# State of Alaska

# Senior and Disabilities Services

Harmony Data System Guide

Intro to Harmony for Certified Providers

T01 version 1.16    9/4/2020

# Table of Contents

# Document Tracking

| Version | Author/Editor | Date | Description |
|---|---|---|---|
| 1.6 | Cina Fisher | 4/6/2018 | Inserted links to specific sections of the document |
| 1.7 | Cina Fisher | 5/7/2018 | Included Document Naming guidelines for attachments; Removed Practice Exercises |
| 1.8 | Cina Fisher | 6/5/2018 | Removed Introduction as a separate chapter heading; Removed Alert Notes; reorder the consumer record description for Plans Tab. |
| 1.9 | Cina Fisher | 6/29/2018 | Added 'Access Request' language |
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# Introduction | Intro to Harmony Training Guide

This technical guide covers the SDS Harmony Data System layout and navigation, along with basic functions such as locating a consumer record requesting access to a consumer record (Inquiry), creating notes with attached documents.

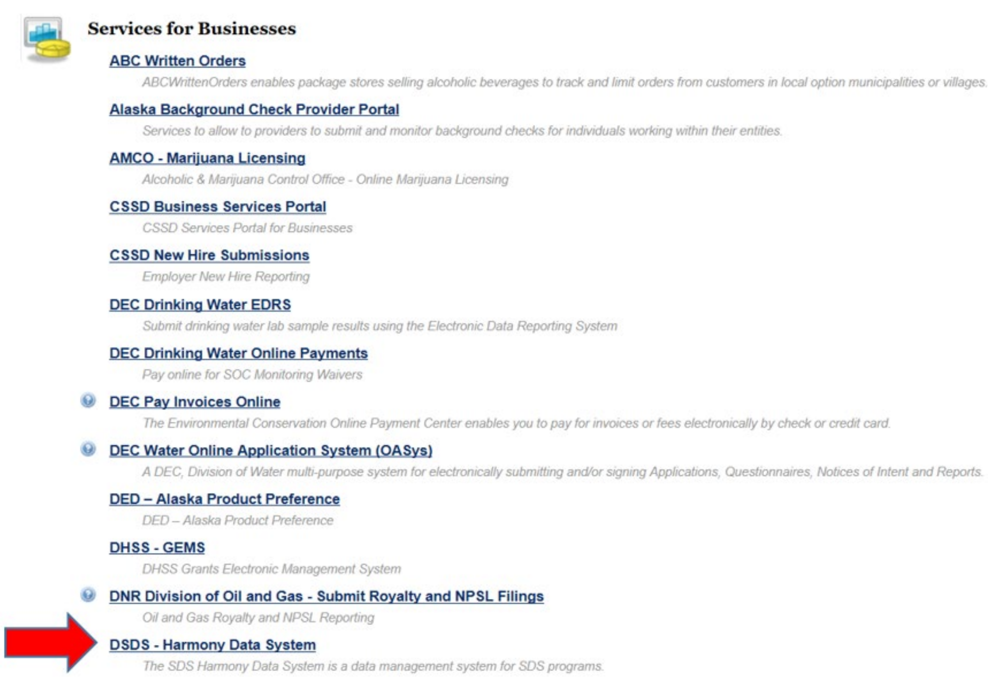
## *Learning Objectives…*

- ✓ Navigate through SDS Harmony
- ✓ Identify the functions of the Consumer, Inquiry, and Providers Chapters
- ✓ Review the tabs of the Consumer record
- ✓ Identify the importance of Notes: how to add a note, attach a file and route it to someone else if necessary
- ✓ Understand the functions of ticklers and how to work with them
- ✓ How to create certified provider reports

In order to use Harmony, SDS needs to ensure your identity is authentic. To do this you will use your myAlaska account. You can create a new account only for this purpose, or you can use a myAlaska account you already have. You can create as many myAlaska accounts as you need. SDS will not be able to see any of your personal information on any myAlaska account you use for Harmony access, such as PFD applications.

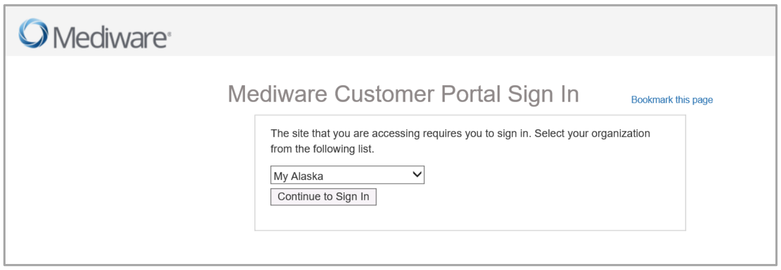
## Provider User Requests Access to Harmony

1. Your agency Access Coordinator will work with you to complete and submit a Harmony Data System Privacy and Security Agreement for Individual Provider User.
2. You will receive an email confirmation once SDS has reviewed and accepted your agreement.
3. Please complete myAlaska self-registration to DSDS Harmony.
   a. Go to My Alaska.gov
   b. Under **Services for Businesses** select '**DSDS – Harmony Data System'**




myAlaska Services for Business page

c. Select My Alaska from the Portal Dropdown list
d. Click **'Continue to Sign In'**



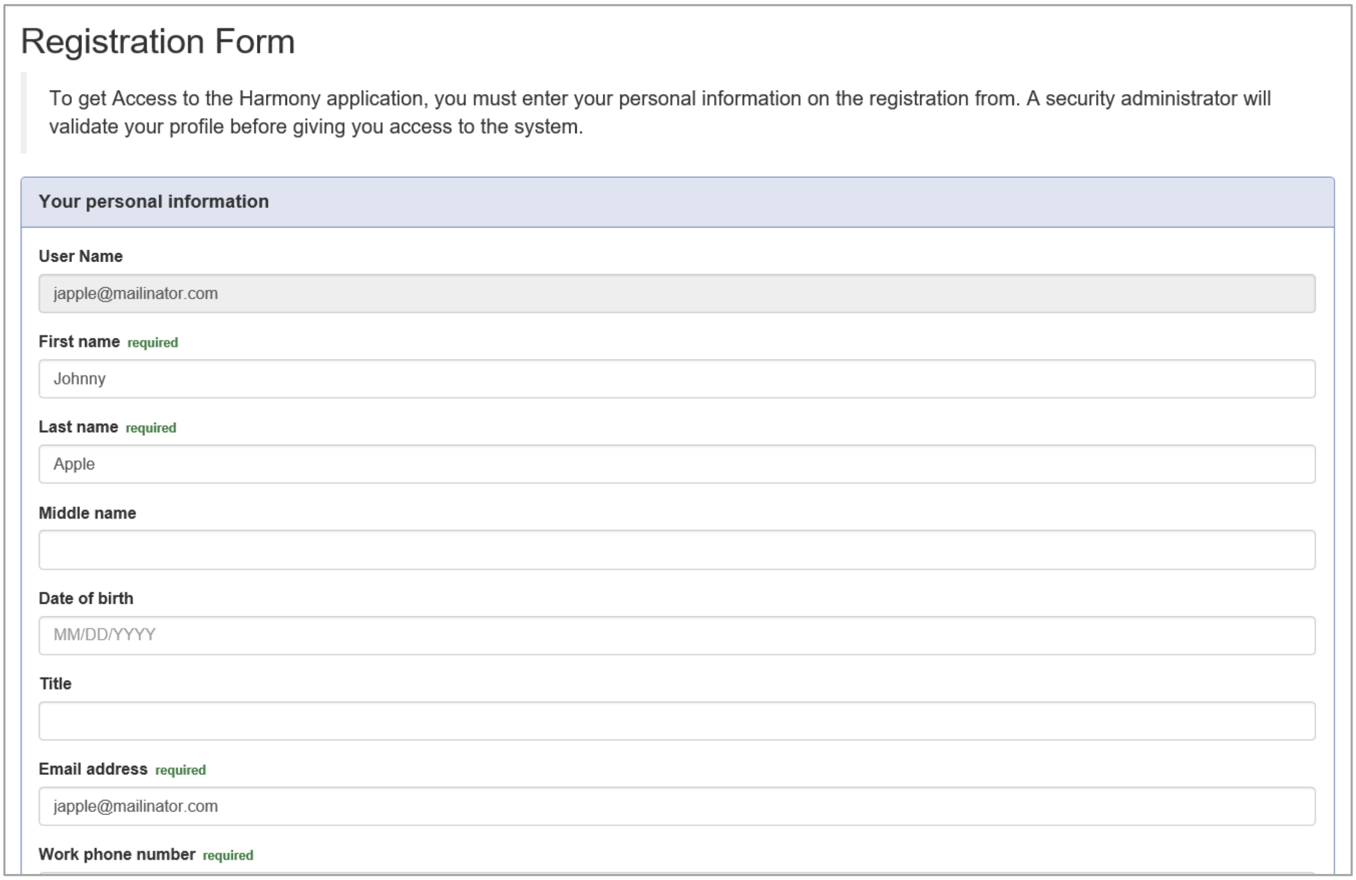

Harmony SSO Portal selection page

e. Login to your myAlaska account
f. Redirected to Privacy Agreement


i. Check the I Accept the Privacy Agreement box
ii. Click **Continue.**

g. Redirected to Harmony Self Registration page.

4. Complete Harmony Registration Form.
   a. Your personal information.
      i. User Name = Defaulted to Email address from myAlaska.
      ii. Set First name = Your first name.
      iii. Set Last name = Your last name.
      iv. Set Middle name = Your middle name *(optional).*
      v. Set Date of birth = Your Date of Birth *(optional).*
      vi. Set Title = Your Job Title *(optional).*
      vii. Set Email address = Defaulted to Email address from myAlaska.



Registration Form

To get Access to the Harmony application, you must enter your personal information on the registration from. A security administrator will validate your profile before giving you access to the system.

**Your personal information**

User Name
japple@mailinator.com

First name required
Johnny

Last name required
Apple

Middle name

Date of birth
MM/DD/YYYY

Title

Email address required
japple@mailinator.com

Work phone number required

Harmony Access Registration Form

viii. Set Work phone number
ix. Set Work phone extension *(optional).*
x. Set Mobile phone number *(optional).*
xi. Set Supervisor name *(optional).*
xii. Add additional comments *(optional).*
xiii. Select your Work Position.
    1. ADRC Specialist
    2. Care Coordinator
    3. Independent Living Specialist
    4. LTC or General Relief Referrer
    5. PCS Services Coordinator
    6. STAR Coordinator

b. Your Provider Agency contact information.
    i. Enter your Provider Agency Name
    ii. Enter the Provider Agency address

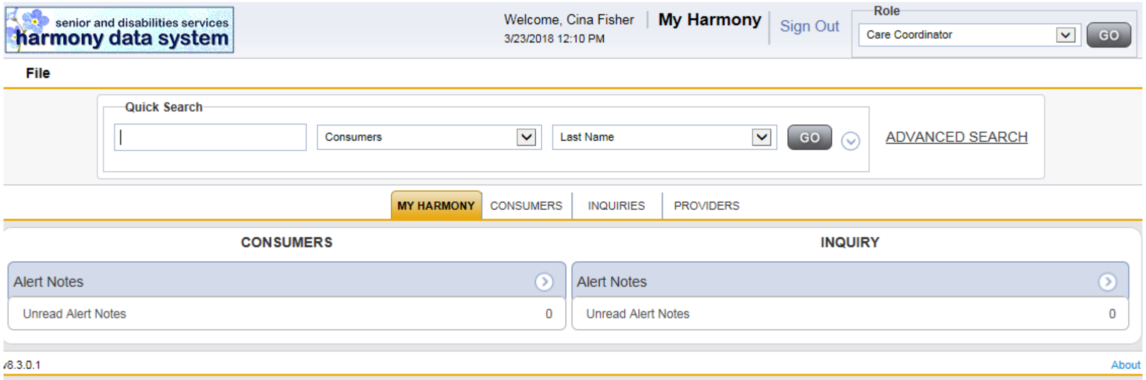
c. Click **Send Information.**

**Key Point**

Once an application is approved, the Position selected will give the user a default role. Not all Positions have the same default role associated to it.

## Provider User Granted Access to Harmony Data System

1. You will receive an "Access Confirmation" email
    a. Open email 'Harmony Self Registration – User Activated'
    b. Click "You can login **here**."
    c. Log into myAlaska
    d. A new tab or window will open the Harmony application to the users My Harmony Desktop.




# Chapter 1 | Login, Roles, My Harmony

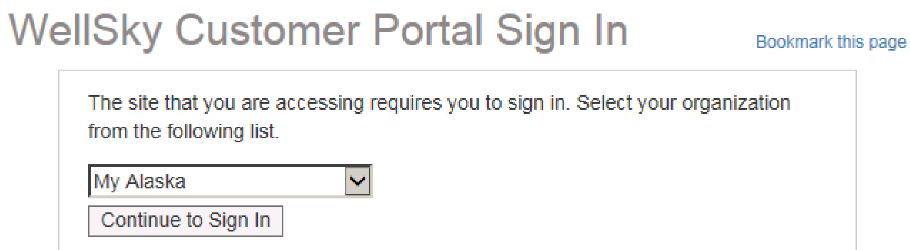
## Login

Like most applications, such as email, you need to log in before you can access and enter information. You are working with Personal Health Information, it is critical that you create a complex password and guard it. It is also important to Sign Out of the program to protect sensitive information, rather than just stay logged in or closing the Internet browser.

SDS Harmony users will use a custom Single Sign-On function. State employees have the ability to automatically login when connected to the state's network. Certified SDS Providers also have a similar automatic login log in through their myAlaska account.

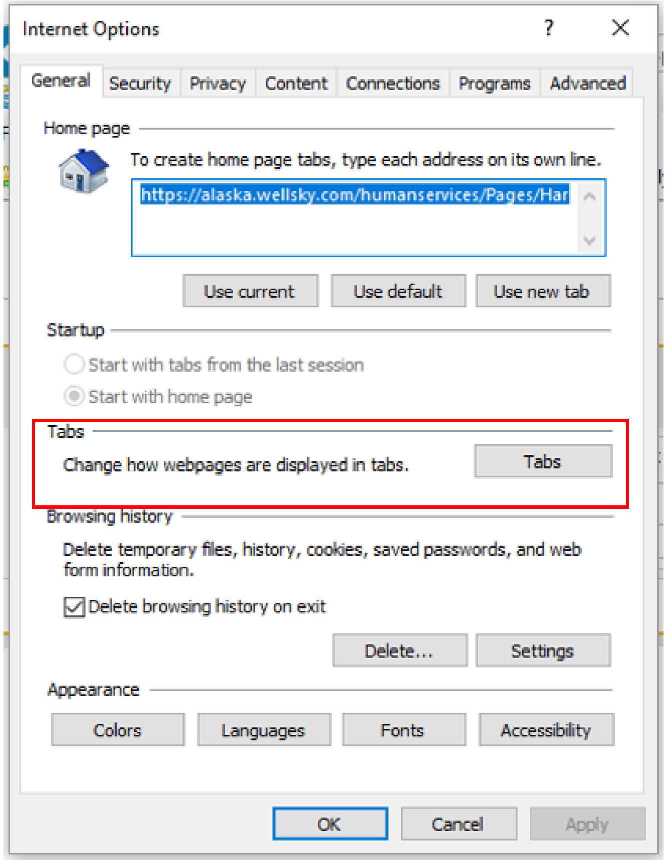
### Sign in to Harmony using MyAlaska login

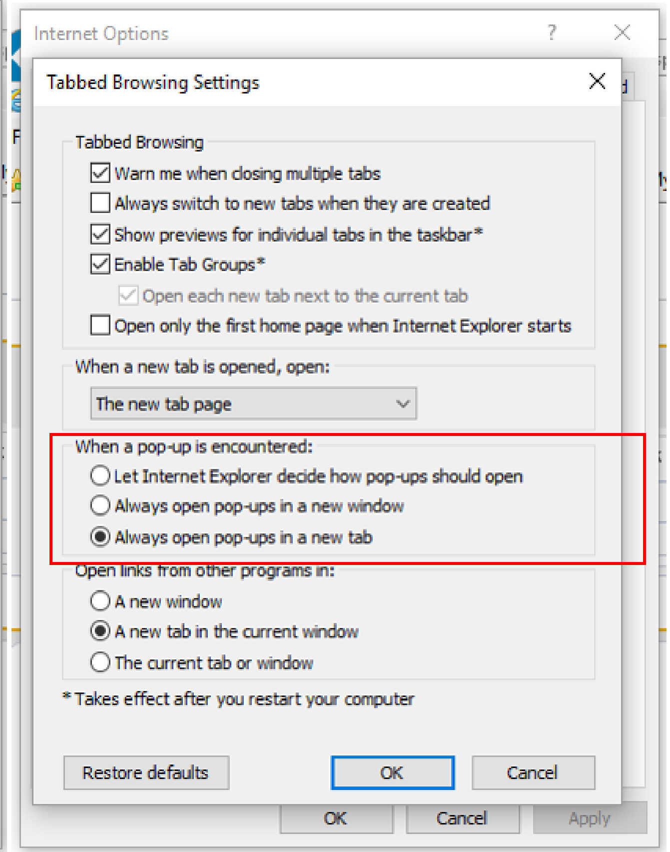
Once your Agency Access Coordinator has submitted your individual User Agreement and you've received the e-mail invitation to self-register in Harmony you will see the portal after you've logged into your MyAlaska Account.




### Internet Browser Set-up for Internet Explorer

The system will time out after 60 minutes of in activity in any window that is open. To avoid managing multiple windows and accidently timing out while working in the system you must set your Internet Explorer –Tools Menu, Internet Options Menu, Tabs Menu to "Always open pop-ups in a new tab".



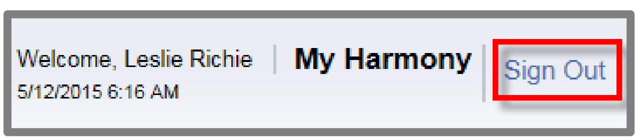




This should help to ensure you don't forget an open SDS Harmony window that cause the system to log you off.

### Sign Out of Harmony

When you are finished using Harmony, you should sign out. Then close your browser window.

1. In the upper right corner of the screen, click **Sign Out**.




Sign Out link

# User Roles

A Role defines what you can see and do in Harmony (read-only, add, edit, and delete). Your assigned role is set to allow you to do your assigned job in the system. You may use more than one role for your work, so you'll need to change roles, depending on what you're doing in Harmony.

A Certified Provider user will have access to 2 roles:

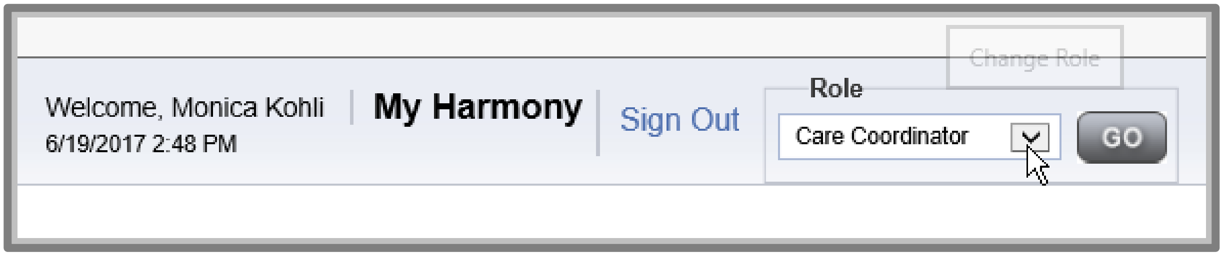
1. User specific: Care Coordinator, PCA Admin (External), LTC Referral Specialist, etc.…
2. Provider Search

Roles limit access to sensitive information. If you do not see certain information, menus, options or fields, it may be because your role does not allow it. SDS staff roles are different then providers and they can often see options in the system that provider users do not.

