CAT Assessment appointments for the consumer. PCS Providers and Care Coordinators will receive an invite to the scheduled assessment. If you 'Accept' or 'Tentatively Accept' the appointment you will also receive updates if the appointment is changed.

Diagnosis

The **Diagnosis** tab allows users to view the (ICD-10) associated with the consumer the SDS Harmony data system. This data is entered from the QDC or VOD sent each year. Open the record to view all diagnosis. **(Only SDS Staff can add to this tab)**

Medications

The **Medications** tab is used to record information on the medications prescribed to consumers. SDS Assessors will capture Medications during the CAT appointment but not all of the information about the medication. Once Care Coordinators are fully in the system, they will fill in all the details and add any additional medications when they are prescribed. Information on discontinued medications remains but does not print on the Support Plan.

Case and Professional Relations

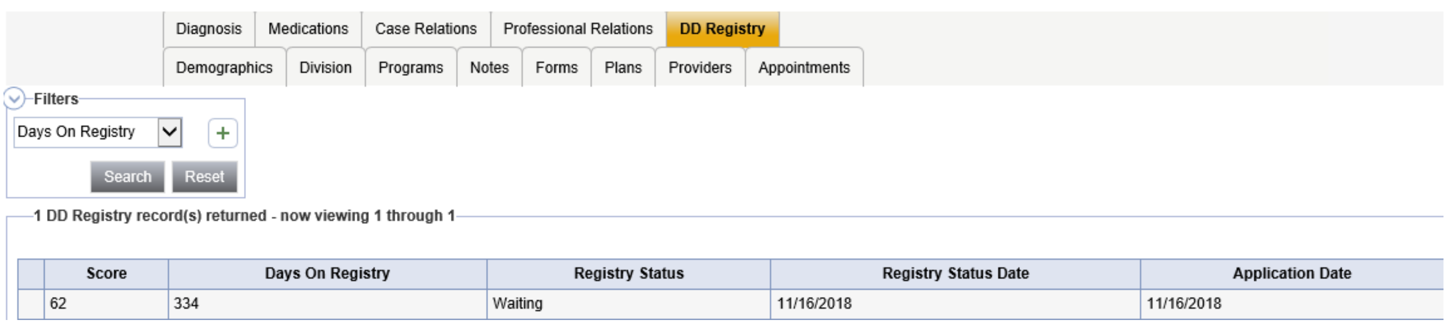
Harmony **Relations** tabs allows users to view, edit or add data for legal representatives and professional persons who are associated with the consumer.

- The **Case Relations** tab is used to track legal representatives. **(Only SDS Staff can add to this tab)** Once the legal representative paperwork has been sent to SDS they will be added to the consumer record. You may see previous case relations or providers listed here. These can be removed by request when the Support Plan is submitted.
- The **Professional Relations** tab is to document specific providers who are involved with consumer care such as Care Coordinators, PCA agency representatives, doctors, clinics, physical therapist, etc… Information located here is transferred to the CAT by the assessor.

DD Eligibility

The **DD Registry** tab provides the user with a quick view of the consumers place on the DD registry. Some Consumers may have an active ISW but still be in waiting status on the DD Registry.

- This is only available for consumers who've entered the registry or updated their DDRR since January 2018



Notes on the Consumer Record

Notes are used to submit Applications, Support Plans, Changes of Status and for Provider Users (CC or PCS Admin), to receive approvals, authorizations and other communications from SDS about a specific consumer. A note allows the attachment of up to 10 files in PDF, Microsoft Word® or Microsoft Excel®, images in jpeg, gif and tif formats.

What information can you locate in Consumer Notes?

- Submitted Applications
- When Applications have been determined complete

    - or returned as incomplete
- LOC Determination Notices including the:
    - LOC Letter
    - CAT report
- Changes to Consumer Data have been processed
- When Support Plans have been received
- Get a copy of the Approved Plan
- Service Authorization numbers
- Approved Amendments
- Approved CFC Travel requests
- Returned Mail notices

Notes that have been routed to you as a note recipient appear on the **My Harmony** Consumer section. They remain there until you 'mark them as read'. The note will always be retained in the consumer's record Notes tab.

There are 2 types of Notes:

1. Consumer notes located through the Notes Tab on the consumers record.
2. Plan or Inquiry notes located through the subpage of the Plan or Inquiry record.
    a. Plan Notes appear in the consumer record's Notes Tab even though they are created in the Plans Tab.
    b. Inquiry notes will be duplicated to the Consumer Notes Tab.

When a Care Coordinator or PCS Admin has been specifically added as a Note Recipient there is generally an important reason. Think of this area as receiving a DSM to take care of something.

Parts of a Note

Each note includes several fields. The **Note Type** and a **Note Sub-Type** fields determine where a note is routed, so **it's important to select the correct options when you create a note**. A table of Note and Sub-Types are listed in the Appendix of this guide.

Note Type

A **Note Type** describes the note's main subject. A common **Note Type** example is **Change of Status.** It is used to notify SDS of a change to a consumer status or records.

Note Sub-Type

The **Note Sub-Type** provides more detail about the note's subject and helps to categorize it for routing. For example, the **Sub-Types** for a Change of Status note include: Admission/Discharge, Demographic Information, Legal Representative, Cognitive Capacity/Service Model, and PCS Provider Transfer, Provider Discharge of Services / Closure, and Returned Mail Courtesy Notice.

** There must be a sub-type selected in order for you to save a Note. Notes without sub-types are view only and cannot be created with the role you are using.

Description

The **Description** area appears in the list view of notes and is where you should enter a statement of the purpose of the Note. Only 270 characters fit in this field and it is a good place to enter a list of the documents that are attached.

Note Body

The body of the **Note** can be very large. It should contain more specific details that SDS or Providers should review when reading the note. The body of the Note can be added to by other readers until the note status is set to 'complete.' SDS staff can change the status of the note to allow for more information to be added. This helps to keep all this information about an issue in one location.

