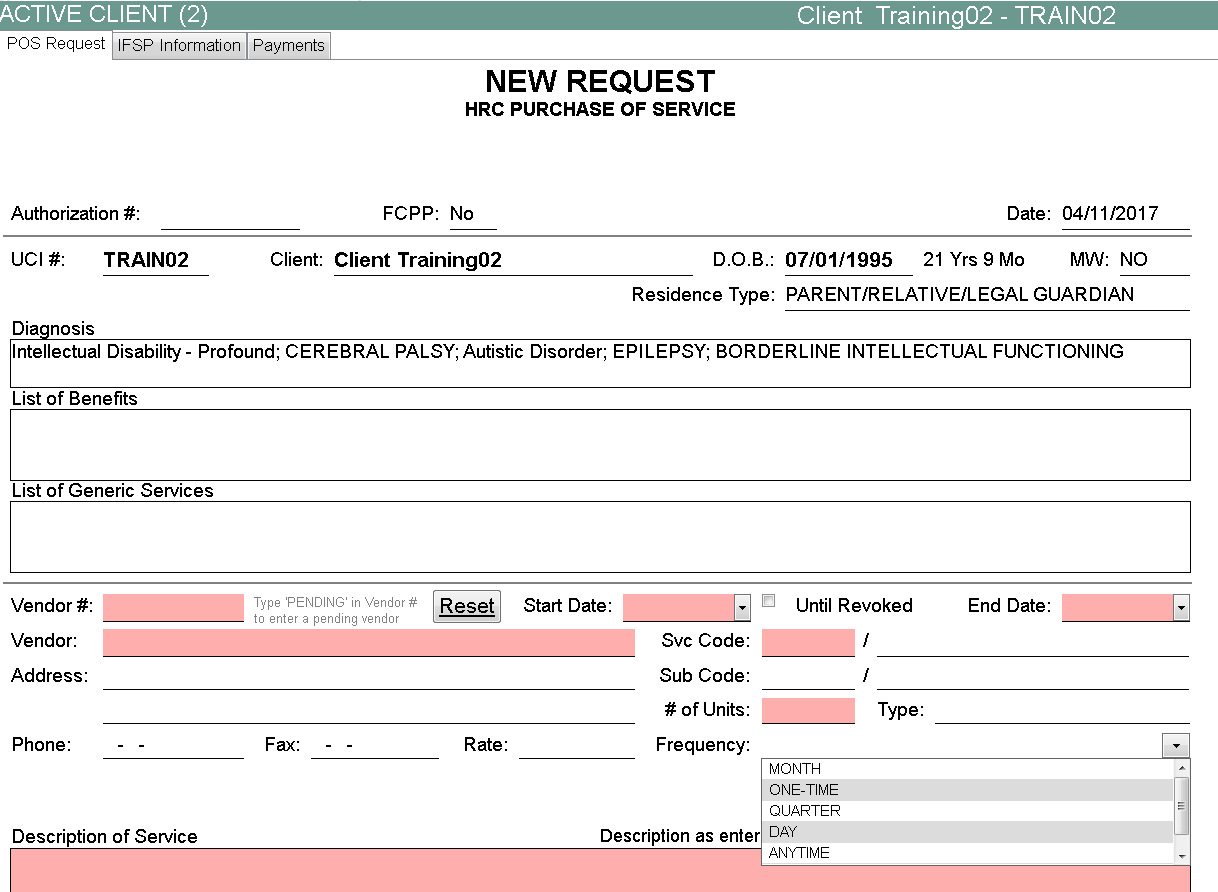
1. POS
   1. **Frequency** – Changed the order of the list and added “QUARTER”
      1. This field is a mandatory field and we need you to start using this field whenever you do a POS. This is not currently working as a mandatory field in Virtual Chart; however, in the version being deployed at the end of May 2017, this field will be mandatory.



