

MediSked Solutions

An Introduction Prepared for Providers



Agenda & Introductions

- **Background**
- **MediSked Solutions**
 - MediSked Connect
 - MediSked Portal
 - MediSked Connect Exchange
- **Questions and Next Steps**



Rachel Hendrickson
Solutions
Representative

About MediSked

- Founded in 2003. Headquartered in Rochester, NY with business offices in Silver Spring, MD & Lewiston, NY.
- Solutions and services span the complete spectrum of human service provision - from oversight & insurance organizations to providers
- Advisor Council is composed of long time human service professionals, offering guidance, input and recommendations on organizational, ethical and operational direction for the company
- Provide solutions in 39 US States supporting records of over 220,000 individuals



Memberships + Affiliations



Involvement with Community and Partner Agencies



MediSked Solutions are Nationwide



Fully Integrated, Patent-Pending Assessment Application for Individuals with I/DD



Powerful Care Management and Service Coordination Platform



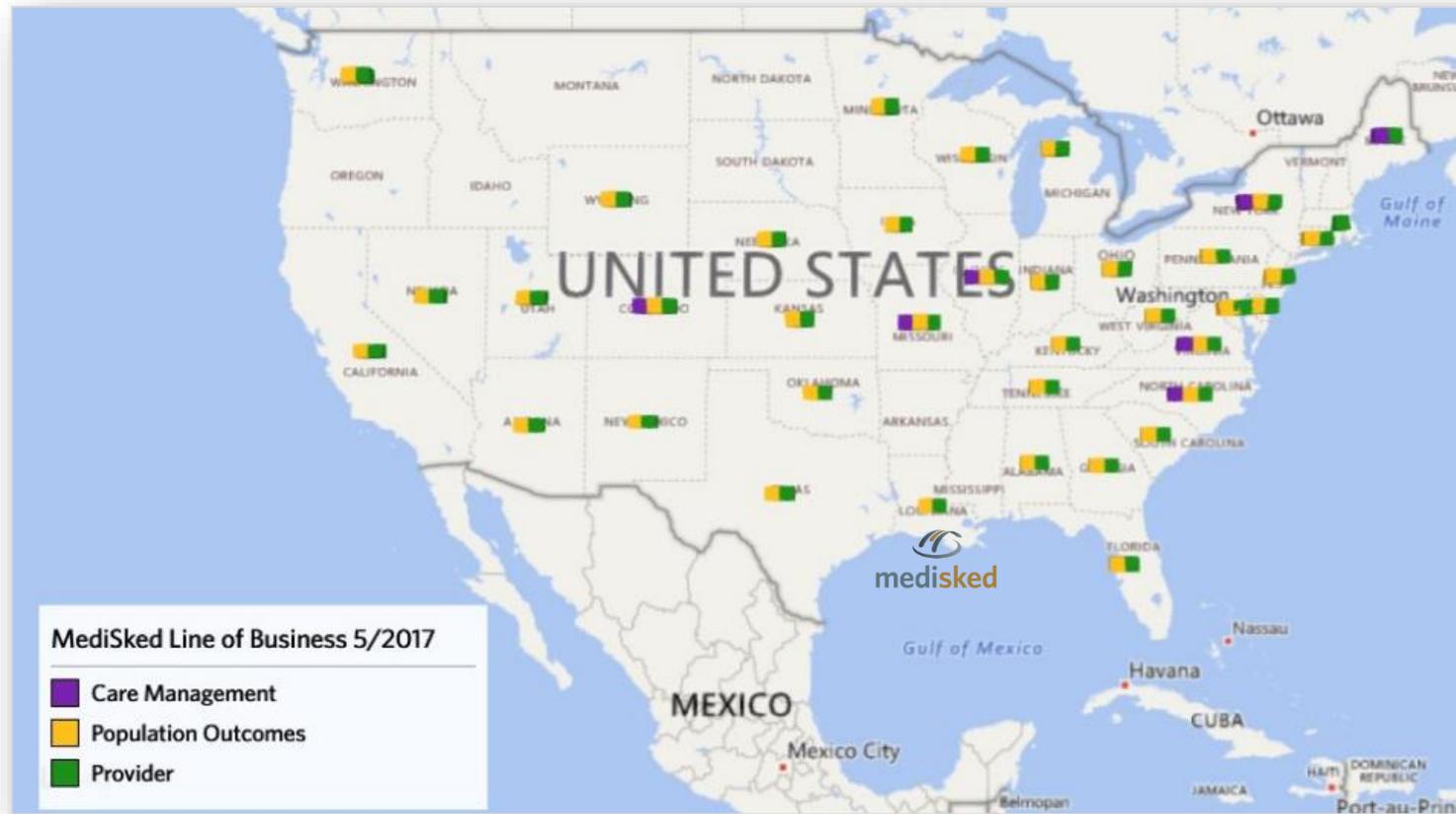
Person-Centered Portal for the Individual, Providers, and Interdisciplinary Team



Population Health, Outcomes, and Compliance Reporting and Analytics



Third-Party System Integrations



MediSked Solutions Support:

- Individuals & their Circles of Support
- Provider Agencies
- State & Administrative Oversight
- Care Coordination Organizations
- HCBS State Transition Requirements
- CMS Final Rule Implementation Plans
- Provider Health and Capacity Challenges
- Quality data collections, analysis and visualization

ROCHESTER, N.Y. & LOUISVILLE, Ky.--(BUSINESS WIRE)--MediSked, LLC, a leader in human services technology solutions, and ResCare, Inc., one of the largest providers of community care in the U.S., today announced that ResCare has selected MediSked's integrated software suite to underpin its Connected Home care model – delivering new tools to support workplace efficiency and job enhancement and to pursue continued advancements in safety, quality and compliance so that people can live their best life.

@ResCare has partnered with @MediSked to deliver new EHR care solutions #ConnectedHome #EHRsolutions

 Tweet this

“Our partnership with MediSked sets another precedent in our industry,” said ResCare President and CEO Jon B. Rousseau. “With the addition of an electronic health record (EHR) to our industry care management solutions that include pharmacy, behavioral health services and remote monitoring and caregiving technologies, we’re establishing a Connected Home model of care across the breadth of our states and people served, today and over the coming years. Our model will lead the way for needed innovations in care solutions

that push our industry forward to work smarter, improve connections across teams and homes, and improve the quality of care and safety outcomes for individuals in the communities we serve – helping them to live their best life.”

ResCare will implement MediSked Connect – *Agency Management Platform* and MediSked Portal – *Person-Centered Platform* to deliver EHRs and personalized collaboration, communication and empowerment tools across its Residential Services operations serving people with intellectual and developmental disabilities (IDD). ResCare will also deploy MediSked Connect Exchange – *Multi-Agency Business Intelligence Platform*, to unify operational, financial and care management data from multiple, disparate systems and make it available for monitoring, analysis and reporting. Together, these tools will provide ResCare access to actionable alerts, trends and predictive analytics to identify risks and improve outcomes – helping individuals supported with home and community-based services (HCBS).

“At MediSked, we are constantly asking how we can deliver the best solutions to drive operational efficiencies, improve outcomes and provide support, empowerment and independence to individuals,” said Doug Golub, president of MediSked. “Our platforms are uniquely positioned to support ResCare’s Connected Home initiative, augmenting its existing investments in pharmacy solutions, smart home monitoring and remote telecaregiving and telehealth. By combining best-in-class technology and high-quality, outcomes-based services

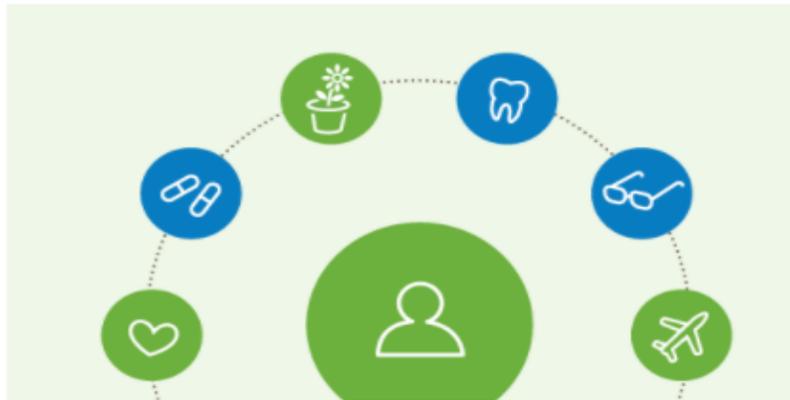
“A best-in-class EHR and accompanying connectivity, data warehouse and analytics solutions like we see with MediSked is a linchpin to better service models and our Connected Home build-out, and we look forward to a partnership with them,”

Mark Gildea, president of ResCare’s Residential IDD business

Your Person-Centered Life Plan

We don't tell you what you need. We ask you what you want and then work to make it happen.

How we build a Life Plan with you at the center



Qui
Abo
Finc
Lea
—

Overview of the Life Plan and Integrated Care

The goal of PHP Care Complete FIDA-IDD Plan for adults with intellectual and other developmental disabilities (IDD) is to enable our participants to be as healthy, happy, and independent as possible. We integrate preventive and wellness services, medical and behavioral healthcare, personal safeguards and habilitation to support each participant's personal dreams in a state-of-the-art documentation system called the Life Plan. The Life Plan is an innovative approach to supporting persons with IDD.

The Life Plan incorporates two major components: "Personal Safeguards" and "Valued Outcomes." The Personal Safeguards section lists all actions needed to keep our participants safe and healthy, including health care, nutrition, fire safety, and personal supports, among others. A participant

- Software vendor behind first fully-integrated dual Medicare/Medicaid managed care plan in the US (FIDA-IDD)

- Partners Health Plan – New York



Solutions Suite



Mobile platform to capture and catalog accurate, relevant, and timely assessments



Brings all of the daily elements of long-term service and support coordination together for more timely, effective communication



Arms stakeholders with data integration and data warehousing tools for actionable alerts, trends, and predictive analytics to lower risks and improve life



Provides a window to what is happening in a person's life, connecting their circle of supports through interactive empowerment tools



Centralizes and manages information to create efficiencies across provider agencies

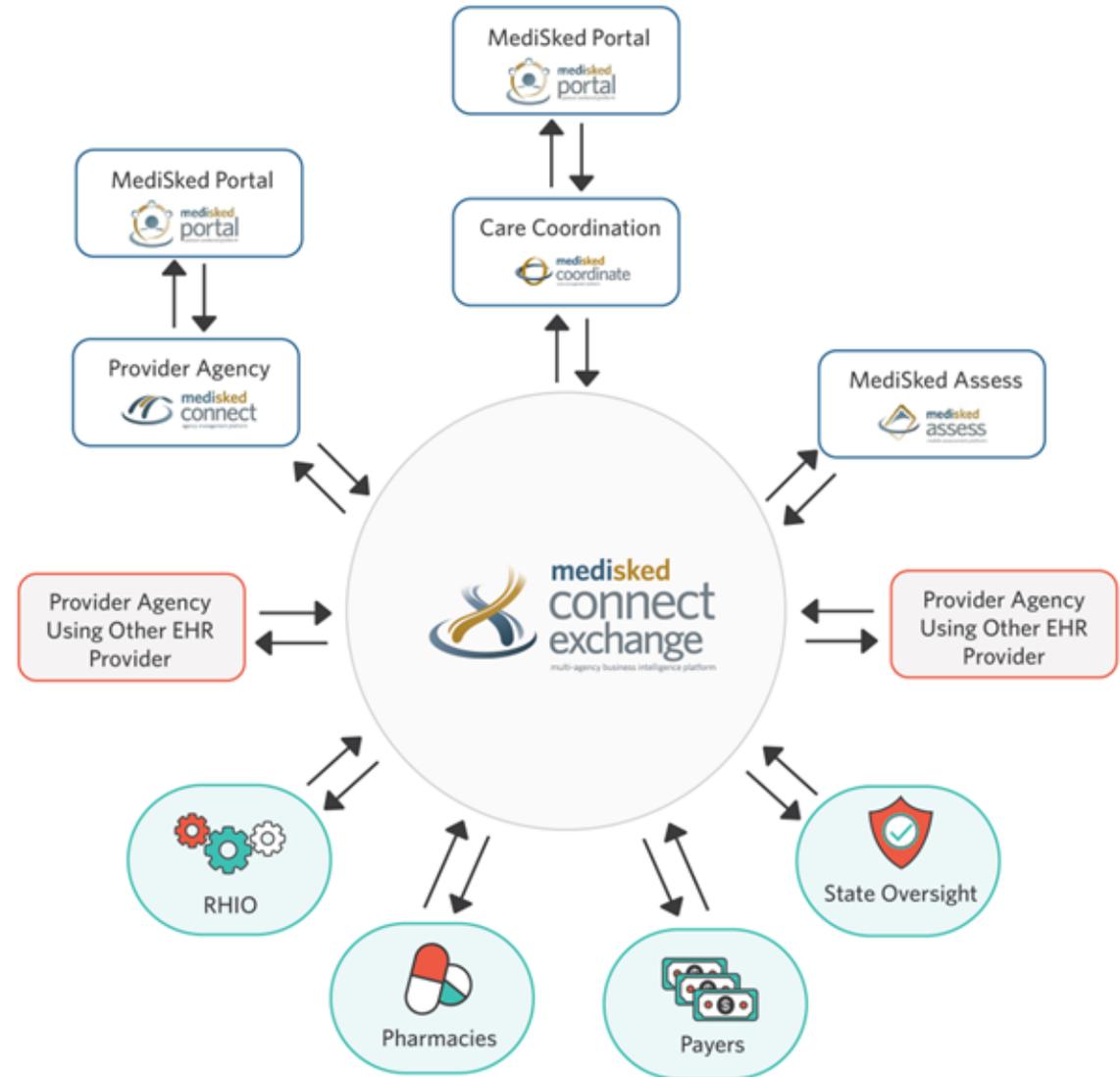


medisked

&

Integrated Systems

The leading brand in holistic solutions that improves lives, drives efficiencies and generates innovations for human service organizations that support our community



