MedCompass®

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Parent/Guardian User Manual

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Note: The pages in this document were formatted so that the document can be printed as a two-sided document. The blank pages in this document are intentional in order to maintain a format conducive to printing in such a manner. **All members are fictitious users created for the purpose of this manual.**

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MedCompass Overview

MedCompass is web-based care management software that enables the flow of information to improve quality of care and population health. MedCompass population health management solutions allow you to track your member's care plan across the full continuum of care. Collaborative care connects all members of a care team, so the right information gets to the right people. Leveraging Med Compass's population health management solutions helps members on the care team improve performance and outcomes. MedCompass supports health coaching and lifestyle tracking to help members/guardians take a more active role in their well-being. MedCompass has been designed to help DPHHS optimize healthcare outcomes for the populations served. Thus, allowing DPHHS to achieve the Vision to improve access to healthcare and treatment outcomes for Montanans.

HIPAA Privacy and Security Transactions

Security is a top priority in MedCompass. MedCompass approaches privacy and security with extensive, customizable, and confidentiality features that ensure full HIPAA compliance. Integrated security meets industry security requirements and is enforced at multiple levels of the software, from the database and user interface profiles to business rules. MedCompass is fully compliant with the HIPAA Electronic Data Interchange Rules, ICD-9, ICD-10 and HIPAA 5010 message standards for payer and provider electronic transactions.

### The MedCompass Approach: Care Management Teams

MedCompass Care Team solution contains all the necessary components to manage your member's care starting from identification through care planning and service plans. Using a member centric model, the application provides a comprehensive view for all staff members whatever their role may be in the care team. A care team for your member will consist of program staff, such as case managers and other health professionals, equipped with the training and skills needed to provide high-quality, coordinated care, specific to the members needs and circumstances. Members on the care team will assume principal responsibilities for specific elements of you members care as the members needs change. The team-based approach ensures that all elements of care are coordinated for your members benefit. For more information on your role as a member of the care team navigate to section *Care Team.*

Accessing MedCompass

*Log into
ICap*
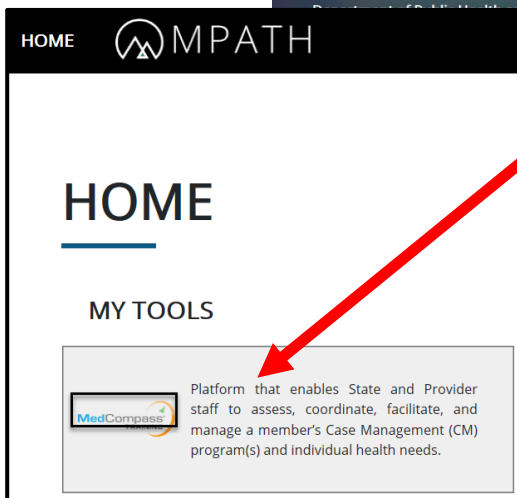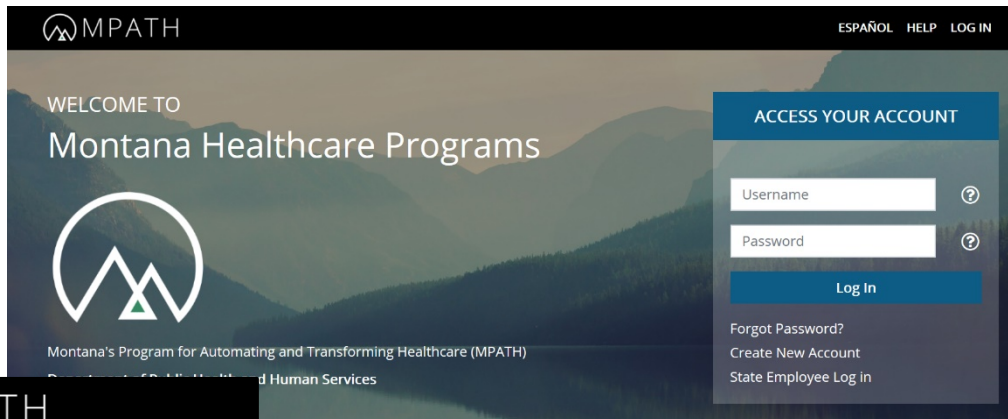
Click on the MedCompass icon
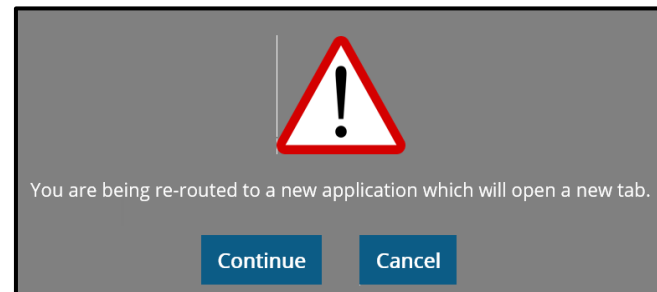
**A warning message will appear
prompting the user to continue to launch the application.*

