COMPASS

Vendor View
for Vendors
User Guide

Updated 04/12/2024

Center for
 Information
Management, Inc.

Table of Contents

Introduction

Users that have the Compass neXt permission will show Compass neXt immediately after successful login. Users may not see all of the module options in the picture below.

Note: For users that have access to multiple nodes based on their user permissions, like shown in the image below, Ctrl+Click will open a new tab in your browser. Having separate tabs may help improve productivity if need to go back and forth between various nodes. For vendor users, it may be between Vendor View and Billing to see authorizations or message the agency while billing.

As users navigate in the various modules of Compass neXt, dialog (pop-up) boxes can be moved so users can see the pop-up and view the information behind the interface.

COMPASS neXt

- Test User ⌄
- Vendor View
- Billing
- Vendor Maintenance
- Help
- Contact Us
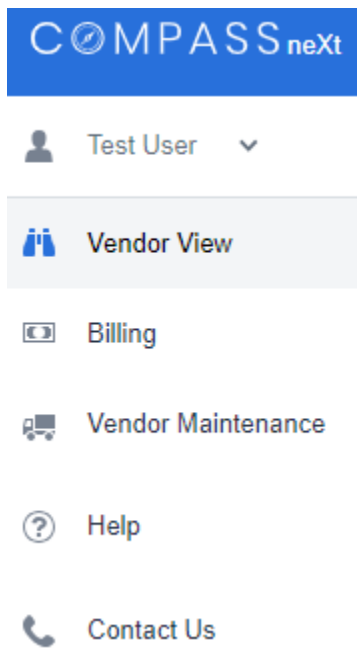
The Help module will display links to appropriate training materials for the modules the user has permission to access. Training video links are included at the beginning of every user guide.

Contact Us

Vendors are to contact the agencies they are contracted with for assistance with using Compass. The Contact Us page found on the left panel in Compass shows the list of agencies and their phone numbers that you work with.

Selector Screen for Vendors

Once the system recognizes your User ID and password, the Agent/Vendor Selector is displayed.

| Notices | Reports | Report Downloads | Messages |

Agent: [Select Agent ⌄]   Vendor: [Select Vendor ⌄]

Current Notices   Archived Notices

[Show All ⌄]   [Search]

- The Notices tab is the default display
- If a Vendor user logs in and is associated with only one Agent and one Vendor, the Agent and Vendor are automatically displayed in the drop-downs
- If a Vendor is using Vendor View in conjunction with more than one Agent and/or Vendor, a drop-down list of the Agents and/or Vendors appears on this screen. The Vendor user will select the appropriate Agent and/or Vendor from the drop-down list(s).
    - If the Vendor user is only associated with one Vendor, that Vendor will automatically populate upon selecting an Agent
    - Only participants associated to that Vendor will be reported
    - This selection process is the same regardless of the Tab (Notices, Reports, Report Downloads, Messages) selected
    - Once the Agent/Vendor is selected, these options will remain the same as the user clicks on different tabs

Vendor users MUST select an agent and vendor for any information to appear or to send new messages if not automatically selected.

Notices

The Notices Tab is split into two subtabs: Current Notices and Archived Notices. When first navigating to Vendor View, the user is taken to the Current Notices subtab (the Current Notices subtab is displayed in blue). The two subtabs' displays are similar (note differences below).

- The Current Notices screen displays all current notices that have not yet been reviewed and archived by the Vendor. As events occur in the Compass systems, notices are automatically posted on the Current Notices screen, with the most recently posted notice on the top.
- If there are no current notices for the selected vendor, the following message is displayed: "No Notifications Available"

Both subtabs have the capability to search by the following filters and only one filter can be used at a time:

- Show All
    - Selected by default
    - 'Show All' displays a complete list of all current notices
- Search for Participant Last Name
    - If the search text box is blank, all notices display
    - Use Search text box from the beginning of the last name, as many letters as desired
- Search for Compass ID - a unique seven-digit numerical identifier that replaces the last four digits of the participant's Social Security Number to protect participant personal health information
    - If the search text box is blank, all notices display
    - Use Search text box to key in the entire Compass ID including dash '#####-##'
    - An error message is returned for invalid formatting
- Once any of the filters are selected and values are entered, click "Search" (or press the Enter key) to conduct the search

Notice Creation

Notices are only created for participants with scheduled services for registered Vendor View Vendors. Notices are created from different data entry and editing functions in Compass, generally including:
- New assessment (triggered by all {re}assessments for Vendors receiving assessment reports; Assessment notices are not created until SW Assessment, Caregivers, RN Assessment, Diseases, Medications, Medical Providers, Pharmacies complete boxes are checked)
- Updated PCSP (Person-Centered Service Plan - triggered by Next Assessment PCSP-SW and PCSP-RN complete boxes are checked)
- Change to participant address or phone number
- Any change to the Care Setting status (e.g. enter the hospital or return home), including new, changed, or removed statuses
- New, changed, deleted, or stopped Service Definition and/or Service Event, Exception, and/or Non-Service; excludes changes to Service Authorization Number
- Optionally Fund Source changes (if agent user chooses to Send Notice when prompted)
- Participant closed

Notices Screen Display

The Notices Screen display includes the following columns:

Column Heading	Description
Check box (Current Notices only)	This column is used to **mark the notice(s) to generate the associated report or archive the notice.** Clicking the top checkbox results in all notices being checked (or unchecked).
Participant	Last Name, First Name
Compass ID	Format is numeric including dash; #####-##
Intake Date (Current Notices only)	
Current Service	For service notices only, this column includes: ▪ Service name (short service name defined by agent) ▪ HCPCS code ▪ Procedure/Modifier code (or dash if none) ▪ Standard Remark code (or dash if none)
Action Detail	Summarizes the action that resulted in the notice
Effective (Date)	Date on which the action takes effect (or today for some notices)
Emailed Date (Current Notices only)	Date the notice reminder email was sent to the vendor
Supports Coordinator (SC)	Initials of primary Supports Coordinator
Notice Created (Date)	Date the notice was created (entry or edit date in Compass)
Reviewed By (Archived Notices only)	User ID of person who reviewed and archived the notice
Reviewed (Archived Notices only)	Date notice was reviewed and archived

Hide or Add Additional Columns

Clicking the highlighted icon in the below picture will result in displaying the optional fields already displayed in the subtab or others available for the user to include in the display as shown in the next picture.

Check or un-check any columns that you want to see or not to change the display of the notices. Not all fields are offered to be added/removed from the display since they are considered essential fields to the notices.

Generate Notice Reports

The Current Notices **Generate Reports** button in the lower left-hand corner of the screen will generate appropriate reports for any checked notices. For example, new services will generate a Service Summary report, changes to care setting will generate a Care Setting report and a new assessment will generate an Assessment or Assessment Comparison report.

Key Notice Report Generation Information:
- Service reports generated from the Notice page automatically INCLUDE Cost/Unit information. Vendors can generate these same reports without Cost/Unit from the Service Reports tab.
- Report generation from the Notice page has been designed to produce only one report if there are multiple notices pertaining to the same service.
- Action Detail information is printed on reports generated from Current Notices subtab, but not on reports generated from Service Reports tab.