MEDISKED CONNECT EXCHANGE
Multi-Agency Business Intelligence
PLATFORM

MediSked Connect Exchange – Multi-Agency Business Intelligence Platform

MediSked Connect Exchange allows for more sophisticated data interface and reporting capabilities. A multi-agency business intelligence platform, MediSked Connect Exchange can be leveraged to expand the breadth of available data and supercharge traditional care coordination tools and workflows.

The dashboard provides a comprehensive overview of system metrics and member information. The 'At a Glance' section includes:

Metric	Value	Change
TOTAL ACTIVE MEMBERS	395	+25 (6.76%)
TOTAL ACTIVE PROVIDERS	23	+16 (228.57%)
TOTAL ACTIVE FACILITIES	2,035	+589 (34.55%)
TOTAL DATA SOURCES	11	No change
TOTAL ACTIVE DATA FEEDS	33/33	No change
UNMATCHED MEMBERS	0	No change
PENDING ENROLLMENTS	7	No change
PENDING DISENROLLMENTS	0	No change
VOIDS	2	No change
INCIDENTS	0	No change

The 'Enrollment History' chart shows the following trends from 4/1/2016 to 11/1/2016:

Month	Monthly Enrollment	Monthly Disenrollment	Cumulative Enrollment
4/1/2016	~50	~5	~50
5/1/2016	~100	~5	~150
6/1/2016	~150	~5	~250
7/1/2016	~200	~5	~350
8/1/2016	~250	~5	~450
9/1/2016	~300	~5	~550
10/1/2016	~350	~5	~650
11/1/2016	~400	~5	~750

Member Details for Boop, Beatrice ("Betty"):

- ID: 000100010 | Gender: Female | Age: 59 years | Status: Active
- Address: 55 Maple Lane, Apt. 100, Piquanville, FL 32888
- Contact: Cell Phone (381) 555-4300, Email boopboop@booppl@gmail.com
- Demographics: Date of Birth, Age 59, Gender Female, Marital Status, County of Residence Montgomery, County of Fiscal Responsibility Montgomery, Regional Service Office Bethesda



Real-time population management and enterprise reporting

The screenshot displays the Medisked Connect Exchange interface. On the left is a navigation sidebar with icons for Home, Reporting, Transactions, Members (highlighted), and Admin. The main content area is titled "Member Map" and features a map of the New York City area with colored markers (yellow, green, orange) indicating member locations. To the right of the map are controls: "Select Cohort...", "Hide List", and "Zoom to Fit". Below the map is a list of member profiles, each with a profile icon, name, and details:

- Duck, Daffy**
Member ID 45000227
Gender: M | Age: 47 | Status: Active
[Member Details](#)
- Fudd, Elmer**
Member ID 45000225
Gender: M | Age: 65 | Status: Active
[Member Details](#)
- Devil, Taz**
Member ID 45000221
Gender: M | Age: 62 | Status: Active
[Member Details](#)
- Coyote, Wiley**

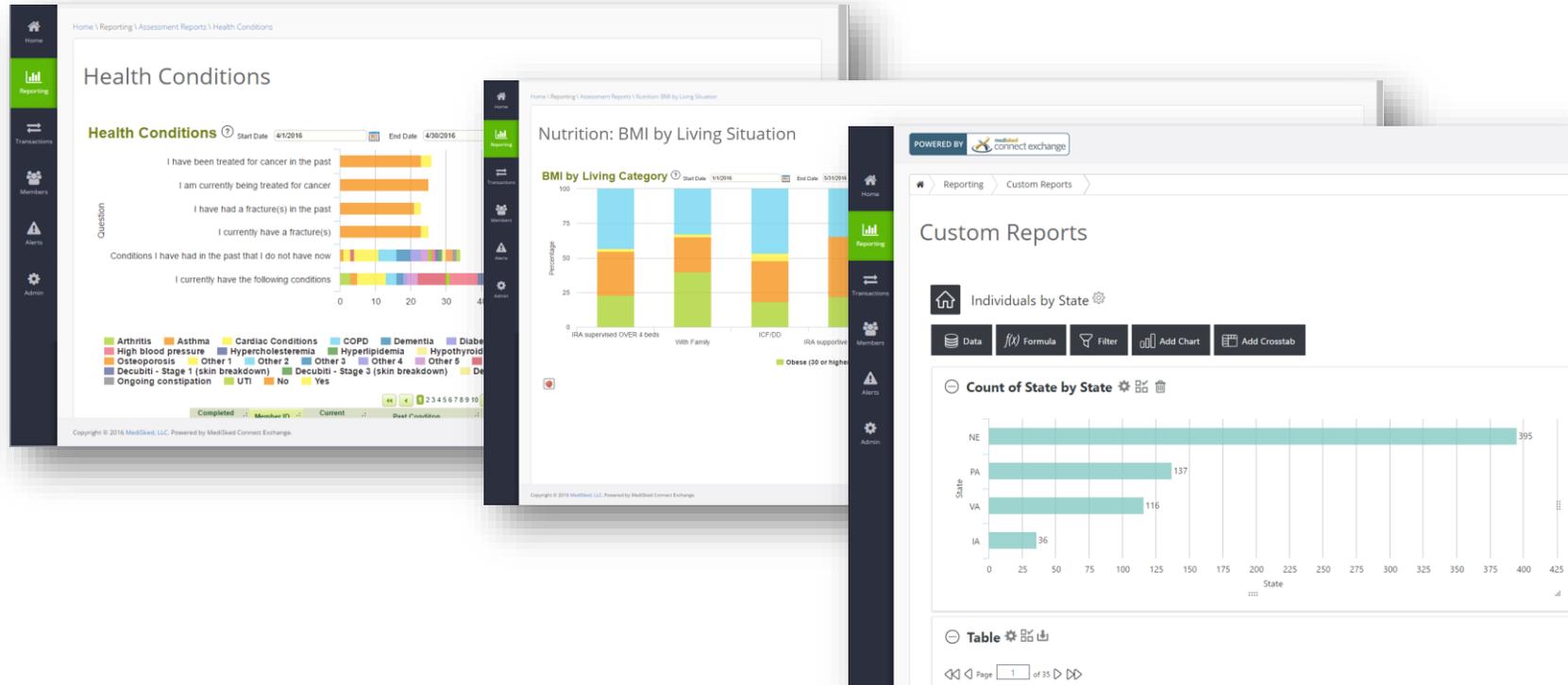
Below the member list is a detailed form for a member named "Avalon". The form includes fields for:

- Member Details:** First Name (Ela), Middle Initial, Last Name (Avalon), Street 1 (2763 S. Main Street), Street 2, City (Chambers), ZIP (13325).
- Demographics:** Date of Birth (02/17/1938), Age (79), Gender (Female).
- Service Eligibility:** Line of Business (AmeriHealth Caritas Pennsylvania D-SNP), Social Security (123456789).

At the bottom right of the interface is the "medisked connect exchange" logo with the tagline "multi-agency business intelligence platform".

A connected agency means better care.™

Connect Exchange includes powerful reporting tools and a custom report builder



Benefits of RHIO/HIE Integration

- Allows for a more comprehensive Individual record in the MediSked systems, allowing team members to see a broader view of the individual
- Ability to share LTSS and social data with RHIO/HIE partners, improving access to unique but relevant data for other providers working with the individual
- Ability to run more comprehensive reports within MediSked Connect Exchange, stratifying members, developing more specific cohorts



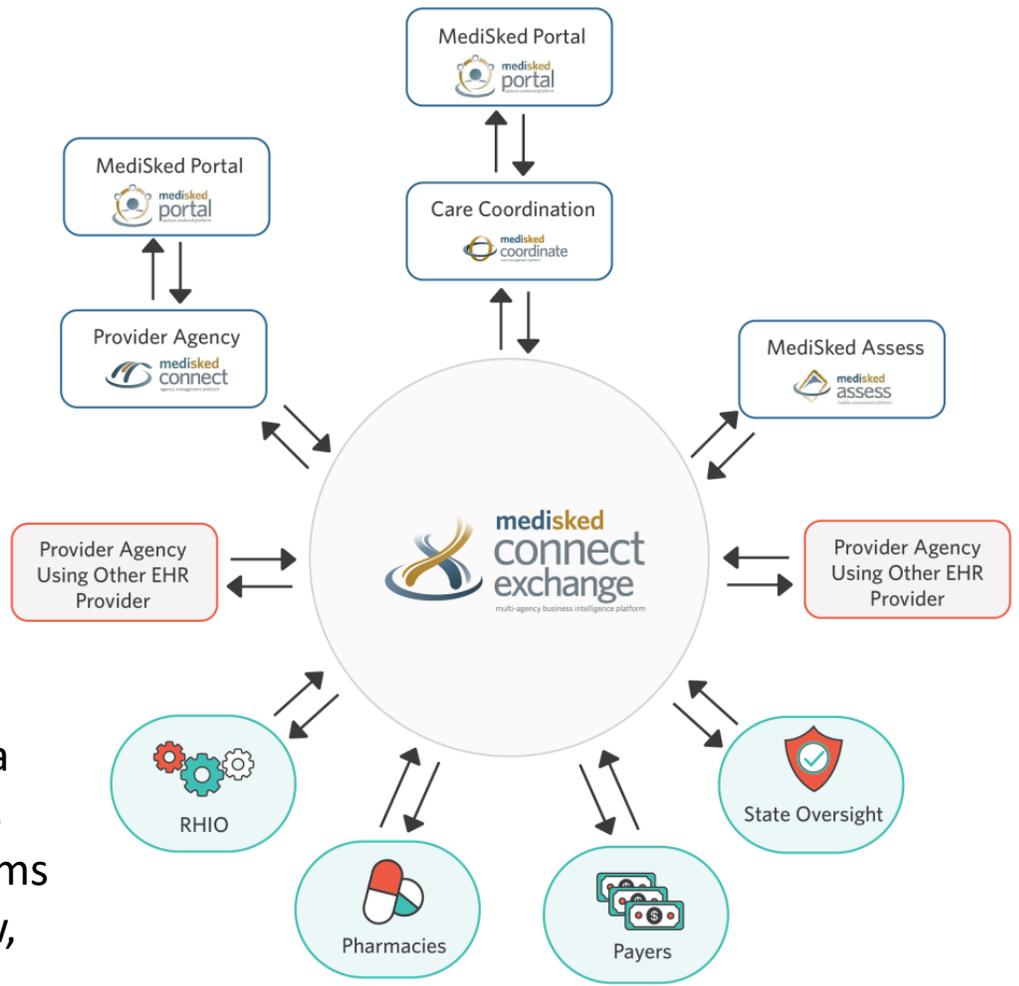
A screenshot of the Clinisync website. The header includes the Clinisync logo, a link to 'VIEW MORE ON YOUTUBE', and navigation links for 'CLINISYNC SERVICES' and 'MEANINGFUL USE & MORE'. The main content area is split into two columns. The left column is orange and features the title 'OHIO HEALTH INFORMATION PARTNERSHIP' in white. Below the title is the address: '3455 Mill Run Drive, Suite 315, Hilliard, OH 43026'. There are two phone numbers listed: '614.664.2600' and '888.390.7274'. At the bottom of this column are three white buttons with red icons: 'OUR BOARD' (people icon), 'OUR STAFF' (person icon), and 'CONTACT US' (envelope icon). The right column is grey and features the title 'PRESS RELEASES' in white. It lists three press releases with dates in teal boxes: 'NOV 18 METROHEALTH JOINS CLINISYNC HEALTH INFORMATION EXCHANGE', 'OCT 31 COLUMBUS HEALTH CENTERS "GO ELECTRONIC"', and 'SEP 9 OHIO'S CLINISYNC HEALTH INFORMATION EXCHANGE CONNECTING MORE THAN 100 HOSPITALS'. At the bottom of this column is a red button with white text: 'View More Press Releases'.