### Change Roles

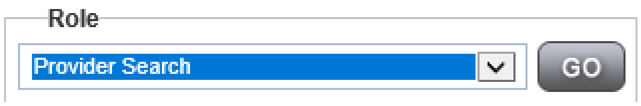
Most Providers who use Harmony will have access to the additional role of "Provider Search"

1. In the upper right corner of the Harmony screen, click the down arrow in the Role section.




Change Roles Area

2. Select the role you want to switch to.




3. Click **Go**.
4. The screen will refresh and display the new role's **My Harmony** screen.

## My Harmony

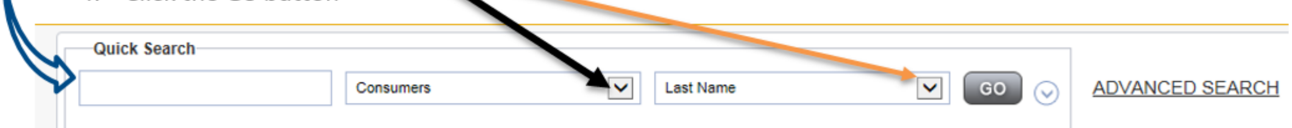
**My Harmony** (chapter) is the first page you see once you are logged in to the Harmony application. **My Harmony** serves as a home page that displays panels of information about the records assigned to you. Some of this information includes ticklers to complete, notes to read, and appointments scheduled. These panels are also shortcuts to lists of records.

### Quick Search

Quick Search works best when you're looking for a specific record and you have a specific information you can filter by, such as a Consumer's Last Name, Case No or Medicaid ID.

To use Quick Search:

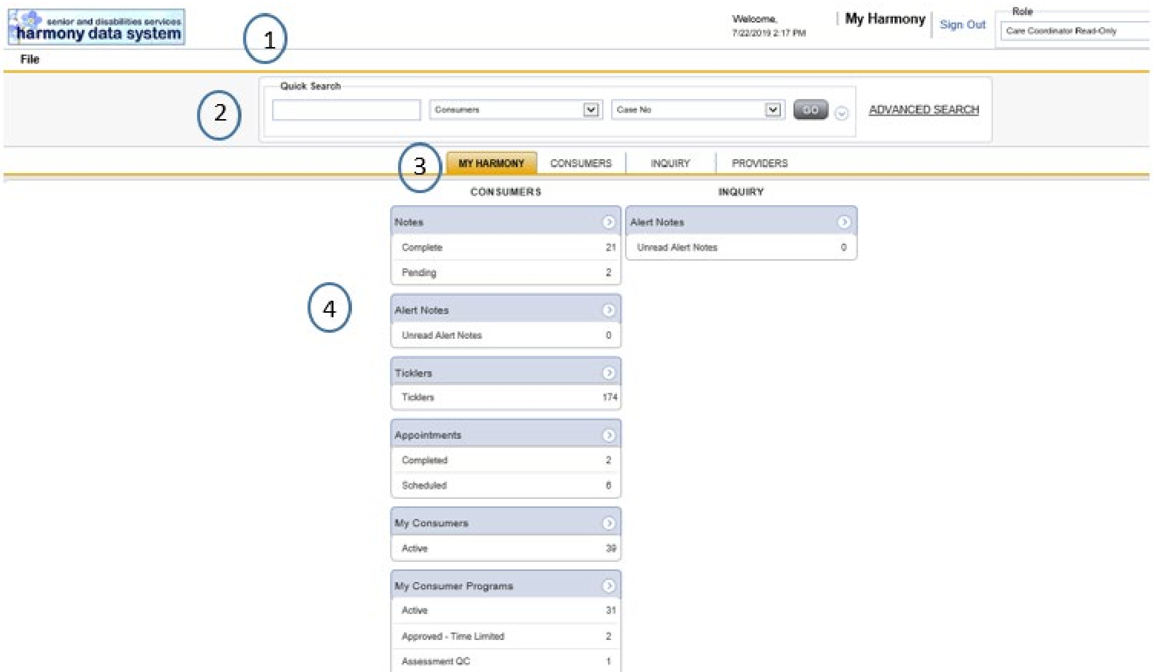
1. Enter the value
2. Select the chapter
3. Select the filter field
4. Click the **Go** button




Quick Search Bar

### My Harmony Screen Elements

There are several parts of the **My Harmony** screen, as shown in the screenshot below. The number and type of columns and panels change depending on your Role in Harmony.




My Harmony

## 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. 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.

## 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 helpful for using multiple filters to search for a specific Consumer.

## 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 an 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 case information is located below the **My Harmony** chapter within **Panels**. The left hand column shows summary panels for **Consumers** assigned to you. The right side, **Inquiry** column shows summary panels for 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 show or hide 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.

### Notes Panel

The panel will disappear when there is no information to display, with the exception of Alert Notes. The Notes will remain in this panel until you mark them as “read”. When there is no information to display the panel will disappear, with the exception of Alert Notes.

Note status of “Complete” end a Note string. Note status of “Pending” allow back and forth communication. In the example below, there are 14 unread notes. 13 are “Completed” and one is “Pending”. If there are no Notes with you as a Note Recipient that you have not already reviewed and dismissed, this panel will not display.


My Harmony Consumer Notes

### Alert Notes Panel

Currently Provider Users will not see any Alert Notes in this section. This is a locked default in the software product so the panel will always remain on the screen.

### Appointments Panel

The **Appointments** panel is used to invite you to a CAT Assessment appointment that has been scheduled for one of your consumers. PCS Providers and Care Coordinators receive invites. If you ‘Accept’ or ‘Tentatively Accept’ the appointment you will receive updates if the appointment is changed. Once you have responded to the Appointment it will disappear from the list.

- If you have no invitations to appointments this panel will not display.

### My Consumers Panel

All of the people that are assigned to you on the Division Tab in their consumer record and/or on the Program tab will be listed here. The category of “active” indicates that they have an “active” division record. It does NOT mean they have an active Program.

### My Consumer Programs Panel

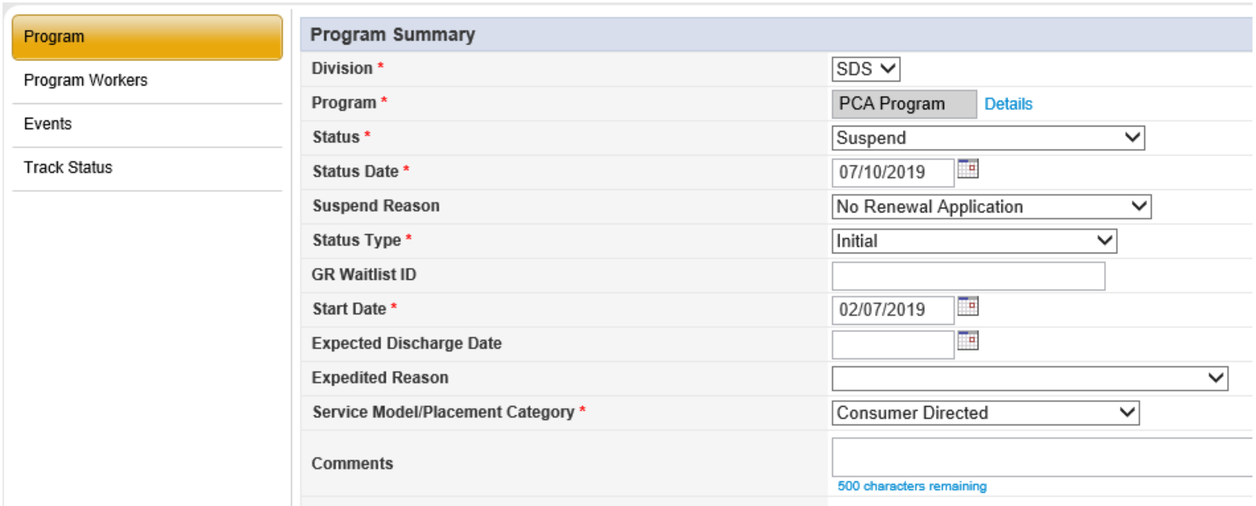
The largest panel on your My Harmony page is likely to be **My Consumer Programs.** Many of our clients have multiple programs; PCS and a Waiver for example. Some of our clients have previously applied for or received services from other SDS programs; CCMC to APDD for example and that history is included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




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.

You should review this information often to see if one of your consumer's programs has unexpectedly changed program statuses. 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 until we can locate the consumer. The CC or PCS agency Admin could then get in contact with the client, deliver the important information and verify any address changes.

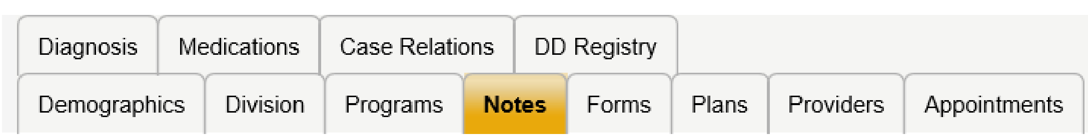
# Chapter 2 | Layout and Navigation

## Introduction

This chapter reviews the layout and structure of the Harmony Data System. It also gives instructions and tips on how to navigate within Harmony. Harmony is organized into chapters, tabs, pages, and fields.

### Tabs

**Chapters** are organized into tabs. Tabs display lists of information. Tabs display rows of file folder tabs below the Chapter bar and the current record name and number:




Consumer Chapter Tabs

### File Menu Bar

The **File** menu is displayed throughout the system, located in the upper left corner of the screen. Other menus, such as Edit, Tools, Reports, Ticklers, and Word Merge may be displayed based on the area within the system.

This is the location where you'll go to create or add records, close and save records and print, among other functions.

Additional functions remain available under each option. Hovering above each item on **File Menu** bar will expand additional menus. Access to these are granted based on the permissions which are driven by roles. Some examples include and are not limited to: **Save**, **Save and Close**, and **Print**.


File Menu

When users scroll through a page in Harmony, the **File Menu** header is frozen so that users will always be able to access these **File Menu** functions no matter where the cursor is located on the page.

- **File**: Contains the functions to add a new record or to view history changes to the data in view.
- **Edit**: Provides the ability to make changes to the data included in the record.
- **Tools**: Provides the user with additional functionality based on the page currently in view.
- **Reports**: If a user has access to the Reports menu, click the menu and select the report and it will open in a new window
- **Ticklers**: Provides the user with a list of "ticklers" or reminders generated for a specific Consumer or Provider. This menu is only displayed at a chapter level.
- **Word Merge**: Contains customized Microsoft Word documents which "merge" in specified information, such as a client name and address. Often used for letters. Select the document to merge and it will open in a new window.

# Pages

The Harmony system has three standard types of pages:

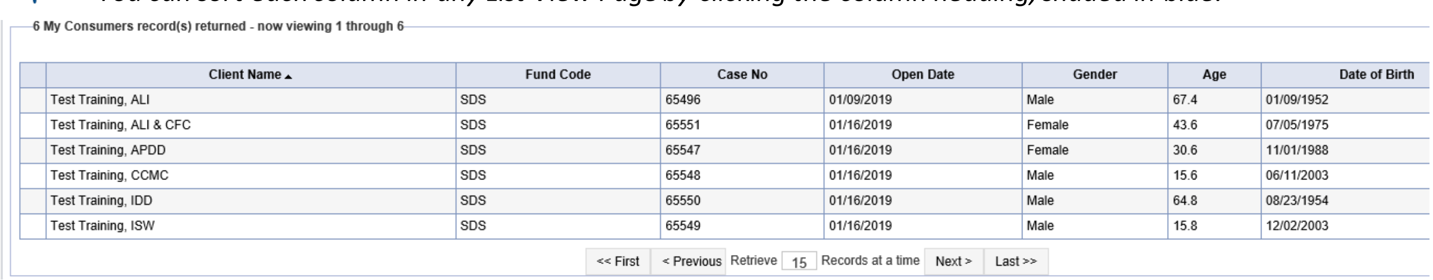
1. List Pages
2. Detail Pages
3. Search Pages

To work with a Consumer or Inquiry record, you must first search and select it using a search page. The chapter will load upon selecting the record. If it is the only record matching the search perimeters then it will automatically open the record.

## List Pages

Most tabs in the Consumers and Providers chapters display a list page when selected. A list page works like a fixed search page that returns results automatically. The results on a list page are the records for the current Consumer or Provider in that information area. For example, the Consumer Notes tab displays a list of Note records entered for the current Consumer. List pages also display via many subpages.

*You can sort each column in any List View Page by clicking the column heading, shaded in blue.*



6 My Consumers record(s) returned - now viewing 1 through 6

| Client Name ▲ | Fund Code | Case No | Open Date | Gender | Age | Date of Birth |
|---|---|---|---|---|---|---|
| Test Training, ALI | SDS | 65496 | 01/09/2019 | Male | 67.4 | 01/09/1952 |
| Test Training, ALI & CFC | SDS | 65551 | 01/16/2019 | Female | 43.6 | 07/05/1975 |
| Test Training, APDD | SDS | 65547 | 01/16/2019 | Female | 30.6 | 11/01/1988 |
| Test Training, CCMC | SDS | 65548 | 01/16/2019 | Male | 15.6 | 06/11/2003 |
| Test Training, IDD | SDS | 65550 | 01/16/2019 | Male | 64.8 | 08/23/1954 |
| Test Training, ISW | SDS | 65549 | 01/16/2019 | Male | 15.8 | 12/02/2003 |

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

Example of List Page

**Key Point**

If you have already opened a list from a **My Harmony** panel that opens a list in a separate window, and you've kept that window open, then additional lists views will **load in that original window** and will not open additional windows. The page tab should flash and change color when information is updated

## Detail Pages

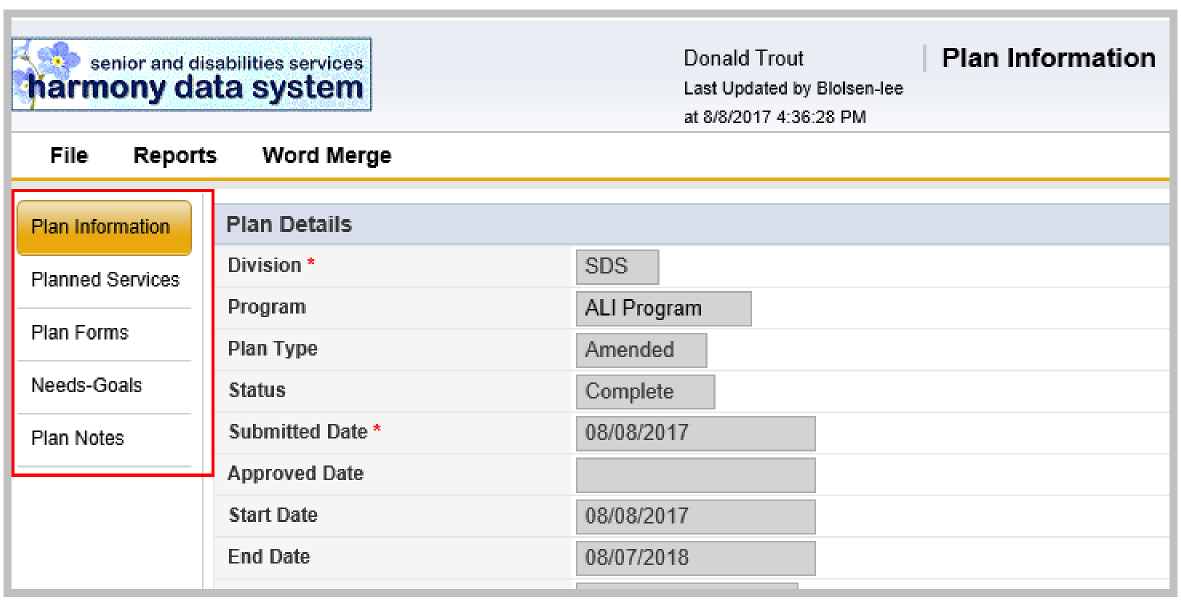
A detail page is a summary screen generally used to add or edit a record. Most detail pages contain a single vertical column of data entry fields with the field label on the left and the data entry field to the right.

| Demographics | | | |
|---|---|---|---|
| Case No | 63089 | Residence Type | Own |
| Last Name | Test | Total in Home | 4 |
| First Name | Test | SSN | |
| Middle Initial | Test | Medicaid ID | 123346567 |
| Preferred Name | | DS3 ID | 180 |
| Date of Birth | 1/10/1962 | Primary Language | English |
| Age | 56.4 | Birth Place | |
| Date of Death | | Primary Alaskan Tribe | |
| Gender | Male | Home Village | Anchorage |
| Race | Caucasian/White | Alaska Resident | Yes |
| Ethnicity | Unknown | Citizenship Status | United Kingdom |
| Marital Status | Divorced | | |

Consumer Demographics Detail Page

## Subpage Menu

If a record has additional pages it, Harmony present a subpage menu to the left of the main detail page. The subpage menu consists of buttons that open list pages or detail pages for the related information. To select a subpage, click the subpage menu button. The current selected subpage is highlighted in orange.

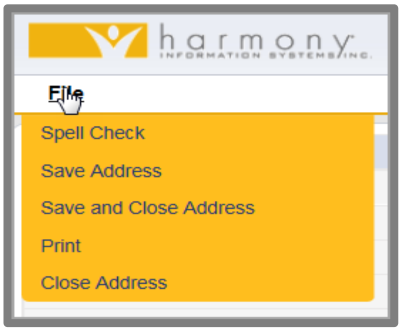



Consumer Plan Subpage Menu

**Note:** Subpage menus only display when viewing/editing a record after the initial save; they will not display when first adding a new record. There are several instance when subpage menus appear after the main page or record creation has been saved. Most often are in the Inquiry Process, Updating Demographics and when creating a Waiver Support Plan

## Save and Close

As you work with records, there are several options to save your work and/or close the file you're working with. The **File** menu displays these options in the context of the task. In the screenshot below, the user is working in the **Consumer Demographics** screen, in the **Address** subpage.