Archive Notices

The vendor indicates that a notice has been received and will be acted upon by archiving that notice. The User ID of the person archiving the notice is saved in the archived record, as well as the date of the archive. Agents will check the "Current Notices" subtab to see which notices have not yet been archived and will take appropriate action to be sure the vendor acts on the notice information. Notices can be archived as part of or after the report generation process.

Important: The Reviewed/Archive function tells the agent that a notice has been received and will be handled by the vendor. In the case of the PCSP notice, archiving the notice is considered an electronic signature by the vendor as required by federal law. Only vendors can use this button to archive notices. DO NOT archive a notice unless the notice has been reviewed and can be handled. The User ID and date/time the notice was archived are saved for reference.

Archived notices can be found by clicking the Archived Notices subtab under the main Notice tab.

To Archive a Notice **after** Report Generation:
1. After reports are generated, check the notice(s) to be archived in the left checkbox column. (Note that checkmarks remain in checkboxes after reports are printed; to archive the same notices, move to step 2. To archive only some of the reported notices, remove checkmarks as necessary)
2. Click the **Reviewed/Archive** button to move notices to the Archived Notices subtab

To Archive a Notice **with** Report Generation:

1. Check the notice(s) to be reported and archived in the left checkbox column
2. Click the **Generate Reports/Review/Archive** button

Note that once notices are archived, the reports cannot be generated from the Archived Notices tab; use the Participant and Service reports tabs to generate up to date information.

Notice Email to Vendors

Twice each day (at 11:30 a.m. and 3:30 p.m.), the Vendor View system finds new, unarchived notices created since the last email, and sends a generic email to any vendor that has new notices. This email is sent from vendorview@ciminc.com to users who have the Notification Emails privilege in Vendor Maintenance.

The subject of the email is "Vendor View: New Notices Available", with this text:

Please log in to Compass and go to Vendor View Current Notices to review your NEW NOTICE(s) from the following agencies:

- **Agent:** 99 – DEMO AGENCY **Phone:** (999) 123-4567 **Vendor:** 123 – TRAINING VENDOR

Click the link below or open your internet browser and copy this link into the address bar:

https://webapp.ciminc.com/CompassMI

Please do not reply to this email. It has been automatically generated.

No participant information is provided in this email in order to protect participant privacy. Vendor View itself contains the participant information being shared.

Each vendor can have **as many email addresses as needed** to receive emails from Vendor View. CIM suggests that one person is assigned the task of monitoring Vendor View and seeing that appropriate information is delivered within the vendor agency. Other email addresses should be provided as back-up to this assigned person.

Note: **It is not necessary to receive an email to review new notices.** Notices are posted in Vendor View as soon as they are created by actions in Compass. The purpose of the email is a reminder that there are new notices in case the vendor staff is not monitoring the website.

Reports

Notices	Reports	Report Downloads	Messages 0

Agent:	10 - AREA AGENCY ON AGING OF NORTHWEST MICHIGAN	Vendor:	0006 - ADVISACARE HEALTHCARE SOLUTIONS

Participant Reports   Service Reports   General Reports

Participant Last Name ⌄	🔍 Search	**Search**

Participant	Compass ID	SC	Close Date	Assessment	Assessment Comparison	Back-Up Plan	Care Settings	Meds/Allergies	Medical Providers/Pharmacies	PCSP Report

The Reports Tab is split into three subtabs: Participant Reports, Service Reports and General Reports.

The Participant and Service Reports pages are used to generate reports at any time, independent of notices. Any participants served by the vendor **in the past six months** or **scheduled for the future** are available on the Reports tabs.

Participant Reports

Participant Reports include (samples at end of document):

- **Assessment** (full assessment without financials; available to vendors set up by agents to receive an assessment report; report is most recent assessment completed for time vendor served participant)
- **Assessment Comparison** (available if the vendor has served the participant for the time covering the two assessments; displays only fields that have changed since prior assessment)
- **Back-Up Plan** (information on the participant's plan in case cannot receive services as planned)
- **Care Settings** (i.e. times at home, in hospital, etc.)
- **Current Medications/Allergies**
- **Current Medical Providers/Pharmacies**
- **Person-Centered Service Plan (PCSP)** (Report displays information of all services participant is receiving in the home)

Key participant report information:

- Vendors not set up to receive assessment reports will have an "X" in those report columns, as well as in the Back-Up Plan, Medications, Medical Providers/Pharmacies, and PCSP reports
- Back-Up Plan, Medications, and Medical Providers/Pharmacies reports are automatically produced with an Assessment or Assessment Comparison report generated from the Notices screen, but NOT from the Participant Reports tab
- Vendors will receive a message "No data to report" on the Initial Assessment Report until the Agent marks the SW and RN assessment and associated medications, diseases, medical

providers, and pharmacies as completed. New assessments will not be available until they are "completed"; vendors will continue to view older assessments until the new one is "completed"
- Reports only display information for the time period of the vendor service

Service Reports

Service Reports include (samples at end of document):
- **Service Summary** (combined service authorizations for date range)
- **Service Calendar** (not available yet)
- **Participant Notice Report** (all notices for a participant, the Reviewer ID and review date)

On the Service Reports tab, selection criteria for reports are on the top of the screen. Users can select:
- a time period (in months)
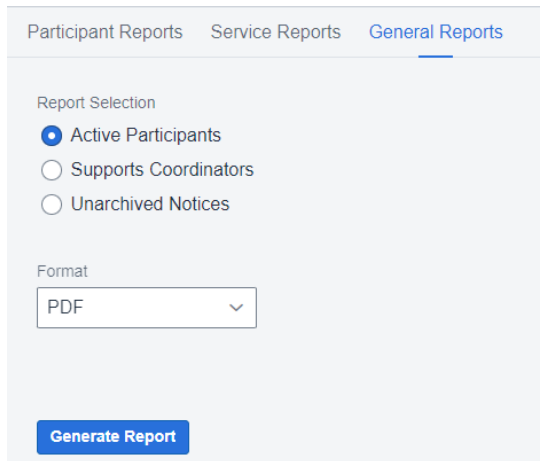- to include or exclude Cost/Unit information (exclude is default)

Key service report information:
- **Reporting period defaults to 3 months**: current, prior, and next
- **A report will print "No Data to Report"** if there is no service event or scheduled exception in the month
- Any **Notes to Vendor pertaining to the service or tasks** will appear on the Service Summary and the Service Calendar reports
- "**At Risk: Needs Services Exactly as Authorized**" appears on service reports if applicable
- The types of patterns are:
    - One-time – this happens one time either on a specific date or within a date range
    - Repeating – this is ongoing and will continue indefinitely or stops on the until date shown; these could repeat at any interval, but most common is every day, week, or month, but you may see something like every 2 weeks or months as well
    - Date-Time – this indicates there are specified days and times associated to this service
    - Date-Anytime – this indicates that there are specified days, but no specified times associated to this service
    - Weekly-Anytime – this indicates that the service is authorized to occur weekly and the number of units aren't for specific days, however, there may be a specified number of days and units/day if shown
    - Monthly-Anytime – this indicates that the service is authorized to occur monthly and the number of units aren't for specific days/dates, however, there may be a specified number of days and units/day if shown
- **Service Calendar Report will not print any data if there is:**
    - no service event for the month
    - no service scheduled in the month
- On Service Calendar Report, **if multiple service schedules in the month,** each schedule will be shown with the tasks and notes associated with each service authorization.