The CERIDD Mission:
Using health care and LTSS data to improve the quality of lives and health care of individuals with intellectual and developmental disabilities while reducing cost.

A multi-agency business intelligence platform, MediSked Connect Exchange serves three primary purposes:

- Interface engine**, to support real-time, bi-directional data sharing and alerting between multiple software platforms
- Data warehouse**, to store data from the connected systems
- Business intelligence tools**, allowing users to create, view, share and download reports and to drill down at the organization, agency and individual level.



Connect Exchange is an **Interface Engine**

Connecting data sources for real-time data sharing

 Home
 Reporting
 Transactions
 Members
 Alerts
 Admin

Home
Transactions
Data Sources
Data Source Details
Transaction History

HealthSmart

Data Feed

[Data Feed Details](#)

Feed Name	Feed ID	Source	Destination	Version	Test Status	Prod Status
Authorizations	3308a516-70d3-4628-a9dc-fc87ee0c5af7	PHP Care Coordination (MediSked Coordinate)	HealthSmart		✔	✔

Transaction History (4/1/2017 - 4/5/2017)

Set Reporting Period
View All Transactions
Columns ▾
Restore Columns
Clear Filters
Export ▾

Date/Time ▾	Transaction ID	Record Count	Message Status	Detail
04/05/2017 1:00 AM	526272	1	OK	
04/04/2017 1:00 AM	526214	3	OK	
04/03/2017 1:00 AM	526201	70	OK	

◀ 1 ▶
15 items per page
1 - 3 of 3 items ↻

Error History (4/1/2017 - 4/5/2017)

Set Reporting Period
Clear Filters
Export ▾

Date/Time ▾	PHP Member ID	Error Batch	AuthID	Action Type	Last Name	First Name	Error Message	SSN
04/04/2017 2:00 PM	4500002254766	532	5050	A			MS Auth - Duplicate AUTH ID: 000002355-001	
04/04/2017 2:00 PM	4500002266447	532	5012	A			MS Auth - Duplicate AUTH ID: 000002101-001	
04/04/2017 2:00 PM	4500002270943	532	5057	A			MS Auth - Duplicate AUTH ID: 000002358-001	



Connect Exchange is a **Data Warehouse**

Storing disparate data from connected systems

The screenshot shows a web-based interface for managing data entities. On the left is a navigation sidebar with icons for Transactions, Members, and Admin. The main area is titled 'Details' and contains the following information:

- Name:** Billing File Summation
- Description:** (empty field)
- Entity Type:** Non-UI Entity

Below the details is a 'Query' section. It features a tree view on the left showing a database named 'mediskedcxdw' with schemas 'coredata' and 'dbo'. Two query windows are open:

- BillingFileSummation (dbo):** Lists columns with checkboxes: BillingFileID (int), TradingPartnerName (nvarchar(500)), StartDateTime (datetime), EndDateTime (datetime), Timestamp (datetime), FileName (varchar(500)), TotalBilling (float), NewBilling (float), PayeeCode (varchar(200)), ConnectVoidCount (int), and ConnectAdjustmentCode (int).
- Data_Source (dbo):** Lists columns with checkboxes: Data_SourceID (int), Data_SourceGUID (uniqueidentife...), DisplayName (nvarchar(200)), and TradingPartnerName (nvarchar(500)).

A blue arrow points from the 'TradingPartnerName' column in the 'BillingFileSummation' window to the 'TradingPartnerName' column in the 'Data_Source' window. Below the query windows is a table with the following columns: Visible, Expression, Column Name, Sort Type, Sort Order, Aggregate, Grouping, Criteria, Or..., and Or... The table contains three rows of data:

Visible	Expression	Column Name	Sort Type	Sort Order	Aggregate	Grouping	Criteria	Or...	Or...
<input checked="" type="checkbox"/>	dbo.BillingFileSummation.BillingFileID					<input type="checkbox"/>			
<input checked="" type="checkbox"/>	dbo.BillingFileSummation.TradingPartnerName					<input type="checkbox"/>			
<input checked="" type="checkbox"/>	dbo.BillingFileSummation.Timestamp					<input type="checkbox"/>			



Connect Exchange is a **BI Toolset**

Enabling real-time data visualization, reporting, alerting

Home Reporting Transactions **Members** Admin

Members Map

Member Map

Select Cohort... Hide List Zoom to Fit

Duck, Daffy
Member ID 45000227
Gender: M | Age: 47 | Status: Active
Member Details

Fudd, Elmer
Member ID 45000225
Gender: M | Age: 65 | Status: Active
Member Details

Devil, Taz
Member ID 45000221
Gender: M | Age: 62 | Status: Active
Member Details

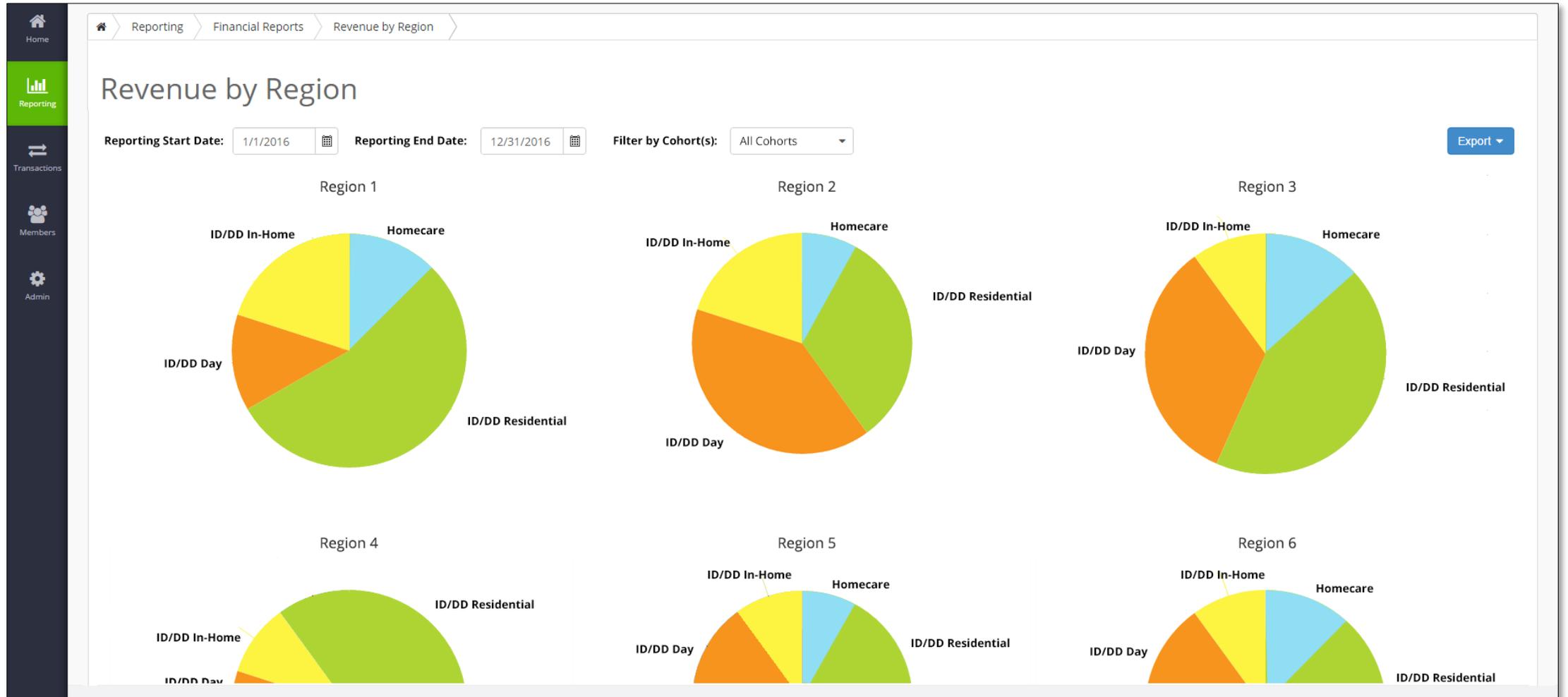
Coyote, Wiley

Mapquest ©2017 MAPQUEST, © MAPBOX, © TOMTOM | TERMS

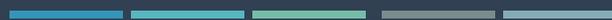


Connect Exchange is a BI Toolset

Enabling real-time data visualization, reporting, alerting



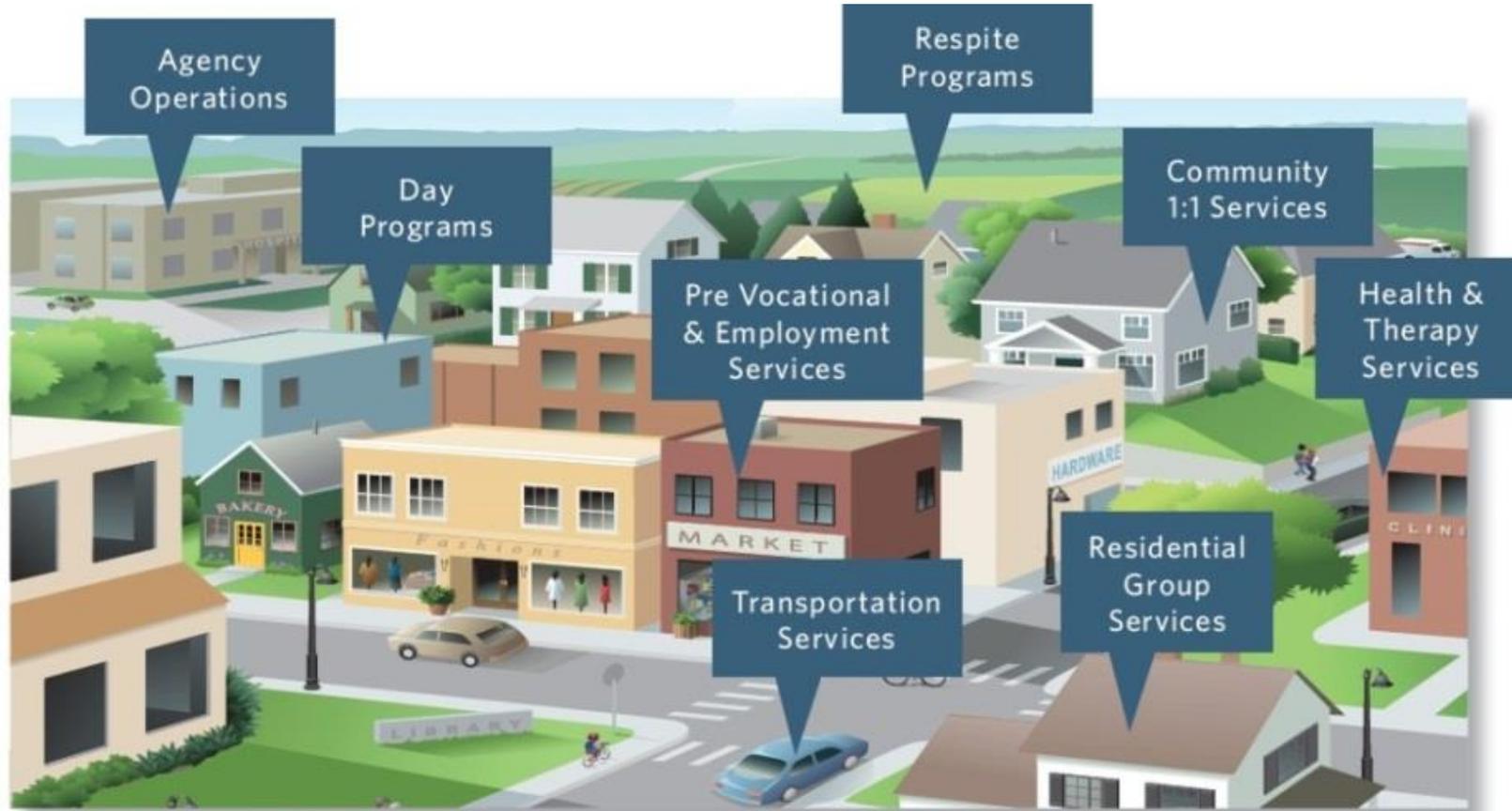
MEDISKED CONNECT



AGENCY MANAGEMENT PLATFORM

Where Can You Use MediSked Connect?