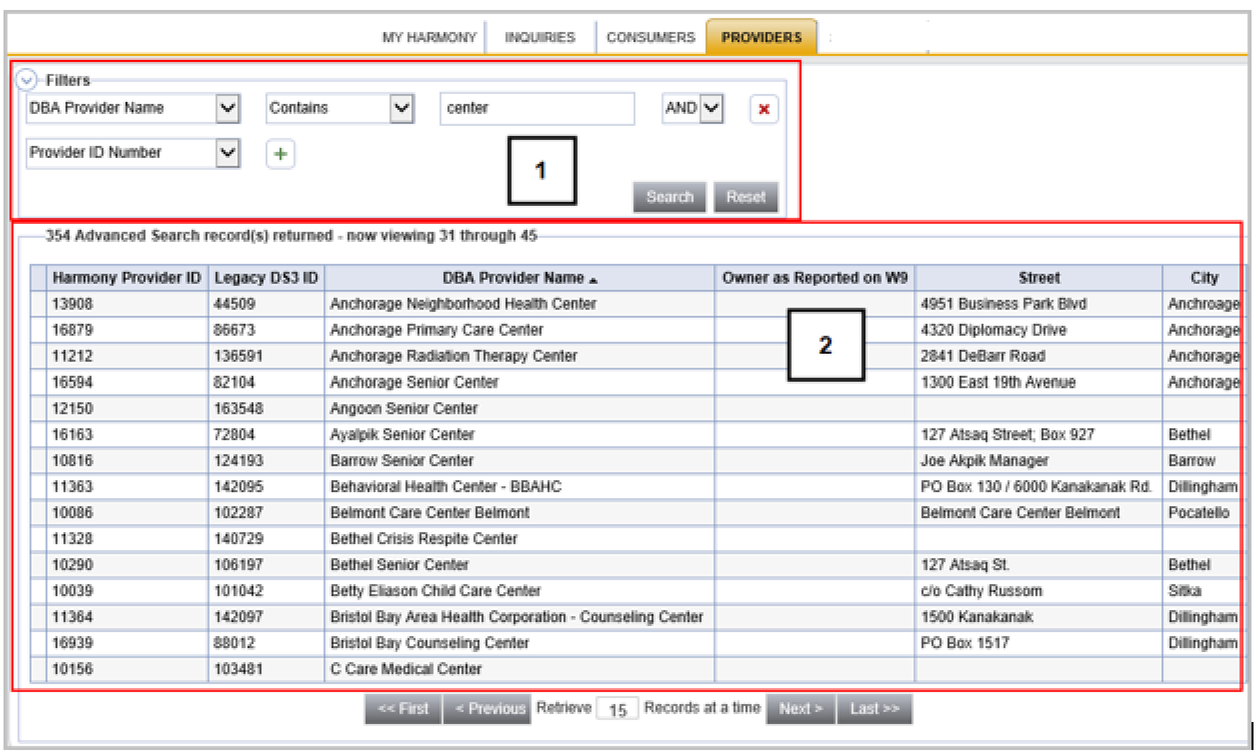



| Option | Definition |
|---|---|
| Save | Save changes and keep the file open. Because the user is working in the Address subpage, the option is Save Address. |
| Save and Close | Save changes and then close the file. In the example above, the option is Save and Close Address. |
| Close | Close the file without saving changes. In the example above, the option is Close Address. |

## Advanced Search

The Advanced Search page is a tool for searching and selecting a Consumer, Provider, or Inquiry record, and is the page that displays when a user clicks on one of these chapters. Search pages have two primary sections:

1. Search Filters above, including a **Search** button
2. Search Results below




Provider Advanced Search

## Search Filters

Each search filter contains four parts:

1. **Filter Field**: the data point to search on
2. **Operator**: the relationship between the filter field and the value
3. **Value**: the filter field answer to search on
4. **Connector**: the relationship between this filter and other filters in the search

## Operators

Each filter row includes an operator that defines the relationship between the filter field and the value:

| Operator | Definition |
|---|---|
| Equal To | Returns records that match the entered criteria. For example, if <Last Name> is entered as "equal to" a specific person's name, the Consumer records assigned to that worker will be returned. |
| Begins With | Returns records that begin with the entered criteria. For example, if <Last Name> is entered as "begins with" 'T' the system will return records assigned to the worker having last names that start with 'T', such as Tester and Thomas. |
| Ends With | Returns records that end with the entered criteria. For example, if you search on <Last Name> "ends with" 'r', you can retrieve records where a Consumer's name ends in 'r', such as Tester. |
| Not Equal To | Returns records that do not match the entered criteria. For example, if a particular name is entered for <Last Name>, the system will return a list of records except those records for the name provided in the search criteria. |
| Greater Than | Returns records that are dated later than the entered criteria. For example, if <DOB> is entered as "greater than" '03/01/2015', the system will return all records with a records whose dates of birth are after March 1, 2015. |
| Less Than | Returns records that are dated earlier than the entered criteria. For example, if <DOB> is entered as "less than" '03/31/2015', the system will return data for all records with a birth date before March 31, 2015. |
| Contains | Returns records that contain the entered criteria. For example, if <Last Name> is entered as "contains" specific values in the person's name, the Consumer Record(s) assigned to that worker with those values would be returned. |
| Blank | A record is returned where the selected field does not have a value in the field. |
| Non-Blank | Returns records where the selected field does have a value in the field. |

## Connectors

The connector options of "AND" and "OR" between multiple filters have the following effects:

- **AND** tightens your search: only returns records that meets ALL filter criteria.

  **Example**

  Find Consumers where **<DOB>** is greater than (>) March 1, 2000 **AND** <DOB> is less than (<) June 30, 2015. This returns all reports dated between the two dates entered.

- **OR** broadens your search: returns records that meet ANY of the filter criteria.

  **Example**

  Find records where **<Last Name>** equals "Jones" OR **<DOB> =** "June 22, 1998." The system returns Consumer records with last name of Jones, regardless of date of birth, and also returns any Consumer records whose birth date is 6/22/1998

## Modifying Filters

The Advanced Search page opens with default filters that have been set up for your role. Users can modify their search by adding, changing, or removing filters. The available filter fields are based on data points within the records you're searching – attributes of Consumers, Providers, or Inquiries.

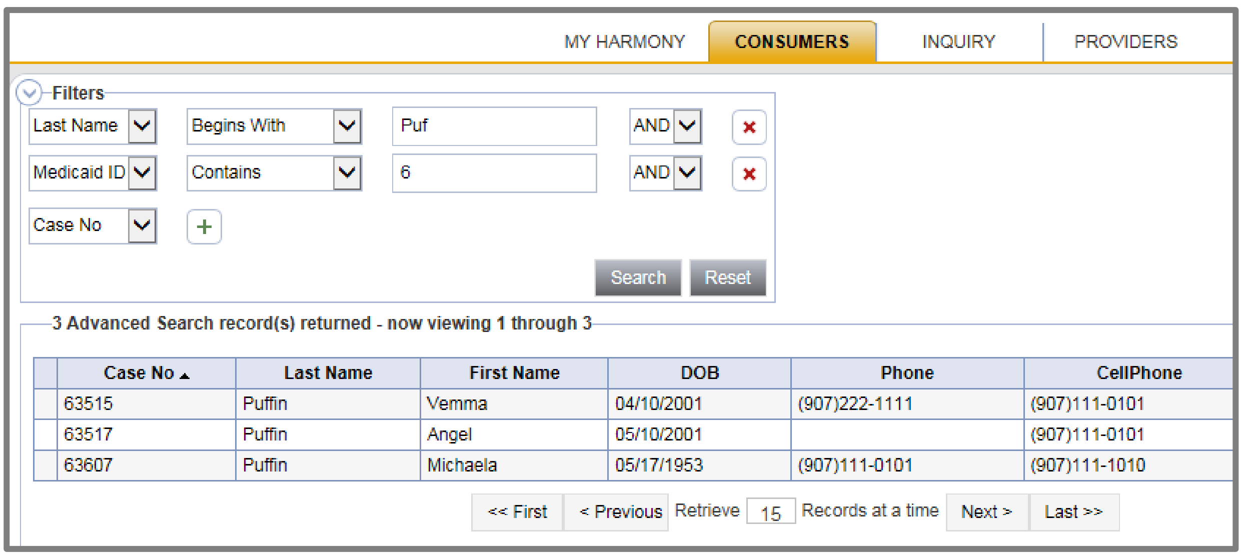
- **Add a Filter**: To add another filter to your search, click the green + button to the right of the bottom filter row. Then proceed to set the filter field, operator, value, and connector for the filter.
- **Change a Filter**: To change an existing filter row, change any of the four filter parts as needed.
- **Remove a Filter**: To remove an existing filter from your search, click the red x button to the right of a filter row.

**Note:** In addition to the search filters you apply, search results will be limited by the security settings of your role. For example:

- External Provider roles, such as a Care Coordinator or PCA Admin, will only see search results for Consumers that are actively associated with.
- SDS and ADRC roles have access to search on all Consumers in the Harmony system.

### Search Results

Once you've adjusted your search filters, click the **Search** button to load or refresh your search results. The search results section of the Advanced Search page displays the results based on your search filter criteria in a table grid with columns of data points and rows of search results records.




Provider Advanced Search Results

## Search Results Features

- **Sort**: The results will be sorted by default on the column with a black triangle icon indicating sort direction: ascending (pointing up) or descending sort (pointing down). Here, results are sorted in ascending order on DBA Provider Name.
    - You can sort on a different column by clicking on the column header.
    - You can toggle to reverse the sort direction by clicking on the sorted column header again.
- **Count**: The search results zone will display a count of records that match the filter criteria.
- **Paginated Results**: Harmony is configured to return up to 15 search results at a time. When the results of the search exceed that limit, the search results section will identify which 15 records in the overall results set are displaying.

**You can increase the results per page by changing the default value of 15 at the bottom of the page and then clicking one of the buttons.**

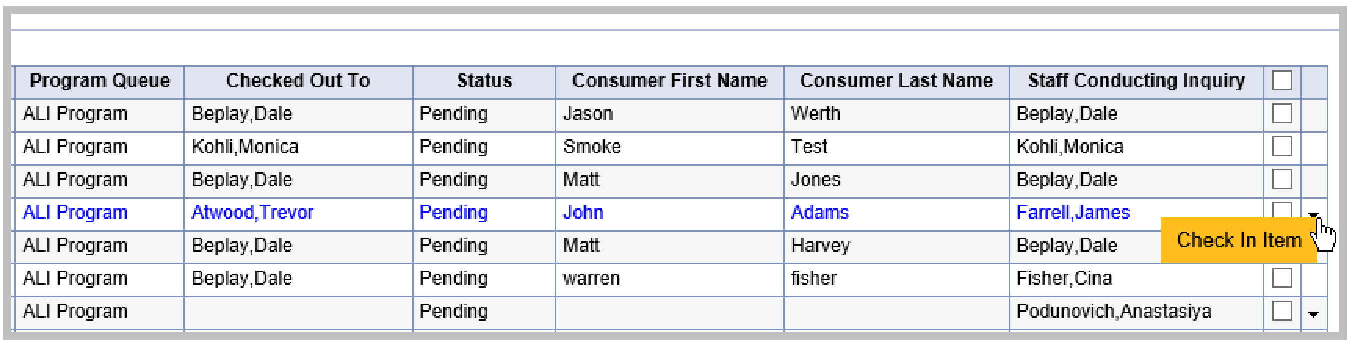
- **Results Navigation**: When your search results in more than 15 records, you can navigate the "pages" of results using these four buttons at the bottom of the search results section:

| Button | Description |
|---|---|
| << First | Jumps to the first set of results |
| < Previous | Jumps to the previous set of results |
| Next > | Jumps to the next set of results |
| Last >> | Jumps to the last set of results |

When you find the right record in the results, click on that row to open that record and load the chapter. Now you can proceed to work with that record to review, add, or update information.

## Flyout Menu

Some pages include flyout menus on the row level at the far right side of the columns. Flyout menus provide additional options for interacting with that record beyond just clicking to select it. Hover over the triangle icon to display a flyout menu, and then click to select a menu option.



| Program Queue | Checked Out To | Status | Consumer First Name | Consumer Last Name | Staff Conducting Inquiry | |
|---|---|---|---|---|---|---|
| ALI Program | Beplay,Dale | Pending | Jason | Werth | Beplay,Dale | |
| ALI Program | Kohli,Monica | Pending | Smoke | Test | Kohli,Monica | |
| ALI Program | Beplay,Dale | Pending | Matt | Jones | Beplay,Dale | |
| ALI Program | Atwood,Trevor | Pending | John | Adams | Farrell,James | |
| ALI Program | Beplay,Dale | Pending | Matt | Harvey | Beplay,Dale | Check In Item |
| ALI Program | Beplay,Dale | Pending | warren | fisher | Fisher,Cina | |
| ALI Program | | Pending | | | Podunovich,Anastasiya | |

Inquiry Advanced Search Flyout Menu

## Field Formats

There are several different types of data fields within Harmony, such as text boxes, checkboxes, date fields, dropdowns (sometimes called lookups) and search fields.

### Required Fields

Required fields are always indicated by a red asterisk (*)


Required Field

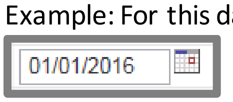
### Linked Fields

Sometimes choosing a value in one dropdown field will filter or change the values shown in another dropdown field on the same page. This is indicated with a blue asterisk (*) to the right of the field.

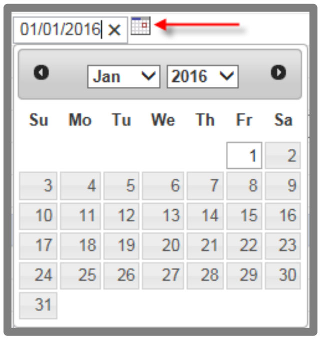
### Date Fields

Date fields can be populated in either of two ways. First, the user can simply type the numbers and Harmony will automatically format the field.

Example: For this date field, the user typed: 01012016



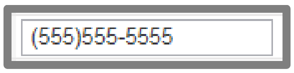
The other option is to click on the calendar icon and use the calendar display. To select a specific date, simply click on the number **after the correct month and year are chosen**.




## Pre-formatted Fields

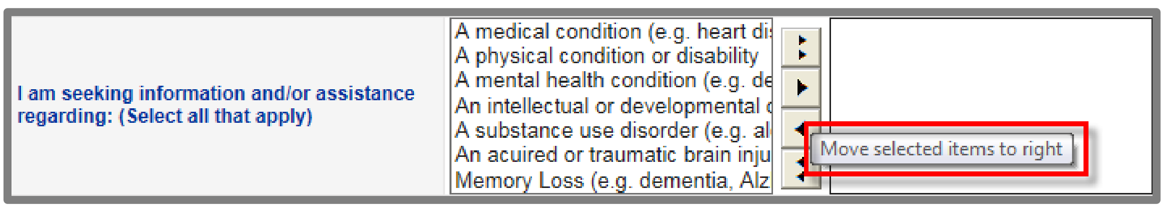
Some fields are pre-formatted for certain types of data, like phone numbers. The user simply has to type the numbers and Harmony will automatically add the appropriate formatting such as dashes or brackets.

Example: for this phone field, the user typed: 5555555555




## Multi-Select Fields

Some areas of the application require you to select items from a list, and move them from one field to another, using arrow buttons. If you hover over one of the arrow buttons, a ToolTip is displayed that describes what the button does. In the screenshot below, the mouse was hovering over the button to move selected items to the right.




Multi-Select Field

### Shift and Ctrl Keys

- You may select more than one item when items are listed consecutively. First, press and hold the **Shift** key on your keyboard and select the first and last records in the group. Then, click the right-facing button to move all items to either the right or left field.
- You can also select more than one item when items are not listed consecutively. First, press and hold the **Ctrl** key on your keyboard while selecting multiple items. Then, click the right-facing button to move the items to either the right or left field.

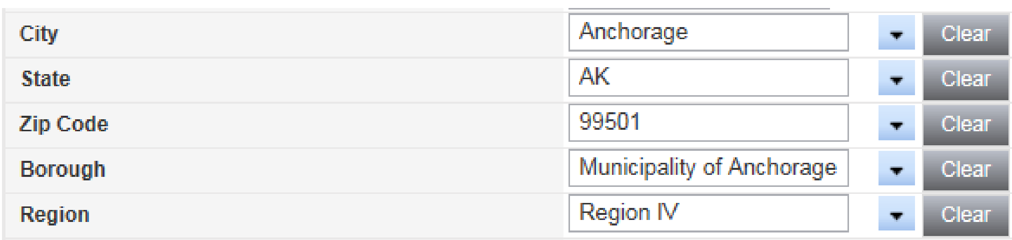
## Entering Addresses (Places Feature)

When you enter an address in SDS Harmony the Places feature links fields together and prefills or filters the options based on the perimeters you've entered. This is a national database that is quickly referenced to prevent users from selecting incorrect combinations.

You must wait for the options to appear based in your entry and then select the correct one from the list.


Blank Places Fields

Entering a ZIP Code first will filter the other fields automatically, and if there is only one option, the other fields will pre-fill.



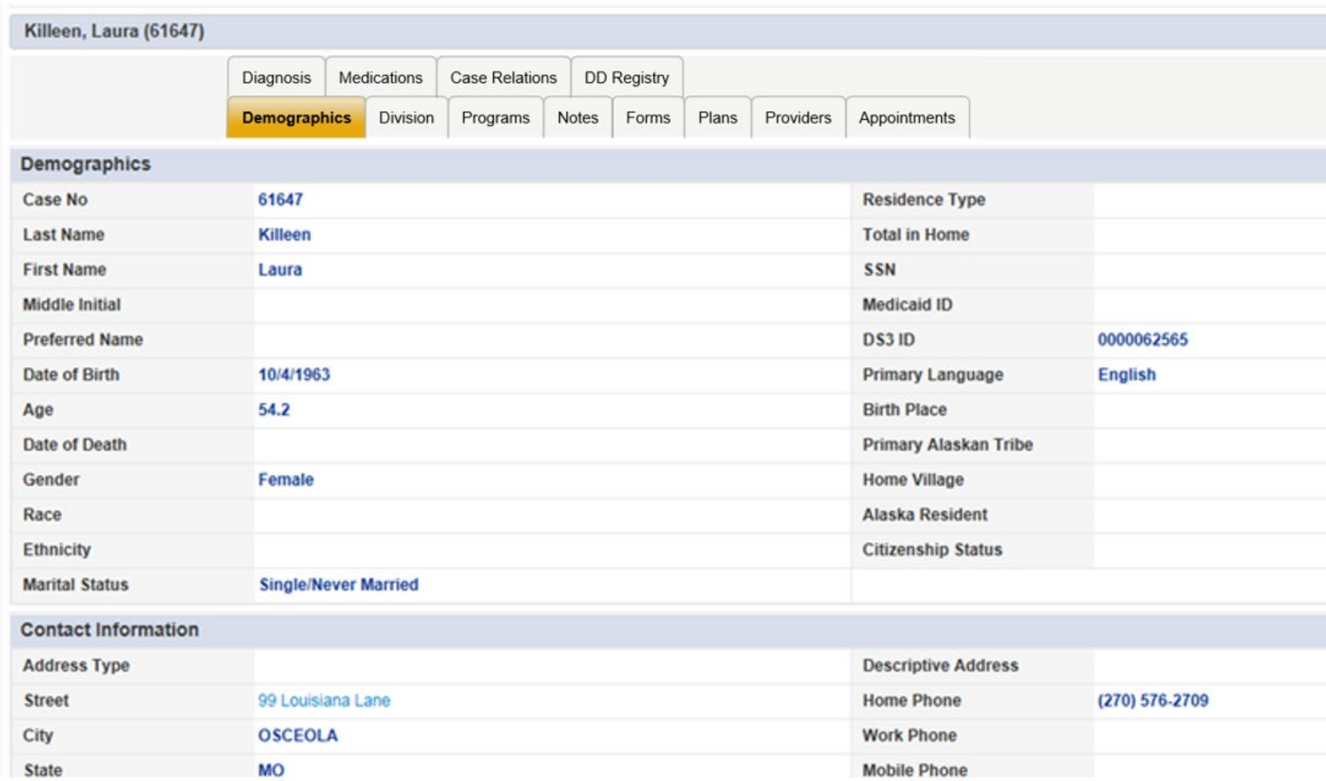

Populated Places Fields

**Key Point**

Addresses must be "Ended" and marked "previous" and the new one added instead of updating the existing address. This helps to maintain a history of addresses the consumer has used.