**Frequency Options:**

MONTH

ONE-TIME

QUARTER

DAY

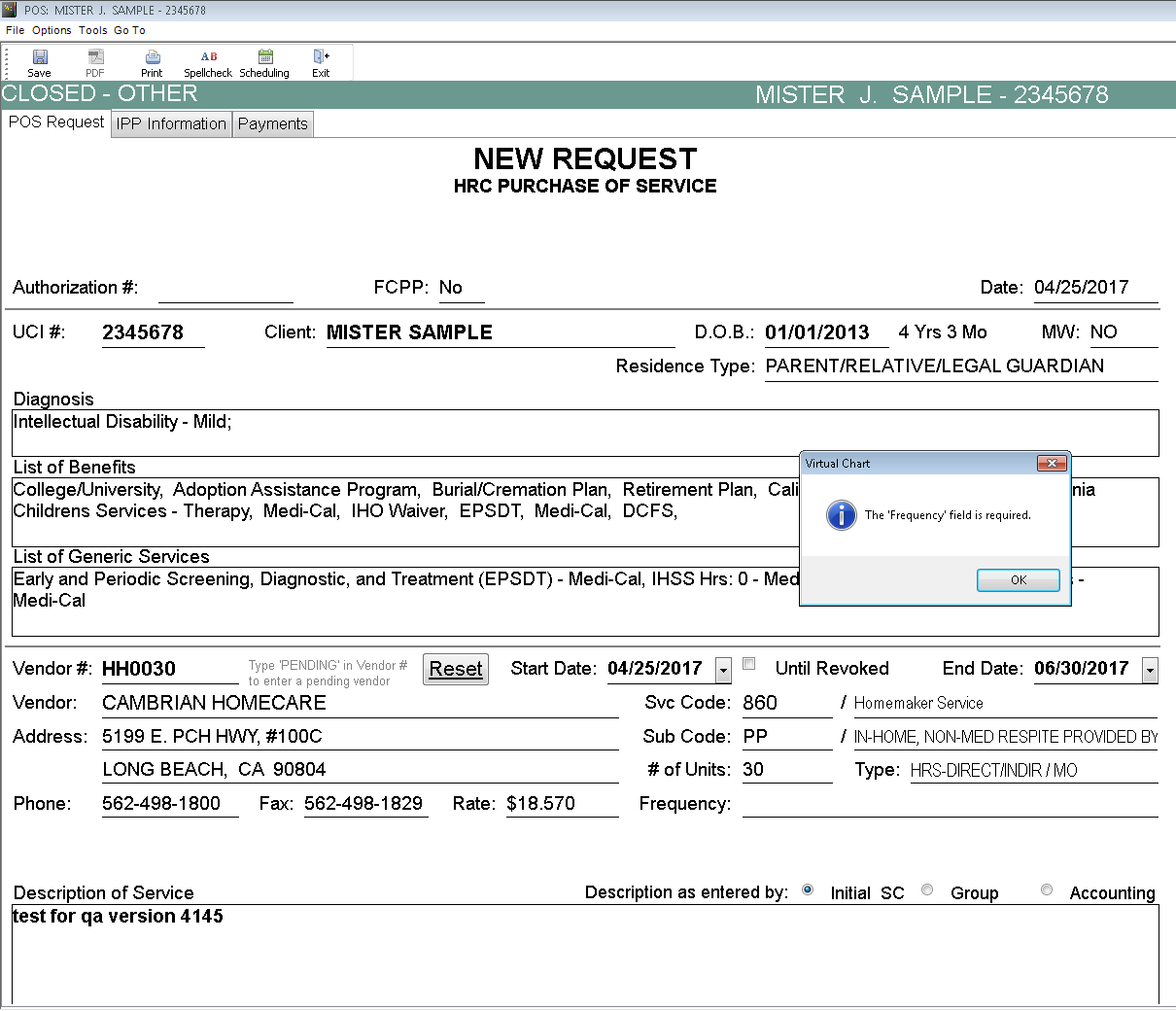
ANYTIME

WEEK

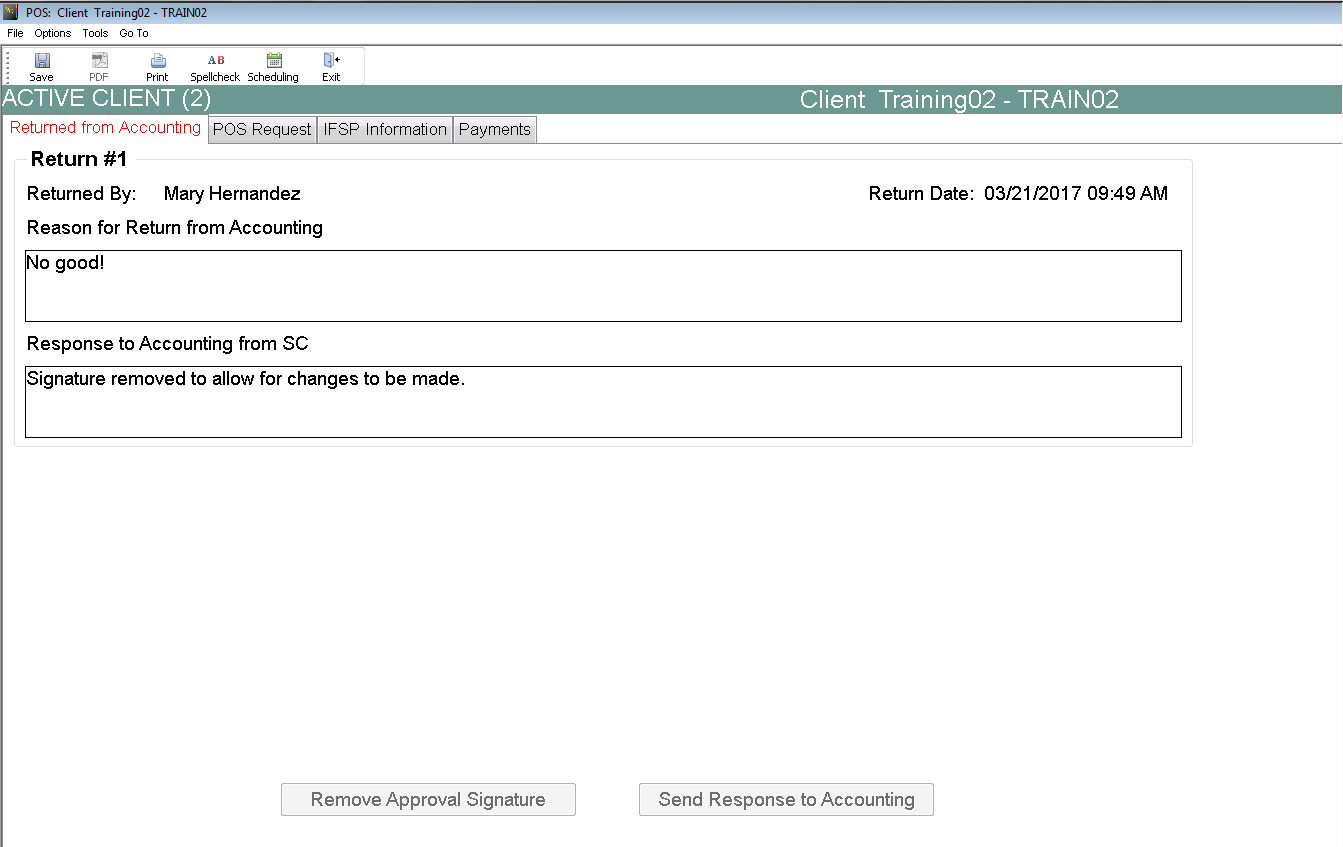
Early Childhood has 40 over 4 and every 2 months additional types.

We have been instructing SCs to contact the accounting person responsible for the service to ask their advice on how to update this field when the frequency does not match the list.

This field is Mandatory in version 8.5.4145.