Connect was the first agency management platform available in the country and continues to be the leader with respect for person-centered evidence based outcomes and health and safety supports.



Who Uses It?

MediSked Connect's workflow offers benefits to every department and employees in every role.

My Caseload NewsFeed

From: To: Category: Keyword:

 **Comment Re: Call with Kelly's Mom**
Kelly's mom called and said she will be going to a doctor's appointment on Friday, so she will be in late.
Kelly Clark 11/3/2016

 **Comment Re: Call with Andrew's nurse**
Call to discuss changes in Andrew's medication list. Updates to dosages on two meds. Please review.
Andrew Smith 11/3/2016

 **Comment Re: updates to Harold's Medications**
Please review the updates to Harold's medications
Harold Henderson 11/3/2016

 **Comment Re: Repairs scheduled**
Repairs are scheduled for the cable on Monday between the hours of 12pm and 4pm.



DSP

Track attendance, enter service notes, log events, incidents, and observations, administer medications, add narrative to an individual's record, send alerts, complete tasks assigned by supervisor



Billing

Review potential claim summaries, generate claims and invoices



Program Manager

Create/modify plans, monthly summaries, track encounters, manage caseloads

Nurse/Nursing Supervisor

Approve new medications, schedule new medications, review med error reports, nursing plans, nursing notes



House Manager/ Supervisor

Modify individuals' records, audit notes, manage trainings, adjust schedules, send alerts, run reports



HR

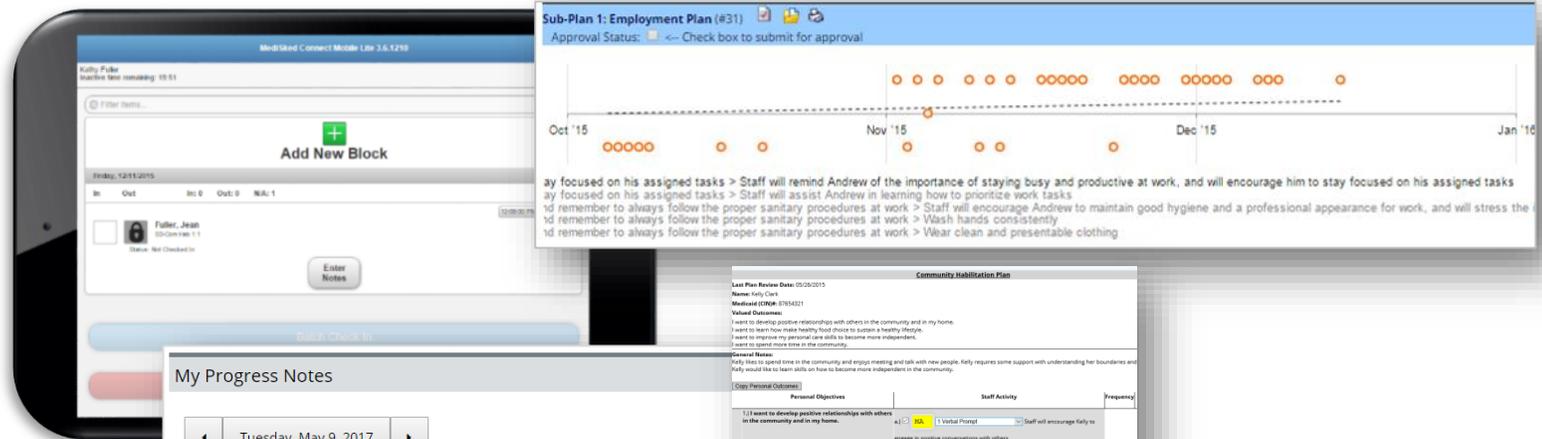
Review/modify employee records, report on trainings, activate and terminate employees



MediSked Connect is the platform dedicated to the daily activities of Providers

These include:

- Individual Record Management
- Outcomes Focus and Reporting
- Staff Scheduling
- ISP/Plan Implementation
- Health and Safety Supports
- Claims and Invoice Billing



Sub-Plan 1: Employment Plan (#31)
Approval Status: Check box to submit for approval

ay focused on his assigned tasks > Staff will remind Andrew of the importance of staying busy and productive at work, and will encourage him to stay focused on his assigned tasks
nd remember to always follow the proper sanitary procedures at work > Staff will encourage Andrew to maintain good hygiene and a professional appearance for work, and will stress the
nd remember to always follow the proper sanitary procedures at work > Wash hands consistently
nd remember to always follow the proper sanitary procedures at work > Wear clean and presentable clothing

Next Plan Review Date: 05/20/2015
Name: Kelly Clark
Medical ID#: 1764021
Values Outcomes
I want to develop positive relationships with others in the community and in my home.
I want to learn how make healthy food choices to assist a healthy lifestyle.
I want to improve my personal care skills to become more independent.
I want to spend more time in the community.

General Notes
Kelly likes to spend time in the community and enjoys meeting and talk with new people. Kelly requires some support with understanding her boundaries and Kelly would like to learn skills on how to become more independent in the community.

Day Personal Outcomes

Personal Objective	Staff Activity	Frequency
1. I want to develop positive relationships with others in the community and in my home.	a) Virtual Prompt b) Staff will encourage Kelly to engage in positive conversations with others c) Staff will encourage Kelly to use her manners.	
2. I want to spend more time in the community.	a) Staff will encourage Kelly to start up for community outings.	

My Progress Notes

Tuesday, May 9, 2017

▼ Jacobs House 776 Jacobs Street, Springfield, KY 45262

Name	Service	Note Status	Actions
 Donohew, Shannon	Residential Daily Note	Not Started	<input type="checkbox"/> Enter Note
 Klein, Tracey	Residential Daily Note	Not Started	<input type="checkbox"/> Enter Note
 Parsons, LaToya	Residential Daily Note	Not Started	<input type="checkbox"/> Enter Note
 Powell, Karen	Residential Daily Note	Not Started	<input type="checkbox"/> Enter Note

▼ Meadowwood House 56 Meadowwood Lane, Springfield, KY 45265

Name	Service	Note Status	Actions
 Angus, Jonathan	Residential Daily Note	Not Started	<input type="checkbox"/> Enter Note
 Corea, Kyle	Residential Daily Note	Not Started	<input type="checkbox"/> Enter Note
 Kurland, Andrew	Residential Daily Note	Not Started	<input type="checkbox"/> Enter Note

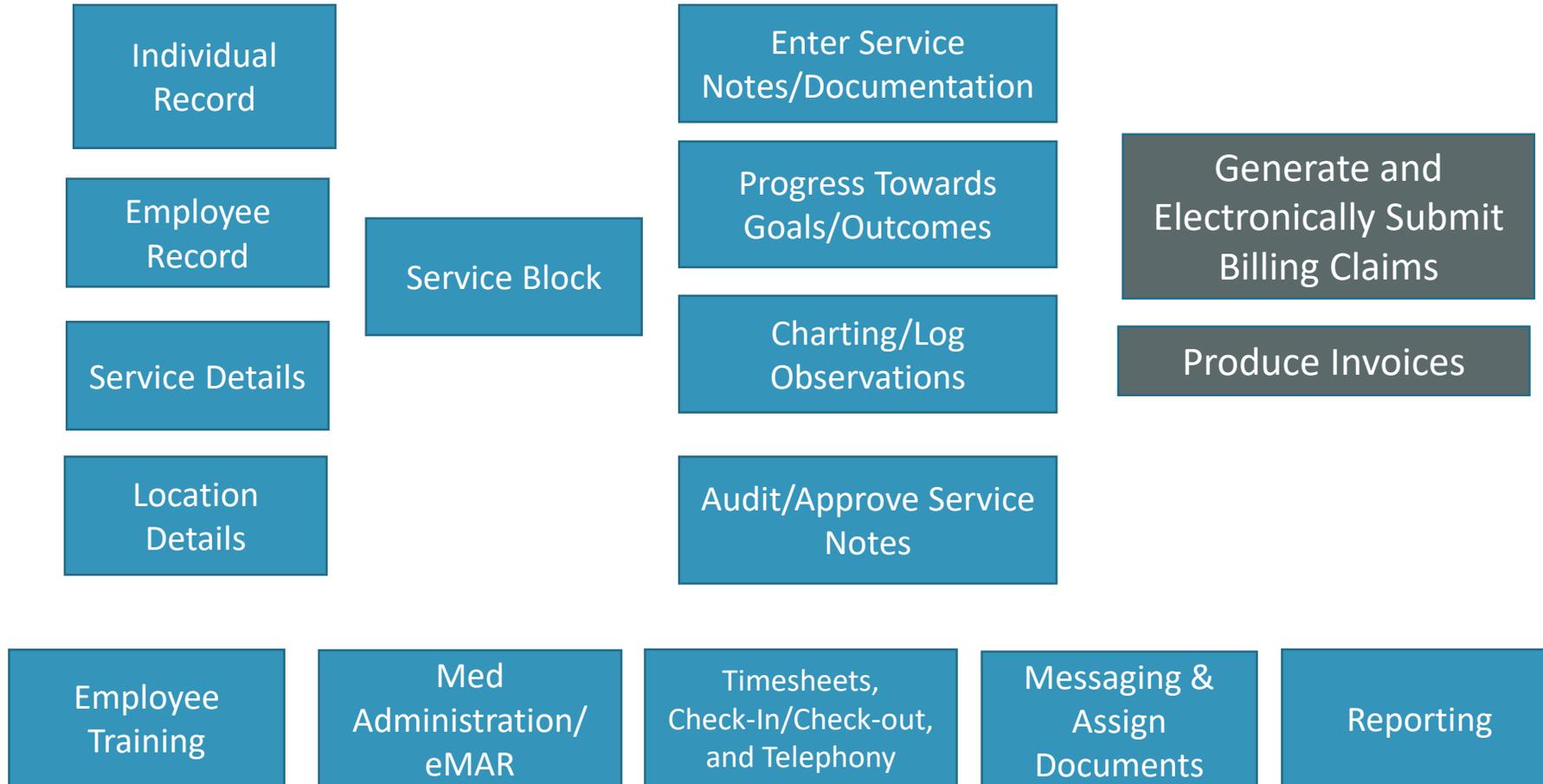
Show unscheduled time blocks | Hide scheduled time blocks | Display schedule as below

Schedule for Individual(s) in [PROGRAM] Day Training, Employee(s) in [PROGRAM] Day Training, Service(s) in [PROGRAM] Day Training, and Location(s) in [PROGRAM] Day Training
Date Range: 9/27/2015 to 10/3/2015
Number of services: 71 | Completed: 6 / 51 hours

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9/27/2015 Sunday	9/28/2015 Monday	9/29/2015 Tuesday	9/30/2015 Wednesday	10/1/2015 Thursday	10/2/2015 Friday	10/3/2015 Saturday
Employee: Kelly Bernard Service: SCL2 Day Train. Location: DT Center Time: 8:30 AM to 4:30 PM Dur: 8h Status: Not Completed Enter Service Notes	Individual: Adam Miller Service: SCL2 Day Train. Location: DT Center Time: 8:30 AM to 4:30 PM Dur: 8h Status: Not Completed Enter Service Notes	Individual: Adam Miller Service: SCL2 Day Train. Location: DT Center Time: 8:30 AM to 4:30 PM Dur: 8h Status: Not Completed Enter Service Notes	Individual: Adam Miller Service: SCL2 Day Train. Location: DT Center Time: 8:30 AM to 4:30 PM Dur: 8h Status: Not Completed Enter Service Notes	Individual: Adam Miller Service: SCL2 Day Train. Location: DT Center Time: 8:30 AM to 4:30 PM Dur: 8h Status: Scheduled	Individual: Adam Miller Service: SCL2 Day Train. Location: DT Center Time: 8:30 AM to 4:30 PM Dur: 8h Status: Scheduled	Individual: Adam Miller Service: SCL2 Day Train. Location: DT Center Time: 8:30 AM to 4:30 PM Dur: 8h Status: Scheduled



What Does MediSked Connect Do?