# Chapter 3 | 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 Authorized Providers and Support Plan details.




**Key Point**

Providers can only access a new consumer record after they have submitted an Inquiry requesting access and SDS has approved that request.

## Division

The **Division** tab is used to capture data about a consumer with SDS. A consumer must have an active SDS Division record, before they can be associated to one of the state's programs.


Division Record

## 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.

| Program | Program ID | Start Date | Status | Status Type | Status Date | Close Date |
|---|---|---|---|---|---|---|
| LTC Facility | | 03/08/2018 | Active | Initial | 03/08/2018 | |
| PCA Program | | 03/05/2018 | Application Submitted | Initial | 06/28/2018 | |
| ALI Program | | 03/01/2018 | Assessment QC | Initial | 04/23/2018 | |

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. Program Status informs the **My Consumer Programs** panel on the My Harmony summary page. User should verify when program goes into "Suspend" status, that it is not affecting other programs.

An IDD/ISW consumer will also have their Assessment Cycle noted in the Program Summary page. A CC can check here to determine which reapplication type to prepare next.

| 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 | |

Program Record

| Program | Description |
|---|---|
| ALI Program | Alaskans Living Independently |
| APDD Program | Adults with Physical and Developmental Disabilities |
| CCMC Program | Children with Complex Medical Conditions |
| CFC Program | Community First Choice |
| DD Eligibility | Developmental Disabilities Program Eligibility |
| DD Registry | Developmental Disabilities Program Registry |
| General Relief | General Relief Program |
| IDD Waiver Program | Intellectual & Developmental Disabilities Waiver Program |
| ISW Program | Individualized Supports Waiver |
| LTC Facility | Long Term Care Facility Authorization |
| LTC ICF-IID | Long Term Care Intermediate Care Facility for Individuals with Intellectual Disability Authorization |
| Nursing Facility Transition | Nursing Facility Transition Authorization |
| PCA Program | Personal Care Services |
| TEFRA Program | Tax Equity and Fiscal Responsibility Act (a Medicaid Qualifying program) |

## Notes

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.

A note can be routed to other Harmony users as long as they are associated (have access to) the consumer. Notes that have been routed specifically to you (as a note recipient) appear in the **My Harmony** Notes panel

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 may not appear in the consumer record's Notes Tab.
    b. Inquiry notes will be linked to the Consumer Notes Tab.

## 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. Forms can be limited to a specific role and can be assigned as a tickler.

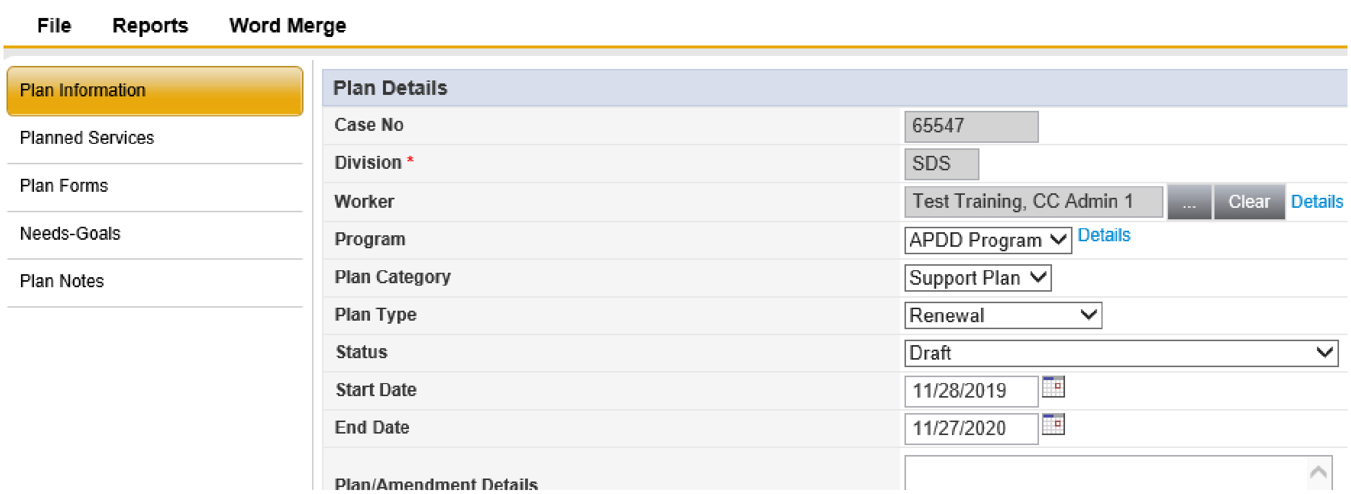
The Plan Expedite and/or a Request for Safeguard Funding for ISW forms are completed in the Forms tab of a Consumer Record. Care Coordinators will complete Plan Forms within a Plan record such as the Plan Details form.

## Plans

The **Plans** tab is used to enter and track Person Centered Support Plans and PCA Service Plans. A Consumer will have a separate plan record for each plan period (year) and any amendments. 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, Plan Questionnaire and the Request for Visit Exception.
- Service Goals are tracked under **Needs-Goals**.
- The **Planned Services** sub-page 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)



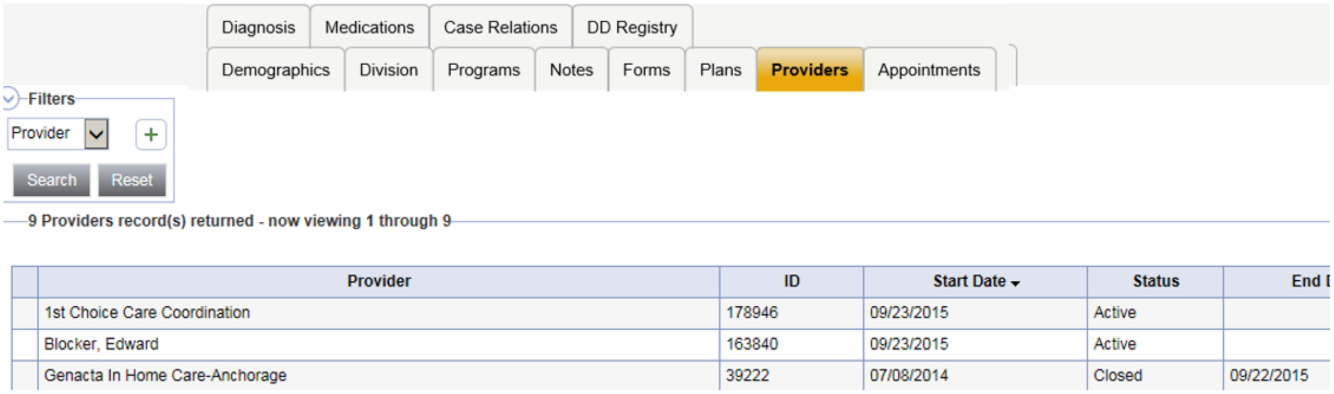
Plan Information detail page

**Key Point**

The Consumer chapter is designed to work on one Consumer at a time. Only one record should be open at a time. <u>If you change consumers, any screens running the background may not be saved</u>.

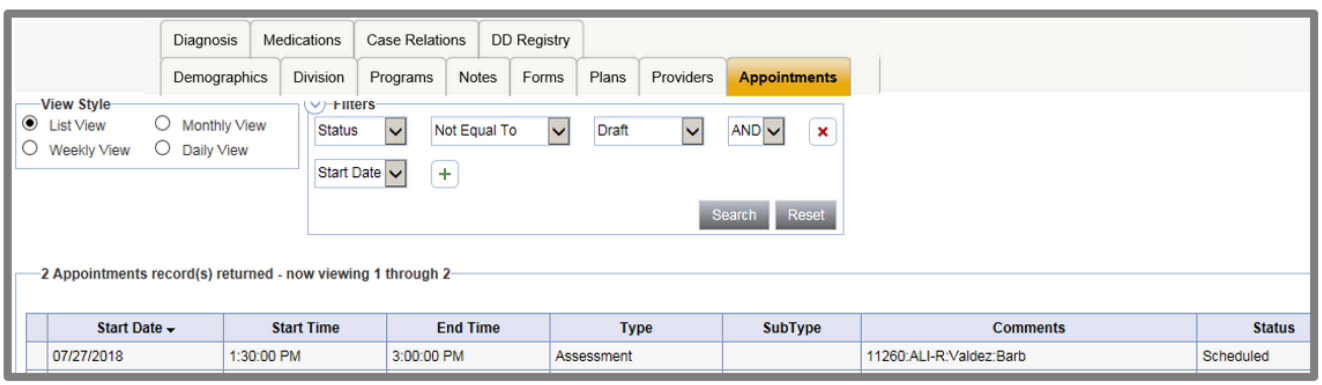
# Providers

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

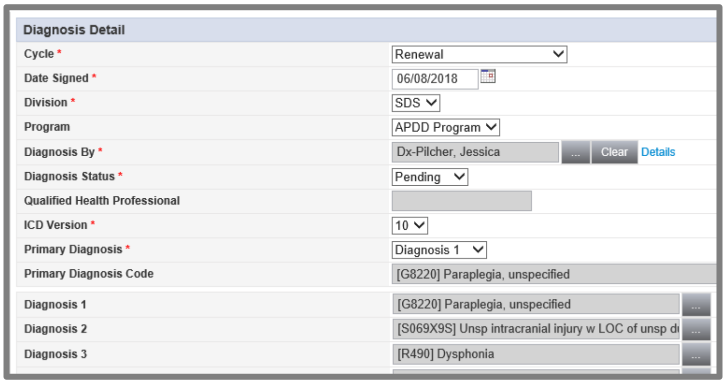
The **Appointments** tab is used to track CAT Assessment appointments for the consumer. PCS Providers and Care Coordinators will receive an invite to the scheduled assessment. If you 'Accept' or 'Tentatively Accept' the appointment you will also receive updates if the appointment is changed.




Appointment Record

# Diagnosis

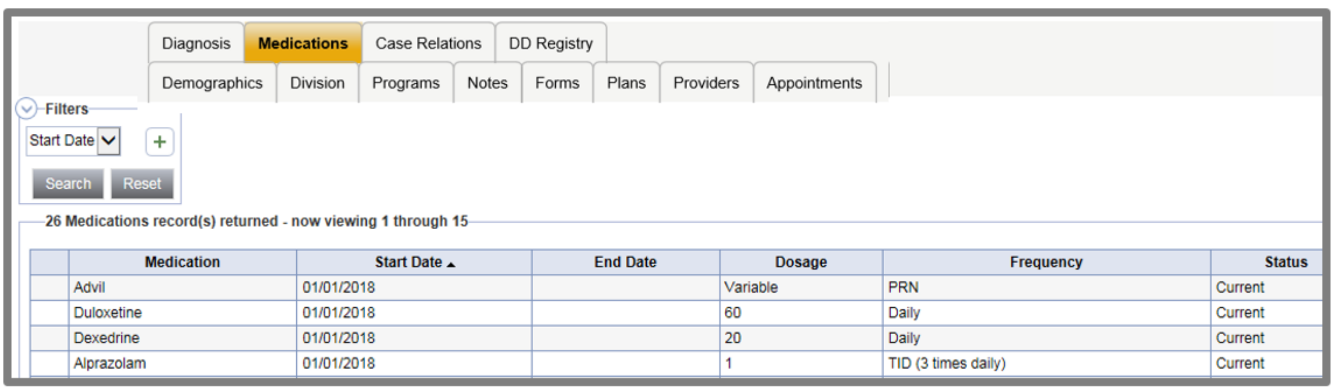
The **Diagnosis** tab allows users to view the International Statistical Classification of Diseases and Related Health Problems (ICD-10) associated with the consumer the SDS Harmony data system. **(Only SDS Staff can add to this tab)**




Diagnosis Details

# 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.

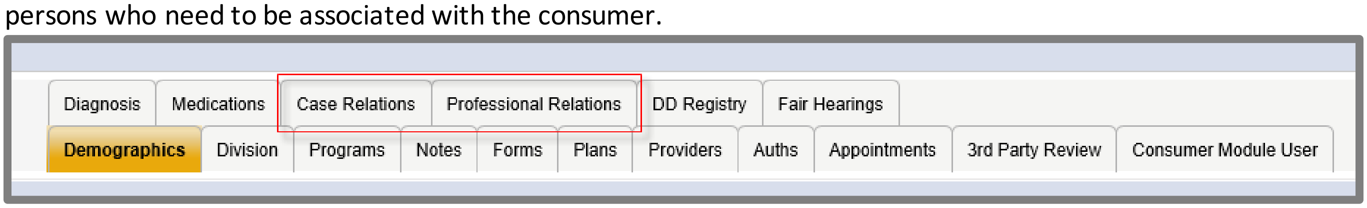



| Medication | Start Date | End Date | Dosage | Frequency | Status |
|---|---|---|---|---|---|
| Advil | 01/01/2018 | | Variable | PRN | Current |
| Duloxetine | 01/01/2018 | | 60 | Daily | Current |
| Dexedrine | 01/01/2018 | | 20 | Daily | Current |
| Alprazolam | 01/01/2018 | | 1 | TID (3 times daily) | Current |

Medication Details

# Case and Professional Relations

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




Case Relations tabs

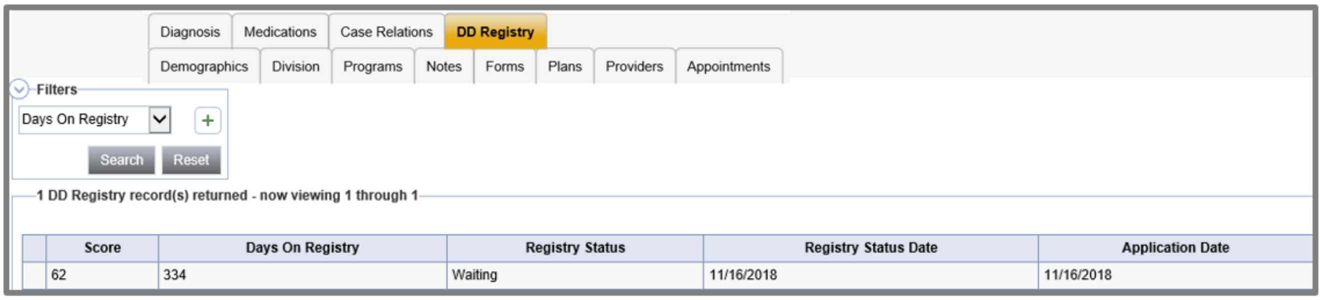
- The **Case Relations** tab is used to track legal representatives. **(Only SDS Staff can add to this tab)** Once the legal representative paperwork has been sent to SDS they will be added to the consumer record. You may see previous case relations or providers listed here. These can be removed by request when the Support Plan is submitted.

- The **Professional Relations** tab is only visible to SDS Staff roles.

## DD Registry

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



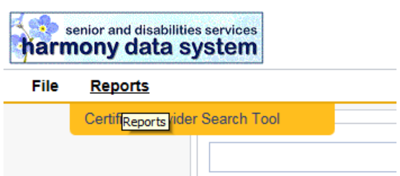

DD Registry Record

# Chapter 4 | Reports

## Reports File Menu

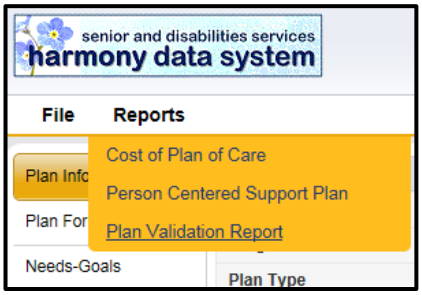
The Reports Menu is located in the File Menu Bar.

Users 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 **<u>Advanced Search</u>** 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

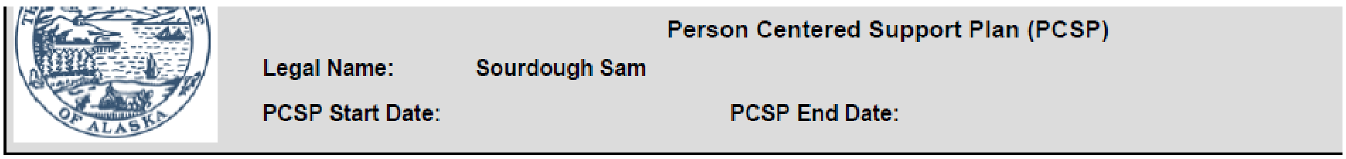
When users click the **Reports** menu a list of reports will display based on the role of the user. Select the report from the list and it will open in a new window or tab labeled "Production Report". Most reports can be saved as a PDF.




Consumer Plan Reports

The Person Centered Support Plan (formally the Plan of Care) is a report. The data that prints on the report is gathered from many locations in the Consumers Record including the Plan Details form.

The Cost of Plan is an overview sheet, listing all the providers and the amount of services being requested. The report also serves to inform consumers of the total cost of the Support Plan.



**Person Centered Support Plan (PCSP)**

**Legal Name:** Sourdough Sam

**PCSP Start Date:** **PCSP End Date:**

**Section I ~ Information**

**Medicaid#:** MI 444555 **DOB:** 07/01/1925 **Gender:** Male

**Marital Status:** Single/Never Married **Height:** 5'11 **Weight:** 180

**Ethnicity:** **Primary Language:** English

**Recipient's Physical Address**

123 1st Ave
Anchorage, AK 99501

**Work-Phone:** **Home-Phone:** (907)555-5565 **Cell-Phone:**

**Email:**

**Mailing Address**

123 1st Ave
Anchorage, AK 99501

Person Centered Support Plan Report

# Chapter 5 | Notes

## Introduction

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.

## 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 is included 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, PCS Provider Transfer, and Provider Discharge of Services/ Closure.

> ** There must 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 this 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 too by other readers until the note status is set to 'complete.'

### 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.

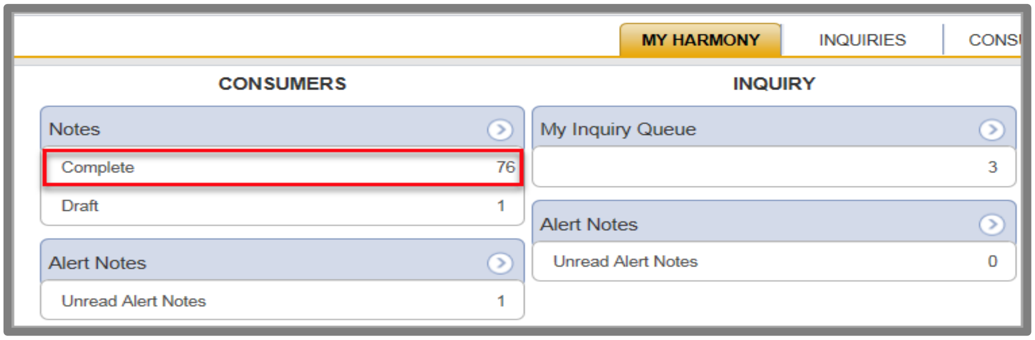
# Open a Note from My Harmony

Notes are opened within the consumer record, or from your **My Harmony** Notes Panel. Notes that you are creating are listed as **Draft** notes. Notes you have filed and are awaiting action from SDS are listed as **Submitted.** Notes that have been acted on by SDS are displayed as **Complete**.