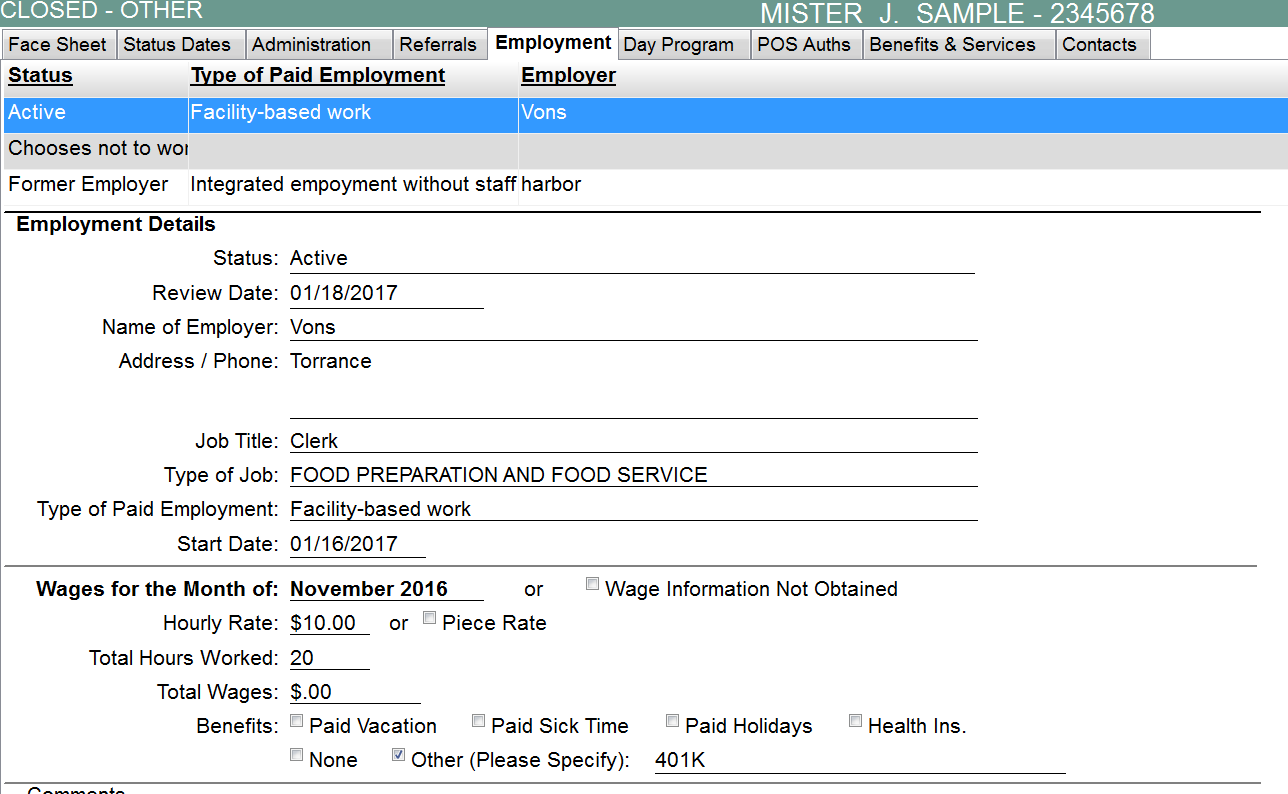
* 1. Rejected POS
     1. Service Coordinator is now presented with a button to remove CSM signature. This allows the SC to resubmit the POS after modifications specified by the rejecter (Accounting or Director) of the original POS without having to track down the CSM.



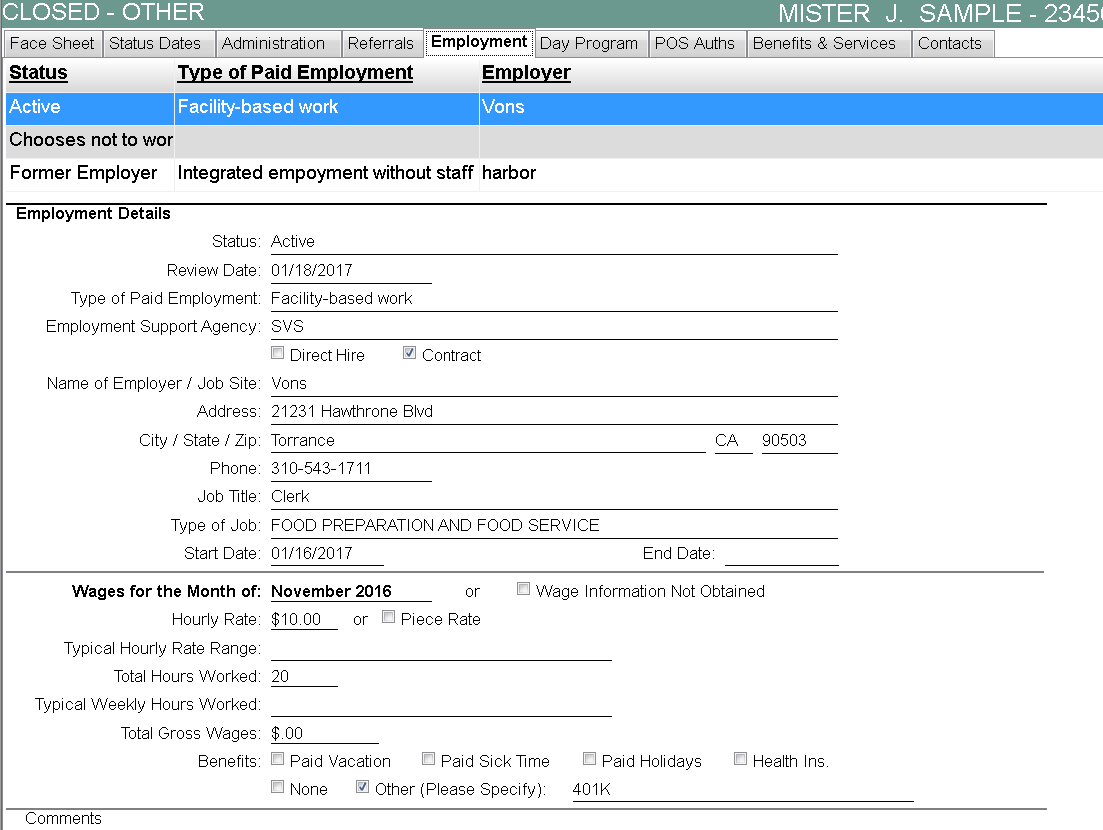
* 1. **Early Start POS – IFSP Information Tab** – Service Frequency and Duration – If these fields are left blank, will not allow an SC to schedule a POS. The info requested is info that is already located on the POS Request tab. There is no drop down menu for these fields. SCs will need to fill them in for now in order for the POS to be submitted and for those POSs in the CSM queue already, seems like we will not be able to sign off on them until those fields are completed. We are working with RCOC to resolve this issue.
     1. This is an Early Start function only – RCOC was hit on an audit for not including this information in the IFSP and this was one of the ways they decided to address the finding.