Daily Documentation and Individual Service Plans

Manage

Manage all aspects of the goals, outcomes or plans for the individuals you are supporting

Build Reusable Templates

Configurable plan templates act as valuable tools



Approve & Lock

Approve and lock plans so they can no longer be changed

Monitor Progress

Ensure services provided are making progress towards individual's specifically outlined goals

Integrated workflow: Service plans feed progress notes, summaries, billing

ISP Documentation

- Monthly Summary will pull narrative comments from that month, as well as activity summary
- Each program/service can have a unique format
- Individual, Date, Goal, Objective, Prompt, Achieved/Not Achieved all are collected daily and are associated with employee who is documenting

ed Administrator) | Service: 60D-DD CILA Individual Rate | Location: 24 hours | Status: Not Completed

Plan # Plan Start Date
Rate 1 7/1/2016

Generate Monthly Summary
Please select Start and End Date for Action Steps/Support Stragies summary:

Start Date:

End Date:

Summarize current block only:

Generate Summary Note

Sub-Plan 1: Habilitation Plan Daily Note (#454) Approval Status: Check box to sign and submit for approval

100%
80%
60%
40%
20%
0%

Legend:
 ■ People are connected to support networks - See my friends and family more often > Arrange for skype with sister
 ■ People have the best possible health - Look differently > Provide an exercise program
 ■ People choose where and with whom they live - I want my own room > Push panel for tv control and headphones
 ■ People choose where and with whom they live - I want my own room > Explore/investigate options for change with the person (e.g. possible room changes, living alone, other living arrangements, etc.)
 ■ People choose personal goals - Be more independent > Determine preferences

Plan for Supports

Individual: Katherine Smith, Medicaid ID: ABC12345, Effective Dates 7/1/2016 through 6/30/2017 Revision:
 Provider: Demo Site Service: 60D-DD CILA Individual Rate

Desired Outcomes/Goals	Action Steps	Support Instructions	Frequency	Duration
People are connected to support networks - See my friends and family more often	<ul style="list-style-type: none"> Arrange for skype with sister [20x = 19.8%] 	<ul style="list-style-type: none"> Schedule Skype call with Jane [14x = 13.86%] Assist with computer set up [7x = 6.93%] Dial Skype number [8x = 7.92%] 	Weekly	Ongoing
People have the best possible health - Look differently	<ul style="list-style-type: none"> Provide an exercise program [17x = 16.83%] 	<ul style="list-style-type: none"> Create area for work out space [9x = 8.91%] Help set up work out video [8x = 7.92%] Assist with work out movement [6x = 5.94%] 	Daily	
People choose where and with whom they live - I want my own room	<ul style="list-style-type: none"> Push panel for tv control and headphones [11x = 10.89%] 	<ul style="list-style-type: none"> Provide assistance with changing channel and volume [6x = 5.94%] Make sure headphone are accessible [6x = 5.94%] Turn tv to viewable position [5x = 4.95%] 	Once	
People choose where and with whom they live - I want my own room	<ul style="list-style-type: none"> Explore/investigate options for change with the person (e.g. possible room changes, living alone, other living arrangements, etc.) [10x = 9.9%] 	<ul style="list-style-type: none"> Inquire about happiness of living situation [6x = 5.94%] Search for openings in a more desirable living situation/location [3x = 2.97%] 	As Needed	Ongoing

Client	Medicaid #	Employee	Service	Plan #	Plan Start Date	Plan End Date	Plan Approved	Allowed Units
Katherine Smith	ABC12345	Not Specified	Residential	4	5/1/2017	7/1/2017	YES	70

Sub-Plan 1: Habilitation Plan Daily Note (#510)

Approval Status:

100%
80%
60%
40%
20%
0%

Legend:
 ■ People are connected to support networks - See my friends and family more often > Arrange for skype with sister
 ■ People have the best possible health - Look differently > Provide an exercise program
 ■ People choose where and with whom they live - I want my own room > Push panel for tv control and headphones
 ■ People choose where and with whom they live - I want my own room > Explore/investigate options for change with the person (e.g. possible room changes, living alone, other living arrangements, etc.)

Desired Outcomes/Goals	Action Steps
People are connected to support networks - See my friends and family more often	<input type="checkbox"/> Arrange for skype with sister

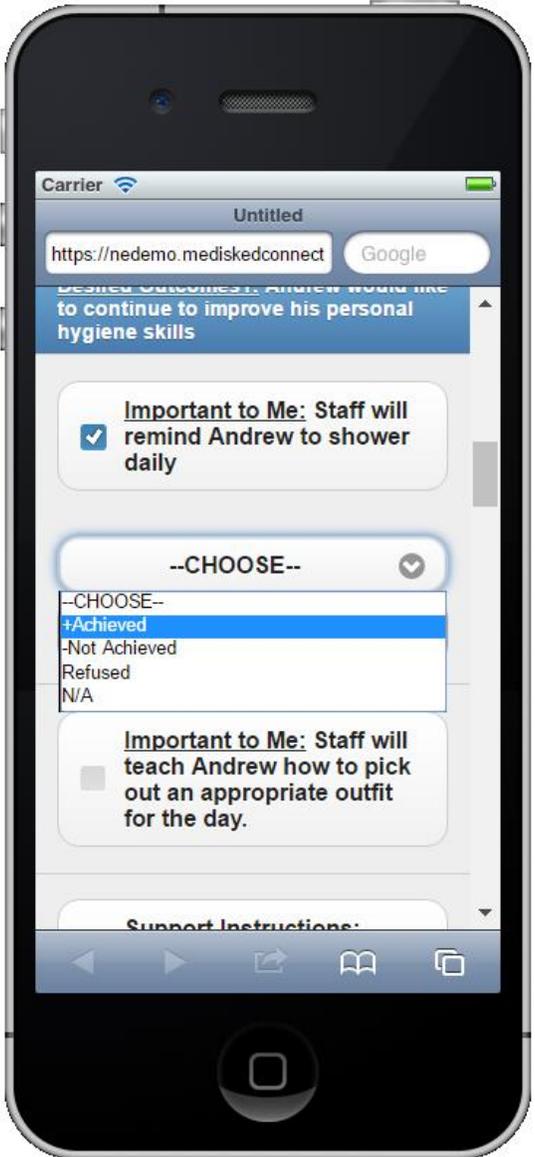


Entering Documentation, Visit Verification and Notes

with MediSked Connect

Notes are tied to the schedule; simple to see what needs to be completed and automatic visit verification

ISP feeds service plans to ensure ADL/IADL, health & safety, valued outcome compliance and quality outcome visibility



Features for consistency and compliance

- Date/timestamp
- Spellcheck
- Digital signature

Alerts to remind employees they have outstanding notes to complete

Record Management: Individuals

Tabs

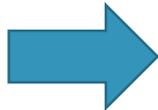
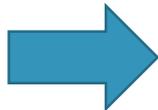
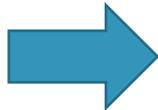
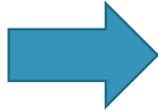
Navigation links located on the left side are referred to as “tabs.” Conceptually each tab can be viewed as a different page.

Clicking on a tab will cause the content on screen to change.

Within the Summary section, Bayberry Inc. can add their own custom tabs, and add the necessary fields.

Custom tabs may also be restricted by access level.

ISP Module is located here



Individual's More Information Page

Summary

- NewsFeed
- Demographics**
- Insurance / Private Pay
- Contacts
- Circle of Support
- Additional Demo Site Fields
- Likes and Dislikes
- Releases and Consents
- Employment Skills

Descriptions

- Descriptions/Considerations
- Medications
- Observations
- Allergies / Adverse Reactions
- Immunizations
- Individual-Specific Dated Comments Log
- Searchable Service Notes
- Prior Approval / Authorizations

Documents

- Individual's Documents
- Person Centered Plans
- Plans
- File Attachments

Memberships

- Caseload Membership
- Group Membership

Individual Information:

Prefix: [] Home Phone: 655-555-2222 [Get Map]

First Name: Andrew Cell Phone: []

Mi: [] Work Phone: 855-888-0000

Last Name: Smith Email: Andy22@gmail.com

Suffix: [] Street: 40 Union St

Nickname: Andy City: Nashville

Individual ID: 12 State: Tennessee

Zip: 37116

Date of Birth: 2/25/1988

Sex: Male

Social Security #: 123068754 County of Residence: []

Medicaid #: 123780455 County of Fiscal Responsibility: []

Medicare #: [] Regional Service Office: []

Marital Status: Single Status: Active

Employment/School Status: Employed US Citizen: Yes No

Education Level: [Not attending school; H.S. Graduate] Latitude (e.g. 43.154738): []

Race: [Choose--] Longitude (e.g. -77.579892): []

White Black or African American American Indian or Alaska Native Asian Indian Asian Chinese Filipino Japanese Korean Vietnamese Other Asian Native Hawaiian

Language: English View Aggregate Observations in Enter Notes: Yes No

Ethnicity: [Choose--] Preferred Language: [Choose--]

Niko Atar Abkhazian Avestan Afrikaans Akan Amharic Argonese Arabic Assamese Avano Aymara

Sexual Orientation: [Choose--] Gender Identity: [Choose--]

Cognitive Status: [] Functional Status: []

Eligibility Expiration Date: 8/31/2016

Date of Initial Referral: 8/17/2009

Date of Enrollment / Start: 7/26/2008

Date of Discharge / End: [Enter Date Here]

Individual has an **Advance Directive**: Yes No

Date **Advance Directive** created/updated: [Enter Date Here]

Advance Directive notes:

Record Management: Employees

- Employees likely have multiple trainings they are required to complete
- Staying current is essential so that services can be provided by qualified employees
- Juggling employee training requirements, due dates, training locations/dates, and completions is a never-ending job
- Likely using spreadsheets and employee files to manage training records



Record Management: Employees

- Services that are set up and flagged as “Training” in Connect will show up in the Training Matrix
- Ability to view by employee/program/date to see when training was completed and how many hours have been logged
- Trainings are set-up as a non-billable service
- Employees may be scheduled individually, or in groups
- Run reports based on date range, training type, and employee/group

Training Matrix
Employee: [Program] Training, Service: [Program] Training
Date range trainings were completed: 1/1/1900 to 2/23/2015

Employee	Benefits Training	Hours	CPR Training	Hours	HCBS Training	Hours	QA Training	Hours	Total Hours
Berts, Vince	2013-11-04 / 2.00 hrs	2.00	2013-10-07 / 4.00 hrs	4.00	2013-11-20 / 4.00 hrs	4.00	2013-08-29 / 2.00 hrs	2.00	12.00
Conte, Brian		0.00		0.00		0.00		0.00	0.00
Dalton, Ryan		0.00		0.00		0.00		0.00	0.00
Dudley, Tammy	2013-11-04 / 2.00 hrs	2.00	2013-10-07 / 4.00 hrs	4.00	2013-11-20 / 4.00 hrs	4.00	2013-08-29 / 2.00 hrs	2.00	12.00
Edwards, Patrick	2013-11-04 / 2.00 hrs	2.00	2013-10-07 / 4.00 hrs	4.00					6.00
Fox, Daniel	2013-11-04 / 2.00 hrs	2.00	2013-10-07 / 4.00 hrs	4.00	2013-11-20 / 4.00 hrs	4.00	2013-08-29 / 2.00 hrs	2.00	12.00
Greene, Rob		0.00		0.00		0.00		0.00	4.00
Harrum, Kim	2013-11-04 / 2.00 hrs	2.00							2.00
Jones, Henry	2013-11-04 / 2.00 hrs	2.00							2.00
MacGill, Mac		0.00							0.00
Moore, Jennifer	2013-11-04 / 2.00 hrs	2.00							2.00
North, Melissa		0.00							0.00
Simmons, Bill		0.00							0.00
Smiley, Susan		0.00							0.00
Smith, Kim		0.00							0.00
Stark, Christy	2013-11-04 / 2.00 hrs	2.00							2.00

Training Matrix [Back]

Start of Date Range: 1/1/1900 End of Date Range: 3/8/2017

Employee: --Choose--

Training Service: --All--

Active and Inactive: [v]

medisked connect People and Services | Planning | Medications/Observations | Schedule/Notes | Messaging | Billing | HR/Payroll | MediSked's Connect