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

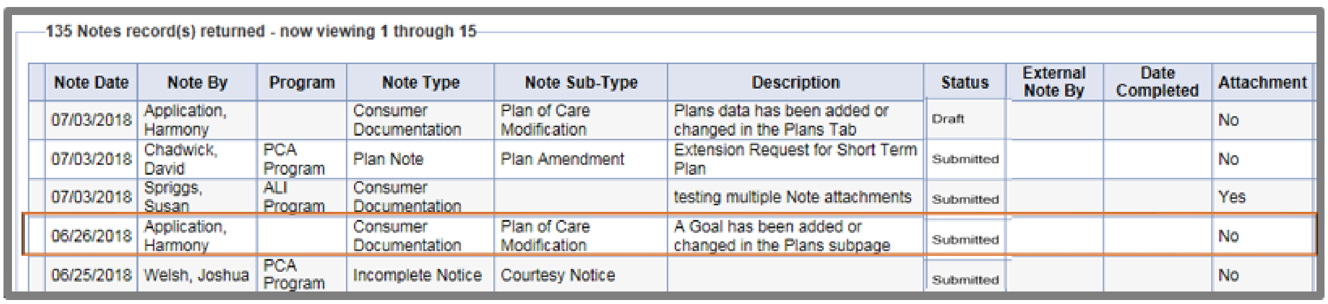
1. To open an unread consumer note, from **My Harmony**, in the applicable section, click anywhere in the **Complete** row.

   *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.

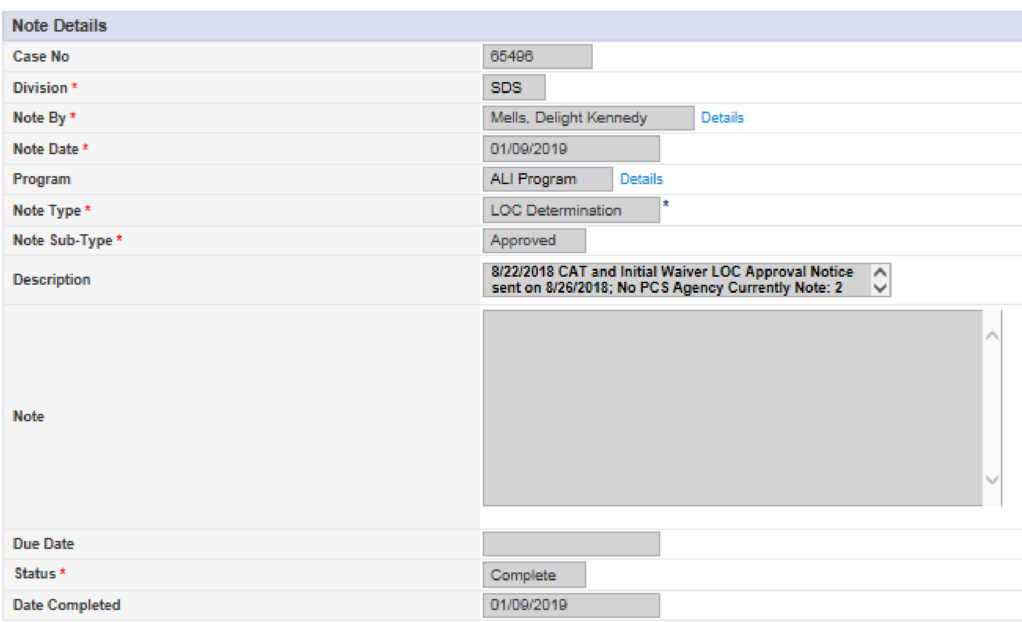


135 Notes record(s) returned - now viewing 1 through 15

| Note Date | Note By | Program | Note Type | Note Sub-Type | Description | Status | External Note By | Date Completed | Attachment |
|---|---|---|---|---|---|---|---|---|---|
| 07/03/2018 | Application, Harmony | | Consumer Documentation | Plan of Care Modification | Plans data has been added or changed in the Plans Tab | Draft | | | No |
| 07/03/2018 | Chadwick, David | PCA Program | Plan Note | Plan Amendment | Extension Request for Short Term Plan | Submitted | | | No |
| 07/03/2018 | Spriggs, Susan | ALI Program | Consumer Documentation | | testing multiple Note attachments | Submitted | | | Yes |
| 06/26/2018 | Application, Harmony | | Consumer Documentation | Plan of Care Modification | A Goal has been added or changed in the Plans subpage | Submitted | | | No |
| 06/25/2018 | Welsh, Joshua | PCA Program | Incomplete Notice | Courtesy Notice | | Submitted | | | No |

List of Notes

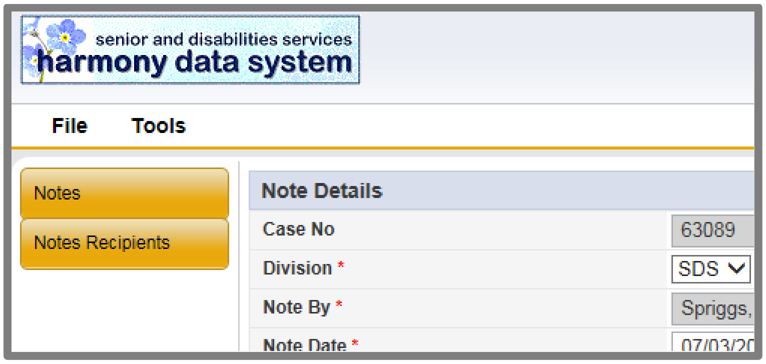
3. More information that is included in the note is displayed.



| 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 |

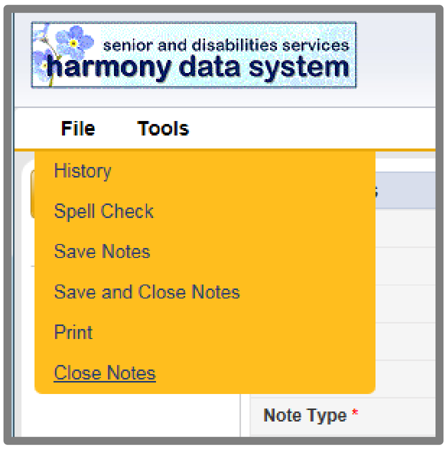
Note Details

4. Some notes include a menu of sub-pages displayed on the left side of the screen.




Note Sub-Menu

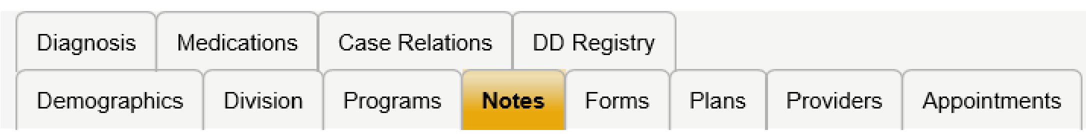
5. To close the note, click **File – Close Notes**.



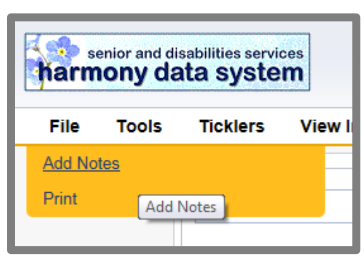

## Create a Note

To create a note, follow the steps below.

1. Click the **Notes** tab in the Consumer's Record.

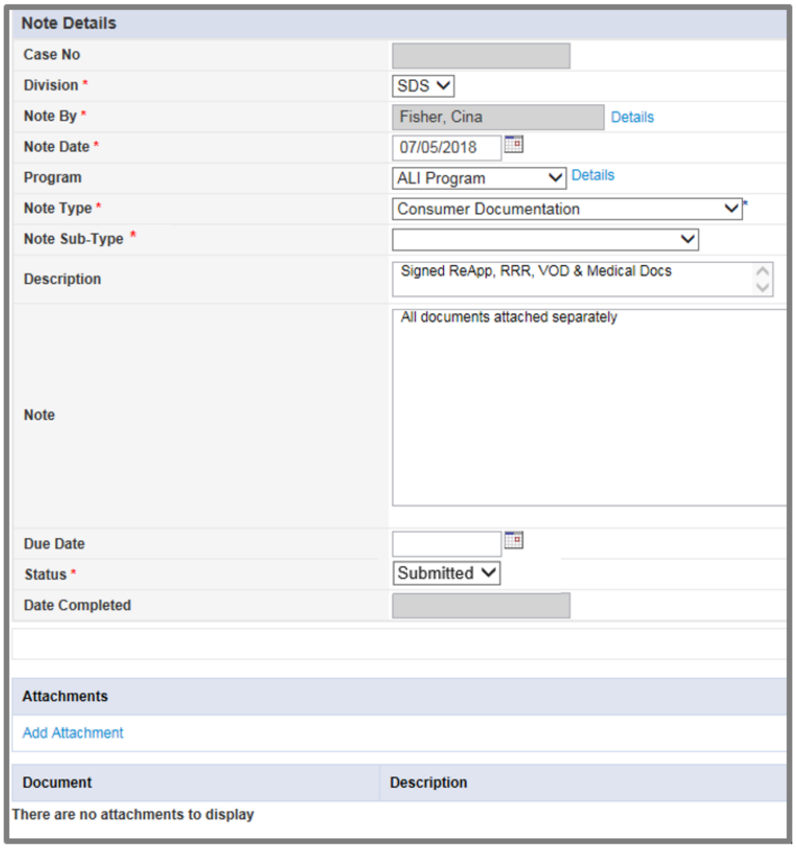



Notes tab in consumer record



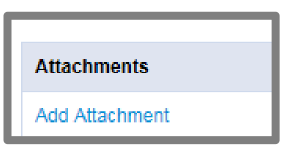

2. Point to the **File** menu and then select **Add Notes**.

The **Note Details** screen is displayed. Required fields are noted with a red asterisk (*) next to them and must be completed before saving the record. Fields without a red asterisk are optional; however, it's always a good idea to enter as much information as you have available.



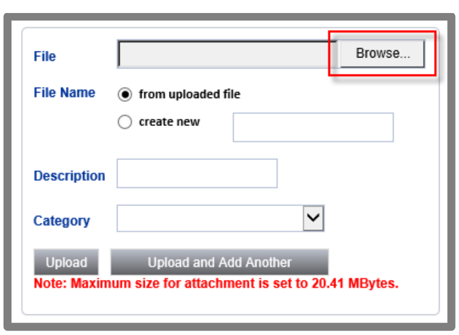

Note Details

3. Select the **Program** you are making the Note about (make sure to select CFC not the Waiver if your Note is about a CFC service)
4. Select the **Note Type** and **Note Sub-Type**
    a. If you cannot select a Note Sub-Type, it means this is a Note you are not allowed to create but you will be allowed to view it if an SDS staff member creates it.
5. Enter a short **Description** similar to an email subject line; include a brief list of any attached documents.
6. Enter the body of the **Note** if there are any clarifying details you would like to communicate.
7. Attach any files or documents. Scroll down to the **Attachments** section and then click **Add Attachment**.




Note Add Attachment Section

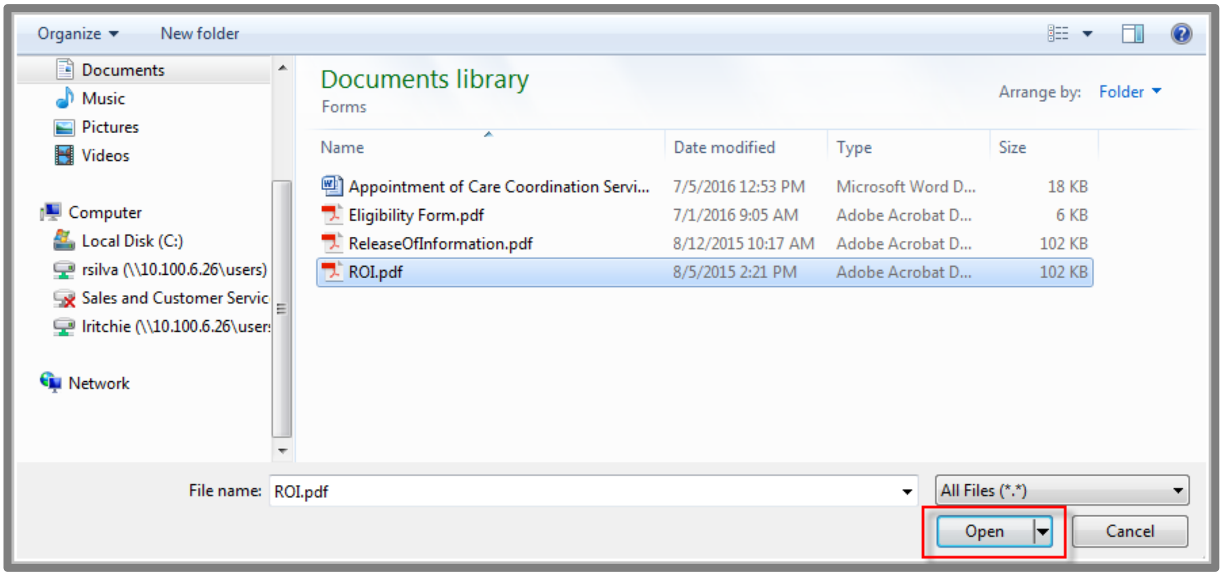
a) Click **Browse** to locate the file on your computer that you want to attach to the note.




Attachment Browse Screen

b) Locate the file, select it and then click **Open**.

  i. In this example, the consumer's ROI has been signed and returned. The user has scanned it to create an electronic PDF file.




Computer file location

c) **File Name** is a feature that allows you to rename a file so that it appears differently in Harmony then what it was originally named in your directory.

d) In the **Description** field, type a brief description of the file.

e) Select a **Category**.

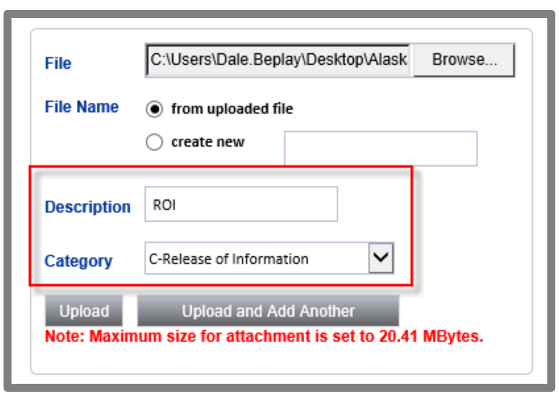
  i. Select the appropriate **Category** based on the file being uploaded.

  ii. "C-" means it's a consumer type document

  iii. "P-" means it's a provider certification document

  iv. Approved SDS forms are listed

  v. Leave blank if there are no matching categories.




Attachment File Brower screen

**Key Point**

***The note description is important!*** Over time, a record can include 100's of notes. If descriptions are missing or inaccurate, the note needs to be opened to see what the attachment is. When the description includes a list of the attachments, it is displayed on the notes list view, so you can easily scan the list to find what you're looking for. Or even user the Advance Search filter to locate a specific word in the description.

f) Click **Upload**

i. To upload the file and then upload another file to the note, click **Upload and Add Another**

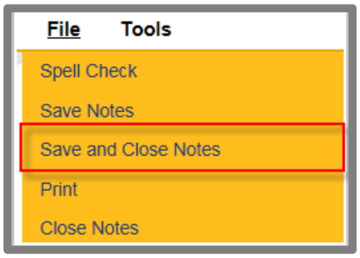
ii. Only 10 attachments of 20.41 Mbytes each can be attached to one note.

1. If you need to add more documents, just add another Note and enter “note 2 of 2” in the Description line.

g) A link to the file is displayed on the note.

h) You can verify the file that’s been attached by clicking the link to open it.

8. Once you’ve entered all the information into the note, change the Status to “Submitted” and then click Save and Close Notes from the File menu.




Note File Menu- Save and Close

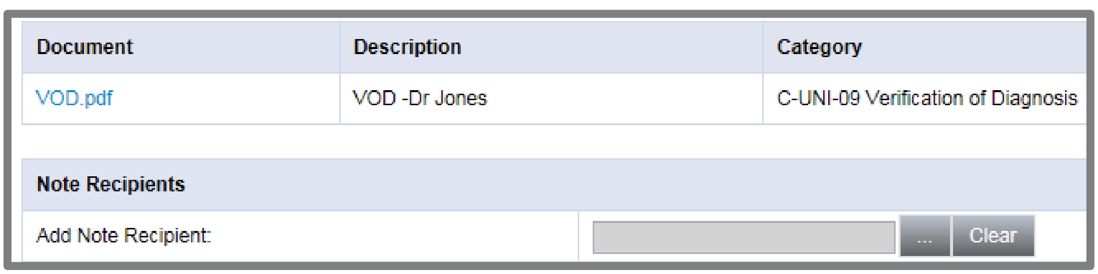
## Route the Note to Another Harmony User

Harmony allows you to route the note to one or more users. When the user receives the note, it is displayed on their **My Harmony** chapter, in the **Consumers** or **Inquiry Notes** panel. The HDS user must have authorized access to the Consumers Record to view the note, otherwise the Note will not open.

***This is rarely done for Specific SDS staff, only in specific situations and when requested by SDS staff.***

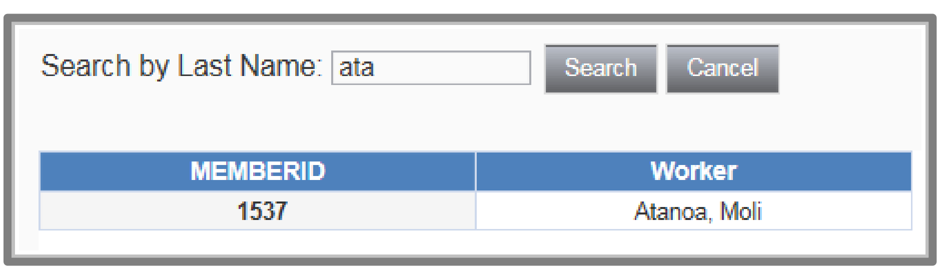
Before saving the note, follow the steps below:

1. Scroll down to the **Note Recipients** section and then click ... (the ellipsis).



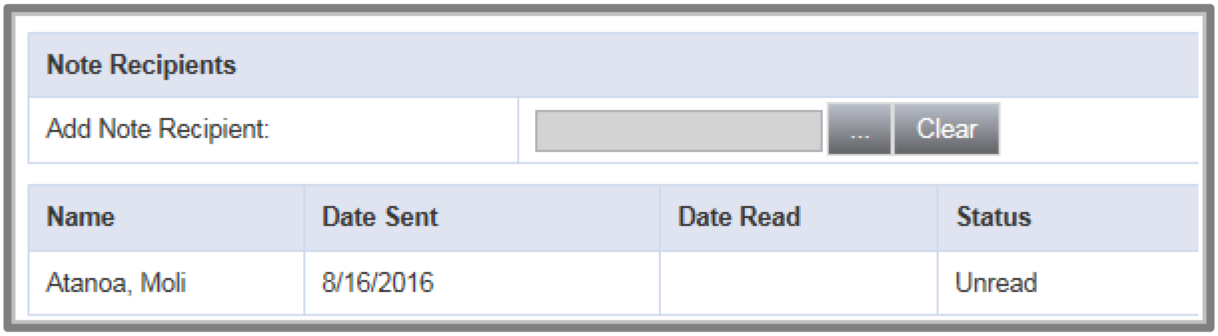

Note Recipient Search

2. Type the last name (or the first few letters) of the Harmony user in the **Search by Last Name** field and then click **Search**.
3. Select the name from the list.