*MedCompass will automatically open to the user's Dashboard.*

*MedCompass will be
accessible from your laptop,
notebook, or other mobile
device. You may use Chrome,
or Safari as your browse.*

Note: **To gain your ICAP Username
contact your Case Manager.**
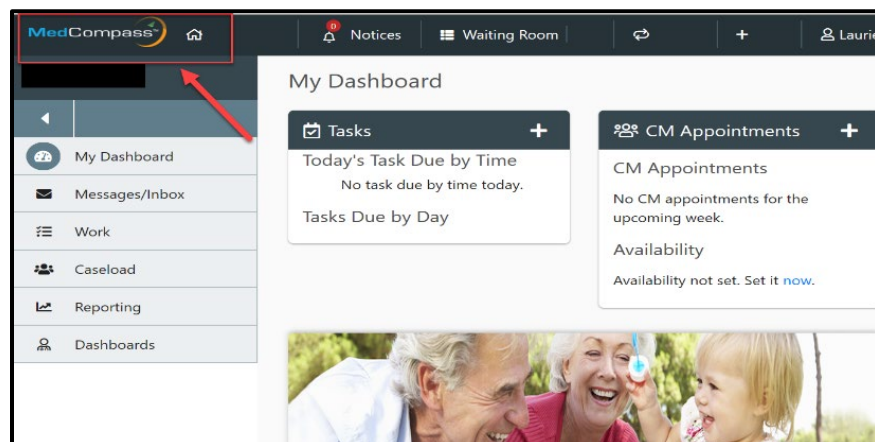
The Dashboard

The dashboard provides you with access to tasks, alerts, your member's record, and more. Much of what is displayed on the dashboard is specific to you viewing it. The following sections will explain each feature of the dashboard.
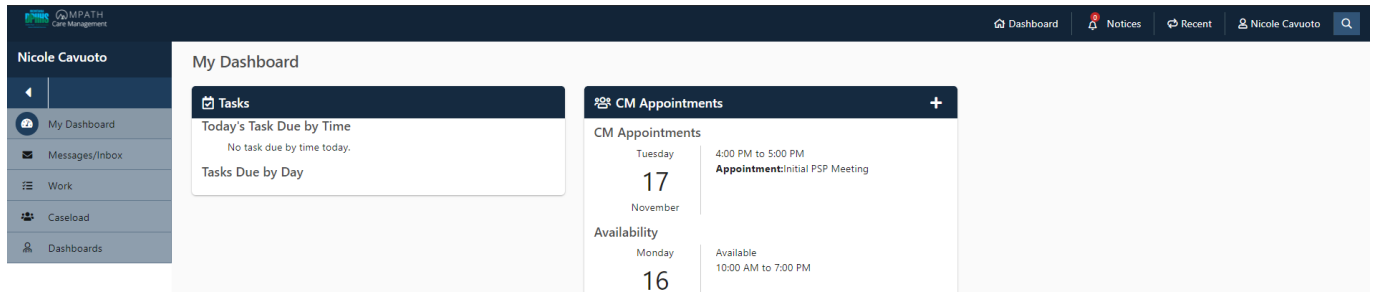
Left Navigation Pane