Note Attachments

Attaching document files to a Note allows signed applications or plans and supportive documentation to be added to the consumer's record. An attachment can be any documentation that is in an electronic form, such as a letter created in Microsoft Word®, a PDF of a signed application, or a nurse's handwritten note that has been scanned into another electronic format.

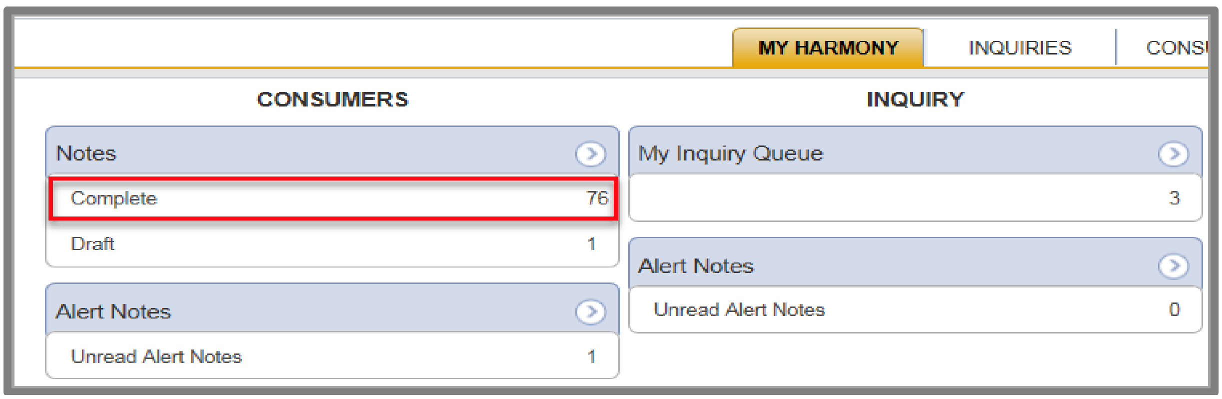
Open a Note from the My Harmony page

Notes are opened within the consumer record, or from your **My Harmony** Chapter. Notes that you are creating begin in a **Draft** status. Notes with a status set to **Submitted** are awaiting action from SDS- they are locked for any additional information**.** Notes that have been acted on by SDS are displayed as **Complete** are also locked.

** You may see older Notes with a **Pending** status. They are the same as Draft status.

1. To open an unread consumer note, from **My Harmony**, in the applicable section, click anywhere in the **Complete** row.

   *If you do not have any unread Notes you will not see this Panel on your **My Harmony** page.



Consumer Notes

2. A list of notes is displayed. To open one of the notes, click anywhere in the note's row.

ner ▲	Note Type	Note Date	Note Sub Type	Subject	Author	Status
	LOC Determination	01/30/2019	Approved	Int 2 1/30/2019 to 1/29/2020	Del Rosario, Maria	Complete
	Plan Note	04/20/2019	Plan Attachments	CIL Access Alaska NFTG Approved	Fordyce, Claire	Complete
	Incomplete Notice	05/30/2019	5 Day Courtesy Notice	QDC, eval	Sowa-Lapinskas, Kathryn	Complete
	LOC Determination	05/27/2019	Approved	LOC 8/12/2019 to 8/11/2020 Interim 1	Del Rosario, Maria	Complete
	LOC Determination	02/06/2019	Approved	Interim 2 4/11/2019 to 4/10/2020	Del Rosario, Maria	Complete
	LOC Determination	05/24/2018	Approved	LOC ICAP - file review	Albert, Julie	Complete
	Incomplete Notice	06/07/2019	5 Day Courtesy Notice		Del Rosario, Maria	Complete
	LOC Determination	06/13/2019	Approved	LOC v 8/23/2019 to 8/22/2020 Interim 1	Del Rosario, Maria	Complete
	Consumer Application	06/06/2019	Renewal Application - Incomplete	1st submission	Fuller, Teri	Complete

List of Notes

3. The Note is displayed. This note is located in the consumer's record this is just a direct link to it.

Note Details

Case No	65496
Division *	SDS
Note By *	Mells, Delight Kennedy Details
Note Date *	01/09/2019
Program	ALI Program Details
Note Type *	LOC Determination *
Note Sub-Type *	Approved
Description	8/22/2018 CAT and Initial Waiver LOC Approval Notice sent on 8/26/2018; No PCS Agency Currently Note: 2
Note	
Due Date	
Status *	Complete
Date Completed	01/09/2019

Note Details

4. You may open, save and print any attachments to the note.

Attachments

Document	Description	Category
Uni-07RecipientRightsResponsibilities.pdf	Recip Rights	C-UNI-07 Recipient Rights & Responsibilities
VOD.pdf	VOD	C-UNI-09 Verification of Diagnosis
UNI-04-ApplicationNewrenewal-ALI-APDD-CCMC-CFC.docx	Signe dALI App	C-UNI-04 Waiver Application for ALI/APDD
Medical Documentation.docx	Medical Docs	C-Medical Information Documentation