Quick Search Screen Results

4. The Harmony user is added to the **Note Recipients** section.




Add Recipient

5. Repeat steps 1 – 4 to add additional note recipients.
6. Click **File – Save and Close Notes**.

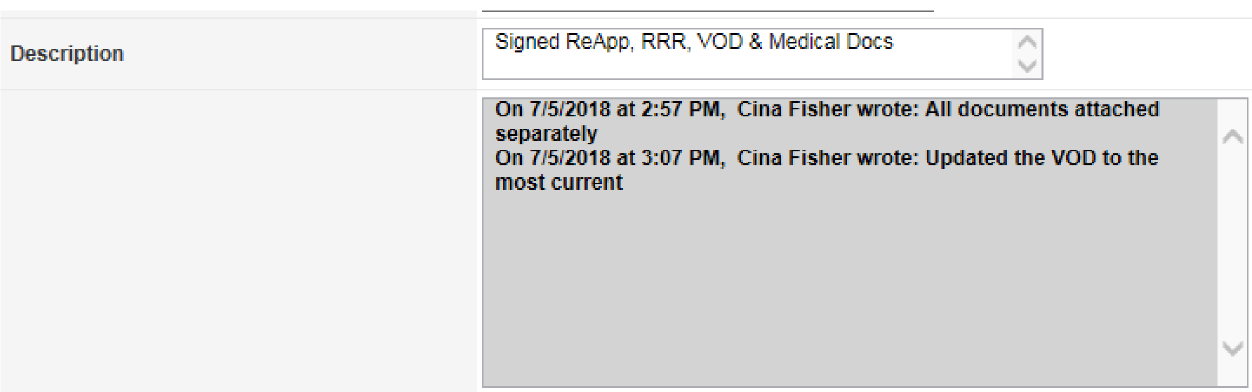
**Key Point**

When the recipient opens the note, the status is automatically changed to **Read**.

It is not necessary to route a note to a specific user. Most notes will be reviewed based on the program and status they are in. **Avoid routing to a specific Harmony user unless necessary**.

## Edit a Note

You can edit notes you created that are in a **Draft** status. Once you change a status to "**Submitted**" your note is filed and cannot be changed. A note also cannot be changed if it's set to **Complete**. (SDS often does this to indicate they've reviewed the Note)



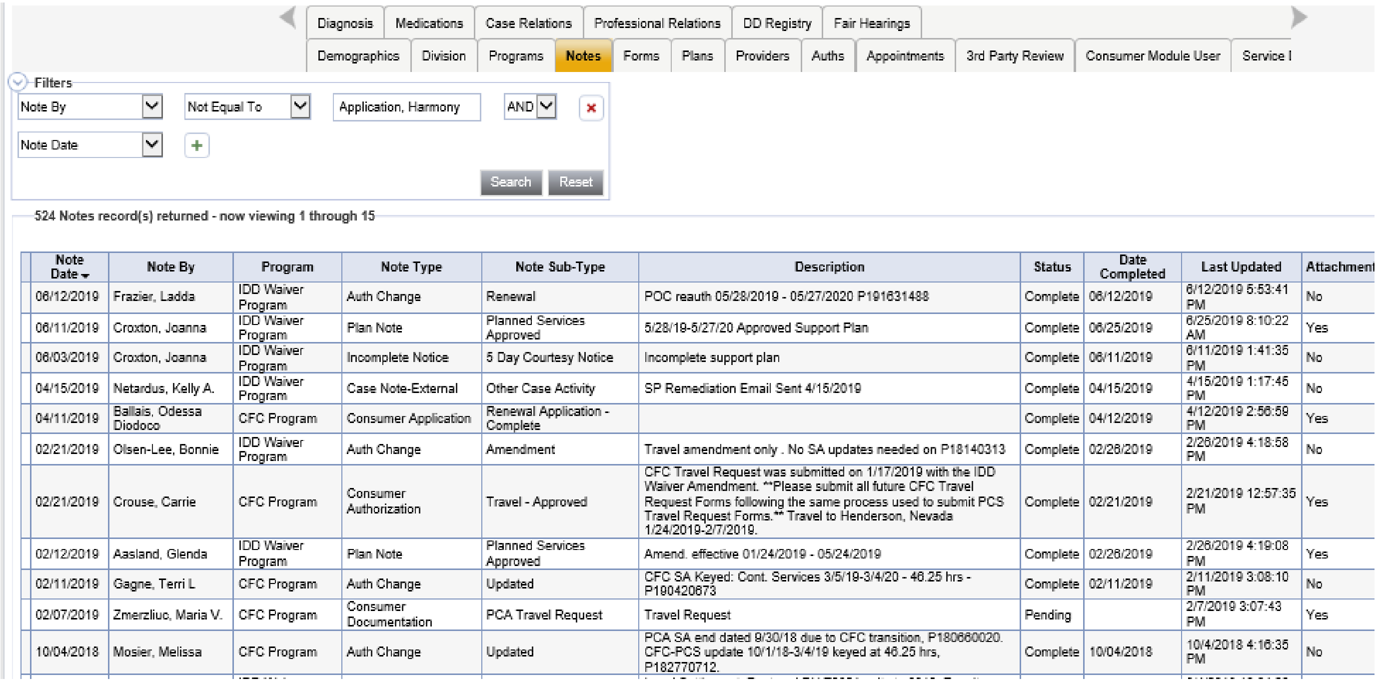

Edited Note

**Key Point**

When the **Note Status** is **Submitted** or **Complete**, the fields are dimmed and you cannot edit them. You must create a new note in this case.

## 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 |

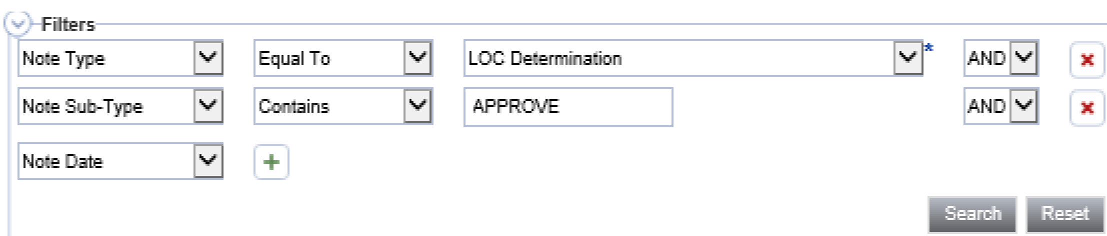
List of Notes from the Consumer Notes Tab

## 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.

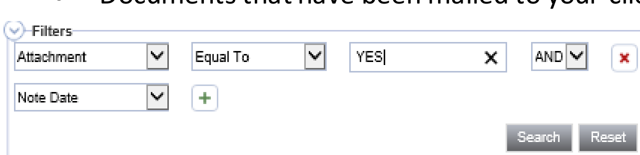
- NFLOC determined waivers use Note Sub-Type 'Notice Sent-Approval'




## 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 client



## 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

# Chapter 6 | Ticklers

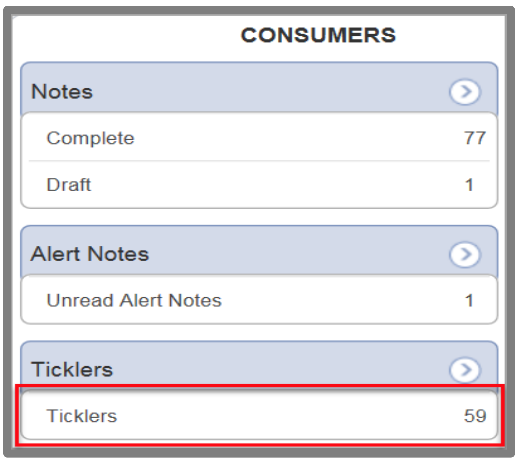
## Introduction

A tickler is a reminder to do something, such as submit a renewal Application or a Support Plan for a consumer. 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. Harmony creates ticklers automatically based on dates entered in the consumer record for LOC/LOS and Support Plans.

## Locate and Open a Tickler

Ticklers are displayed on the **My Harmony** Chapter. You may receive several ticklers throughout the day, so it is important to check often for new ones. The screenshot below shows that there are 59 consumer ticklers. These are reminders to do something for or that an action has been taken or will be taken for one of the people you serve.

1. From **My Harmony**, locate the ticklers under the **Consumers** column.
2. Click anywhere in the ticklers row to display a list of consumer ticklers.




Consumer Ticklers

3. To open one of the ticklers, click anywhere in the row.

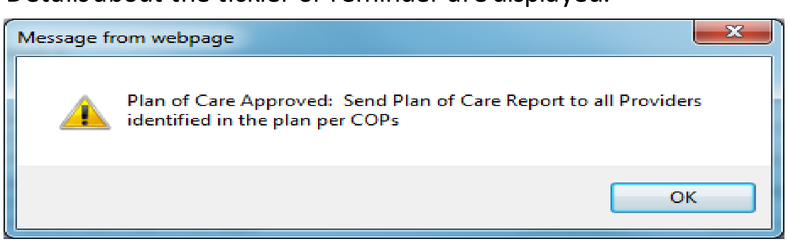
4 Ticklers record(s) returned - now viewing 1 through 4

| CaseNo | Consumer Name | Tickler Name | Date Created | Date Due | Date Completed | Status |
|---|---|---|---|---|---|---|
| 61624 | Sam, Sourdough | Plan of Care Approved: Send Plan of Care Report to all Providers identified in the plan per COPs | 09/21/2017 | 09/21/2017 | | New |
| 61624 | Sam, Sourdough | Renewal Plan of Care due in 30 days | 09/21/2017 | 07/23/2017 | | New |
| 61624 | Sam, Sourdough | Plan of Care Approved: Send Plan of Care Report to all Providers identified in the plan per COPs | 09/29/2017 | 09/29/2017 | | New |
| 61624 | Sam, Sourdough | Renewal Plan of Care due in 30 days | 09/29/2017 | 07/31/2017 | | New |

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

List of Consumer Ticklers

a. Details about the tickler or reminder are displayed.




Tickler Description

b. A Tickler can also send you directly to complete an action on a consumer like beginning the renewal application or begin an initial plan after LOC is determined.

## 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

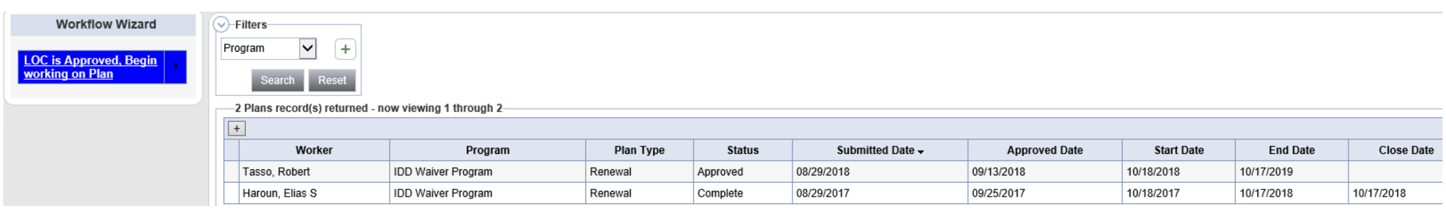
List View screens allow you to quickly retrieve a desired record. If the desired record is not displayed on the initial list view, you can click on one of the buttons at the below the list to scroll through the returned records.

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.

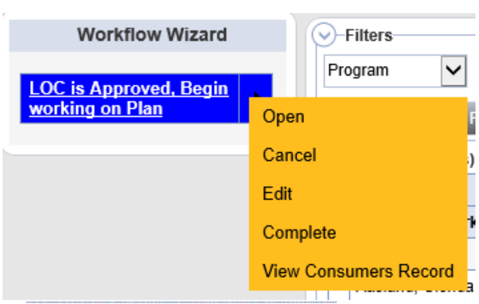
You can also modify the number of records returned in the List View by entering the desired number in the "Retrieve [15] records at a time" field at the bottom of the screen and then clicking on one of the record search buttons (i.e., First, Previous, Next, Last).

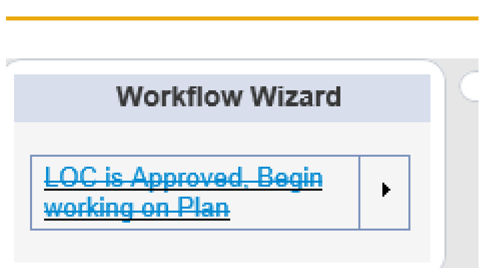

### Act on a Tickler

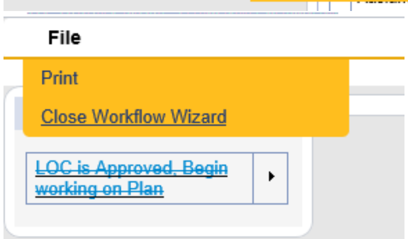
When you open a Tickler that has an associated action in the HDS it may take you directly to that action point in the consumer's record. For example we clicked on the Tickler named "LOC is Approved, Begin working on the Plan" and the system took us to the consumer's record> plans tab.



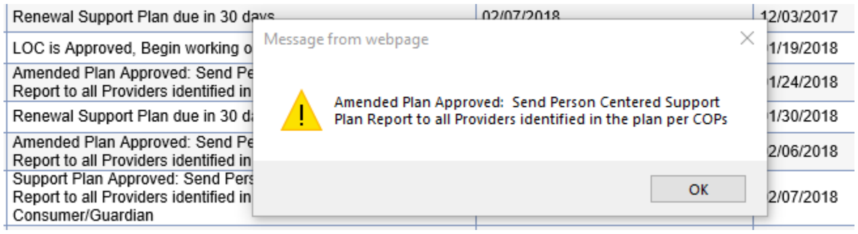

We can clearly see that the Support Plan from this Tickler that was dated 1/19/18 has already been submitted. So it can be marked 'Complete' by using the flyout menu available in the Workflow Wizard task area. Then using the **File** menu select **Close the Workflow Wizard.**



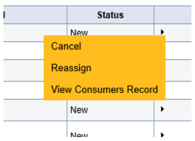




When opened some Ticklers just show you a message that repeats the Tickler Name like this:




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 | ▸ |

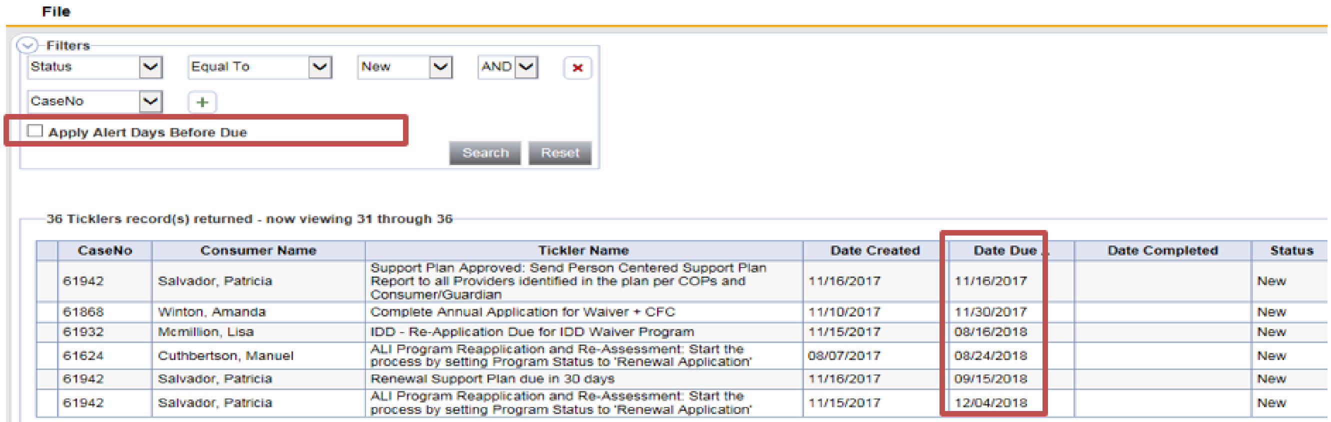
2. Open the Flyout menu by hovering your mouse pointer over the triangle on the far right of the tickler line. The action menu for this specific tickler will appear. Possible actions can include:
   - Cancel
   - Reassign -only send a task to someone who also has access to this consumer
   - Edit
  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

**Key Point**

If you cancel a tickler this does not cancel the need to complete the task if it has not been done. Ticklers are reminders. Like alarms, just because you turn them off doesn't mean you don't have to get up!

