



InfoServ DDSM is an Internet-based consumer tracking and management tool for direct and indirect providers of service to individuals with developmental disabilities. It includes comprehensive individual records management, financial management, human resource tracking, employee training tracking, provider/agency facility tracking, as well as incident and investigation management. **InfoServDDSM** brings the entire circle of support together to collaborate on providing the planning and care most beneficial to the consumer and is available from anywhere in the world via the Internet. Integrated information from all parties involved helps keep everyone accountable and helps you become more efficient, more effective, and more proactive.

Key Features

- Anytime/anywhere access (no licensing restrictions on number of users and users may access from any computer connected to the Internet)
- Information may be shared among multiple providers, government, families, and advocates
- Low up-front costs; does not require a Local Area Network
- No additional staff needed for technical support
- Software upgrades are done on the server without the need to send out new versions or licenses
- Our systems have redundant storage capabilities with failsafe protection
- Central Administration and Backups are done by us
- Internet access can be limited to PHS applications only (Tunneling)
- Ability to integrate other Internet services (maps, Physician's Desk Reference, web-based email)
- A single source of data entry saves time and increases accuracy and accountability
- Help Desk
- Intra-agency messaging system allows for messages/reminders to be sent to any employee (with the ability to send a single message to many recipients) without anyone having to have an email account
- Employees' messages are displayed for viewing immediately after login

Security

- Proactive intrusion detection and monitoring capabilities
- 128-bit encryption and SSL3 capable
- Firewall protection at the router, web server, and database server
- Users login through a secured database login
- Users belong to a user group and inherit that group's rights
- Specific user rights may override their group rights
- A user may have Add/Edit/Read/Delete rights down to "No Access" for any specific module in the system
- Indirect providers (i.e. Independent Support Coordination or case management organizations, day providers, physicians, etc. can be granted the rights to specific individuals within the database if granted that privilege
- State governments have access ranging from full administrative and monitoring rights while being able to limit access by user by module, by county or by area/region

Flexible Design

- Ability to add new forms without programming
- Ability to interface with existing systems
- Statewide ability to add new pull-down categories and items without programming
- Provider may add new pull-down categories and items without programming
- Access can be limited based on the provider entity, the individual, the user group, or the employee
- Reporting at County, Regional, and State levels
- Providers may have "parent" provider agencies in the system in order to consolidate reporting
- Multiple fund categories and service groupings
- Reports are available in multiple formats
- Queries
- Custom reporting solutions are also available
- Centralized database -- *Microsoft's SQL Server*
- Unlimited number of individuals and transactions per individual
- Unlimited number of employees and users
- Unlimited number of sites
- Data validation and integrity are built in
- Scanning of outside documents and file attachments
- Content: News, links, regulations, laws, forums on-line
- Email Help Information and phone support
- On-line "movies" are available to teach users how to use specific parts of the system
- Web-based training
- Help manuals are designed for different user types (direct care professionals, managers, etc.) and are available on-line

Individual Records Management

- Comprehensive demographics kept for each individual
- Training specific to the needs of the individual are recorded and are available for direct care staff to view
- Quickly view information recorded for an individual in the last 24 hours
- Monthly Summaries/Reviews per individual automatically retrieve information gathered throughout the month on the individual (*automated reviews!*)
- Record eligibility information, Waiver certifications, etc.
- Schedule doctor visits, physicals, dental visits, etc.
- Enter follow-up information on completed doctor visits, physicals, etc.
- An individual's contacts (guardians, friends, advocates, etc.) may have multiple addresses, types/roles, and relationships
- Contacts may be marked as a Circle of Support Member, an Emergency Contact, or an ISC Contact while also maintaining their contact type of Guardian, Friend, Advocate, Parent, etc.
- Individual's Professionals (Doctors, Nurses, Neurologists, etc.) may have multiple addresses and can link to multiple individuals
- Unlimited Assessment Types (Doctor Visits, ENT Assessments, Nursing Assessments, etc.)
- Individual Support Plans (Personal Plans) are uploaded as file attachments but also show current ISP info gathered by the system from the different areas. On-going amendments to the plan are date/time stamped
- Behavior Support Plans, Grooming Plans, Meal Plans, etc. are entered or attached
- Daily Notes are analyzed and alerts are sent immediately to supervisors if key words (such as "police", "hit", or any words you choose) have been entered. This information helps supervisors monitor whether or not Incidents may have occurred that have not been recorded
- Community Participation outings can be scheduled and/or tracked and include billing units and detailed note sections
- Personal Assistance Notes are tracked and include billing units and detailed note sections
- Follow-Along Notes can be entered for vocational rehabilitation participants
- Nurse Notes are tracked
- Support Notes for Independent Support Coordinators track face-to-face visits, general notes, home visits, provider visits, and outcome notes
- Legal forms such as the Authorization to Release Information and Freedom of Information forms are available to fill out and later view per individual
- Insurance policy detail is kept per individual
- Management of consumer funds through our Checking and Batch Checking modules
- Inventory an Individual's personal property
- State tagged property can be tracked from individual to individual
- "Health Charting" tracks medical conditions, medical supplies, weight records, seizure records, behaviors, medical devices used, diet changes, and many other similar categories per individual
- "Diagnoses" tracks each diagnosis per individual (MR Level, AB Level, DSMIV, and Dual Diagnosis)