List of Note Attachments

5. To close the note, click **File – Close Notes**.

Mark a Note as Read

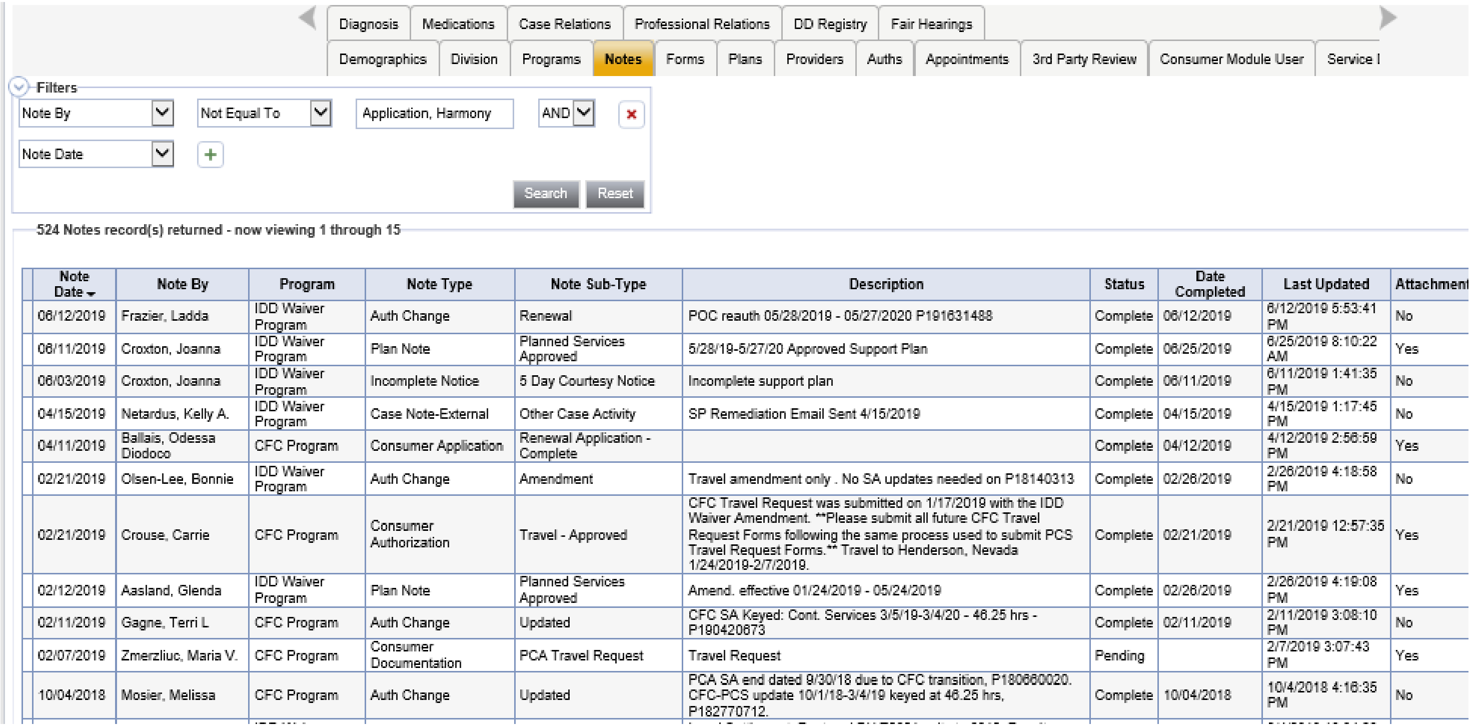
Notes specifically routed to you will appear in the **My Harmony > Notes** panel and will continue to display there until you manually mark the Note as "Read."

Once you are done with a Note, you may 'Mark as Read' from the **Tools** menu to remove it from the Unread Notes panel. This does not removed it from the consumer's record.

1. Check the box at the end of the Note line when ready to delete it from this list
2. Go to the **Tools** menu
3. Click **Mark as Read**
4. Notes that were checked will be deleted when the **My Harmony** screen refreshes

Filtering a list of Notes

Any list view of records can be narrowed for specific information using the Filters area. The following are helpful filters to locate specific types of information:



Note Date	Note By	Program	Note Type	Note Sub-Type	Description	Status	Date Completed	Last Updated	Attachment
06/12/2019	Frazier, Ladda	IDD Waiver Program	Auth Change	Renewal	POC reauth 05/28/2019 - 05/27/2020 P191631488	Complete	06/12/2019	6/12/2019 5:53:41 PM	No
06/11/2019	Croxton, Joanna	IDD Waiver Program	Plan Note	Planned Services Approved	5/28/19-5/27/20 Approved Support Plan	Complete	06/25/2019	6/25/2019 8:10:22 AM	Yes
06/03/2019	Croxton, Joanna	IDD Waiver Program	Incomplete Notice	5 Day Courtesy Notice	Incomplete support plan	Complete	06/11/2019	6/11/2019 1:41:35 PM	No
04/15/2019	Netardus, Kelly A.	IDD Waiver Program	Case Note-External	Other Case Activity	SP Remediation Email Sent 4/15/2019	Complete	04/15/2019	4/15/2019 1:17:45 PM	No
04/11/2019	Ballais, Odessa Diodoco	CFC Program	Consumer Application	Renewal Application - Complete		Complete	04/12/2019	4/12/2019 2:56:59 PM	Yes
02/21/2019	Olsen-Lee, Bonnie	IDD Waiver Program	Auth Change	Amendment	Travel amendment only . No SA updates needed on P18140313	Complete	02/26/2019	2/26/2019 4:18:58 PM	No
02/21/2019	Crouse, Carrie	CFC Program	Consumer Authorization	Travel - Approved	CFC Travel Request was submitted on 1/17/2019 with the IDD Waiver Amendment. **Please submit all future CFC Travel Request Forms following the same process used to submit PCS Travel Request Forms.** Travel to Henderson, Nevada 1/24/2019-2/7/2019.	Complete	02/21/2019	2/21/2019 12:57:35 PM	Yes
02/12/2019	Aasland, Glenda	IDD Waiver Program	Plan Note	Planned Services Approved	Amend. effective 01/24/2019 - 05/24/2019	Complete	02/26/2019	2/26/2019 4:19:08 PM	Yes
02/11/2019	Gagne, Terri L	CFC Program	Auth Change	Updated	CFC SA Keyed: Cont. Services 3/5/19-3/4/20 - 46.25 hrs - P190420673	Complete	02/11/2019	2/11/2019 3:08:10 PM	No
02/07/2019	Zmerzliuc, Maria V.	CFC Program	Consumer Documentation	PCA Travel Request	Travel Request	Pending		2/7/2019 3:07:43 PM	Yes
10/04/2018	Mosier, Melissa	CFC Program	Auth Change	Updated	PCA SA end dated 9/30/18 due to CFC transition, P180660020. CFC-PCS update 10/1/18-3/4/19 keyed at 46.25 hrs, P182770712.	Complete	10/04/2018	10/4/2018 4:16:35 PM	No