The left navigation pane on the dashboard is primarily used to open the full lists of the items contained in the various panes.
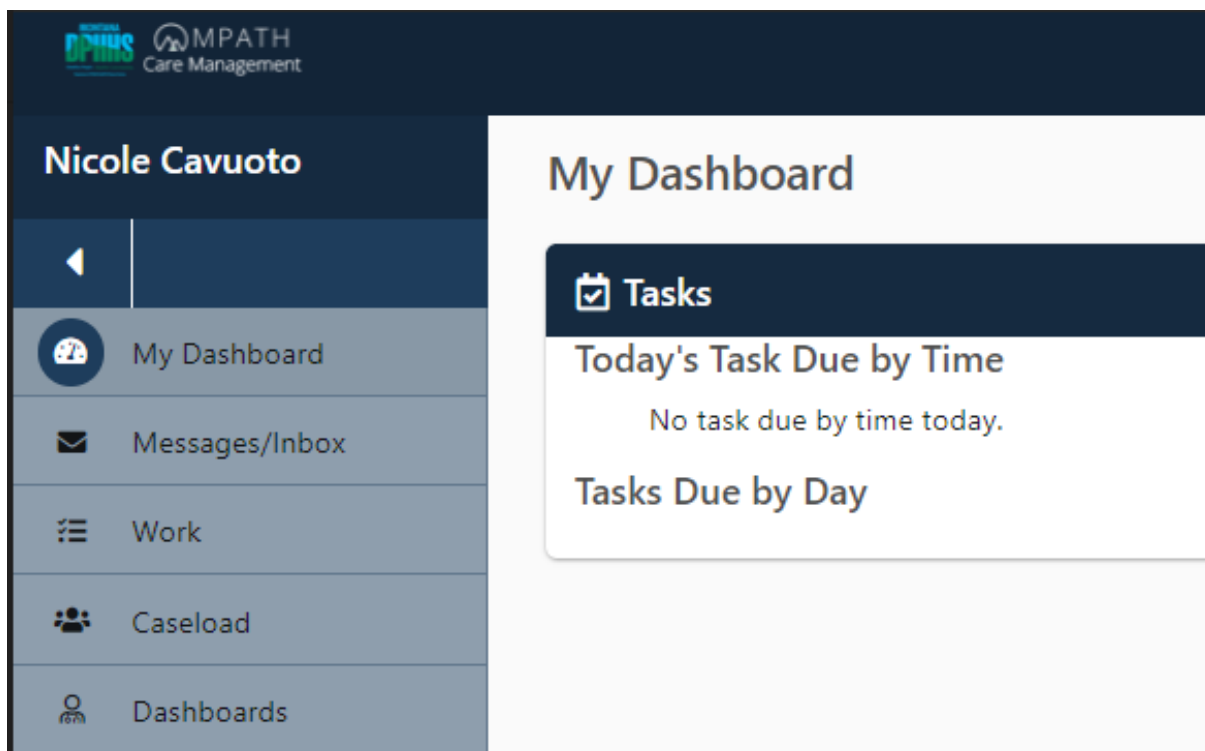
1. Display of User Name
2. Arrow: Collapse or Expand the menu as needed
3. My Dashboard: Returns the user to the dashboard
4. Messages/Alerts: Opens the User Inbox
5. Work: Opens the user Tasks List; Opens the user calendar

6. Caseload: Opens the full list of members the user is managing

Secure Messaging

Throughout your duties as a parent/guardian to a member you may need to send a secure message to another member of the Care Team. The Messages feature in MedCompass looks and operates like other email applications with one major difference. It is a HIPAA compliant, self-contained messaging system. It does not send messages outside of MedCompass and only authorized users may send and receive messages.

There are four folders: Inbox; Sent; Draft; and Deleted. The Inbox contains all unread and read messages that have not been deleted. The Sent folder contains any messages sent by you. The Draft folder lets you save an outgoing message without sending it. The Deleted folder will hold any messages that are deleted for a period of time set by your administrator-after which they will be removed from MedCompass.