1. Outstanding Accounting / POS Bugs & Fixes:
   1. Version 8.5.4139 –
      1. **POS** - Erroneous POS Service and Sub codes – Fiscals would reject or just fix errors due to a database mismatch between the Accounting System and Virtual Chart.
      2. **POS** – Director Signoff issue – shows as being in Director queue when it was actually in Accounting Review. This was fixed some time ago with a work around and has been permanently fixed in the coding of the POS module in this version
      3. **Accounting** – Vendor Number Pending – Set as Level 1 (CSM signoff) - When a vendor does not exist (bus pass for client) and SC uses Pending as the vendor number. POS now goes to the Director for signoff Level 2.
   2. Version 8.5.4145 –
      1. POS Cancellation Request - Respite hours used field needs to be changed to optional. Need to test with Tes and Karina to validate but this is supposed to be changed in version 8.5.4145.
   3. Not yet Fixed –
      1. Authorized POS requests are not to be modified by Case management. Only by accounting staff.
2. Employment Tab



**OLD VERSION**

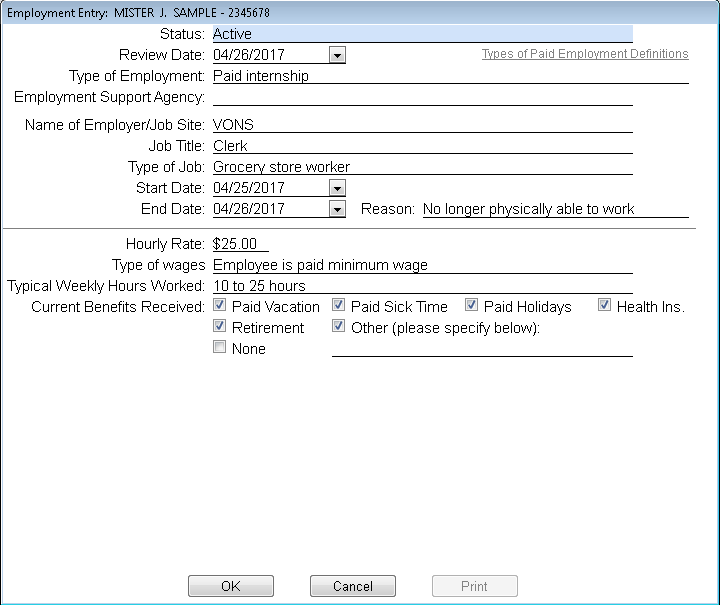


NEW

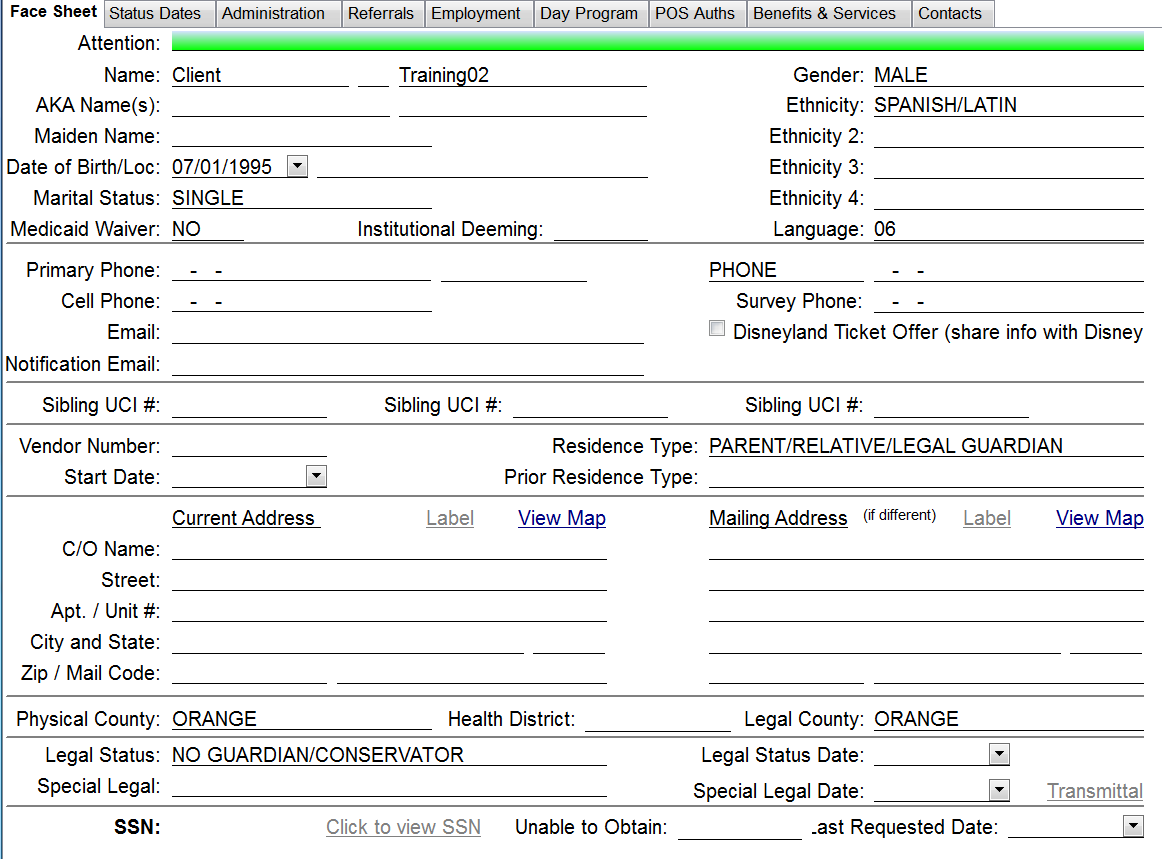
VERSiON

1. The week of 5/22/2017, a new version of VC will be rolled out for the new setup for the employment tab.
2. **Address / City / State / ZIP / Phone** – all have their own field now.
3. **End Date** - field was added to capture when this particular employment has ended for the client.
4. **Typical hourly Rate Range** – Don’t use now will be trained before 5/22
5. **Typical Weekly Hours Worked** - Don’t use now will be trained before 5/22
6. Continue to fill out as you have done up until today.