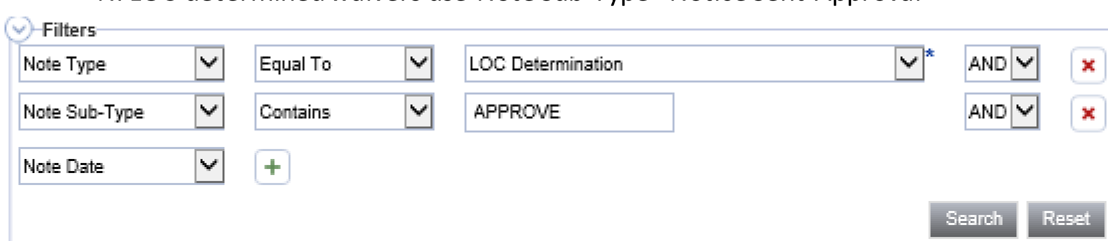
List of Notes from the Consumer Notes Tab

Note Type Filter

This filter will help you locate a specific Note Type. All the results will include the Notes with that specific Note Type. You can narrow your search by adding an additional filter of Note Sub-Type, click the green plus to add as many filters as you need. This will requires you to know the right subtype (in this case approved) and have the item listed.

This is an example of finding an IDD LOC Determination.

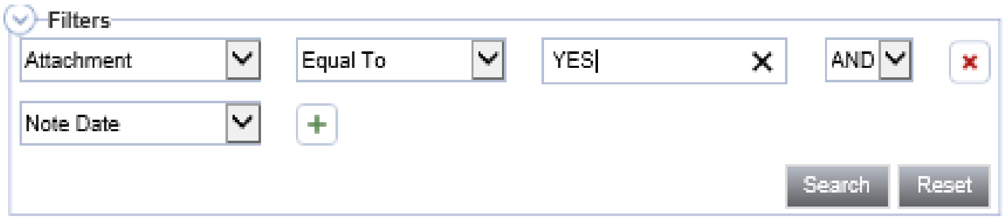
- NFLOC determined waivers use Note Sub-Type 'Notice Sent-Approval'



Filter for Attachments

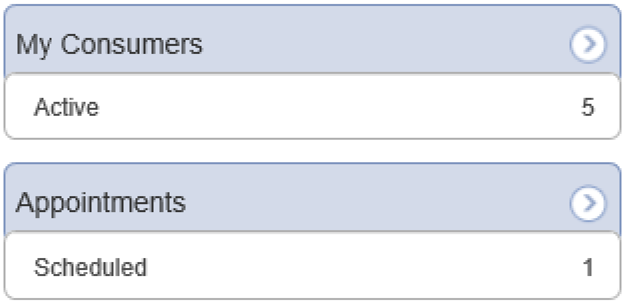
This filter is helpful for finding Notes with attachments. These usually contain:

- LOC Letters
- CAT Reports
- Approved Support Plans
- Applications
- Documents that have been mailed to your consumer

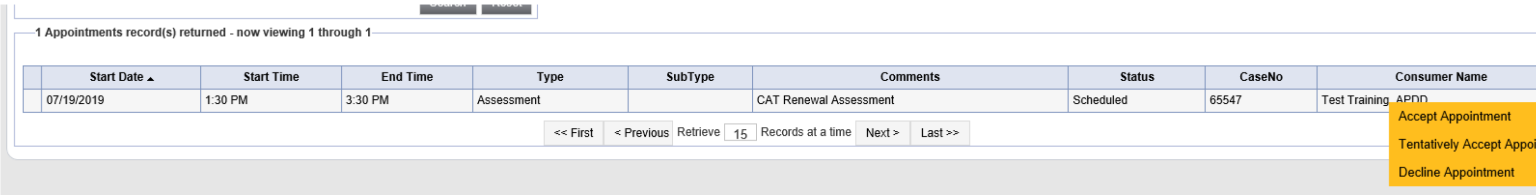


Assessment Appointments

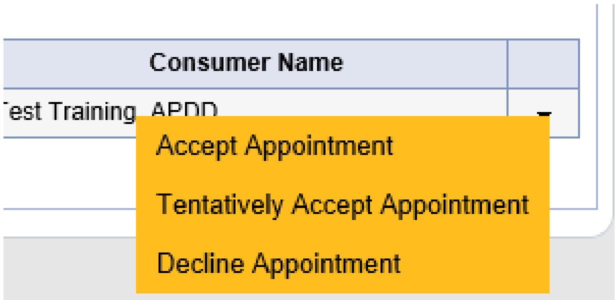
The **Appointments** tab is used to track CAT Assessment appointments for the consumer. Care Coordinators and PCS Providers will receive an invite to the scheduled assessment. If you ‘Accept’ or ‘Tentatively Accept’ the appointment you will also receive updates if the appointment is changed. You will be alerted to a new appointment when the Appointments panel appears on your My Harmony page. It appears under the My Consumers panel.



1. Click to open the Scheduled assessment.



2. Got to the flyout menu at the far right of the appointment line and select ‘Accept’ or ‘Tentatively Accept’. If you choose to ‘Decline’ the appointment you will not receive any updates if the appointment date or time changes.



3. Once the Appointment has been accepted it disappears from your My Harmony page. It is still listed in the consumer’s record. So make sure you transfer the information to your personal schedule

4. If there are no assessment appointments that you’ve been invited to, there will be no Appointments panel.

Ticklers

A tickler is a reminder to do something, such as complete a form for a consumer. Harmony creates ticklers automatically based on specific system triggers. You should review your Ticklers daily, but do not rely on them to let you know when something is due. You are required to maintain your own record keeping system as part of your Conditions of Participation.

SDS began using the SDS Harmony Data System (HDS) in January 2018, Ticklers have been generating since then. After the launch of the HDS many configuration changes have happened, therefore many ticklers are irrelevant now or have been updated to be more helpful. Additionally many ticklers due dates have long passed.