To create a secure communication, navigate to your Dashboard and select **Messages/Inbox** and select **(+) Compose**
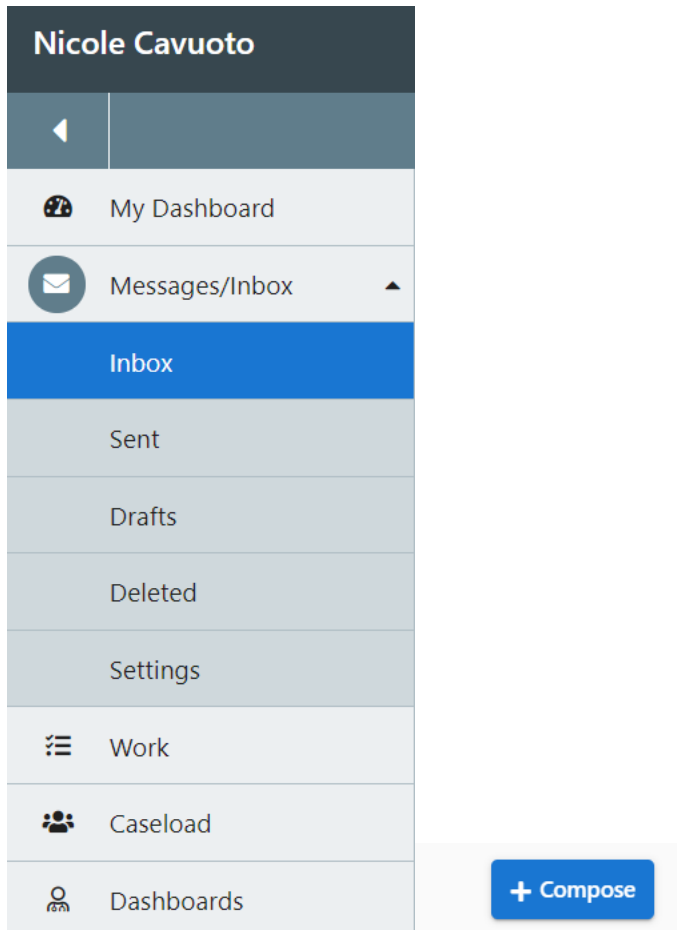
You will be directed to the New Message Screen.

Click on the **To** field for the individual you wish to send a secure communication to. Type in the individuals name and click **Search**. Select the User.

Be sure to include a **Subjec**t, the **Priority** of the Message (High, Normal, Low) and the **Body** of the message. You also have the availability to add attachments and link your member under **Member Name.** To link the Member for which you are the parent/ guardian for in the secure communication, click the **magnifying glass** in the **Member Name** field.

Type in the member's name and click **Search.** Select the Member.

Review your secure communication and if everything is documented, click **Send.**

Tasks

Tasks are the basic unit of work in MedCompass. They may be auto- generated by rules or created manually by users. Any Task that is assigned specifically to you, is due today or overdue, and has not yet been completed will appear on the dashboard in the Tasks Pane. The tasks will be specific to your duties as a

guardian in MedCompass. **Tasks** can be found in two places, one on a user's **Dashboard** or the **Left Navigation Pane > Work > Tasks.** Here a user will see all Tasks assigned to them. Guardians will not have the ability to create new tasks.