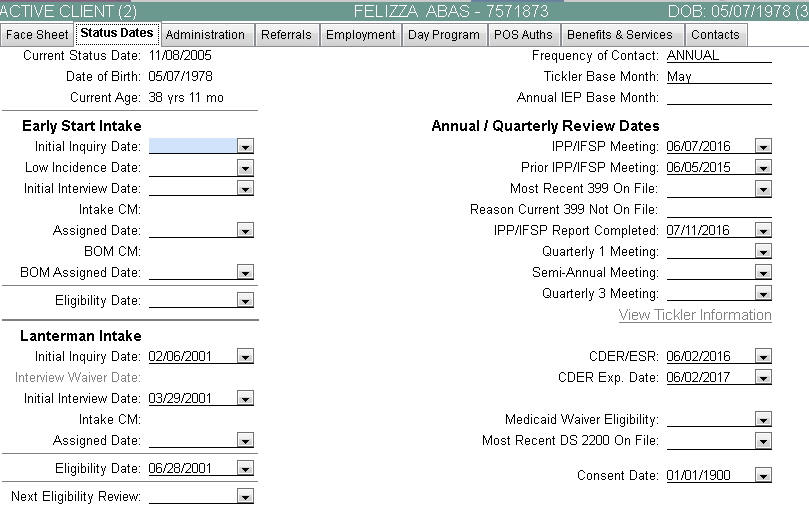
Version 4145 (to be deployed the week of 5/22/2017) Employment Tab.



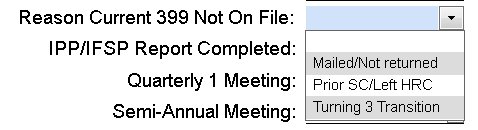
1. Face Sheet – Face Sheet
   1. Disneyland Ticket Offer (Share Info with Disney)
      1. You can select this in the Modify view of the Face sheet
   2. Sibling UCI # X 3
      1. Does Not auto populated from Sib’s Face sheet
      2. We are **NOT** going to use these at this time.
   3. Click to view SSN
      1. In the previous version, the SSN was always showing.



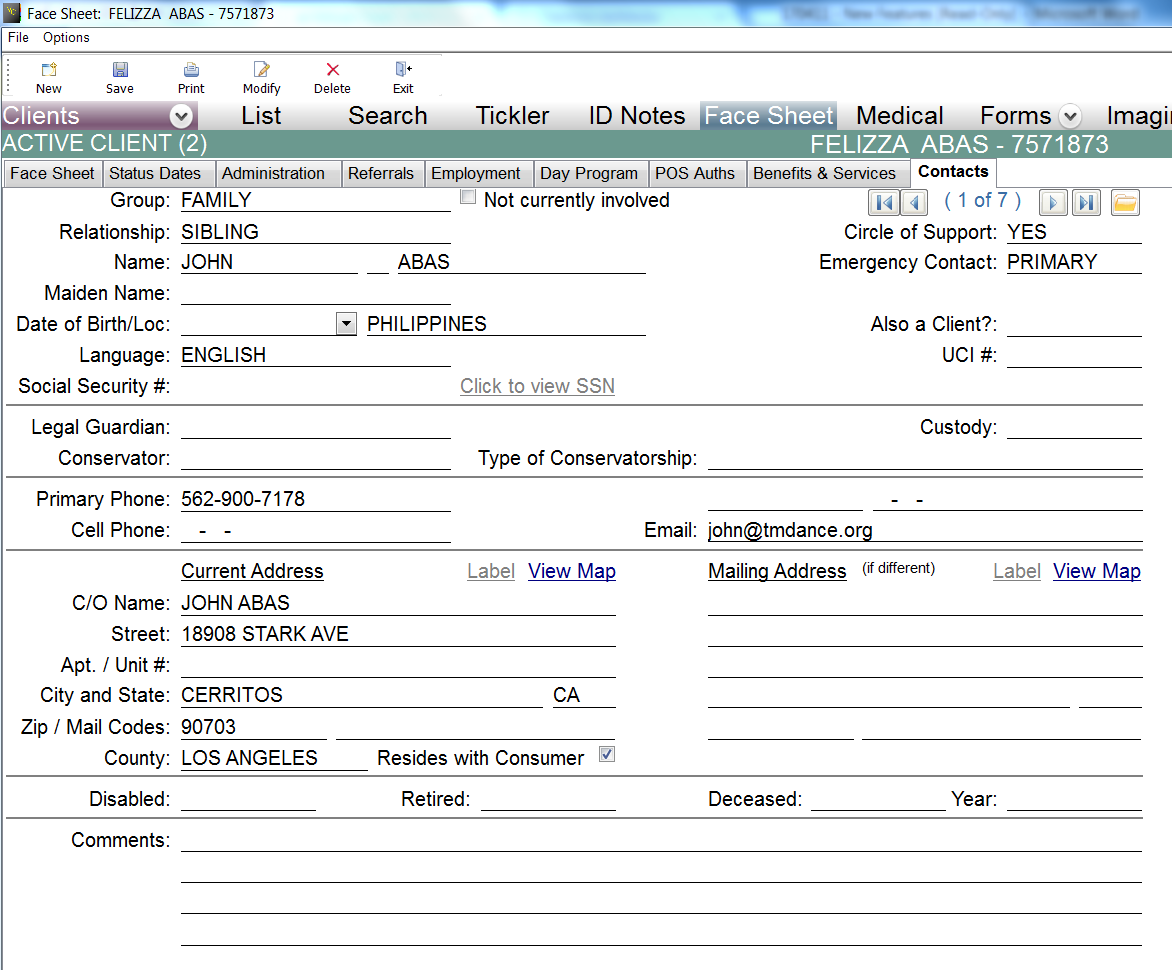
1. Face sheet – Status Dates
   1. Reason Current 399 Not On File: field
   2. This connects to the IPP signature page for RCOC in their Imaging System, and creates a tickler reminder if the IPP signature page isn’t there.
   3. Both 399 fields are tied to RCOC’s Imaging system and are NOT USED by HRC.