That's a lot of Reminders!!!

It is OK to cancel or complete these.

Prior to deleting any Tickler you should check your own records to verify the action has been completed.

Using Ticklers Daily–

The HDS creates ticklers automatically. You may receive several ticklers throughout the day, so it is important to check often for new ones.

Sorting List Views

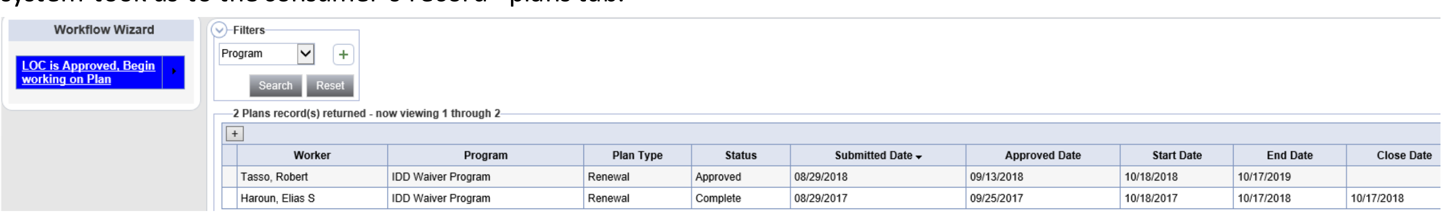
List View screens allow you to quickly retrieve a desired record. If the desired record is not displayed on the initial list view, you can click on one of the buttons at the below the list to scroll through the returned records.

All HDS data that is displayed in a List View can be sorted by ascending or descending order by clicking on the column headers in the list view.

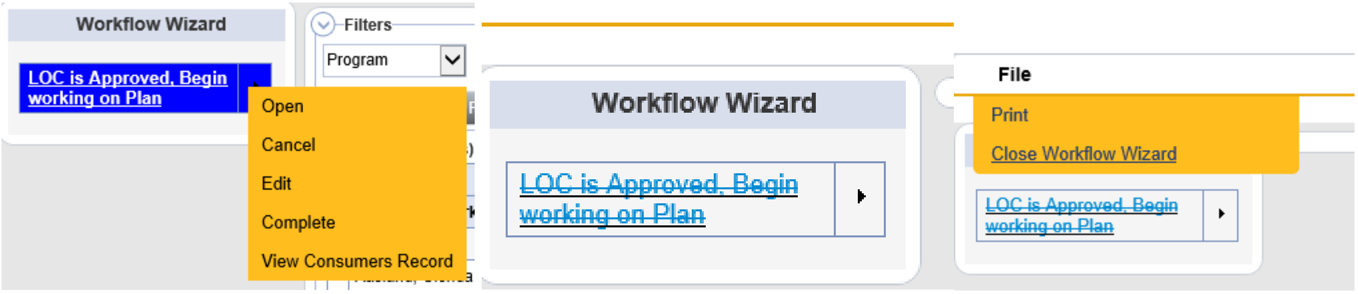
You can also modify the number of records returned in the List View by entering the desired number in the "Retrieve [15] records at a time" field at the bottom of the screen and then clicking on one of the record search buttons (i.e., First, Previous, Next, Last).

Act on a Tickler

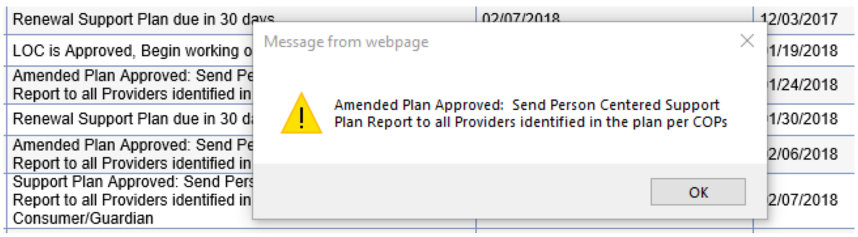
When you open a Tickler that has an associated action in the HDS it may take you directly to that action point in the consumer's record. For example we clicked on the Tickler named "LOC is Approved, Begin working on the Plan" and the system took us to the consumer's record> plans tab.



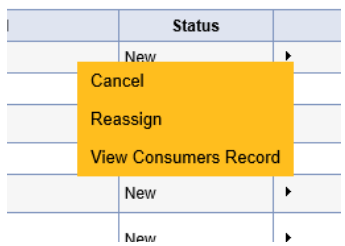
We can clearly see that the Support Plan from this Tickler that was dated 1/19/18 has already been submitted. So it can be marked ‘Complete’ by using the flyout menu available in the Workflow Wizard task area. Then using the **File** menu select **Close the Workflow Wizard.**



When opened some Ticklers just show you a message that repeats the Tickler Name like this:



Use the flyout menu at the end of the tickler line to ‘Cancel’ or ‘Complete’ when you no longer need the reminder.



Managing your ticklers should help you to manage your work load but DO NOT rely on them to direct your tasks all the time. You must maintain your own client management tools in order to meet regulatory deadlines. If you receive a transfer client close to when their reapplication or renewal Plan is due you may not receive the ticker. Therefore you will be late.