Working a Task

Within your duties of MedCompass, you may be assigned a task from the Care Team, such as a Case Manager Requesting you to complete the necessary assessments for your members. In this example the Case Manager is requesting the guardian to sign the annual PSP. The task will contain the Task Description, Priority, Status, Type and Due Date. You will also notice the task has been assigned to Nicole, which will be the guardian in this example. You will be able to work this task by navigating to your **Dashboard > Work > Tasks.**
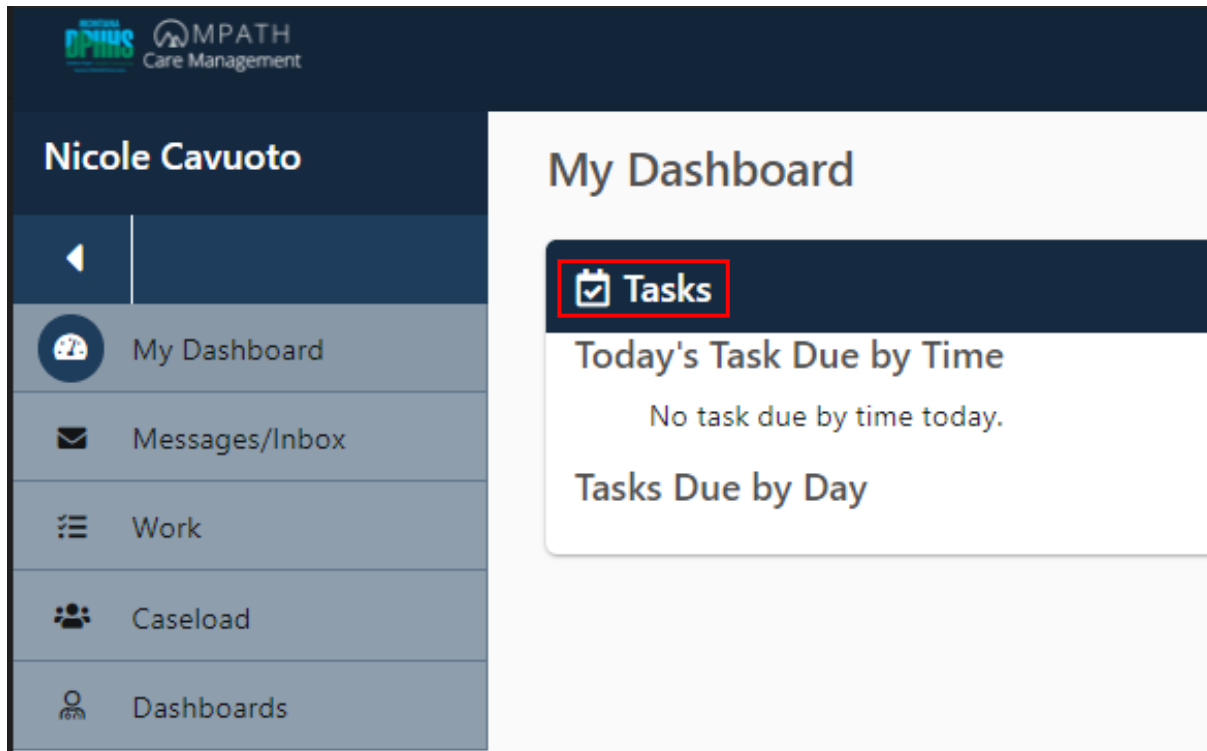

After the task has been worked, in this case, review and sign your members PSP, you will select navigate back into the Task. Under Status select **"Completed"** and hit **Save.**
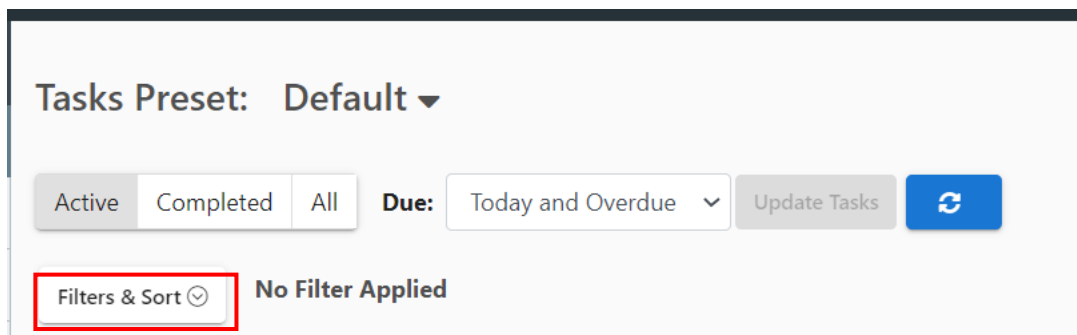
Filtering Tasks

There are a series of filters that can be exposed by clicking the button labeled "Filter and Sort". This displays a set of drop downs so that a user can filter Tasks by fields on the Task screen like priority, type, and status. To Filter your tasks, navigate to your dashboard and select Tasks.