## 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

# Chapter 7 | Inquiry Creation

## Introduction

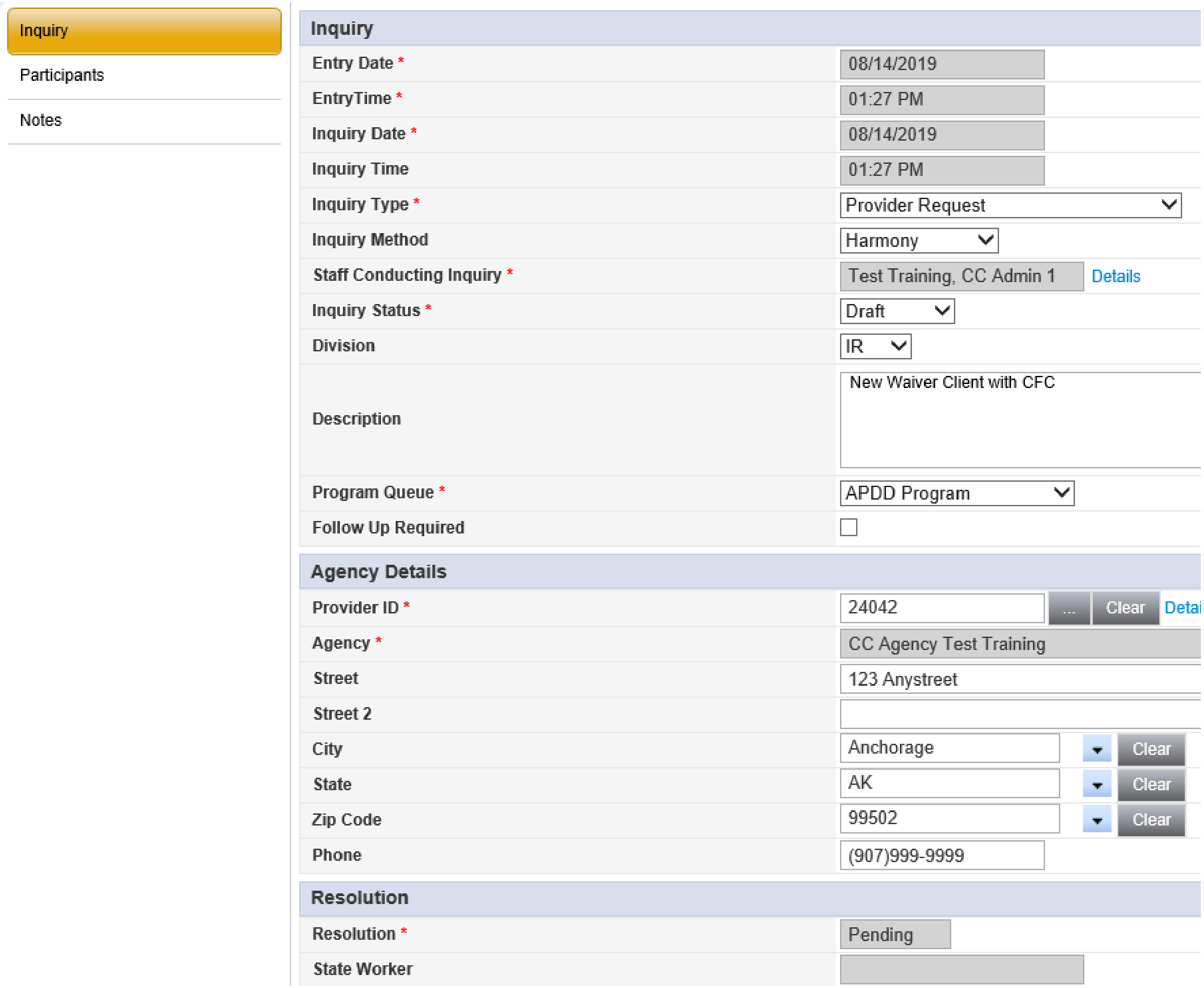
The Inquiry chapter serves as the “front door” for requests to work with a specific consumer.

To file a program application, a Certified Provider must first be associated with a person (consumer) by making a Provider Request Inquiry and attaching a Note including the client’s Release of Information (ROI) and other supporting documents. Provider Users must also make an Inquiry for Consumer’s who wish to transfer from another provider. (Provider Request-Transfer)

The Provider User will select the Program Que their potential new client (Person Seeking Supports) is applying for and associate the Agency they work for prior to entering minimal demographic information. SDS will review the information and match it to any Consumer Records we may already have for the individual.

How to create a Provider Request Inquiry is part of your role based training. The following is brief summary as there are slight variations depending on how you will be serving the person.

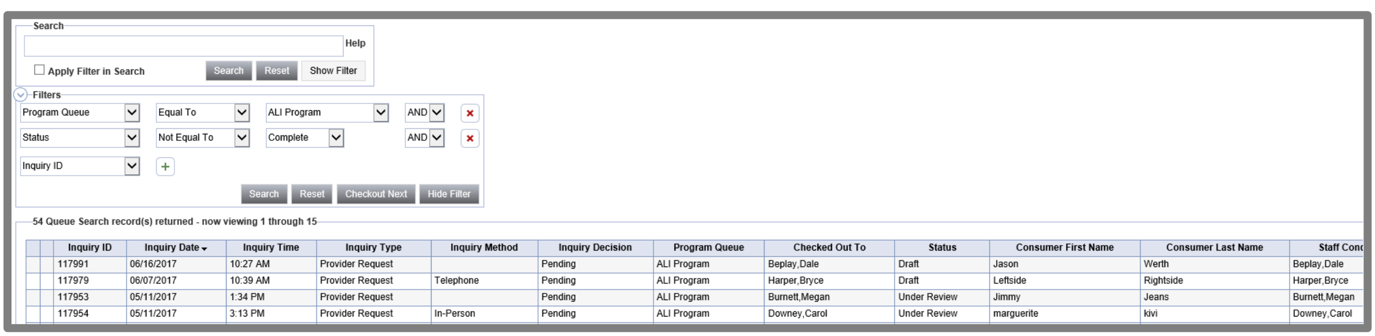
Almost every action in the HDS starts by going to the **File Menu** and then selecting **Add _____.** In the case of Inquiries we begin by going to the **Inquiry** Chapter, hovering over the **File** menu and clicking on **Add Inquiry.** Then a detail screen appears for you to begin the inquiry process.




Once the Program Que and the inquiring Agency has been selected and the file is saved, the potential consumer's basic information must be collected.

## Program Queue

When users navigate to the **Inquiry** chapter, a queue displays records based on default filters. The queue is configured differently for state users and providers users. State staff will monitor this queue daily, for new provider request submissions.

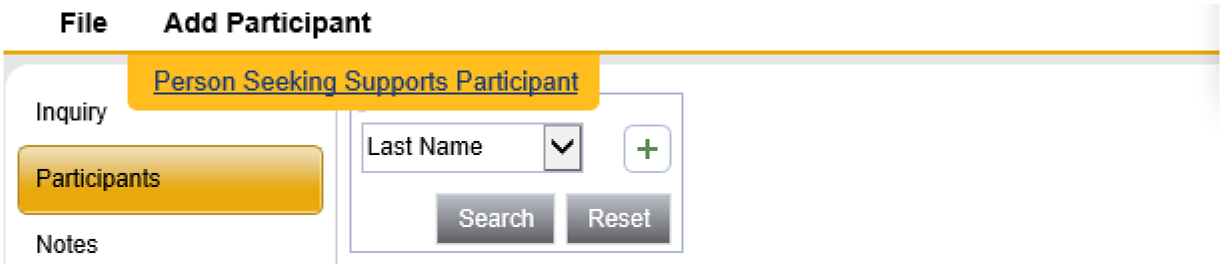



Inquiry Queue

# Creating an Inquiry Request

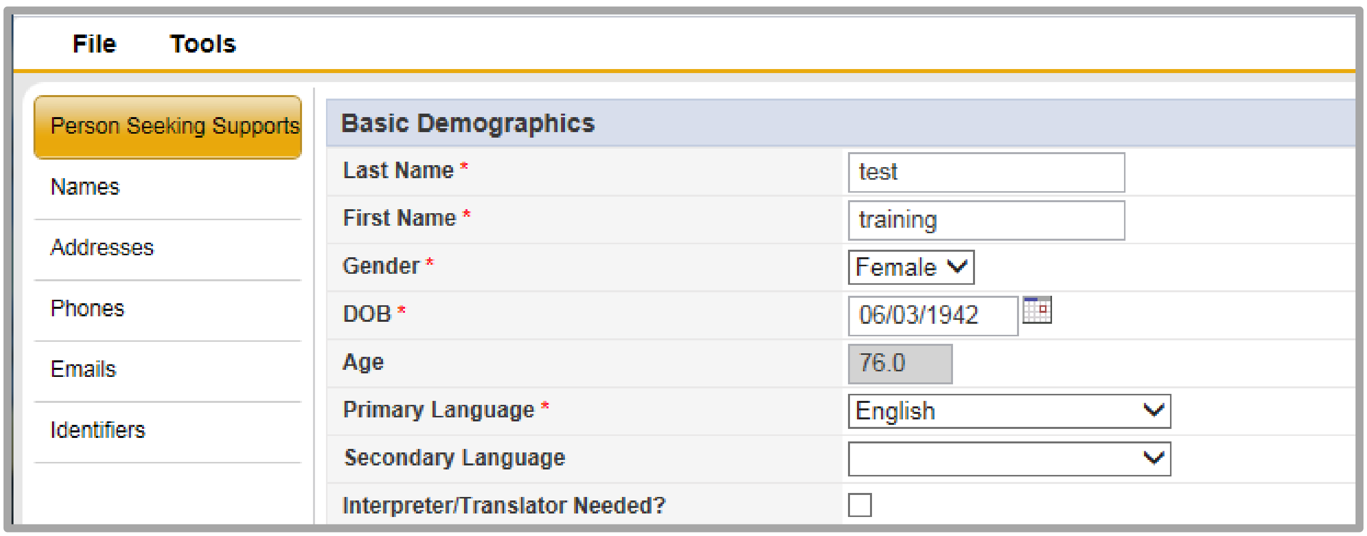
## Participant Information

The **Participants** sub-page is used to document demographic details for the Person Seeking Supports (Potential Consumer). Minimal demographic information is required to be entered here. AND for most Program applications the Medicaid # and Eligibility code must be added to the Identifiers sub-page.




Participants sub-page

From the **Add Participant** menu select 'Person Seeking Supports', complete the name, gender, DOB, age and primary language. Then go to the file menu and save.

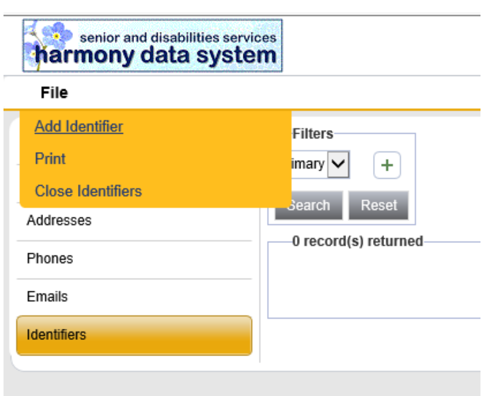


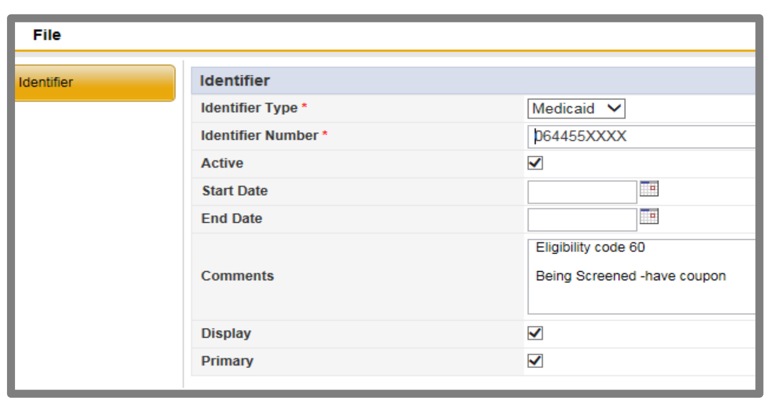

Basic Demographics

Select the participants sub-page **Identifiers**

## Identifiers

On the **Identifiers** sub-page go to the **File** Menu to **Add Identifier**. Select the **Identifier Type** of Medicaid and enter the consumers **Medicaid Number**, and then the eligibility code in the **Comments** box. Verify the Active, Display and Primary Boxes are checked, then go to the File menu, and select Save and Close.

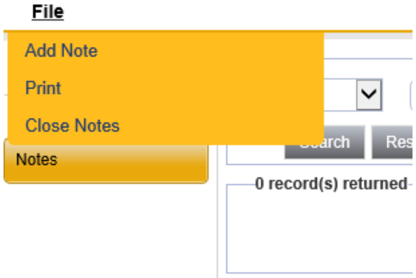


### Inquiry Note

To process the Inquiry, the UNI 16 – Release of Information (ROI) must be submitted to SDS.

1. Create a Note through the **File Menu – Add Note** option




2. Set the **Division** to 'IR'
3. Do NOT change the **Note By**
4. Do NOT change the **Note Date**
5. Select the Client Name from the **Participant** drop down list
6. **Note Type**: Consumer Documentation
7. **Sub-Type**: Release of Information
8. Add a brief **Description** of the documents you will be attaching to this note.
    a. Depending on the consumer other documents may be needed such as an Appt of Care Coordinator.
9. Click **Add Attachment** and browse your computer for the files you need to attach.
    a. You must select a category matching the type of document you are attaching
10. Change the **Status** to Submitted
11. Use the **File** menu to **Save and Close Note**

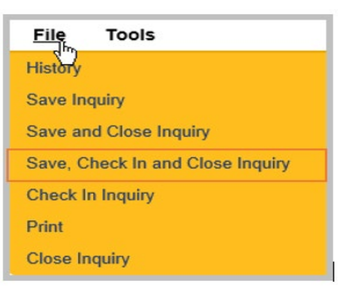
### Submit the Inquiry

1. Return to the **Inquiry** Sub-Page
2. Update the **Inquiry Status** to 'Submitted'
3. On the **File** menu select **Save, Check-in and Close Inquiry**

## Checking-In or Checked Out Inquiry

After you are finished entering the Inquiry information, several options exist to save, close and/or check in the record. These options are found on the **File** menu.

1. Click **File** and then select one of the options that are defined below.
2. Only **Checked-in** inquires in the **Submitted** Status can be reviewed and approved by SDS



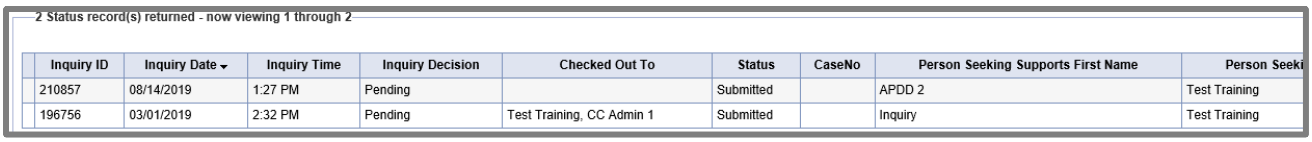

File Menu – Save, Check In and Close Inquiry

| Save Option | Click this when you want to |
|---|---|
| Save Inquiry | Save changes you have made to the record and keep it open and checked out. |
| Save and Close Inquiry | Save your changes and close the record but do not check the record in.<br>SDS will not be able to approve this request until you Check it In |
| Save, Check In and Close Inquiry | Save your changes, close the record and then check it in. |
| Check in Inquiry | Check the inquiry in and keep the record open. |

## See Who has a Record Checked Out

If a record is locked and you need to work with it, you can easily find out who has the record checked out.

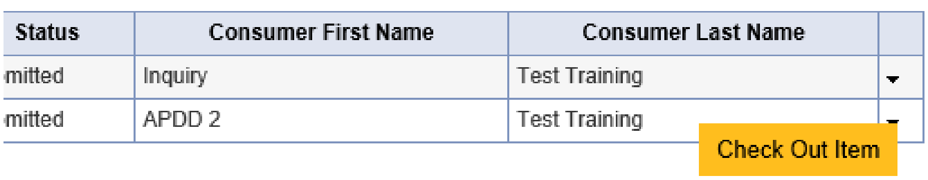
1. Click the **Inquiries** chapter.
2. Search for the inquiry. For more information, see *Search for Records.*
3. The person who has the record checked out is listed in the **Checked Out To** column.




Inquiry List

## Check Out an Inquiry Record

1. On the far right of the list, point to the Fly-out Menu and then click **Check In Item**.
   a. To verify that the record is checked in, point to . You should see **Check Out Item.**

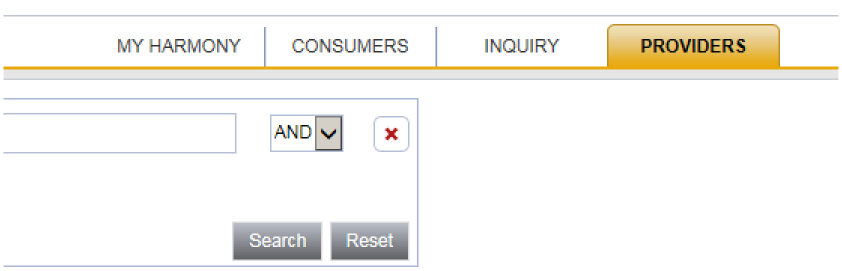



Inquiry List

# Chapter 8 | Provider Records

## Introduction

A certified provider has an organization record in Harmony. Most providers in Harmony are service provider agencies, but individual Care Coordinators are also tracked as providers. The Providers chapter includes functionality to track certification and licensing credentials, ID numbers, workers, services offered, service areas, and other types of provider information.



To review your Provider record select the Providers Chapter then click the search button.

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

| Harmony Provider ID | Legacy DS3 ID | Provider Name ▲ |
|---|---|---|
| 10001 | 10001 | DSDS |
| 24042 | | Test Provider 2 (Care Coordination Agency) |

All of the Agencies you are associate to will be listed, just click to open the Provider Record.

# Provider

The main provider record contains the identification, location, and contact information.

Test Provider 2 (Care Coordination Agency) (24042)

Linked Providers | Directory Info | Service Area
Provider | Credentials | Categories | Services | Workers | Consumers

**Basic Information**

| | | | |
|---|---|---|---|
| Provider Name | Test Provider 2 (Care Coordination Agency) | Exclude from Dropdown | No |
| Owner as Reported on W9 | Provider Gen 2 | External | Yes |
| Provider ID | 24042 | Monitor 1 - Compliance | |
| Legacy DS3 ID | | Monitor 2 - Certification | Beplay, Dale |
| IRS Status | Commercial-Limited Liability Company | Monitor 3 - Licensing | |
| Compliancy Status | Compliant | | |

**Physical Address**

| | | | |
|---|---|---|---|
| Street | New Info | Provider Phone | (888)555-1212 |
| Street 2 | | Extension | |
| City | Anchorage | Fax Number | |
| State | AK | Email | |
| Zip Code | 99501 | Website | |
| Region | Region IV | Contact Name | Carol Downey |
| Pricing Region | 01 - Pricing Region 1 (Anchorage Area) | Contact Phone | |
| Borough | Municipality of Anchorage | | |

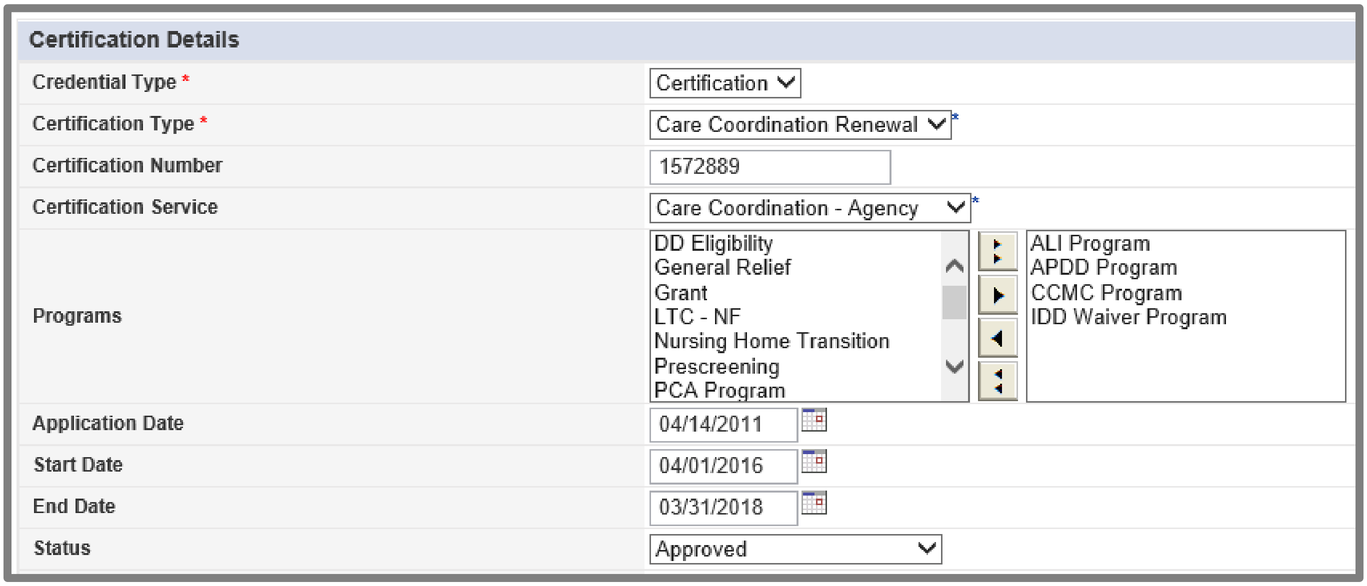
**Location of Recipients Records**

| | | | |
|---|---|---|---|
| Recipient Record Location Street | 808 Test St | Recipient Record Location State | AK |
| Recipient Record Location Street 2 | suite 1234 | Recipient Record Location Zip Code | 99501 |

Provider Record

# Credentials

The **Credentials** tab is used by SDS to manage the provider network and to capture critical information about important credentials that establish whether a provider is qualified to render services. The SDS Harmony system contains two types of credentials: certifications and licenses.