Dismissing Ticklers

1. To start open your Ticklers list, then click on the ‘Date Due’ twice to sort them by the oldest due date.

nsumer Name	Tickler Name	Date Created	Date Due ▲	Date Completed	Status
	Renewal Support Plan due in 30 days	02/07/2018	12/03/2017		New
	LOC is Approved, Begin working on Plan	01/19/2018	01/19/2018		Cancel
	Amended Plan Approved: Send Person Centered Support Plan Report to all Providers identified in the plan per COPs	01/24/2018	01/24/2018		Reassign
	Renewal Support Plan due in 30 days	04/06/2018	01/30/2018		View Consumers Record
	Amended Plan Approved: Send Person Centered Support Plan Report to all Providers identified in the plan per COPs	02/06/2018	02/06/2018		New
	Support Plan Approved: Send Person Centered Support Plan Report to all Providers identified in the plan per COPs and Consumer/Guardian	02/07/2018	02/07/2018		New
	Renewal Support Plan due in 30 days	04/09/2018	02/07/2018		New
	Amended Plan Approved: Send Person Centered Support Plan Report to all Providers identified in the plan per COPs	02/13/2018	02/13/2018		New
	Support Plan Approved: Send Person Centered Support Plan Report to all Providers identified in the plan per COPs and Consumer/Guardian	02/13/2018	02/13/2018		New

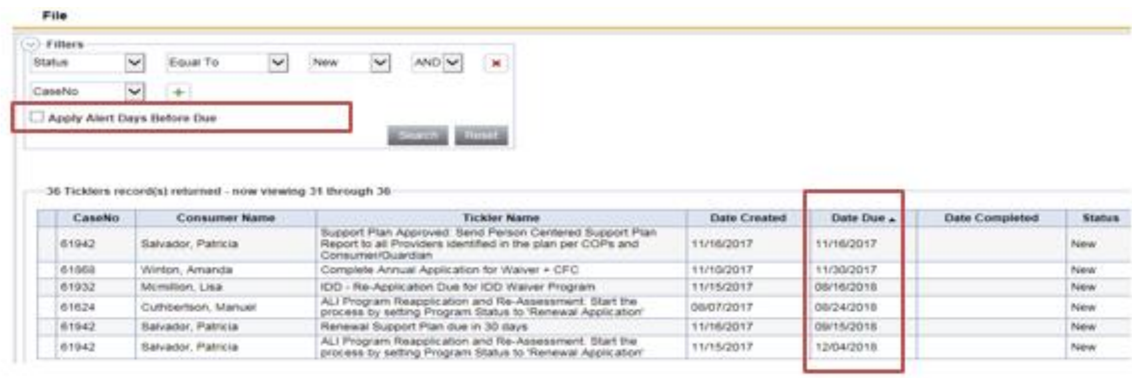
2. Open the Flyout menu by hovering your mouse pointer over the triangle on the far right of the tickler line. The action menu for this specific tickler will appear. Possible actions can include:
   - Cancel
   - Reassign -only send a task to someone who also has access to this consumer
   - Edit

- Complete
- View Consumers Record -use to verify you have already completed the task

3. Select either ‘Cancel’ or ‘Complete’ to remove the Tickler from your list. SDS does not track what you do with your ticklers. They are there simply to remind you something may need to be done or let you know that something (like a LOC or Support Plan) has been approved or completed.

View Future Ticklers

If you are looking for ticklers that have a due date in the future, uncheck the **Apply Alert Days Before Due** and click **Search**. The list view page will refresh and present a list of the ticklers and their due dates.



CaseNo	Consumer Name	Tickler Name	Date Created	Date Due	Date Completed	Status
61942	Salvador, Patricia	Support Plan Approved: Send Person Centered Support Plan Report to all Providers identified in the plan per COPs and Consumer/Guardian	11/16/2017	11/16/2017		New
61868	Winton, Amanda	Complete Annual Application for Waiver + CFC	11/10/2017	11/30/2017		New
61932	Mcmillion, Lisa	IDD - Re-Application Due for IDD Waiver Program	11/15/2017	08/16/2018		New
61624	Cuthbertson, Manuel	ALI Program Reapplication and Re-Assessment: Start the process by setting Program Status to 'Renewal Application'	08/07/2017	08/24/2018		New
61942	Salvador, Patricia	Renewal Support Plan due in 30 days	11/16/2017	09/15/2018		New
61942	Salvador, Patricia	ALI Program Reapplication and Re-Assessment: Start the process by setting Program Status to 'Renewal Application'	11/15/2017	12/04/2018		New

Apply Alert Days Before Due tickler list view

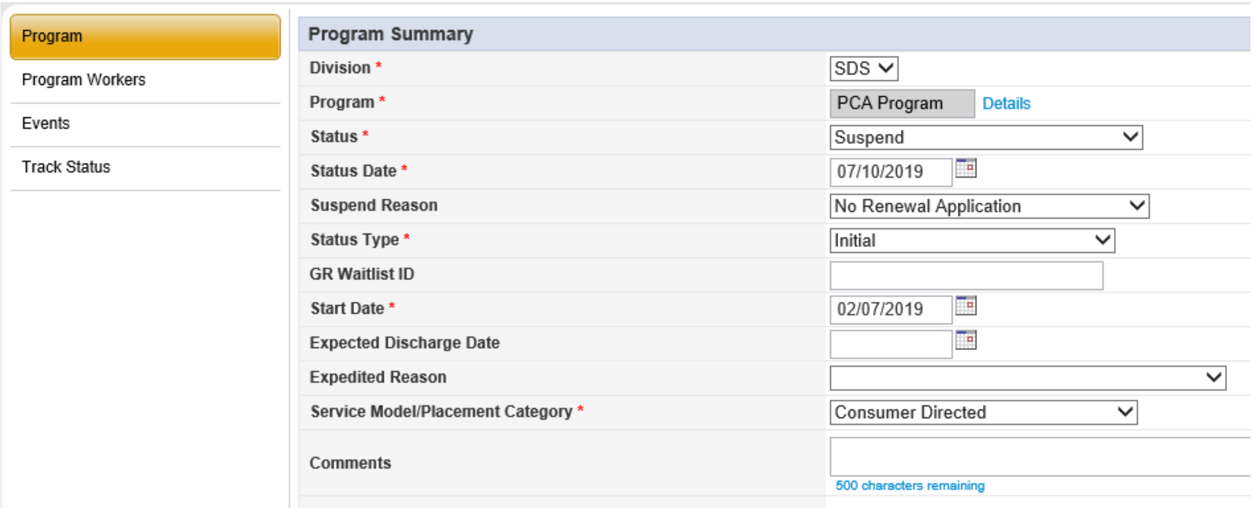
My Consumer Programs

The largest panel on your My Harmony page is likely to be **My Consumer Programs.** Many of our clients have multiple programs; PCS and a Waiver for example. Some of our clients have previously applied for or received services from other SDS programs; CCMC to APDD for example and that history is included in their Consumer Record. Therefore your My Consumer Programs total count **will not** the same as your My Consumers count.