Select Program [v]

Hide Menu [v] [Next >>] Administrator [v]

Payroll Module

- Completed Service Overlap
- Pay Rate Differentials
- Payroll Parameters

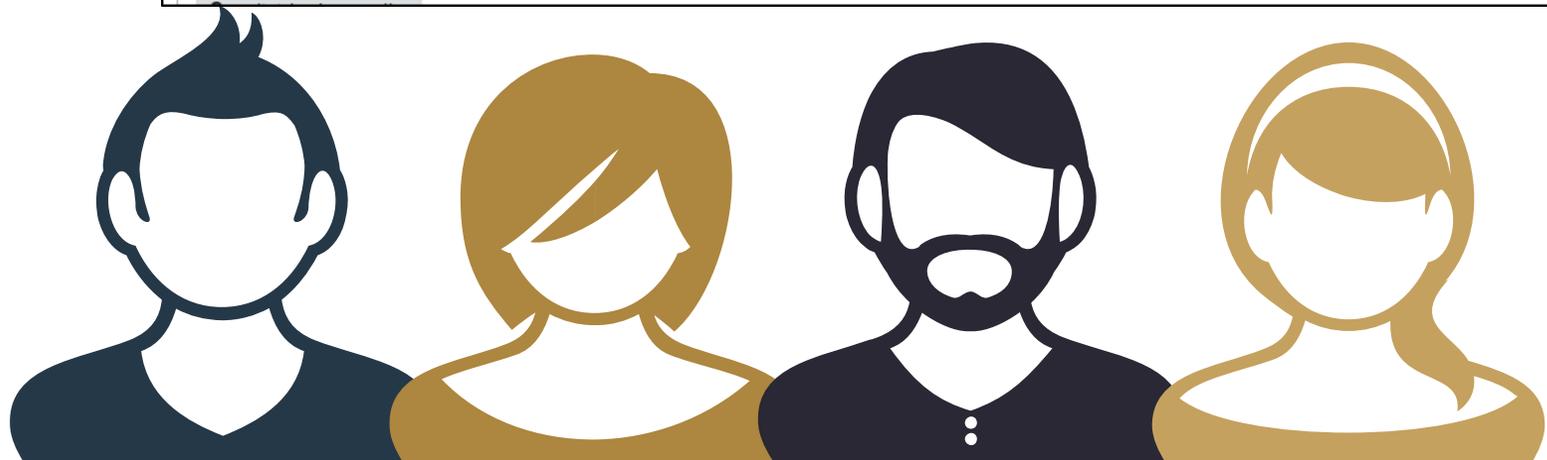
Employee Payroll

- View Employee Payroll
- View Employee Payroll Detail
- Employee Pay Rate Matrix
- Generate Employee Payroll File

Training Matrix

Employee: [Group] 19 Thompson St., Service: All
Date range trainings were completed: 1/1/1900 to 3/8/2017

Employee	Annual Agency Training	Hours	B-Staff Training	Hours	Benefits Training	Hours	Comprehensive First Aid	Hours	CPR Training	Hours	HCBS Training	Hours	QA Training	Hours	Total Hours
Gardner, Julie	2017-02-05 / 1.00 hrs	1.00		0.00		0.00		0.00	2017-02-19 / 1.00 hrs	1.00		0.00		0.00	2.00
Hope, Terry	2017-02-05 / 1.00 hrs	1.00		0.00		0.00	2017-01-15 / 3.00 hrs	3.00	2017-02-19 / 1.00 hrs	1.00		0.00		0.00	5.00
Myers, Angela	2017-02-05 / 1.00 hrs	1.00		0.00		0.00		0.00	2017-02-27 / 1.00 hrs	1.00		0.00		0.00	2.00
Warren, Elizabeth	2017-01-16 / 2.00 hrs	2.00		0.00		0.00	2017-01-15 / 3.00 hrs	3.00	2017-02-27 / 1.00 hrs	1.00		0.00		0.00	6.00



Scheduling

Non-base: This is a one-time occurrence

Base: This will be a reoccurring service

every Wednesday, starting 3/8/2017 ▼

No Recurrence (Non-Base)
on Wednesday, 3/8/2017 ONLY

Weekly Recurrence (Base)
every Wednesday, starting 3/8/2017

every other Wednesday, starting 3/8/2017

every day (daily), starting 3/8/2017

every weekday, starting 3/8/2017

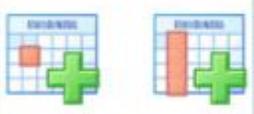
Monthly Recurrence (Base)
on 8th day of every month, starting 3/8/2017
on 2nd Wednesday of every month, starting 3/8/2017

Employee: Is a specific employee assigned?

Individual: If a 1:1 service, who is the individual?

Service: What is the service?

Time: Start and end time before check-in

Wednesday	Wednesday
3/8/2017 Wednesday	3/8/2017 Wednesday
 [NON-BASE] [BASE]	 [NON-BASE] [BASE]
Employee: Angela Myers Service: 4IND-W6096-Elig Location: 19 Thompson St. Time: [BASE] 8:00 AM to 12:00 PM  Dur: 4 h Status: Scheduled Change/Delete: 	Employee: Vince Berts Individual: [Shawn Pearson] Service: Personal Suppor.. Time: [BASE] 9:30 AM to 2:00 PM  Dur: 4.5 h Status: Scheduled Change/Delete: 

If an individual is not eligible for a service, and/or an employee is not eligible to be scheduled, a service block for that combination cannot be created.

Alerts

Planning | Schedule/Notes | **Messaging** | Billing | HR/Payroll | MediSked's Connect | Telephony/Timekeeping | Admin |

Select Program There are 1 alerts to view Resources MediSked Administrator

Date Based Alert Rules

Record Type	Date Field	Alert Threshold (days)	Alert Recipients	Active	Update
Client PA/AUTH	EndDate	3	Grubiak, Vanessa	✓	Change
Client PA/AUTH	EndDate	14			
Worker	ReviewDate	14			
Client Insurance	EndDate	3			
Worker	OrientationDate	1			
Client Insurance	EndDate	1			

Configure Alerts

The following alerts are enabled for Administrator, MediSked:

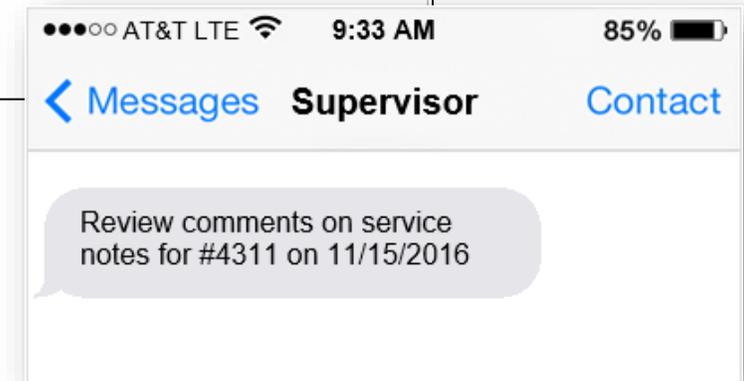
You may update alerts for yourself and your direct reports.

Enabled	Email	Email/SMS	Synch/Asynch	Module	Description	Reminder	Parameter	Notify Supervisor/Manager	Notify Employee
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Synchronous	Billing	Change to a payer	IMMEDIATE		True	True
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Synchronous	Document Tracking	Alert caseload of new record in client log	IMMEDIATE		False	True
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Synchronous	Document Tracking	Document/task assigned	IMMEDIATE		False	True
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Synchronous	Medications	Controlled Medication Difference	IMMEDIATE			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Synchronous	Medications	Incorrect Dosage Administered	IMMEDIATE			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Synchronous	Medications	Medication Reminder Alert	IMMEDIATE			

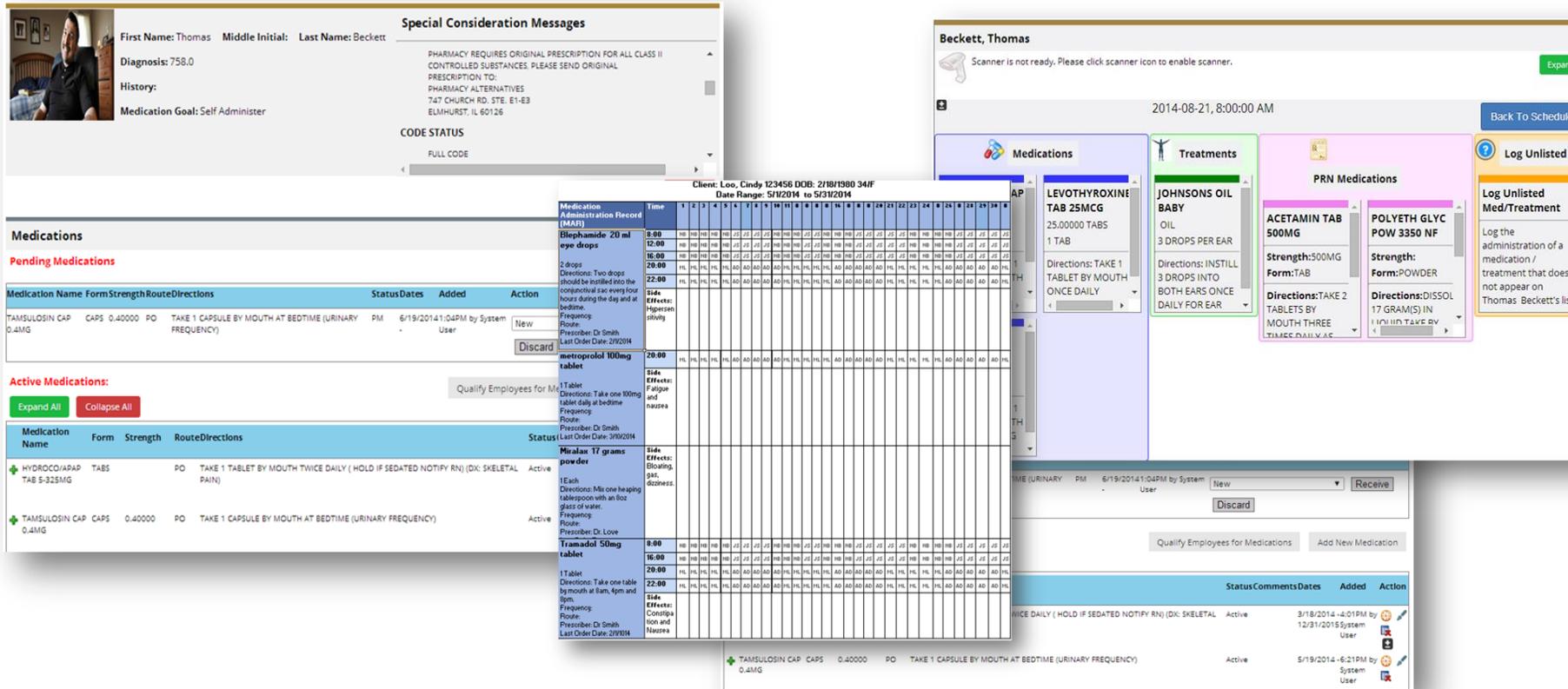
New Date Based Alert Rule

Record Type	Field	Alert Threshold (days)	Alert Recipients	Add Rule
--Select Record Type--	Please select a Record Type	1	[Group] Pilot Group <input type="checkbox"/> Alert Caseload (Only applicable if Record Type=Client)	Submit

- Date based or specific activity alerts can be set up
- Alerts issued in Connect, and notifications can also go out via email and/or text



Medication Administration

Special Consideration Messages

PHARMACY REQUIRES ORIGINAL PRESCRIPTION FOR ALL CLASS II CONTROLLED SUBSTANCES. PLEASE SEND ORIGINAL PRESCRIPTION TO:
PHARMACY ALTERNATIVES
747 CHURCH RD. STE. E1-E3
ELMHURST, IL 60126

CODE STATUS
FULL CODE

Client: Loo, Cindy 123456 DOB: 2/18/1980 34IF
Date Range: 5/1/2014 to 5/31/2014

Medication Name	Form	Strength	Route	Directions	Status	Dates	Added	Action
TAMUSULOSIN CAP	CAPS	0.40000	PO	TAKE 1 CAPSULE BY MOUTH AT BEDTIME (URINARY FREQUENCY)	Active	6/19/2014	1:04PM by System User	New / Discard
HYDROCO/APAP TAB 5-325MG	TABS		PO	TAKE 1 TABLET BY MOUTH TWICE DAILY (HOLD IF SEDATED NOTIFY RN) (DX: SKELETAL PAIN)	Active			
TAMUSULOSIN CAP 0.4MG	CAPS	0.40000	PO	TAKE 1 CAPSULE BY MOUTH AT BEDTIME (URINARY FREQUENCY)	Active			