- “Movement” keeps track of where the individual has come from (an institution, an ICF/MR, etc.)
- Medication history
- Director’s medication checklist/survey
- Track current medications and prescriptions
- Medication scheduling through a calendar interface
- Medication administration
- Medication alerts warn supervisors when scheduled medication has not been given within a specified time
- Medication refill/reorder tracking
- Medication errors logged
- Outcomes, actions, status records, implementation strategies and progress notes are tracked
- Current and prior services per individual are reportable
- An Audit Trail is built into the system. Management has the ability to track who added, edited, deleted, and who viewed any records in the system
- Cost Plans and Service Plans include “Authorization” date/time stamps and authorization histories so that lapses in authorizations may be determined
- Therapy Progress Notes link to Outcome Actions and Services and compare units used to approved units
- Therapy Progress Notes automatically compute billable units based on start and end times – automatically compute mileage based on starting and ending odometer readings
- Missed Units and Missed Unit Reasons are tracked for Therapy Progress Notes
- Therapy agencies can create timesheets with billable and non-billable time entries
- Client Referrals information is tracked
- Individuals can be selected by name, by site, or from a list of “alternates”
- Driving Directions are available from and to any location automatically

Incidents and Investigations (Protection from Harm)

- Incidents and Investigations are created on-line and are available to monitor in real time
- Incidents can be emailed to appropriate parties
- Incident alerts are automatically emailed to all concerned parties when an incident is added
- Case managers may view only incidents from their case load
- Incident Coordinators have full access to all incidents and investigations and follow-up
- Track multiple Committee Review Meetings per incident
- Multiple follow-up tasks per Committee Review Meetings are tracked
- Incident and Committee Review Meeting reports include Electronic signatures
- High-risk reviews, other reports, and follow-ups
- Trending analysis and queries are available
- Committee Review Meeting reports ensure that meetings on each incident have occurred

Billing Features

- Last year's Service Plans may be renewed with the click of a mouse
- View Pending Service Plans (or by any disposition, by Support Coordinator, by ISP Effective Year, by Plan Type with flexible sorting/display)
- Email Service Plans with pre-attached ISP, Amendments and other supporting documentation
- A disposition history is recorded for every service plan record
- Detailed service appeal information may be recorded and State authorities can provide immediate feedback on service plan dispositions
- Service plan services and agencies are chosen through easy-to-use pull-down menus
- "Days remaining" for a State response (approval/denial) are calculated and displayed for each plan record
- Cost Plan can be automatically generated from a State-approved Service Plan
- Payments made are compared against potential maximum income
- Electronic Billing -- Attendance per site and per individual entered by providers and ISC agencies automatically feeds into billing
- Monthly maximums, monthly caps, and period caps are tracked
- A real-time billing calendar is included (compare units used to units approved at any time!)
- Track billing adjustments and exceptions
- Bridge billing income and receivables to existing accounting systems
- Batch Checking feature makes managing multiple individual/consumer checking accounts easier by splitting utilities, grocery bills, etc. by home
- Batch Checking invoices carry forward to next month for quick adjustments
- Flexible reports allow for many different filtering combinations

Employee Training Tracking and Human Resource Management

- Create Training Schedules in InfoServ DD and all employees can immediately see what classes are available
- Let the system determine which training and certifications courses an employee needs
- Courses may be State mandated, agency specific, or both
- Enter courses in batch or by individual
- Report successful/unsuccessful completion of course material
- Tickler reports show which employees are due for follow-up training
- Employees can have multiple positions/titles
- Track the sites/locations from which employees are allowed to work
- Employee driving/transportation information (State required)
- Employee health information (State-required)
- Pre-employment screening and other information (Abuse registry, personal reference checks, work reference checks, background checks, drug test results)
- Post-employment (termination) information
- Prior employment history remains available (unlimited employment periods are tracked for returning employees)



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- Employee Bonuses may be tracked with collaborative input from multiple managers/parties
- Employee benefits
- Workers Compensation Claims
- W4 information is tracked (also track garnishments)
- Applications for Employment are on-line
- Applicants may be converted to employees
- Job vacancies are tracked
- Disciplinary actions are tracked
- Change of Employment Status
- Work Scheduling is made easier through the selection of default shift schedules
- Employee Time-Keeping - Logins/logouts tracked now with the physical location being recorded (to prove that employee was at correct site/home at time of punch-in/out)
- Employee evaluations
- Additional documents may be scanned or attached to an employee's record
- On first login, employees are prompted to update their personal information (to ensure accuracy of information and to lessen the burden of data entry on human resource personnel)

Provider/Agency Facility Tracking

- Licensure information is available per site/home/facility
- Fire Drills are recorded per site/home/facility
- Weather Drills are recorded per site/home/facility
- Evacuation procedures per site/home/facility are tracked
- Record Residential Site Visits
- Record Casual Site Visits
- Director's Medication Checklist (per site)
- Directions to each site/home/facility are provided
- Download blank forms prior to system use to get employees familiar with the new system

Reports and Queries

Report by individual, provider, county, region, class, or state levels.