There are over 45 program statuses available in the SDS Harmony Data System. Ranging from ‘Active’ to ‘Suspend’. Most of them are self-explanatory and none of them require a Care Coordinator to take an action. They are available for your information and to provide transparency to the life cycle of the consumer’s program status.

Some of the most common Program Statuses a Care coordinator may see are:

- Request Application
- Assessment Requested
- Assessor Assigned
- Assessment Scheduled -There should also be a corresponding Appointment reminder
- Assessment QC
- Assessment Scoring
- LOC/LOS Determined -There should be tickler to begin this person’s initial Support Plan
- Active
- Suspend -SDS is awaiting a determination of some type. Medicaid, LTC, Incarceration etc...



You can open the Consumer's **Program** Tab to see reasons why a program was Expedited, Suspended or Closed. Sometimes there are additional comments about why a program is in a specific Status.

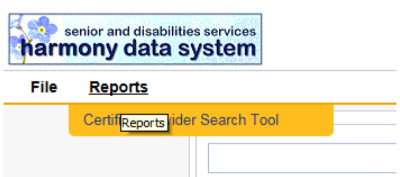
Care Coordinators should review this information often to see if one of their consumer's programs has unexpectedly changed. This could be an indicator that something needs to be looked into. For example if SDS sends a registered letter and it comes back undeliverable, the program may be put into 'Suspend' status. The CC could then get in contact with the client, deliver the important information and verify any address changes.

How to Locate…

A List of Specific Providers

Care Coordinators often need to locate certified providers of service in specific areas of the state. Sometimes you just need to find the Medicaid ID # for a certified provider.

1. Go to the Providers Chapter
2. Click the Advanced Search Link
3. The **Reports** menu should appear next to the **File** menu

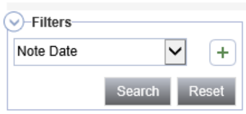


4. Select the Certified Provider Search Tool from the Reports menu
5. Set your report perimeters
    a. Select the certified services
    b. The Boroughs you are looking for providers in
    c. What SDS programs the provider is certified to serve
6. Click the View Report button in the upper right corner.
7. You can download the report in a variety of formats by selecting this icon 
    a. To create an Excel document that can be sorted, select the CSV format

The Most Recent LOC Determination

There is no data field in the Consumer Record that records the current LOC dates for the consumer. The LOC determination and its supporting documents are located in the Note tab of the consumer's record.

1. Open the **Consumer's Record**
2. Open the **Notes** Tab
3. Filter the Notes by clicking the **green plus sign** to open the Filters



4. Set to **Note Type** to "LOC Determination" and click **Search**

Notes should automatically list newest to oldest- *some notes prior to 2019 may look odd*

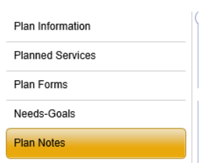
Note Date	Note By	Program	Note Type	Note Sub-Type	Description	Status	Date Compl
06/11/2019	McCafferty, Liza T	IDD Waiver Program	LOC Determination	Approved	IDD LOC 05/31/19 - 05/30/20 ICAP File Review	Complete	06/11/2019
08/18/2017	Application, Harmony	IDD Waiver Program	LOC Determination	Approved	LOC interim 1	Complete	05/30/2019
10/19/2016	Application, Harmony	IDD Waiver Program	LOC Determination	Approved	LOC ICAP	Complete	05/30/2019
09/06/2013	Application, Harmony	IDD Waiver Program	LOC Determination	Approved	LOC ICAP	Complete	05/30/2019

***For NFLOC determinations look for note Sub-type 'Notice Sent-Approval'

Note Date	Note By	Program	Note Type	Note Sub-Type	Description	Status	Date Comp
04/09/2019	Atanoa, Moli T.	ALI Program	LOC Determination	Notice Sent - Approval	01/28/2019 to 01/27/2020.	Complete	04/09/2019
01/28/2019	Rodes, Barbara B	ALI Program	LOC Determination	Approved	Approval Initial ALI waiver program.	Complete	02/28/2019

A Current Authorized Plan

1. Open the **Consumer's Record**
2. Open the **Plans** Tab
3. Open the most current **Plan** with the Status of 'Approved'
4. Go to the **Plan Notes** Sub-Page



5. Locate the Note Type **Plan Note** with Note Sub-type **Planned Services Approved** or **Plan Attachments**

<u>ALI Plans</u>

3 Plan Notes record(s) returned - now viewing 1 through 3

Note Date	Note By	Note Type	Note Subtype	Description	Status	Date Completed	Attachment
05/08/2019	Care Coordinator	Plan Note	Plan Attachments	SP, COS, POC Questionaire	Complete	05/14/2019	Yes
05/17/2019	Frazier, Ladda	Auth Change	Initial	DPA Approval – Initial POC auth 01/28/2019 - 02/27/2020 P191371055	Complete	05/17/2019	No
05/21/2019	Krasilovsky, Vitaliy L.	Plan Note	Plan Attachments	Initial Support Plan start date:1/28/2019; End date:1/27/2020 has been uploaded into the database. A copy has been mailed to consumer and also has been sent to CC via DSM.	Complete	05/21/2019	Yes

<u>IDD Plans</u>

2 Plan Notes record(s) returned - now viewing 1 through 2

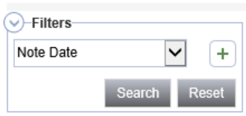
Note Date	Note By	Note Type	Note Subtype	Description	Status	Date Completed	Attachment
04/23/2019	Croxton, Joanna	Plan Note	Planned Services Approved	5/7/19-5/6/20 Approved Support Plan	Complete	04/29/2019	Yes
04/29/2019	Frazier, Ladda	Auth Change	Renewal	POC RENEWAL reauth 05/07/2019 - 05/06/2020 P191190047	Complete	04/29/2019	No