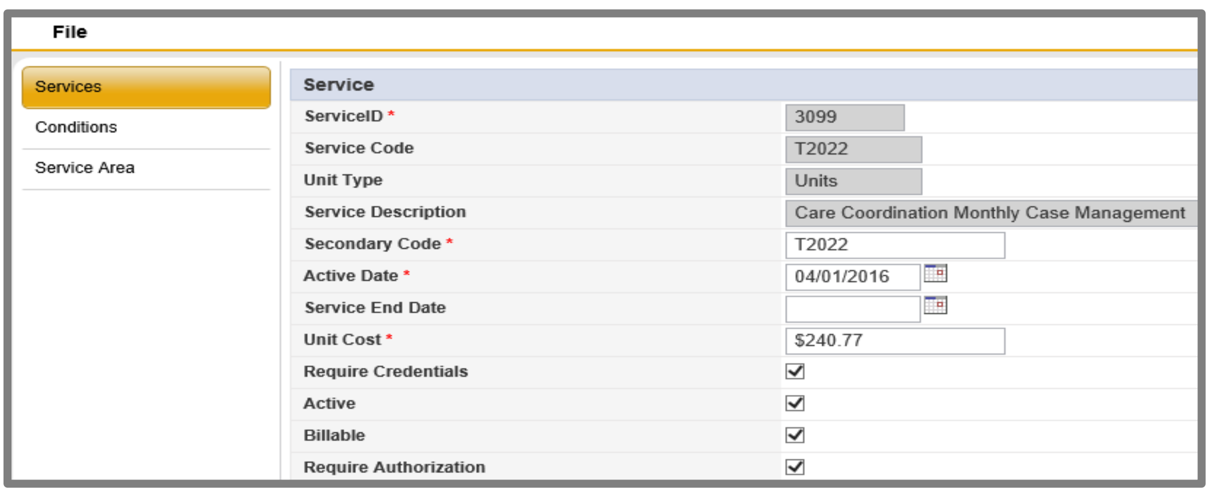


| Certification Details | |
|---|---|
| Credential Type * | Certification |
| Certification Type * | Care Coordination Renewal * |
| Certification Number | 1572889 |
| Certification Service | Care Coordination - Agency * |
| Programs | DD Eligibility, General Relief, Grant, LTC - NF, Nursing Home Transition, Prescreening, PCA Program / ALI Program, APDD Program, CCMC Program, IDD Waiver Program |
| Application Date | 04/14/2011 |
| Start Date | 04/01/2016 |
| End Date | 03/31/2018 |
| Status | Approved |

Provider Credentials Record

## Services

The **Services** tab is aimed at capturing the services that a provider would offer to the community. Services are established in Harmony using the **Service Code Utility** and then each service is linked to the program or provider using the **Services** tab. A consumer has to be enrolled with a program/provider before services can be recorded in authorizations or activities for a consumer.



File

Services
Conditions
Service Area

| Service | |
|---|---|
| ServiceID * | 3099 |
| Service Code | T2022 |
| Unit Type | Units |
| Service Description | Care Coordination Monthly Case Management |
| Secondary Code * | T2022 |
| Active Date * | 04/01/2016 |
| Service End Date | |
| Unit Cost * | $240.77 |
| Require Credentials | ☑ |
| Active | ☑ |
| Billable | ☑ |
| Require Authorization | ☑ |

Provider Services

## Workers

The Worker Tab shows Harmony Workers that SDS affiliated with your agency. This is not a full list of employees. This list can include CCs, owners, and Harmony provisioned staff.

Test Provider 1 (24042)

Linked Providers | Directory Info | Service Area

Provider | Credentials | Categories | Services | Workers | Consumers

Filters

9 Workers record(s) returned - now viewing 1 through 9

| | Worker Name ▲ | Phone Number | Fax Number | Active | |
|---|---|---|---|---|---|
| | Atwood, Trevor | | | True | True |
| | Beplay, Dale | | (703)674-5151 | True | True |
| | Chadwick, David | (907)375-8264 | | True | True |
| | Farrell, James | | | True | True |
| | Fisher, Cina | (907)269-3734 | | True | True |

## Consumer Tab

The Consumer Tab shows all the consumers the agency currently serves. If you are a Care Coordinator you can view your individual consumer list by going to your provider record and look at this tab.

## Linked Providers

The screen will show you any agencies or organizations that have a certification relationship with the provider. Especially helpful to determine the oversight agency for a Family Hab home, if there is one. If you are a Care Coordination Agency you should see a list of the certified CCs that work for your agency.

## Service Area

The **Service Area** tab is used as a repository for information about what areas the agency/provider may serve in the community.

| Service Area | |
|---|---|
| Unrestricted | False |
| State | AK |
| Region | |
| Borough | Municipality of Anchorage |
| City | |
| Zip Code | |

Service Area data

# Glossary

| Term | Definition |
|---|---|
| 3rd Party Review | The 3rd Party Review tab in the Consumers chapter is used to track communication via notes between SDS and Comagine Health when outside review is needed to complete a consumer's level of care determination. This is part of the Material Improvement Review Process (MIRP). |
| Inquiry | The "front door" for requests to work with a specific consumer. A Provider Request must be made in order to initially associate the Certified Provider User with the person (consumer) so a program application can be made. Provider Users must make an Inquiry for Consumer's who wish to transfer from another provider. |
| Actions | The Actions tab in the Providers chapter is used to track and monitor disciplinary actions taken by SDS or DHCS Residential Licensing on a provider resulting from negative outcomes of a compliance review or an investigation, a provider's failure to renew certification or licensing, or a referral for an action by an outside entity. Actions may lead to formal enforcement actions, sanctions, or fines, as well as appeals from the provider subject to the action. |
| Advanced Search | A search page is used to select an entity. Advanced Search pages allow the user to search using multiple filters and display the contents with default filters for the most common search scenario. Like a list page, a search page has filters at the top, a search button in the middle, and search results below.<br>The Advanced Search page is the gateway to loading a chapter. Users click to select a record from the search results to open it and load that record as the entity for the chapter.<br>Examples include Consumer Advanced Search, Provider Advanced Search, and Inquiry Queue Advanced Search. |
| Alert Note | A Harmony feature to highlight critical information on a consumer or provider by displaying a note immediately in a pop up window every time a user selects that entity. A note displays as an alert if the note status = 'Alert'. |
| Appeals | The Appeals tab in the Providers chapter is used to document when a provider appeals a decision, ruling, or notice that they are out of compliance. A provider has the right to appeal the finding(s). SDS staff can add and update appeals, associate them to actions, and monitor the status. |
| Appointments | The Appointments tab in the Consumers chapter is used to track consumer assessment appointments. Provider users can be invited to appointments, and invitation responses can be tracked. |
| Attachment | A file attached to a note on a consumer, provider, or inquiry record. A note can contain up to five attachments. Users can designate an attachment file name and select an attachment category. |
| Authorizations (Auth) | The Authorizations (Auths) tab allows a user to pre-authorize a consumer to receive specific services from specific providers. Each authorization is associated with a specific provider and date range. The service(s) that provider is authorized to deliver are entered under the Auth through the Auth Service subpage. **SDS is not currently using this Tab. External providers will not be able to see it.** |
| Case Relations | The Case Relations tab in the Consumers chapter is used to track family members, advocates, emergency contacts, and other contact people for a consumer. |

| Term | Definition |
|---|---|
| Categories | The Categories tab in the Providers chapter is a tool to classify the various kinds of provider records in Harmony. Categories can be used to automatically assign relevant services to the provider as part the certification approval process. |
| Chapter | Chapters are the core workspace areas in Harmony. Examples include Inquiry, Consumers, Providers, Inquiry, and Reports.<br>The Consumers and Providers chapters are organized into tabs. The Inquiry chapter omits the tabs and navigates directly to the Inquiry page and subpages. The My Harmony chapter is organized by columns of widgets that navigate to targeted list pages and queues. The Reports chapter displays a list of all summary reports available for the current role. |
| Check Out/Check In | Check Out/Check In is a Harmony feature used on Inquiries to limit edits to an Inquiry record to one user at a time. To edit an Inquiry, a user must check out the record. When the user is finished, they should check in the Inquiry. |
| Close | A file menu option to close the current window without saving any changes. The Close menu option will bring the user back to the previous window and refresh that window. |
| Consumer | An entity record for a person who is an applicant for or recipient of services. In the Consumers chapter, users work with one Consumer record at a time. |
| Consumer Module | The Consumer Module tab in the Consumers chapter is used to grant the consumer and authorized contacts access to log in to that Consumer's record in the Consumer Module application. A representative for each consumer on the DD Registry is required to log in to the Consumer Module and complete an annual *DD Registration and Review* form. |
| Credentials | The Credentials tab in the Providers chapter is used by SDS to manage provider certifications and by DHCS Residential Licensing to track Assisted Living Home licenses. Certification credentials are distinct by certification service and indicate the applicable programs. |
| DD Registry | The DD Registry in Harmony is a wait list feature used to track consumers on the DD Registry waiting for IDD Waiver or ISW programs. The entire DD Registry is accessible from My Harmony > Tasks. If a Consumer is on the DD Registry, their Registry record is accessible from their Consumer record in the Consumers chapter > DD Registry tab. |
| Detail Page | A basic type of screen in Harmony used to add or edit a record. Most detail pages contain a single vertical column of data entry fields with the field label on the left and the data entry field to the right. After a record is initially saved, the detail page displays a subpage menu to the left, if applicable.<br>The Detail Page is also referred to as an Edit Page. |
| Directory Info | The Directory Info tab in the Providers chapter contains settings that control whether a Provider record is published to or excluded from the Access Point online directory. |
| Division | Divisions in Harmony represent major lines of business; for example, "SDS" is a distinct Division from "ALL" (Assisted Living Licensing). The system requires that Consumers and Providers be active in at least one Division to be considered active in the system. Consumers must be active in the SDS Division before they can be associated with a Program.<br>The Division is also known as Fund Code. |
| Edit | User account permissions to update/modify to the data in a record. |
| Entity | A core record in Harmony that functions as the centerpiece of a chapter. Examples include Consumer, Provider, and Inquiry. |

| Term | Definition |
|---|---|
| Experience | The Experience tab in the Providers chapter is used by agencies to manage their provider network. Critical information about important background and experience is tracked, which establishes whether a provider (or a worker associated with a provider) is qualified to render services. |
| Fair Hearings | The Fair Hearings tab in the Consumers chapter is used to track appeals and fair hearing process information. |
| File Menu | A list of options for user actions on a List Page or Detail Page. Options vary by page; examples include: Add New, Save, and Close. The File Menu bar can include other menus such as Tools, Reports, and Word Merges. |
| Forms | Forms in Harmony are data entry screens specific to Alaska SDS. Examples include the CAT Assessment and Level of Care Determination. The Forms tab is available in both the Consumers chapter and Providers chapter and displays records entered for the current Consumer or Provider through a Harmony form. |
| Inquiry | The Inquiry chapter is used for tracking system “front door” interactions including requests for information from an ADRC, prescreening, program referrals, and requests from Providers to access to a Consumer record in order to submit an application. The Inquiry Advanced Search page can be filtered by work queues based on program. Inquiry records identify a Person Seeking Supports that can be copied to create a new Consumer or link to an existing Consumer to facilitate Provider access. Once access is granted, the Provider can apply for and coordinate services in the system. |
| Linked Providers | The Linked Providers tab is used to track formal relationships between Providers. Examples include Care Coordinators associated with Care Coordination Agencies and rendering Group Homes and Family Habilitation Homes operated by or contracted with Certified Billing Providers. |
| List Page | A basic type of screen in Harmony used to display a list of records in a particular information area. A list page functions like a search page with preset filters that display the results automatically. Most list pages allow the user to modify the filters and refresh the lists. When a user clicks on a record in the list, that record opens in a detail page in a separate window.<br>Also referred to as a List View or Grid. |
| Monitor | The assignment of a State Staff Worker to a specific Provider record for certain responsibilities related to certification, licensing, or compliance. |
| My Harmony | The system home page that presents panels and queues of records in the system that are relevant to the current user, including assigned Tickler tasks, Notes to be read, and Consumer caseloads. |
| Note | A note is used to communicate with other agencies and/or workers or for moving a process to the next step. Notes can be tracked in several areas in the system, including Inquiries, Consumers, Consumer Plans, and Providers. |
| Note Recipient | Notes functionality that allows a user to route a Note to one or more workers to prompt them to read and review the Note. Note Recipients will see Notes routed to them on My Harmony, and the system tracks if the Recipient has read the Note. |
| Note Type and Sub-Type | Notes are used to track a wide variety of information, and Note Types and Sub-Types are the categories for classifying Notes. |
| Open | To load a page in Harmony. Usually refers to loading a Detail Page to view or edit a record by clicking on the row for that record in the results of List Page or Search Page. |

| Term | Definition |
|---|---|
| Panels | Widgets on the My Harmony home page that contain a header and a breakout of line items by type or status with a count of related items. My Harmony panels provide at-a-glance counts of key information like assigned Ticklers, Notes to be read, and Consumers on a caseload. Panels are also links to access lists of records that are included in the counts. |
| Participant | A record for a person associated with an Inquiry. Examples include a Person Seeking Supports, an Involved Person in a Central Intake report, a Reporter, and other Contacts. |
| Plans | The Plans tab in the Consumers chapter is used to track Person Centered Support Plans and Personal Care Service Plans. Plans are specific to a program and a service period date range. Consumers have a separate Plan record for each renewal cycle or plan amendment. Plans can include Planned Services, Needs and Goals, Forms, and Notes. |
| Primary Worker | A Worker assigned to a Consumer on a Division or Program record. Primary Workers can receive tickler tasks and reminders for their assigned Consumers. |
| Professional Relations | The Professional Relations tab is used to track Consumer's Care Coordinator & Back-up CC, any PCS Agency Contacts and ALL Medical Providers. |
| Programs | The Programs tab in the Consumers chapter is used to track a Consumer's involvement in a formal Program. The Program Status field is the key indicator of the Consumer's current status in the stages of the program life cycle across processes for application, assessment, planning, active service engagement, renewal, and closure. |
| Provider | A Provider is a core record in Harmony that represents an organization. The Providers chapter includes functionality to track certification and licensing credentials, ID numbers, workers, services offered, service areas, and other types of provider information. |
| Provider Associations Tab | The Provider Associations tab in the Consumers chapter is used to connect a Consumer to any Providers involved in their case, such as Care Coordination Agencies, PCA Agencies, and Medical facilities. An active Provider Association is used to grant external Provider agency workers access to a Consumer's record to submit applications and coordinate care. |
| Provider ID Numbers | The Provider ID Numbers tab in the Providers chapter tracks official identification numbers for the current Provider, such as Medicaid IDs by Provider Type, NPI, and PVN. |
| Quick Search | A shortcut search tool alternative to Advanced Search designed to find a record using a single key search filter such as Consumer Case No or Inquiry ID. |
| Record | An entry in a table in the Harmony system database. Harmony List Pages and Search Pages display lists of multiple records, whereas Detail Pages display the fields within a single record for viewing or editing. |
| Reports | Reports are tools for getting data out of the system. Harmony includes standard reports as well specific reports built for Alaska SDS. Reports may display data from a single record, such as a form, for the purpose distribution or signature, or combine information across records. |
| Required Fields | A field on a page must be completed before the page can be saved. Required fields are designated with a red asterisk. |
| Reverse Status | A File menu option to reverse the status of a record that has been saved with a status of "Complete" or "Approved," which locks the record as read-only. Reverse Status is used when a record needs to be modified after it has been completed or approved. Permissions to reverse status are limited to select roles, including supervisors.<br>Also referred to as Reverse Disposition. |
| Role | A Role is a system profile in Harmony that defines a user's security permissions and available functionality necessary to perform job duties. |
| Save | A File menu option to save changes on the current page but keep the page open. |

| Term | Definition |
|---|---|
| Save and Close | A File menu option to save changes on the current page and also close the page. Upon close, the system will navigate the user back to the previous screen. |
| Service Area | The Service Areas tab in the Providers chapter is identifies the geographic locations served by a Provider. |
| Services | The Services tab in the Providers chapter identifies the specific services or procedure codes that a provider is eligible to deliver to recipients, as well as any specific service rates for that provider.<br>Services in the Consumers chapter can be added to plans. |
| Subpage | An information area under a primary record. Subpages are displayed in a page menu on the left side of a Harmony screen with the primary record as the top page in the menu. Clicking on a subpage typically displays a list page of the records that are associated under that primary record. Examples include Planned Services under a Plan, Inquiry Participants under an Inquiry, and Consumer addresses under Consumer Demographics. |
| Tab | An information area with a chapter. Tabs are displayed in rows across the top of a chapter screen, above the list page area. Clicking on a tab brings the user to a list page of the records in that area for the current, selected entity in the chapter. |
| Tickler | A Tickler is a system-generated to-do task or message reminder. Ticklers can be scheduled based on process timelines such as a prompt to submit a renewal application or plan, or triggered by data entry events such as the submission of an application or plan for review. |
| Unlock Record | See Reverse Status. |
| User | A user account authorized to log into Harmony. Every user must be linked to a Provider Worker. |
| Word Merge | A Harmony feature to generate an output form populated with system data via merge fields within a template. Word Merge is typically used to generate notices or letters. Word Merge templates are pre-configured to merge specific data points and are generated via the Word Merge File menu and via Workflow Wizard tasks. After Word Merges have been generated, they can edited in Microsoft Word, printed, and saved as note attachments in Harmony in PDF or Word format.<br>Word Merge also refers to the resulting output. |
| Worker | The Workers tab in the Providers chapter tracks the individual staff members at a Provider or State organization. Workers may or may not also be system users. |
| Workflow Wizard | An automated feature in Harmony to prompt the user with a set of tasks or reminders that pop up in a separate window when triggered by a specific data entry event. Each task in a Workflow Wizard is a tickler and remains on the user's tickler list on My Harmony, until it is completed. |