General Reports

The General Reports tab includes (samples at end of document):

- **Active Participants** (list of active participants and their contact/address information)
- **Supports Coordinators** (list of the selected agent's supports coordinators initials, names, and phone number)
- **Unarchived Notices** (all notices that are not yet archived by the vendor)
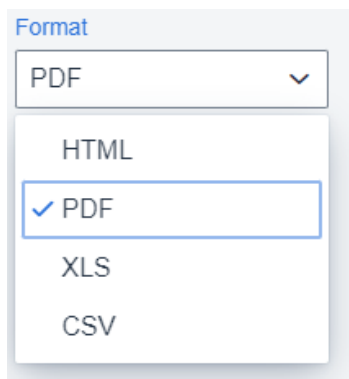

- Users have three reports available to select
- Users may only select one report at a time as different parameters may exist
- Click the appropriate button to select the report
- The picture below shows the available format options, PDF is the default

- Click on the desired format
- Click the **Generate Report** Button

Report Downloads

The Report Downloads tab includes all submitted and completed reports that have been requested by the user. Reports remain in the Report Downloads list for 24 hours from the time of submission. All Vendor View reports that can be generated should appear here. This includes:

- Current Notice Reports
- Archived Notice Reports
- Participant Reports
- Service Reports
- General Reports

When a user selects a report by:

- Clicking **Generate Report(s)** successfully from one of the abovementioned subtabs in Vendor View, the user automatically moves to the Reports Download tab and displays the queued report in the Pending Reports area.
    - o The report is unavailable for the user to select while the Download button is grey and the Status is "Submitted". Users are able to press **F5** to refresh the Pending Reports area to see if the report is available for download

Reports are available for 24 hours from the time of submission.

Pending Reports - Press refresh [F5] to see if report is ready to download.

Action	Status	Report Name	Submitted	Format
Download	Submitted	Supports Coordinators	07/13/2023 03:20	PDF

    - o Once the Download button is blue and the Status is "Completed", users are able to press the Download button to view the report
    - o Depending on your browser preference, the report may automatically open in a new browser tab or download to your computer to be opened
    - o Once the report is open, users can save or print these reports

Reports are available for 24 hours from the time of submission.

Pending Reports - Press refresh [F5] to see if report is ready to download.

Action	Status	Report Name	Submitted	Format	Additional Information
Download	Completed	Active Participants	07/13/2023 01:13	PDF	

    - o Once the report is viewed, the report moves to the Downloaded Reports area

Reports are available for 24 hours from the time of submission.

Pending Reports - Press refresh [F5] to see if report is ready to download.

Action	Status	Report Name	Submitted	Format	Additional Information

Downloaded Reports

Action	Report Name	Submitted	Format	Additional Information
Download	Active Participants	07/13/2023 01:13	PDF	

Messages

Agents and vendors are able to communicate about services and participants securely that will prevent unauthorized access to participant protected health information by using Vendor View messages.

Note: Vendor View messages are sent to the organization, not a specific staff person at either agent or vendor; the staff monitoring Vendor View messages must distribute them within the organization. Each agency must decide how the messages system will be used internally.

Message Threading

In Compass Vendor View, message threading is used in the Messages module so that users can easily read and reply to messages. Adding this conversation-style functionality improves organization, adds context to a conversation, and makes Agent-Vendor communication much easier. "Threads" will consist of a group of messages that have been directly replied to back and forth between the sender and recipient. Message threading will only contain two different organizations (the sender and the recipient). Message threading allows for "collapsing" and "expanding" messages when there are multiple messages.

Messages Filter Bar

The last primary tab is the Messages tab and is displayed below.

- Unread message threads will appear with bold styling so it is easy to see which threads have follow-up left to do. Once the messages in a thread have been marked as read, the thread will no longer be bold

Show Filter
The highlighted area above shows the default type of message is 'New'. All options available are displayed in the picture below.

- *All* – Show all messages threads. Show the most recent message sent by either organization (and its corresponding sent date/time) in the message grid
- *New* – Show messages threads that were sent to the logged-on user's organization that are not marked read yet. Show the most recent message sent to the user's organization (and its corresponding sent date/time) in the message grid
- *Sent* – Show messages threads that include at least one message that was sent by the logged-on user's organization. Show the most recent message sent by the user's organization (and its corresponding sent date/time) in the message grid
- *Sent Not Read* – Show messages threads that have at least one message that was sent by the logged-on user's organization that is not yet marked as read by the recipient. Show the most recent sent message that is not yet read from the user's organization (and its corresponding sent date/time) in the message grid
- *Sent to Me* – Show messages threads where the original message was sent to the logged-on user (use the new 'To User' field). Show the most recent message sent by either organization (and its corresponding sent date/time) in the message grid

Search

There are a few ways to search for messages – by last name, Compass ID, or anything within the subject or message itself. You can use a combination of the two search boxes, date range, and the message type filter (New, All, etc.) to find messages.

Search for Participant

This search is to filter the messages for a specific participant. This only pulls messages that had the participant selected when the message was created. It will not search for the participant's name or ID within the message body itself. You could use the Search Anything feature if the participant was only named in the message

> 🔍 Search by last name or ID

- Search for Participant Last Name
    - o Use Search text box from the beginning of the last name, as many letters as desired
- Search for Compass ID
    - o Use Search text box to key in the entire Compass ID including dash '#####-##'

Search Anything

This search box in the Messages tab allows the user to search literally anything that they can see within the messages. Below are some basic rules for the user regarding search functionality.