6. Once the Note is opened, the approved Plan can be saved to your files and printed as needed.

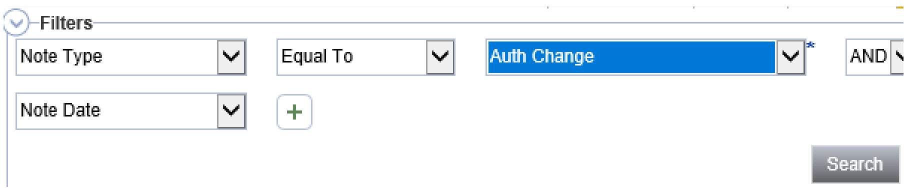
The Current Service Auth

There is no data field in the Consumer Record that records the current Service Authorization (SA) # for the consumer. The SA# and any supporting documents are located in the Notes tab of the consumer's record.

1. Open the **Consumer's Record**
2. Open the **Notes** Tab
3. **Filter** the Notes by clicking the **green plus sign** to open the Filters.



7. Set to **Note Type** to "Auth Change" and click search

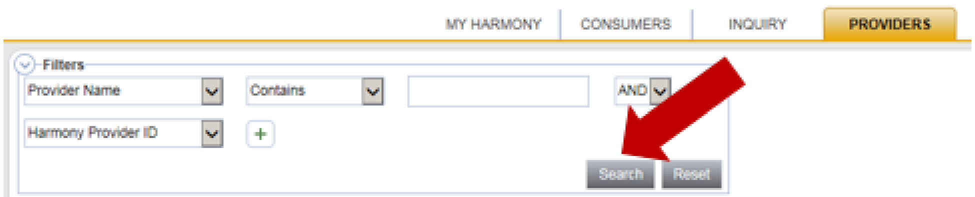


All of the Authorizations created since 2018 will be shown, this will capture any changes to the SA that may have occurred due to various reasons i.e. Amendments, Mediations or Fair Hearing.

Your Certification (credential) Dates

Your renewal certification application is due to SDS no later than 60 days before the expiration of the current certification. It's important to track this information so you can meet all the training requirements in a timely fashion.

1. From the My Harmony page select the "Providers" chapter.
2. Click ADVANCED SEARCH in the Quick Search area to clear your previous results. (if needed)
3. Within the Advanced Search field select the "Search" button. Leave all fields blank to pull all providers you are affiliated with.



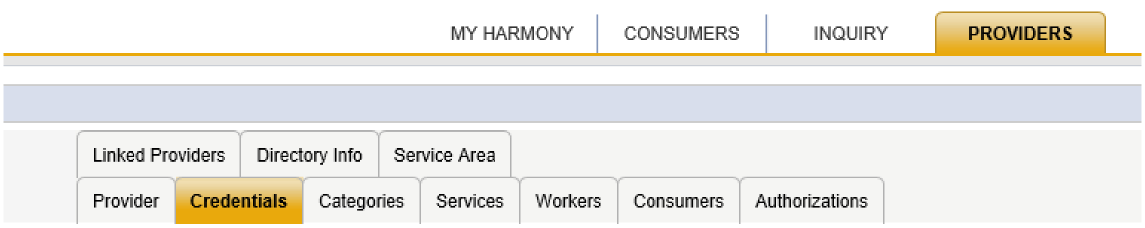
4. Now select your Individual Care Coordination Record


2 Advanced Search record(s) returned - now viewing 1 through 2

Harmony Provider ID	Legacy DS3 ID	Provider Name	Street	City	State	Zip Code
24042		Test Provider 1	New info	Anchorage	AK	99501
24043		Test Test	123 main	Adak	AK	99546

<< First < Previous Retrieve 15 Records at a time Next > Last >>

5. Open the Credentials tab



6. Current and past certification dates will be listed

Credential Type	Certification and License Type	Credential Number	Credential Status	Start Date	End Date	Settings Site Name	Settings Site Address	Programs
Certification	Care Coordination Renewal		Approved	05/01/2018	04/30/2020			ALI Program,APDD Program,CCMC Program,IDD Waiver Program,ISW Program
Certification	Care Coordination Renewal		Complete	05/18/2017	04/30/2018			ALI Program,APDD Program,CCMC Program,IDD Waiver Program,ISW Program

Who do you contact for Questions?

Where to find something?

The SDS training team is here to help you navigate the system and get more comfortable exploring it!

Senior & Disabilities Services Training Team:

Kara Thrasher - Livingston – Training Specialist III (907) 269-3685
Kara.Thrasher-Livingston@alaska.gov,
Cina Fisher – Training Specialist II (907) 269-3734
Cina.Fisher@alaska.gov,
Delight Mells – Training Specialist I (907) 269-3672
Delight.Mells@alaska.gov,
Cassandra Lynch – Health Program Associate, Training (907) 269-3448
Cassandra.Lynch@alaska.gov,

Is it broken?

Please let our DSDS Harmony Help team know if something doesn't seem right with the system. Examples include:

- unable to login (account is deactivated),
- difficulty loading pages,
- slow search results speeds,
- other functional issues

Contact via email: dsdsharmonyhelp@alaska.gov no HIPAA data please

OR DSM to: "HarmonyProviderHelp, DSDS" <dsds.mcelp@hss.soa.directak.net>

An attachment is missing or I have a case related question.

Contact either the IDD or NFLOC unit about case related information or if you believe an attachment is missing. Harmony does not function like an email system so it is critical that you keep your DSM account to communicate about your clients and comply with HIPAA.

Contact the unit if you are missing a consumer or suddenly see one and they are not familiar to you.

IDD Unit's DSM sds.iddAnchorage@hss.soa.directak.net

NFLOC Unit's DSM dsds.nflocwaiver@hss.soa.directak.net