The dropdown is populated with the following list:

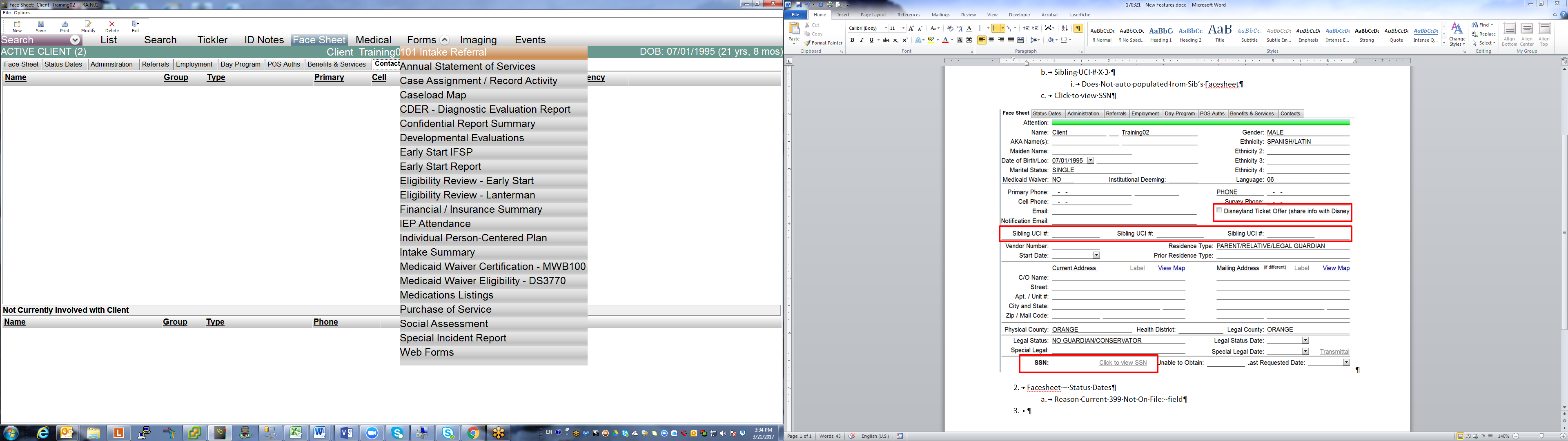


1. Contacts

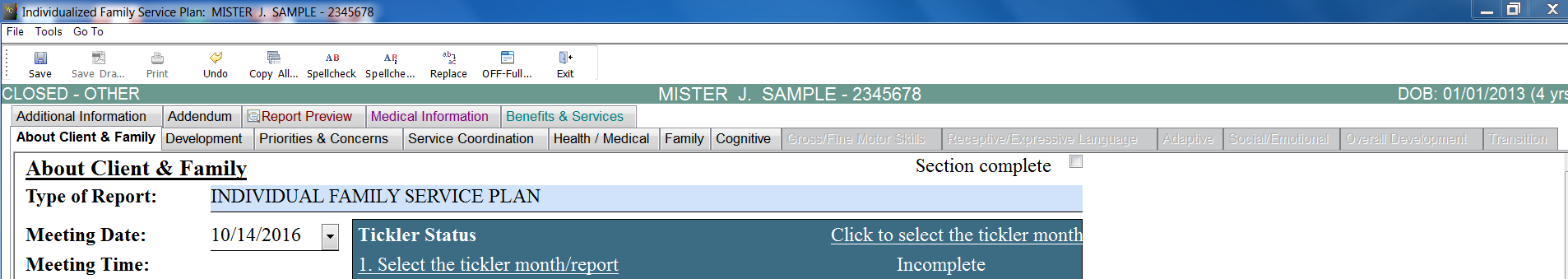


* 1. **Also a client & UCI #** - these fields were put in place by RCOC to track if a child client has a parent who is also a client and vice versa. The UCI #: field currently does NOT hyperlink to or reference anywhere else in Virtual Chart, although it may in the future.
     1. This was also setup to redact the parent or child client’s info from the other’s IPP.
  2. **Click to View SSN** – Same as Face sheet
  3. **Legal Guardian, Custody, Conservator, Type of Conservatorship** – All were relocated under Social Security # in their own group.

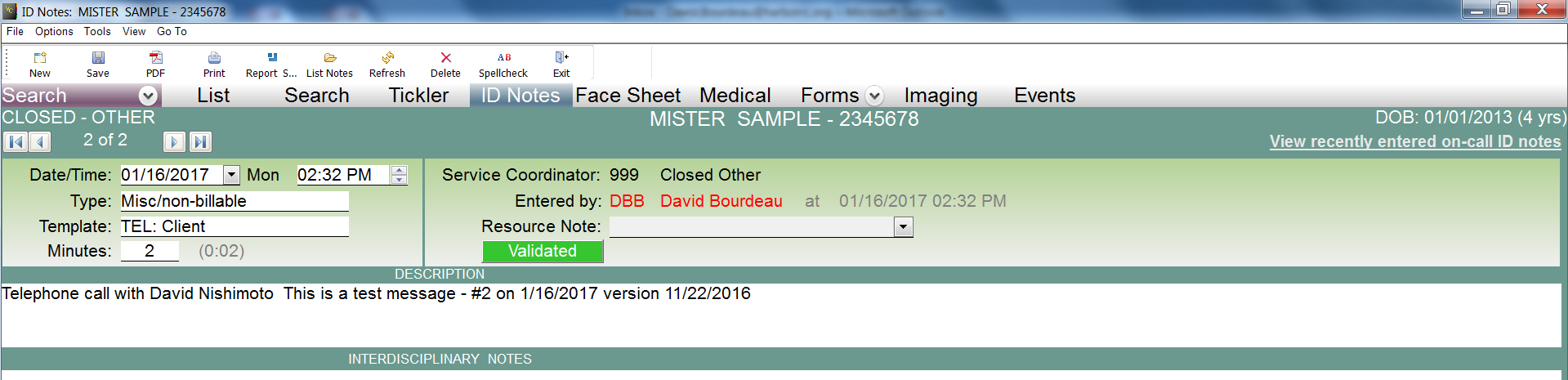
1. Forms
   1. Renamed **IFSP +3** Form to **Individual Person-Centered Plan**
      1. This has been in place for a while but was part of the update.