> 🔍 Search in messages

- **Searches with spaces looks for any word**
    > 🔍 authorized amount

- o   Example: If <authorized amount> is searched, then return message threads that contain either <authorized> OR <amount>
- o   If you want to search for <authorized amount> together only, then the search should add double quotation marks around the phrase like this:

> Q "authorized amount"

- **Search the Subject line Only**

> Q subject: authorized

- **Search messages with attachments**

> Q has: attachments

- **Search messages that include multiple conditions**

  - o   AND
    - ▪   For example, <meeting and has: attachment>; that should find messages where at least one message has that keyword (meeting in this case) and an attachment
    - ▪   Note the attachment would have to be on the same message; you shouldn't get a result if the message that included the word "meeting" was not the same message that included the attachment
  - o   OR
    - ▪   For example, <subject: authorized or "auth units">; this should find messages for either subject having word authorized or auth units anywhere in the message
  - o   **Note:** You cannot combine 'AND' and 'OR' in the same search

- **Minus Filter**

  - o   If you want to remove a certain word from your search results, you can type a minus sign before the word.
    - ▪   For example, if you type < -approved>; all message threads where approved was used in one of the messages will be removed from the results
  - o   You can also use quotes around a phrase to remove from your search (i.e.: -"Quoted text")

Sent Date Range Filter

Sent Date: [   ] 🗓   to   [   ] 🗓

- Select dates from the calendar or enter them in MM/DD/YYYY format to find messages sent within that date range

New Messages Alert
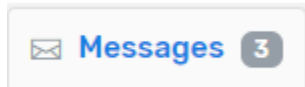
The new message alert displays the number of new messages that have not been marked as read for the entire organization. This does not change based on the filters in the message search. This won't display a count until both agent and/or vendor is selected in the drop down. The count is determined based on "unread" threads - not specific messages, so the count will actually be the number of threads that have at least one unread message.

- o   For example, if a user replies twice in a row to the same thread, the New Messages Alert would say (1) for the number of unread threads rather than (2) for each unread message
- o   Or if there were 3 threads and two new messages in each of them, then the new message count would be (3), not (6)

This count of message threads is different than the count that is to the left of each message thread (pictured below w/black arrow). The individual message count is the total number messages in the thread.
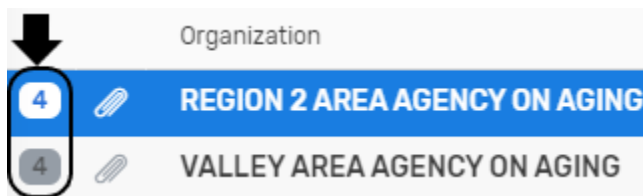
View Messages within a Thread

The Messages show a list of all the message threads related to the selected agent and/or vendor. When a message thread is selected, then the messages within that thread appear on the right panel.
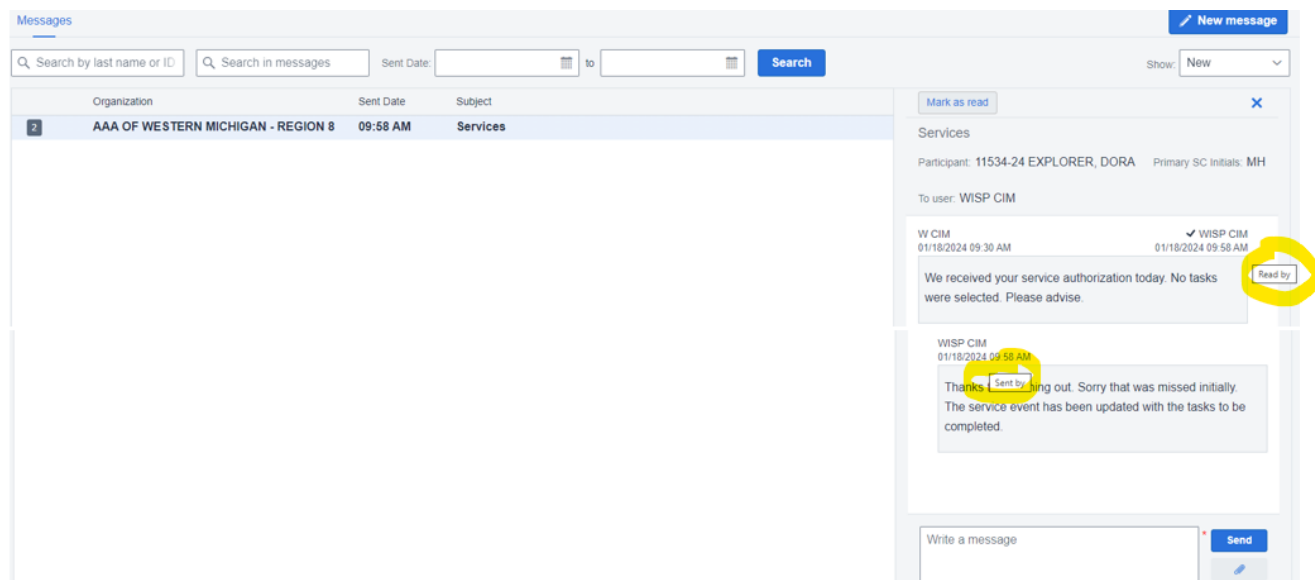
Message Column Details

Most columns have the ability to hover over the field to see the full information in a tooltip as some fields may be cut off depending on the size of the browser and contents of the messages and is denoted by ' ⋯ ' three dots in various place on the screen. (The entire message does not appear as a tooltip.)

	Organization	Sent Date	To User	Subject	Participant	Message
2	AAA OF WESTERN MICHIGA…	09:58 AM	WISP CIM	Services	11534-24 EXPLORER, DORA	Thanks for reaching out. Sorry that was missed initially. The …
	AAA OF WESTERN MICHIGAN - REGION 8					

- Thread Count **2** - The number of messages in the thread are displayed
- Attachment - A paper clip icon 📎 is displayed if the message contains any attachments
- Organization - Display the agent's name that the user is communicating with.
- Sent Date – Displays the most recent sent date or time; if today's date, this shows just the time, otherwise it shows the date.
- To User – This is shown if a user was selected when the message was created
- Subject – In this example, "New Service"
- Participant – This is shown if a participant was selected when the message was created
- Message – This shows the most recent message of that thread

Message Thread Details
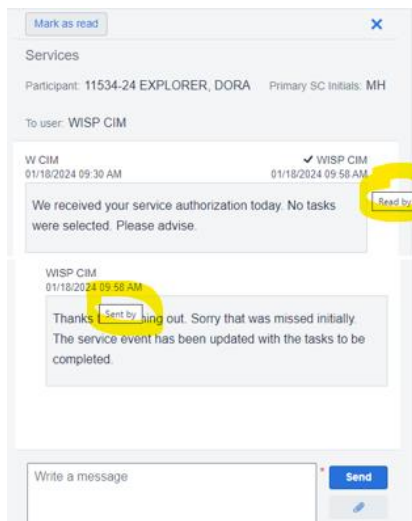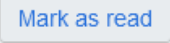
- Subject – shown at the top
- Participant is shown if applicable
- Primary SC initials are shown if the message had a participant selected
- To user is shown if applicable
- Sender Name: Shows the logged-on user's info who sent the message
- Sent Date/Time: Shows the Date/Time the message was sent
- Read by Name: Shows the user's name who marked the messages read by either clicking the (Mark as Read button or by sending a reply which auto-marks previous unread messages from the other org as read)
- Read by Date/Time: Shows the Date/Time the message was read

- Message
- Tooltips are included that show "Sent by" or "Read by" to help distinguish what info is displayed when hovering over a user's name
- Messages show the sender organization on the left side of the message and the recipient organization on the right side of the message

Mark Message as Read

In the message thread details section, users need to mark the messages as read so that the sending organization knows that you've received it and you remove your "New" messages. There are two ways to mark messages as read:

- Click [Mark as read] when the message details are shown on the right panel; this adds your user name and the date/time that you marked the message as read to the thread
- Reply to a message; this automatically marks all unread messages above the reply as read

Reply to Message

If a message was sent to you, you can easily reply by typing in the box that says, "Write a message" and click Send. You can also attach files using the paperclip icon in that reply. There is no need to start a New Message if just need to reply.