- Demographic information / Personal Information "Face Sheets" (with photograph)
- Scheduled Appointments
- Addresses (nearest hospital, residence, etc.)
- Contacts (parents, guardians, conservators, advocates, etc.)
- Contact Note Reports show contacts made, method, date/time, and notes
- Professionals (Primary Care Physician, Neurologist, etc.)
- Waiver Re-certifications due
- Physicals due, and other encounter types
- Legal forms
- Consumer Funds (checking) reports



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- Personal property listings
- Health Passport
- Services and service providers
- Medical conditions, medical supplies, medical devices
- Seizures
- Weight records
- Behaviors
- Incidents and Investigations
- High Risk reviews (multiple formats)
- Incident Trending analysis reports
- Incident Committee Review Reports
- Incident Committee Review Task Lists
- Daily notes and signature log
- Individual Support Plan
- Individual Support Plan Amendments
- Behavior Support Plan
- Outcomes, Behavior Outcomes, ISP Outcomes, “Other” Outcomes and Actions
- Outcome Status Report
- Implementation Plans/Strategies and Implementation Progress Notes
- Therapy Progress Notes
- Client Referral Lists
- Assessments (multiple formats and types)
- Monthly Summary/Review
- New Employees Report
- Employee Training Roster
- Employee Training Tickler Reports
- Employee Demographics
- Default Shift Schedules
- Employee Work Schedules
- Employee Timesheets
- Employee Login/Logouts
- Professionals and individuals served (agency view, State view)
- Contacts and individuals related to them (agency view, State view)
- Service Plans
- Cost Plans
- Billing – Paid, Unpaid, Rebills, by period, by billing cycle (by person, by site, by agency, by State)
- Billing Adjustments (by person, site, agency, State)
- Chart of Accounts Export Reports/Files
- State services listings by group, by fiscal year
- Batch Checking Invoices per individual and per home
- Caseload Weighting Report accounts for class member weighting vs. non-class member weighting
- Master Caseload Report for ISC Agencies
- Caseload Report by Discipline/Department for Therapy or Provider Agencies
- The Monthly Tracking report shows re-certification and physical dates, ISP effective and meeting dates, doctor and dental visits, quarterly medication dates for provider



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agencies and substitutes face-to-face and home visit dates for medical dates for the ISC agencies

- Professionals are listed with the individuals they serve
- User-Defined Queries let you choose the fields to display as well as the selection criteria and sort order
- Electronic Signature technology may be applied to any report or form
- PCP/Specialist Chronological report shows visits to PCP's and Specialists
- "Last 24 Hours" shows notes, appointments, outings, and medications recorded since yesterday's date

(The above represent a list of example reports in the system and may not include all available reports and queries.)



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The *Practical* Solution

(For more information, go to <http://www.practicalhealthsystems.com>)

PHS delivers a total solution to your organization.

- We offer email accounts to you for your employees that have your organization's domain name (i.e. **jd@yourorganization.org**).
- We provide wiring, dialup and broadband Internet connectivity solutions
- We provide HIPAA compliant solutions for dialup and broadband Internet connectivity
- We provide your organization with the training you need in order to successfully implement and use InfoServ DD
- We listen to your suggestions and continue to enhance InfoServ DD
- We provide custom reporting, training, and programming services for your organization to meet your specific needs

Recommended/Optimum System Requirements:

- Intel Pentium II at 500 MHz or higher
- Hard drive with 10MB of free disk space
- Internet Service Provider (ISP) account
 - Remote locations – 56k Virtual Private Network (VPN)
 - Broadband – T1, DSL, ISDN
- Microsoft Windows 98 Second Edition, 2000, NT, ME or XP
- Microsoft Internet Explorer 6.0
- Mouse or compatible pointing device
- Keyboard
- SVGA monitor (800 x 600 with High (16 bit) Color) or higher
- Compatible printer and multi-page scanner
- Email account

**Practical Health Systems, Inc.* recommends checking the web site <http://www.windowsupdate.com> as part of the configuration/installation process to ensure that you have the latest security patches for your browser. Browsers and patches are provided free of charge. Flash components and an ActiveX viewer will be downloaded automatically upon first use (if not already present on your machine).



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