1. IPP
   1. INDIVIDUAL FAMILY SERVICE PLAN is finally be renamed to INDIVIDUAL PERSON-CENTERED PLAN in the IPP form.



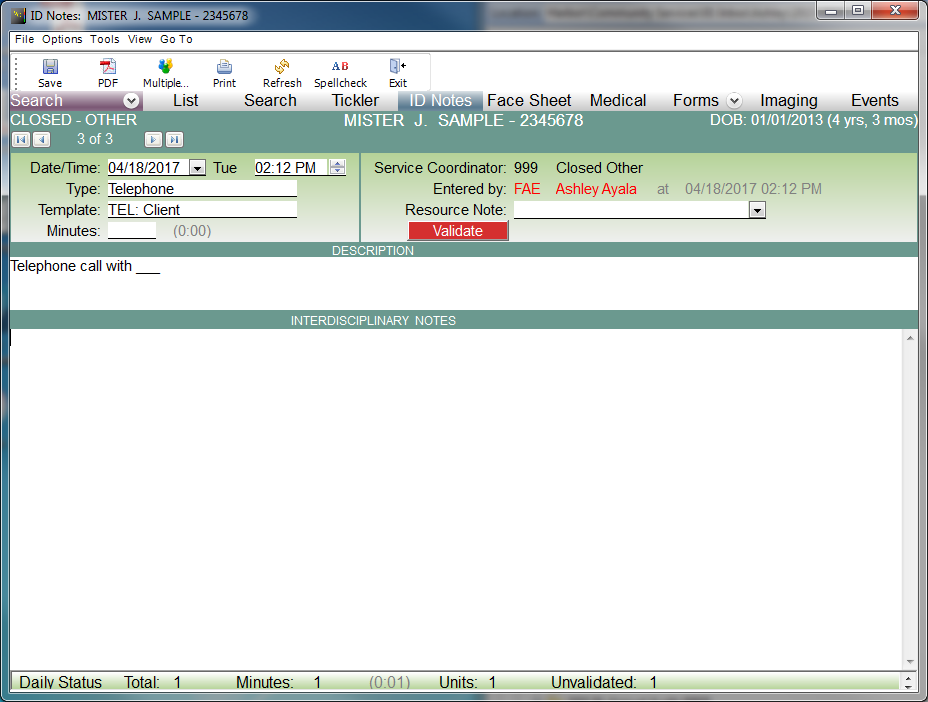
1. ID-Note entry screen
   1. **View recently entered on-call ID Notes**
   2. When clicked it pops open a window that shows a list of other people who have entered an ID Note for your client.



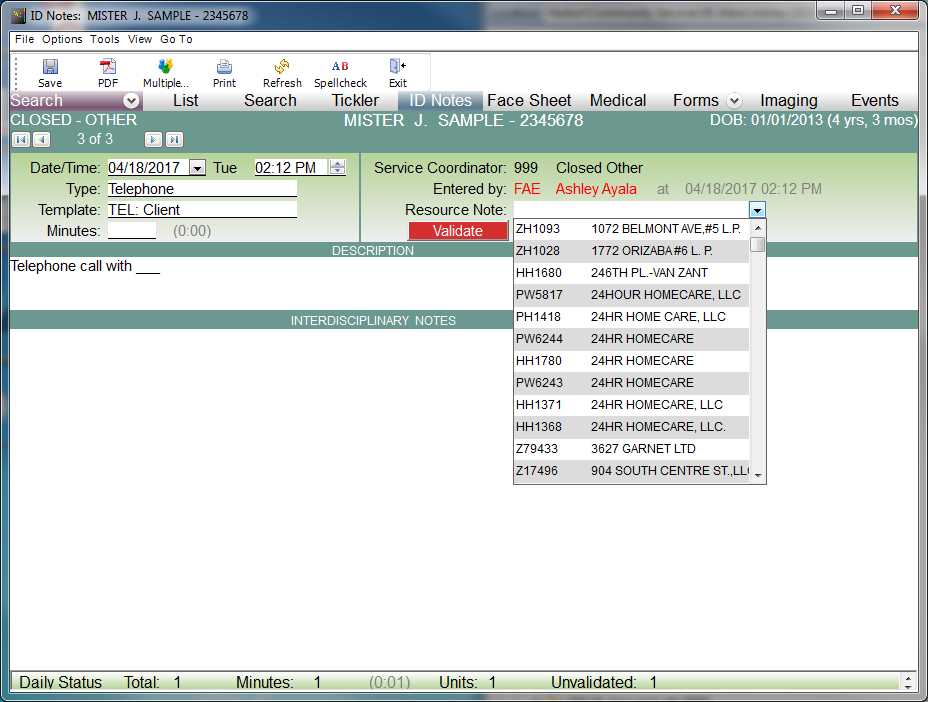
* 1. ID Note screen - # of Units changed to Minutes. We are working with RCOC to revert this to Units.
  2. ID Note Screen – Bottom of screen – View My Dashboard – RCOC purchased data visualization software to provide a more intuitive view into the individual SC performance by using graphs, charts and other data visualization techniques. We are NOT doing this today, but may look into it for the future.

**Client ID Notes**

1. The **ID Note** on the client record is a **green** template and has a **Resource Note** section.
2. If the **Resource Note** section is completed on the client side, the **ID Note** will automatically duplicate in Vendor record.