Send New Message
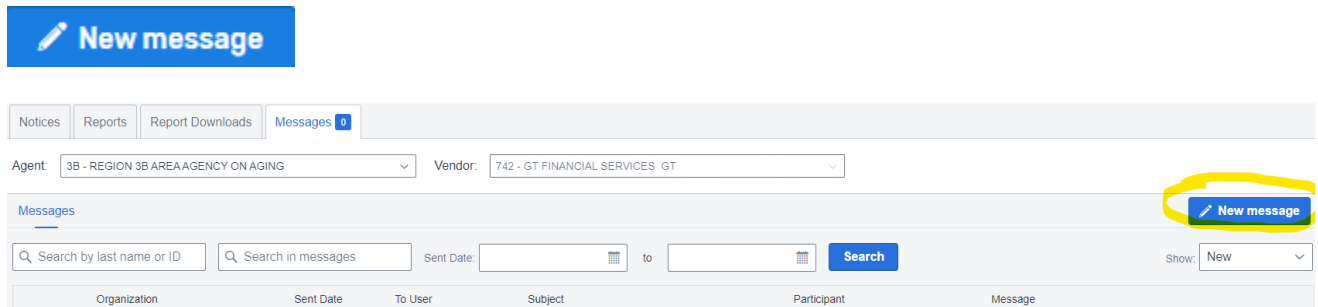
The **New Message** button displays when the user has selected the Agent/Vendor. To add a new message,

1. Click the **New Message** button
2. This will bring up the New Message dialog box:

- Select the type of message to be sent
  - Make sure to select Send Participant message if this is about a specific person; this helps with finding those messages about a participant later
  - Standard Message is the default and used for general messages not related to a participant
- To is a required field that will always be read-only for vendors and prepopulated based upon your selection of the agent drop/down from the Messages tab; if you mean to send to a different Agent, click Cancel, change the Agent in the drop down, and click New Message button again
- To User is an optional field; Select from the drop-down list if you'd like to send this to a particular agent user
  - The agent user list comes from the users that have permission to view Vendor View
  - If a participant is selected, then this defaults to the primary Supports Coordinator, even if they don't have permission to view Vendor View
- Subject is a required field
- Message
- Attachments are optional
  - Click Upload Files or drag and drop a file if you'd like to attach it to this message
  - Users can select more than one file at a time to upload
  - Maximum attachment file size is 15 MB; Maximum number of attachments to one message is 10
  - Successfully upload files will show the "file name" and "x" below the Attachment box
  - If attached a file in error, click the X button to remove it

When all is complete, click the Send button. Cancel if you do not want to send this message.

Note that if you sent a message in error, you need to contact the Agent and they can delete it. Vendors cannot delete messages.

Message Email to Vendors

Twice each day (at 11:30 a.m. and 3:30 p.m.), the Vendor View system polls for new messages created since the last email that have not been marked as read and sends a generic email to the recipient vendor or agency. **Note: This is not just new unread messages. This is for all unread messages.** This email is sent from vendorview@ciminc.com to users who have the Notification Emails privilege in Vendor Maintenance.

The subject of the email is "Vendor View: New Messages Available", with this text:

> Please log in to Compass and go to Vendor View Messages to review your NEW MESSAGE(s) from the following agencies:
>
> - **Agent:** 99 – DEMO AGENCY **Phone:** (999) 123-4567 **Vendor:** 123 – TRAINING VENDOR
>
> Click the link below or open your internet browser and copy this link into the address bar:
>
> https://webapp.ciminc.com/CompassMI
>
> **Please do not reply to this email. It has been automatically generated.**

No participant information is provided in this email in order to protect participant privacy. Vendor View itself contains the participant information being shared.

Note: **It is not necessary to receive an email to review new notices.** Notices are posted in Vendor View as soon as they are created by actions in Compass. The purpose of the email is a reminder that there are new notices in case the vendor staff is not monitoring the web site.

Each vendor can have **as many email addresses as needed** to receive emails from Vendor View. This is set in the Vendor Maintenance User privileges. It is recommended that at least one person is assigned the task of monitoring Vendor View and seeing that appropriate information is delivered within the vendor agency. Other email addresses should be provided as back-up to this assigned person.

Report Samples

Assessment Report

Vendor View Assessment Report
Report Type: EXPANDED
Agent: AREA AGENCY ON AGING OF NORTHWEST MICHIGAN
Vendor: ADVISACARE HEALTHCARE SOLUTIONS

12034-25 SMITH, BRANDON 123 SESAME ST TRAVERSE CITY, MI 49684	**Phone:** (517) 555-7894 **Primary Supports Coordinator:** JW **Secondary Supports Coordinator:** CHR **Date of Birth:** 01/01/1990

Assessment Date: 08/01/2023

Section A: Identifying Information

Others Present:	**Beth - Mother/Guardian**
Marital Status at this Assessment:	**Never married**
Residential / Living Status at Time of Assessment:	**Private home / apartment / rented room**
Who person lived with at time of referral (assessment) or currently lives with (reassessment):	**With sibling(s)**
Residential History Over Last 5 Years (Code for all settings person lived in during 5 YEARS prior to date case opened)	
Long-term care facility--e.g., nursing home:	**No**
Mental health residence--e.g., psychiatric group home:	**No**
Psychiatric hospital or unit:	**No**
Board and care home, assisted living:	**No**
Setting for persons with intellectual disability:	**No**
About Me	
Records strengths, abilities, desires, choices, interests, etc:	**Uses PODD Talk to communicate. Likes bird sounds and listening to the harp. Enjoys listening to music and stories. I require specialized care that is rare and not well-known: Lindeman Trach, Stomach Venting, Rectal Venting, Dysautonomia, Dysreflexia, Laryngectomy Tube Care**
Person's expressed goals of care:	**"The level of care is beyond what a nursing facility can provide. It is at the level of an intensive care unit. Decisions need to be made to provide equipment and environmental services similar to an acute level of care." per Beth and physicians involved**
Description of Conditions Noted Above:	**Routine reassessment per LMSW and RN at the home. Guardian/mom Beth provides all information due to Brandon's limited ability to communicate. Brandon had an OBRA evaluation in 2017 for nursing home placement. The evaluation indicated intensity of care needed was too high for nursing home placement, so his care needs must be met at home. He remains eligible for the MI Choice Waiver program via Door 1.**
Include in PCSP?	**Yes**
If yes, briefly describe issue, if no, briefly indicate why:	**Brandon and guardians wish for him to remain enrolled in MI Choice Waiver program in order to receive Supports coordination services.**