Medications Administration Record (MAR)

Time	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
0:00	HL																														
12:00	HL																														
16:00	HL																														
20:00	HL																														
22:00	HL																														

Medications

- LEVOHYDROXINE TAB 25MCG (25.00000 TABS)
- JOHNSONS OIL BABY OIL (3 DROPS PER EAR)
- ACETAMIN TAB 500MG (Strength: 500MG, Form: TAB)
- POLYETH GLYC POW 3350 NF (Strength: 17 GRAMS, Form: POWDER)

Medication Administration Record (MAR)

Time	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
0:00	HL																														
8:00	HL																														
16:00	HL																														
22:00	HL																														

Medication's module/eMAR allows for tracking vital medication information for all individuals
Medication lists (active/inactive)

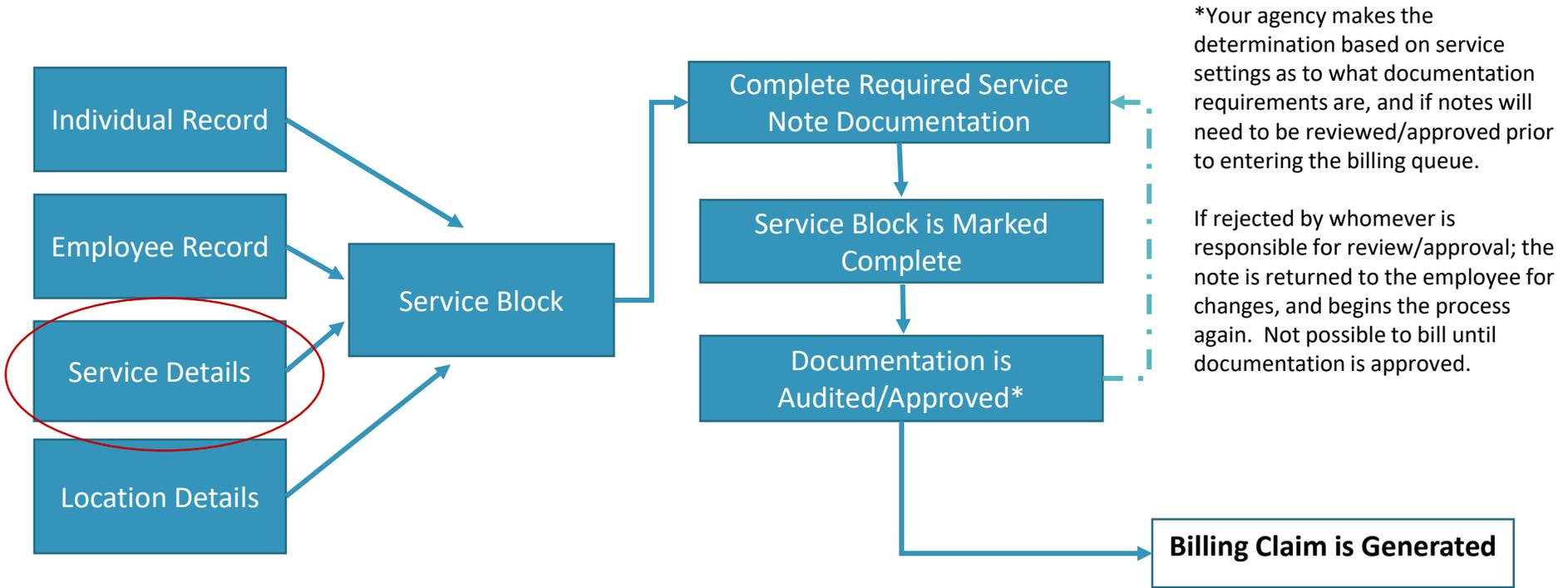
Allergies or adverse reactions

Immunization administration lists

Medication administration record (MAR)

Medication error reporting

What Happens Before Claims are Generated in MediSked Connect?

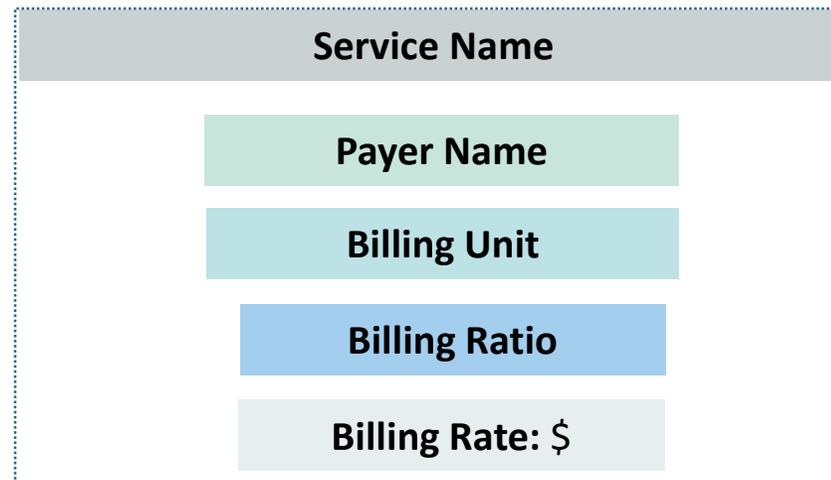


Service and Payer Configuration

Within Connect, each Service would be configured so that it is associated with a Payer. This is the entity that will receive the claim (in some format).

When a Service is created in Connect, a Payer is attached to it, or the service is set up as non-billable (employee training, participant with family, etc). Some Services may have multiple payers, or may have logic associated with them so that if certain criteria is not met, they become non-billable, or change to another service.

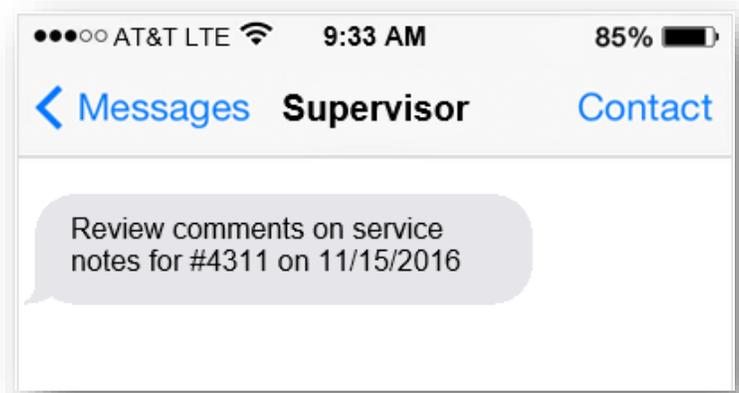
Other details within Service configuration relate to how claims are billed (by unit, by the hour, daily, etc) along with a billing ratio. A bill rate is then added that is associated to the billing unit.



BillingUnit

- CLAIM > 1 Hour Unit
- Non-Billable
- CLAIM > 1 Hour Unit
- CLAIM > Realtime
- CLAIM > Daily
- CLAIM > Daily Variable
- CLAIM > Monthly
- CLAIM > Monthly Variable
- CLAIM > Mileage
- CLAIM > 1 Block Unit
- INVOICE LINE > Hourly
- INVOICE LINE > Flat Rate
- INVOICE LINE > Mileage
- INVOICE LINE > Variable Unit

Supervisor Oversight Workflow:



Sub-Plan 1: Daily Residential Goal Log (#34)

Approval Status: <- Check box to submit for approval

- Andrew would like to continue to improve his personal hygiene skills > Staff will remind Andrew to shower daily
- Andrew would like to continue to improve his personal hygiene skills > Staff will teach Andrew how to pick out an appropriate outfit for the day.
- Andrew would like to more independent > Staff will assist Andrew with learning how to put laundry in the washer and dryer
- Andrew would like to more independent > Staff will teach Andrew how to use the stove and oven safely
- Andrew would like to more independent > Staff will work with Andrew on making smart decisions with his money
- Andrew would like to learn how to better manage his money > Staff will work with Andrew on his money counting skills
- Andrew would like to learn how to better manage his money > Staff will teach Andrew how to save for important items.

Plan for Supports

Individual: Andrew I Smith, Medicaid ID: 123789456, Effective Dates 10/1/2015 through 3/31/2016 Revision:

Provider: Demo Site Service: Community Home

Desired Outcomes/Goals	Action Steps	Support Instructions	Frequency	Duration
Andrew would like to continue to improve his personal hygiene skills	<ul style="list-style-type: none"> Staff will remind Andrew to shower daily [40x = 65.57%] Staff will teach Andrew how to pick out an appropriate outfit for the day. [40x = 65.57%] 	<ul style="list-style-type: none"> Andrew would like to learn how to be a presentable as possible. [38x = 62.3%] 	Daily	3/31/2016
Andrew would like to more	<ul style="list-style-type: none"> Staff will assist Andrew with learning how 	<ul style="list-style-type: none"> Andrews goal is eventually have a place of his own. He wants to learn 	Daily	Ongoing



Technical Overview

- SaaS platform; Cloud based; accessible from any device with an internet connection and a modern browser
 - Hosted with Amazon Web Services
 - SLA in place with all customers
 - HL7 interface capabilities
- Mobile “lite” version runs on phones/tablets with nothing to install
- New features released quarterly; included for all customers
- MediSked Support Team located in Rochester NY office
 - Phone and email support
 - Support tickets, knowledge base (self-help) and user group meetings
- HIPAA Compliant billing
 - Interface that allows daily/hourly/unit billing claims to be submitted from MediSked Connect
 - Connection to 800+ payers through Emdeon/Change Healthcare clearinghouse
 - Generate invoices for payers that do not allow for electronic claim submissions
 - Exports can be created for additional billing scenarios, as well as payroll
- eMAR
 - Med administration within platform
 - Can interface with pharmacy directly (Pharmacy Alternatives, CVS Omnicare, etc)
- Access Levels
 - Records and features can be restricted based on employee and/or job type – Create groups based on service, supervisor, location, etc.



Supporting YOUR AGENCY as a Data-Driven Organization



Electronic Records

- Individual information
- Employee information
- Service details
- Location details
- Cloud-based



Scheduling

- Appointment tracking for both individuals and employees
- Matches staff qualifications and availability with services to eliminate conflicts



Documentation

- Develop individual service plans (ISPs)/goals/outcomes /ADLs-IADLs
- Track observations
- Enter service notes and HPC documentation
- Audit/approve service notes



Billing

- HIPAA Compliant Electronic claim submission to multiple payers
- Invoice generation
- Reporting