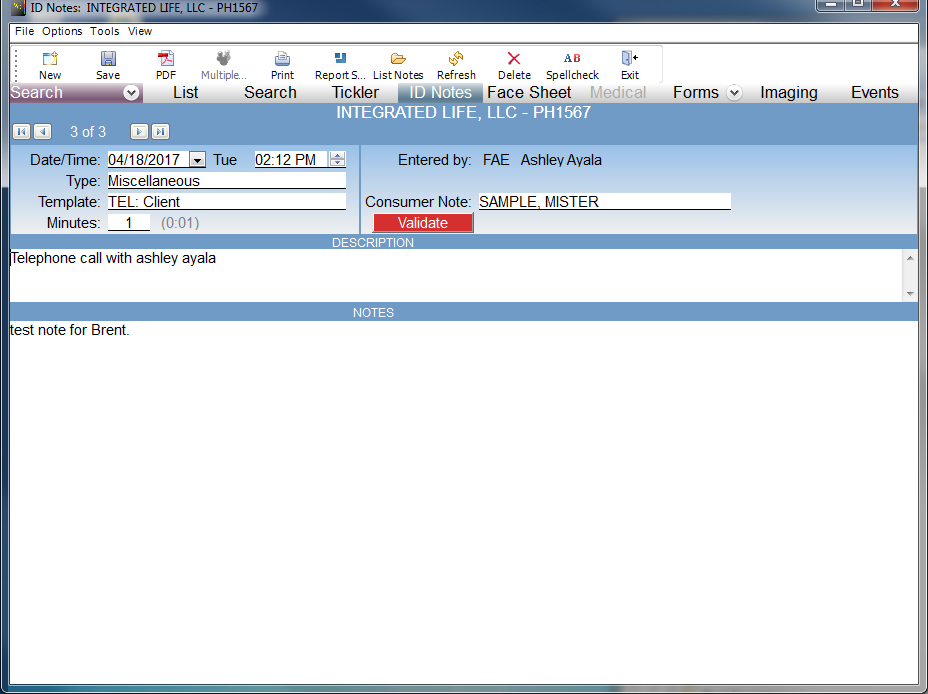


1. To populate the **Resource Note**, select the correct vendor number from the drop down menu. The **Client ID Note** will now be linked to the selected vendor file.
2. Select **Validate** to save the **ID Note**.

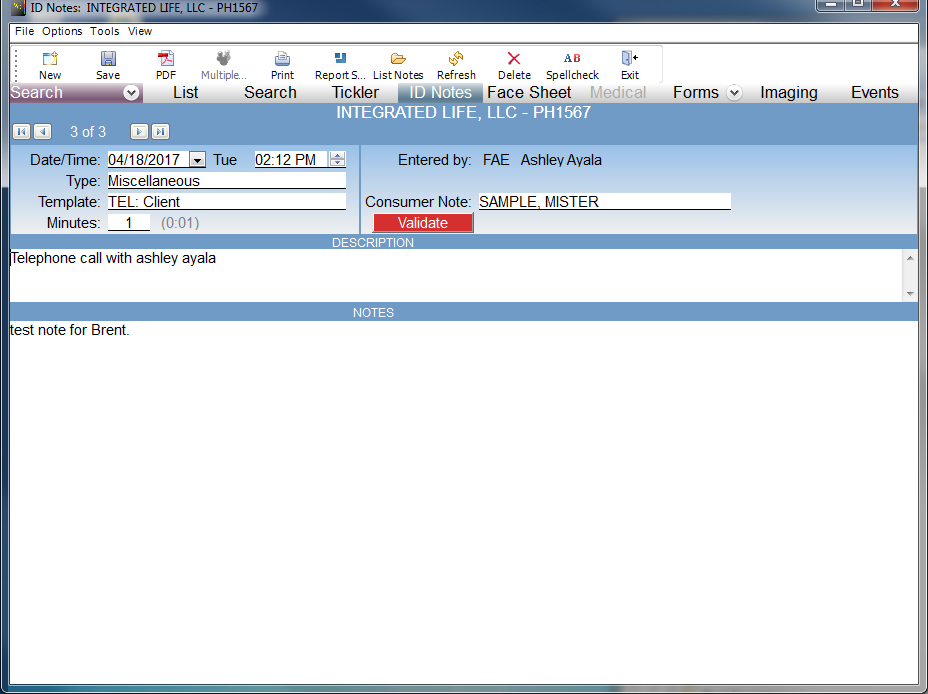


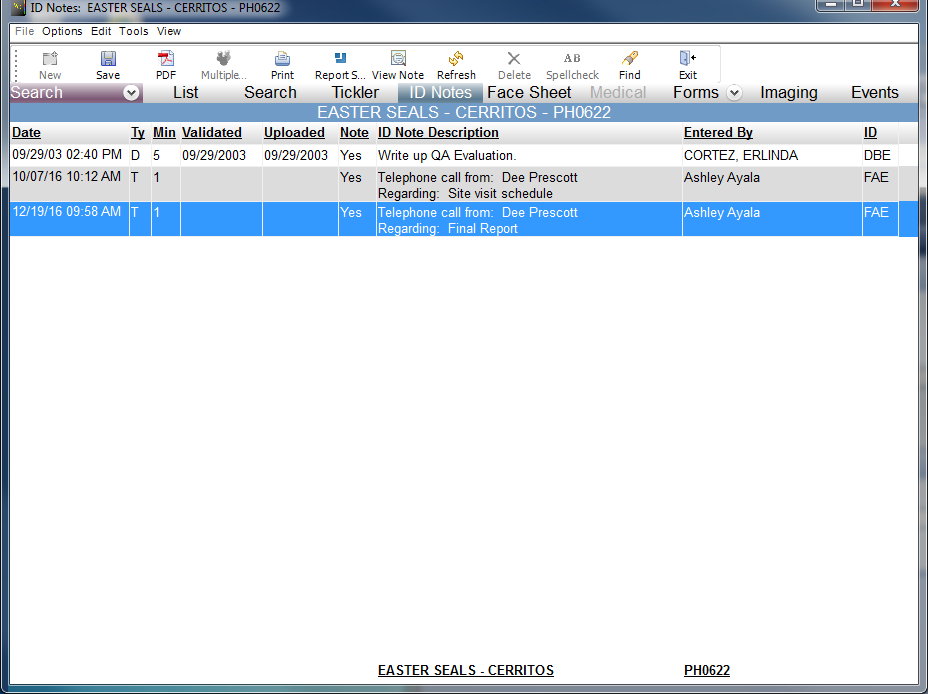
**Vendor ID Notes**

1. The **ID Note** in the **resources database** is a **blue** template and has a **Consumer Note** section.
2. If an **ID Note** was created in the **client database** and included a vendor in the **Resource Note** section, the client will now be listed in the **Consumer Note** section on the resources **ID Note** because they are linked.
3. An **ID Note** created in the **resources database** that includes client information in the **Consumer Note** section ***will not*** be linked to the client record. For a client specific issue that needs to become part of the client record complete the **ID Note** in the **Client database**.
4. Select **Validate** to save the **ID Note**.



1. The **List Notes** option allows you to view a list of the **ID Notes**. Available in both the **Client** and **Resources** databases.





Admin will begin inputting ID Notes for Vendors (Resources) only.

Circumstances for which ID Note creation will be forthcoming.

If we find that we do the same ID Notes repeatedly, we need to create a template to make it easier to do.