Section B: Social Functioning

Social Relationships[Note: Whenever possible, ask person]	
Participation in social activities of long-standing interest:	**In last 3 days**
Visit with a long-standing social relation or family member:	**In last 3 days**
Other interaction with long-standing social relation or family member--e.g., telephone, e-mail:	**Never**

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Assessment Comparison

Vendor View Assessment Comparison Report

Report Type: EXPANDED
Agent: AREA AGENCY ON AGING OF NORTHWEST MICHIGAN
Vendor: ADVISACARE HEALTHCARE SOLUTIONS

12034-25 SMITH, BRANDON 123 SESAME ST TRAVERSE CITY, MI 49684	**Phone:** (517) 555-7894 **Primary Supports Coordinator:** JW **Secondary Supports Coordinator:** CHR

Assess Date: 09/25/2023
Prior Assess Date: 08/01/2023

Section A: Identifying Information

Place of Assessment:	**Home**
	No Response
Assessment Reason:	**Return assessment - An assessment conducted when the person returns from the hospital, nursing facility or reenters the home care system after a planned absence.**
	No Response
Reason for Late Assessment:	**Participant choice/scheduling issue**
	No Response
Description of Conditions Noted Above:	**Beth provides all information due to Brandon's limited ability to communicate. Brandon had an OBRA evaluation in 2017 for nursing home placement. The evaluation indicated intensity of care needed was too high for nursing home placement, so his care needs must be met at home. He remains eligible for the MI Choice Waiver program via Door 1.**
	Routine reassessment per LMSW and RN at the home. Guardian/mom Beth provides all information due to Brandon's limited ability to communicate. Brandon had an OBRA evaluation in 2017 for nursing home placement. The evaluation indicated intensity of care needed was too high for nursing home placement, so his care needs must be met at home. He remains eligible for the MI Choice Waiver program via Door 1.

Section B: Social Functioning

Social Relationships[Note: Whenever possible, ask person]

Participation in social activities of long-standing interest:	**4 to 7 days ago**
	In last 3 days
Visit with a long-standing social relation or family member:	**4 to 7 days ago**
	In last 3 days

Section Reminder

Previous Reminder

Reminder notes entered at previous assessment:	**"Services paid for with MI Choice funds must not duplicate nor replace services available through the State Plan. Where applicable, the participant must use State Plan, Medicare, or other available payers first. MI Choice is the funding source of**

Back-Up Plan

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Vendor View

Back-Up Plan for BRANDON L. SMITH

123 Sesame St   Traverse City, MI   49684

Phone Number: (517) 555-7894   Date of Birth: 01/01/1990   As of today: 09/26/2023

</div>

In an EMERGENCY always CALL 911 or push your PERS button

For medical issues that are not an emergency, call your doctor's office:
Selle   Phone Number: (231) 935-0614

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AREA AGENCY ON AGING OF NORTHWEST MICHIGAN is authorizing your Services.

Your Current Supports Coordinators are:
JESSICA WARPUP Phone number: (231) 947-8920
CHARLOTTE RYKSE Phone number: (231) 947-8920

**If they cannot be reached, please call the agency at 231-947-8920
or toll-free at 800-442-1713.**

** It is important to call AREA AGENCY ON AGING OF NORTHWEST MICHIGAN about any changes in your services, condition, or circumstances, including if you were hospitalized. **

</div>

The purpose of this plan is to address your needs when you experience an issue that disrupts your scheduled service such as bad weather or an unavailable caregiver.

SERVICE NEED LEVEL: 1A   This means you cannot be left alone. If your services are not delivered as planned, your backup plan needs to start immediately.

CONTACTS

Emergency Contacts

Beth Smith   Relationship: Parent/ guardian
  Main: (517) 456-1234   Mobile: (517) 456-5555   Work:

Emily Wee   Relationship: Parent/ guardian
  Main: (517) 555-9999   Mobile: Work:

Tom Smith   Relationship: Parent/ guardian
  Main: (517) 555-1234   Mobile: Work:

Continued on next page

Back-Up Plan continued for BRANDON L. SMITH

My Legal Guardian: Beth Smith
   Main: (517) 456-1234   Mobile: (517) 456-5555   Work:

My Legal Guardian: Emily Wee
   Main: (517) 555-9999   Mobile: Work:

My Legal Guardian: Tom Smith
   Main: (517) 555-1234   Mobile: Work:

My DPOA: none

ADVANCE MEDICAL DIRECTIVES

I have advance medical directives: Yes
These are located at: At their home

EMERGENCY ASSISTANCE

I will need assistance in evacuating my home due to fire, flood, etc.

This is my evacuation plan: Exit out the side door or the main door. Ramp is in place.
                              Brandon would need 2 people to carry him out of the home.
                              "Safety problem in evacuating from home if there is a fire. No
                              viable, safe access through the window of the bedroom for fire
                              evacuation"- per guardian

I use medical equipment that relies on power.

Is there a back-up system in case of power failure?   Yes

What is the back-up system?   Generator

Back-up oxygen tanks are present.

My medication list is located: at the bedside

ALTERNATE CAREGIVERS

I want an alternate caregiver to provide services if my regularly scheduled person is not available.

My Back-Up Plan For Care Is:

Albridge provides back up caregivers. Parents will act as paid CLS provider if emergency coverage
needed. In the event that neither co-guardian is able to perform their duties, Samantha Garcia will be
contacted to perform guardianship duties in accordance with state regulations. A conservator would
be appointed by the court for financial management.
If alternative housing is necessary due to changes in guardianship/assets, SCs will work with new

Continued on next page

Care Settings

Vendor View Care Settings Report

Agent: AREA AGENCY ON AGING OF NORTHWEST MICHIGAN

Participant:	12034-25 SMITH, BRANDON	Supports Coordinators:	JW
Address:	123 SESAME ST		CHR
	TRAVERSE CITY, MI 49684		
Phone:	(517) 555-7894		

Start Date	Stop Date	Care Setting	Memo
08/21/2023		Home	
06/05/2022	04/30/2023	Home	Example memo.