Supporting YOUR AGENCY as a Person-Centered Organization



MEDISKED PORTAL

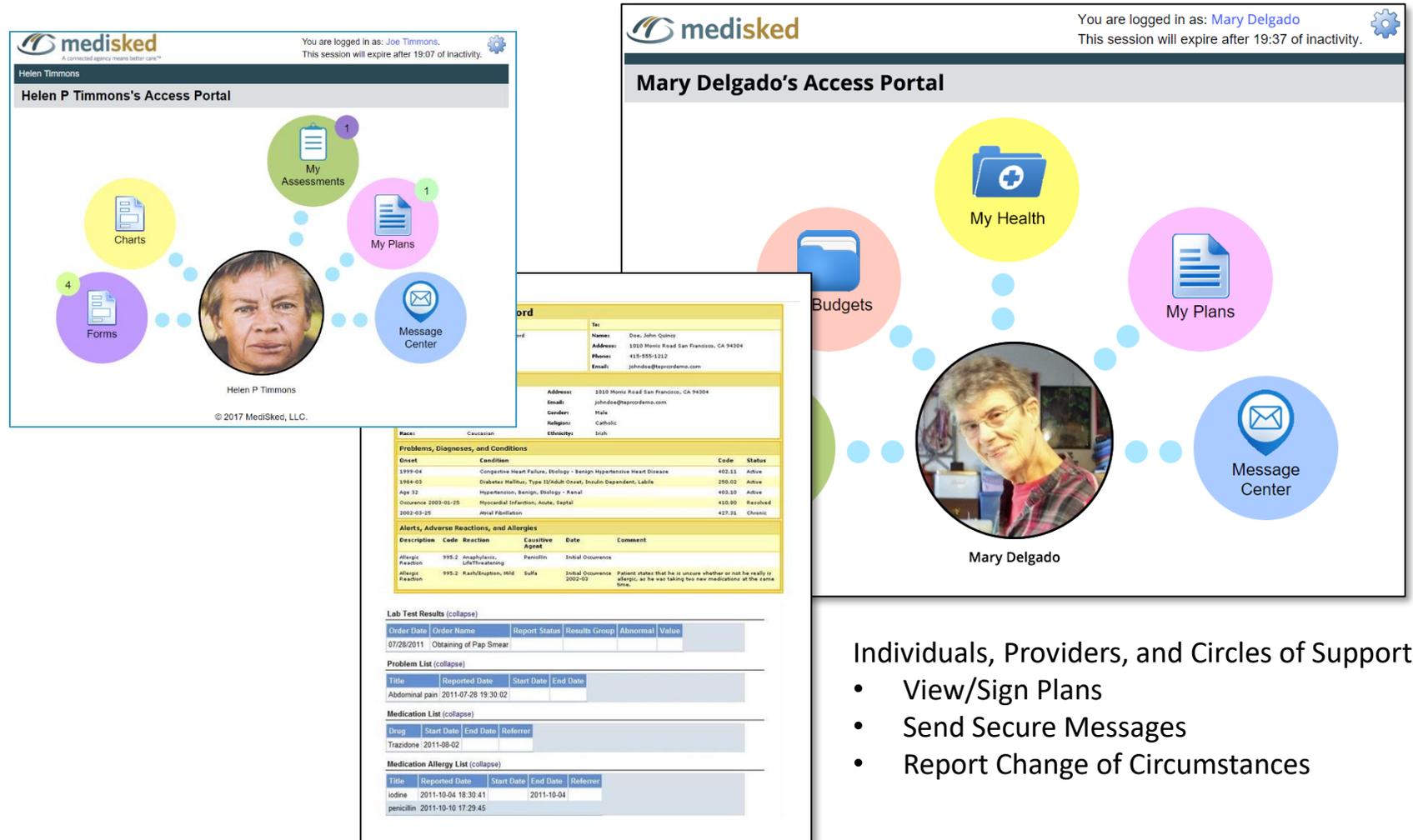
PERSON-CENTERED PORTAL



Person-Centered Portal

The Person-Center Portal enables organizations to expose elements of an individual's record to the individual, their providers, or their interdisciplinary care team for review and signatures, including:

- Messaging
- Plans
- Service Notes
- Observation Charts
- Health Records



Helen P Timmons's Access Portal

You are logged in as: Joe Timmons.
This session will expire after 19:07 of inactivity.

Helen Timmons

Helen P Timmons's Access Portal

My Assessments (1)

My Plans (1)

Message Center

Charts

Forms (4)

Helen P Timmons

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Mary Delgado's Access Portal

You are logged in as: Mary Delgado
This session will expire after 19:37 of inactivity.

Mary Delgado's Access Portal

My Health

My Plans

Message Center

Budgets

Mary Delgado

John Quincy

Names: Dr. John Quincy
Address: 1510 Home Road San Francisco, CA 94304
Phone: 415-555-1212
Email: johndoe@corporatedemo.com

Address: 1510 Home Road San Francisco, CA 94304
Email: johndoe@corporatedemo.com
Gender: Male
Religion: Catholic
Ethnicity: Irish

Race: Caucasian

Event	Condition	Code	Status
1999-04	Coronary Heart Failure, Etiology - Benign Hypertensive Heart Disease	402.11	Active
1984-03	Diabetes Mellitus, Type II/Adult Onset, Insulin Dependent, Labile	250.02	Active
Age 32	Hypertension, Benign, Etiology - Renal	403.10	Active
Occurrence 2003-03-25	Myocardial Infarction, Acute, Septal	410.00	Resolved
2002-03-25	Atrial Fibrillation	427.31	Chronic

Description	Code	Reaction	Causative Agent	Date	Comment
Allergic Reaction	995.2	anaphylaxis, LifeThreatening	Penicillin	Initial Occurrence	
Allergic Reaction	995.2	Rash/Eruption, Mild	Sulfa	Initial Occurrence	Patient states that he is unsure whether or not he really is allergic, as he was taking two new medications at the same time.

Lab Test Results (collapse)

Order Date	Order Name	Report Status	Results Group	Abnormal	Value
07/28/2011	Obtaining of Pap Smear				

Problem List (collapse)

Title	Reported Date	Start Date	End Date
Abdominal pain	2011-07-28	19:30:02	

Medication List (collapse)

Drug	Start Date	End Date	Referrer
Trazidone	2011-08-02		

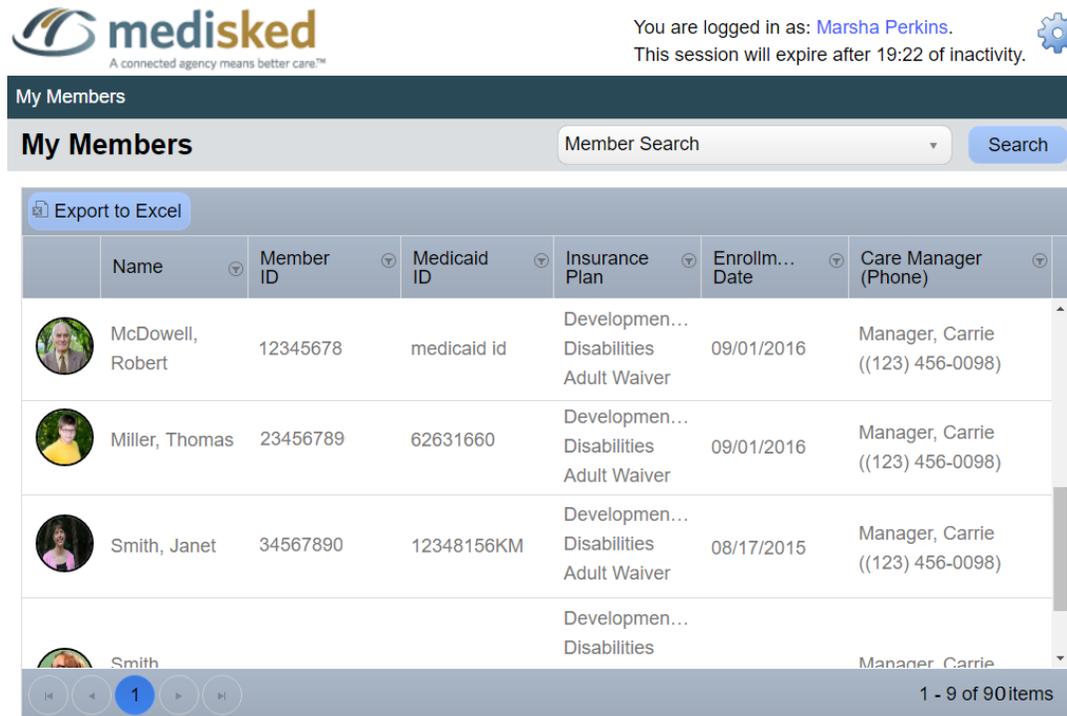
Medication Allergy List (collapse)

Title	Reported Date	Start Date	End Date	Referrer
iodine	2011-10-04	18:30:41	2011-10-04	
penicillin	2011-10-10	17:29:45		

- Individuals, Providers, and Circles of Supports can
- View/Sign Plans
 - Send Secure Messages
 - Report Change of Circumstances

The MediSked Provider Portal allows providers to:

- Access Individual records
- Submit service summaries
- Submit observation data
- Etc.

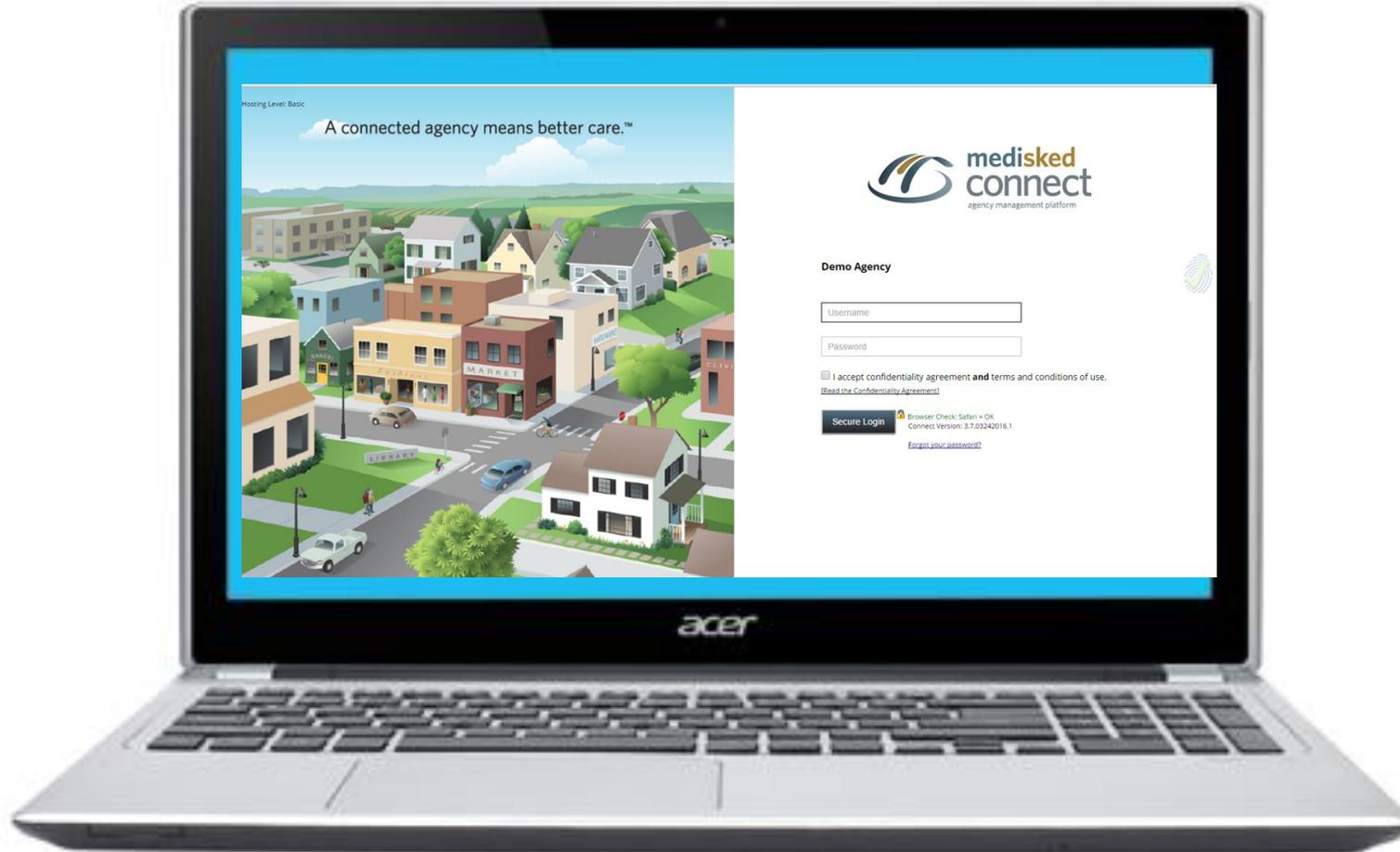


The screenshot shows the 'My Members' page in the MediSked Provider Portal. At the top, the user is logged in as Marsha Perkins, and the session will expire after 19:22 of inactivity. The page features a search bar and an 'Export to Excel' button. Below is a table of members with columns for Name, Member ID, Medicaid ID, Insurance Plan, Enrollment Date, and Care Manager (Phone).

Name	Member ID	Medicaid ID	Insurance Plan	Enrollm... Date	Care Manager (Phone)
McDowell, Robert	12345678	medicaid id	Developmen... Disabilities Adult Waiver	09/01/2016	Manager, Carrie ((123) 456-0098)
Miller, Thomas	23456789	62631660	Developmen... Disabilities Adult Waiver	09/01/2016	Manager, Carrie ((123) 456-0098)
Smith, Janet	34567890	12348156KM	Developmen... Disabilities Adult Waiver	08/17/2015	Manager, Carrie ((123) 456-0098)
Smith			Developmen... Disabilities		Manager, Carrie

1 - 9 of 90 items

Request a Demo



Rachel M. Hendrickson

Solutions Representative

866-633-4753 x 709

330-807-1621

Rachel_Hendrickson@medisked.com