Current Medications/Allergies

Vendor View Current Medications and Allergies Report
Agent: AREA AGENCY ON AGING OF NORTHWEST MICHIGAN

Participant:	12034-25 SMITH, BRANDON					**Supports Coordinators:**	JW
Address:	123 SESAME ST						CHR
	TRAVERSE CITY, MI 49684						
Phone:	(517) 555-7894						

Name/Strength	Route	Frequency	PRN*	Purpose	Prescribed By	Start Date	Stop Date
ACETAMINOPHEN 5OO MG/1	ET (Enteral tube)	TID (3 times daily)/and 1 tab QD PRN for pain	No	pain	Scott Selle MD	11/30/2017	
ACIDOPHILUS 1 CAPSULE	ET (Enteral tube)	BID (2 times daily)	No	GI probiotic	Scott Selle MD	11/30/2017	
Pure Encapsulations 8 am; probiotic cap 4pm							
ALBUTEROL 2.5 MG/3 ML (3ML)	IH (Inhalation)	BID (2 times daily)	No	open airways	Dr. Selle MD	01/27/2022	
AMINO ACID POWDER 3 TBSP	ET (Enteral tube)	QD (Daily)	No	supplement	Dr. Scott Selle	12/17/2021	
ANDROGEL PUMP GEL- 4 SQUIRTS	TOP (Topical)	QD (Daily)	No	hormone replacement	Dr. Selle MD	07/26/2017	
on shoulders or belly after shower							
ANTACID 10-20 ML	PO (By mouth/oral)	OTH (Other)/as needed	Yes	heartburn/reflux	Scott Selle MD	01/27/2022	
APPLE CIDER VINEGAR 30 ML	ET (Enteral tube)	OTH (Other)/BID PRN UTI protocol	Yes	supplement	Dr. Scott Selle	12/08/2020	
BABY GLYCERIN LAXATIVE 8ML	REC (Rectal)	QD (Daily)/and at 6pm prn if no BM after am administration	No	bowel program	Scott Selle MD	11/30/2017	
BACLOFEN 10 MG/1 (2 TABS)	ET (Enteral tube)	TID (3 times daily)	No	muscle rigidity	Dr. Selle MD	01/27/2022	
BACTRIM DS 800MG-100MG/1	ET (Enteral tube)	BID (2 times daily)	No	antibiotic	Dr. Scott Selle	12/18/2021	
BACTROBAN OTC TOPICAL CREAM TO SORES	TOP (Topical)	OTH (Other)/as needed to wounds/sores/cuts	Yes	prophylactic for skin infection or for infection	Scott Selle MD	11/30/2017	
BAG BALM TOPICAL APPLICATION	TOP (Topical)	OTH (Other)/as needed to cover skin problem/rash	Yes	skin irritation/rash	Scott Selle MD	11/30/2017	
BENADRYL- DYE FREE 12.5MG/5CC- GIVE 15CC	ET (Enteral tube)	OTH (Other)/every 4-6 hours	Yes	hives/anylphylaxis	Scott Selle MD	11/30/2017	
CALCIUM CITRATE 1 TAB	ET (Enteral tube)	QD (Daily)/8pm	No	supplement	Dr. Scott Selle	12/08/2020	
CARNITINE 100 MG/ML (30 ML)	ET (Enteral tube)	OTH (Other)/diluted in 1000ml H20	No	Supplement	Dr. Selle MD	01/27/2022	
500 ml medicated water used during day shift, 500 ml used during night shift; water contains carnitine, salt, choline, sugar, lysine, potassium chloride and chelated Magnesium							
CHELATED MAGNESIUM POWDER 1 TSP	ET (Enteral tube)	OTH (Other)/diluted in 1000 ml H20	No	supplement	Dr. Scott Selle	01/27/2022	
500 ml medicated water used during day shift, 500 ml used during night shift; water contains carnitine, salt, choline, sugar, lysine, potassium chloride and celated Magnesium							
CHOLINE 1 TSP	ET (Enteral tube)	OTH (Other)/diluted in 1000ml H20	No	supplement	Dr. Scott Selle	12/08/2020	
500 ml medicated water used during day shift, 500 ml used during night shift; water contains carnitine, salt, choline, sugar, lysine, potassium chloride and chelated Magnesium							
CHROMIUM PICONOLATE 1 TAB/1	ET (Enteral tube)	QD (Daily)	No	supplement	Dr. Scott Selle	12/08/2020	
CIPRO 500 MG/1	ET (Enteral tube)	BID (2 times daily)	No	antibiotic	Dr. Scott Selle	12/18/2021	
CLARITIN 10 MG/1	ET (Enteral tube)	QD (Daily)/crush tab	No	allergies	Scott Selle MD	11/30/2017	
COLLOIDAL SILVER 2 ML	SL (Sublingual)	OTH (Other)/QID PRN UTI protocol	Yes	supplement	Dr. Scott Selle	12/08/2020	

*PRN is a medical abbreviation for frequency of "as needed".

Current Medical Providers/Pharmacies

Vendor View Current Medical Providers and Pharmacies Report

Agent: ███████████████████████

Participant: ███████████████   *SC Initials: MH/None*

Assessment Date: Next Assessment

Medical Providers

Business Name	Phone	Primary Physician
███████████ - CARDIOLOGIST - Cardiologist	(517) 353-4830	
███████████	(616) 391-3785	
███████████ - NEUROLOGIST - neurologist	(989) 723-1390	
███████████ - PULMONOLOGIST - Pulmonologist	(616) 947-4470	
███████████ - ORTHOPEDIST	(616) 267-8860	
███████████ - FAMILY PRACTICE - Primary Care Physician	(616) 285-6450	Yes

Pharmacies

Business Name	Phone
BAY MILLS PHARMACY	(906) 248-2031
Humana Pharmacy Online	(800) 379-0092
RITE AID-BIG RAPIDS	(231) 796-8659
WALGREENS - COMSTOCK PARK	(616) 647-2260

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Person-Centered Service Plan (PCSP)

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Vendor View
Person-Centered Service Plan for
BRANDON SMITH

123 Sesame St Traverse City, MI 49684

</div>

Phone: (517) 555-7894   **Date of Birth:** 01/01/1990   **As of:** 09/26/2023

<div align="center">

Preferred Method of Communication
Email: Beth Smith - beth@email.com

My Supports Coordinators from AREA AGENCY ON AGING OF NORTHWEST MICHIGAN are:
JESSICA WARPUP, LMSW (231) 947-8920   CHARLOTTE RYKSE, RN (231) 947-8920

</div>

About Me

Uses PODD Talk to communicate. Likes bird sounds and listening to the harp. Enjoys listening to music and stories. I require specialized care that is rare and not well-known: Lindeman Trach, Stomach Venting, Rectal Venting, Dysautonomia, Dysreflexia, Laryngectomy Tube Care
I choose to live At home with formal and informal supports in place. Per parent's/guardian's preference.

Communication Support Needs

Limited communication through PODD talk.
Parents/guardians and experienced caregivers interpret needs.
Persons untrained in PODD Talk cannot communicate with Brandon, guardian requests that someone that knows PODD Talk is necessary to accompany Brandon at all times for the IADL service of communication.

Expressed Goals of Care

"The level of care is beyond what a nursing facility can provide. It is at the level of an intensive care unit. Decisions need to be made to provide equipment and environmental services similar to an acute level of care." per Beth and physicians involved

Communication Plan

I agreed to have my Supports Coordinator contact me every 30 days.
I agreed to assessments every 360 days.
I agreed to have a person-centered planning meeting every 180 days.

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Person-Centered Service Plan continues for BRANDON SMITH

I prefer for my Supports Coordinator to communicate with Beth about my services and supports.

Participant/Guardian/Legal Representative will take responsibility to communicate with all informal supports regarding their role in care

My other preferences for communication are: -Supports Coordinator as needed will update Guardian weekly via email on status of pending requests.

-Supports Coordinator will coordinate with guardian to a keep list of supplies and equipment that has been approved in the past and update it throughout the year as new services are requested.

-AAANM will deliver or ship all supplies to the home, not asking the guardian to pick them up.

-Communication is preferred to be by email. If a response is needed within 24 hours then AAANM will call and email guardian. Does not want paper mail.

-If appointments between guardian and supports coordinator are cancelled they will be rescheduled within 10 days.

-Guardian allows for three way calls with providers as necessary

Informal Supports providing me regular assistance

Provider	Phone	Tasks	Start Date	Stop Date
Beth Smith Parent/ guardian	(517) 456-1234	Guardian only provides guardianship duties which consist of authorizing, requesting, and signing for services. In addition she provides paid Community Living Supports above what paid caregivers provide.	09/28/2018	
Tom Smith Parent/ guardian	(517) 555-1234	Guardian only provides guardianship duties which consist of authorizing, requesting, and signing for services. In addition she provides paid Community Living Supports above what paid caregivers provide.	09/28/2018	
Emily Wee Parent/ guardian	(517) 555-9999	Provides support and assistance to guardians as needed. Stand by guardian if guardians are unable to fulfill their duties.	01/29/2020	

Service Summary

Service Authorization Summary

Agent ███████████████████████

Report Date Range: 12/01/2023 to 12/31/9999

Include Cost/Unit: Yes

████████████████████████████

1225 CHRISTMAS LANE   NORTH POLE, AK 49872 (231) 555-5555

Supports Coordinators: ███████████ / None

Service Need Level

1A   *This means you cannot be left alone. If your services are not delivered as planned, your backup plan needs to start immediately.*

Vendor: B370████████████████████	**Fund Source:** 100 MI-Choice Waiver
Service: H2015--5502 Comm. Support Svcs/15min: No transport	**SDL:** 3007851

Repeating Date-Anytime Pattern

12 unit(s) a ███████ unit* Occurs every Day

Starting: 01/18/2024   **Total every day:** 12 Unit(s), $82.80

Tasks: *CLS: PC-Tub Bath/Shower, CLS: PC-Assist in Dressing, CLS: PC-Mouth Care, CLS: PC-Hair Care, CLS: PC-Skin Care, CLS: PC-Assist w/Toileting, CLS: PC-Assist w/Incont. Products, CLS: PC-Med Self-Admin Remind, Observe, Document, CLS: HMKR-Laundry - Client, CLS: HMKR-Floors; Sweep/Mop, CLS: HMKR-Remove Trash, CLS: HMKR-Wash Dishes, CLS: HMKR-Clean Kitchen, CLS: HMKR-Clean Client Bedroom, CLS: HMKR-Clean Bathroom*

Notice Detail: *New Service Schedule for H2015--5502. Occurs every Day starting on 01/18/2024.*

* Cost/Unit shown is based on your contracted rate and is applicable as of the end date of the Report Date Range

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Participant Notice Report

Vendor View
Participant Notice Report
for
08/01/2023 to 10/31/2023
Agent: AREA AGENCY ON AGING OF NORTHWEST MICHIGAN

Participant: **12034-25 SMITH, BRANDON**   **Supports Coordinators:** JW

Current Address: CHR

         123 SESAME ST

         TRAVERSE CITY, MI 49684

Phone: (517) 555-7894

Vendor: ADVISACARE HEALTHCARE SOLUTIONS

Action Detail	Current Service	Effective Date	Notice Create Date/Time	Reviewed Date/Time	Reviewed By
New Service Schedule for H2010--2000. Starting on 01/01/2023 to 01/01/2023.	Medication management /15 min-H2010--2000	01/01/2023	09/26/2023 08:09 pm		
New/Changed Care Setting			09/26/2023 08:09 pm		
New Assessment		09/25/2023	09/26/2023 08:09 pm		
PCSP Updated		09/26/2023	09/26/2023 07:09 pm		
New Assessment		08/01/2023	09/26/2023 07:09 pm		
New Phone Number		09/26/2023	09/26/2023 04:09 pm		
New Address		11/18/2016	09/26/2023 04:09 pm		

Active Participants

Vendor View - Active Participants Report

Agent: 10 AREA AGENCY ON AGING OF NORTHWEST MICHIGAN
Vendor: 0006 ADVISACARE HEALTHCARE SOLUTIONS

Name	Compass ID	Address	County	Phone	SC Initials
▮▮▮	11615-96	▮▮▮	EMMET	▮▮▮	BK/MB
▮▮▮	12713-00	▮▮▮	WEXFORD	▮▮▮	AS/DBW
▮▮▮	12854-11	▮▮▮	EMMET	▮▮▮	BK/MB
▮▮▮	12781-65	▮▮▮	EMMET	▮▮▮	BK/MB
▮▮▮	12034-26	▮▮▮	GRAND TRAVERSE	▮▮▮	W/CHR
▮▮▮	12118-74	▮▮▮	CHARLEVOIX	▮▮▮	MB/BK
▮▮▮	12649-40	▮▮▮	CHARLEVOIX	▮▮▮	MB/BK
▮▮▮	12508-58	▮▮▮	EMMET	▮▮▮	T/SW
▮▮▮	12034-25	▮▮▮	GRAND TRAVERSE	▮▮▮	JW/CHR
▮▮▮	11109-76	▮▮▮	EMMET	▮▮▮	AW/None

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Supports Coordinators

Vendor View
Supports Coordinator Report

Agent: 10 - AREA AGENCY ON AGING OF NORTHWEST MICHIGAN

SC Initials	Name	Phone
AS	SALK, ANDREW	(231) 947-8920
AW	WESTOVER, ASHLEY	(231) 947-8920
BK	KOPROWICZ, BRITTANY	(231) 947-8920
BR	ROBBINS, BARBARA	(231) 947-8920
CHR	RYKSE, CHARLOTTE	(231) 947-8920
DBW	WAUGH, DIANA	(231) 947-8920
DM	MONROE, DEBRA	(231) 947-8920
JW	WARPUP, JESSICA	(231) 947-8920
KD	DILLON, KALEY	(231) 947-8920
KS	SMITH, KATELYN	(231) 947-8920
MAT	HAMBURG, MATTHEW	(231) 947-8920
MB	BOSLEY, MICHAEL	(231) 947-8920
MUR	MURRAY, ANDREW	(231) 947-8920
RV	VANCORE, REBECCA	(231) 947-8920
SW	WILLINGHAM, SHANIA	(231) 947-8920
TT	TANNER, TAMMI	(231) 947-8920
WG	GURKA, WHITNEY	(231) 947-8920

Unarchived Notices

Vendor View Unarchived Notices Report

Notices Created On or Before: 09/26/2023

Agent: AREA AGENCY ON AGING OF NORTHWEST MICHIGAN

Vendor: ADVISACARE HEALTHCARE SOLUTIONS

Vendor Code	Vendor Name	Number of Notices	Min. Notice Create Date	Max. Notice Create Date
0006	ADVISACARE HEALTHCARE SOLUTIONS	7	September 26, 2023	September 26, 2023
	Total Unarchived Notices:	7		