As you can see in the task list it can be overwhelming to see all the columns.

Click into the button Filter & Sort to apply a filter.

Scroll on the way to the bottom where you can find the selected Columns section.

Many of the columns have been removed and now the user will be able to see a cleaner view of their tasks.

	Due Date	Task Type	Description	Priority	Member Id	Member	Status	Due Today/Overdue	Inserted Date	Start Date

These filters can be customized to fit the certain criteria you will be looking for in your day to day responsibilities.

Appointments

This feature includes options such as user availability and member appointments. The dashboard pane will display appointments and available time slots for the current week. As with other panes, you may access other portions of the feature by navigating to the **left navigation pane > Work > CM Appointments.**

Key Facts about Appointments:

1. Before scheduling takes place, availability must be set.
2. Availability is set by days of the week, so an entry of availability on a Monday from 9-5 will mean that the user is available on any Monday from 9-5 (minus any slots where appointments have been set).
3. Appointments must identify a user, and a member.
4. Double booking is not allowed. MedCompass will display a warning message if a user tries to double book.
5. You do not accept an appointment; if you cannot attend the appointment scheduled, reach out to the user who created the appointment directly.

Setting Availability

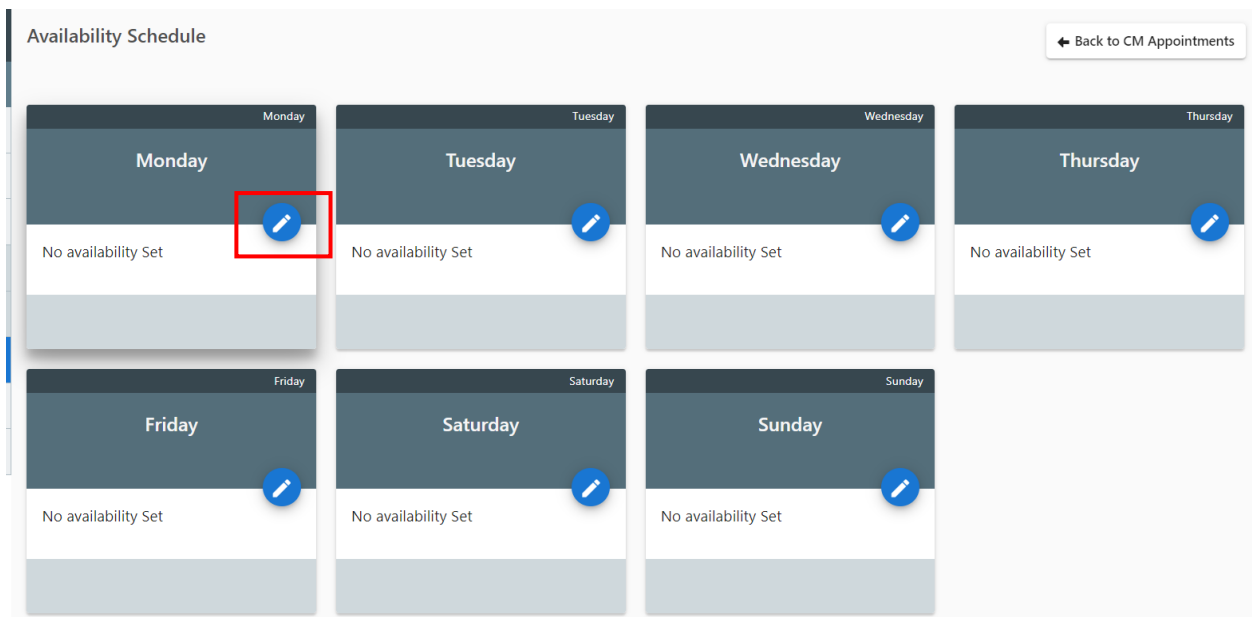You may be asked to join meetings concerning the member and the plan of care. As a result, you will need to set your availability. In your main **dashboard**, navigate to **Work > CM Appointments.**
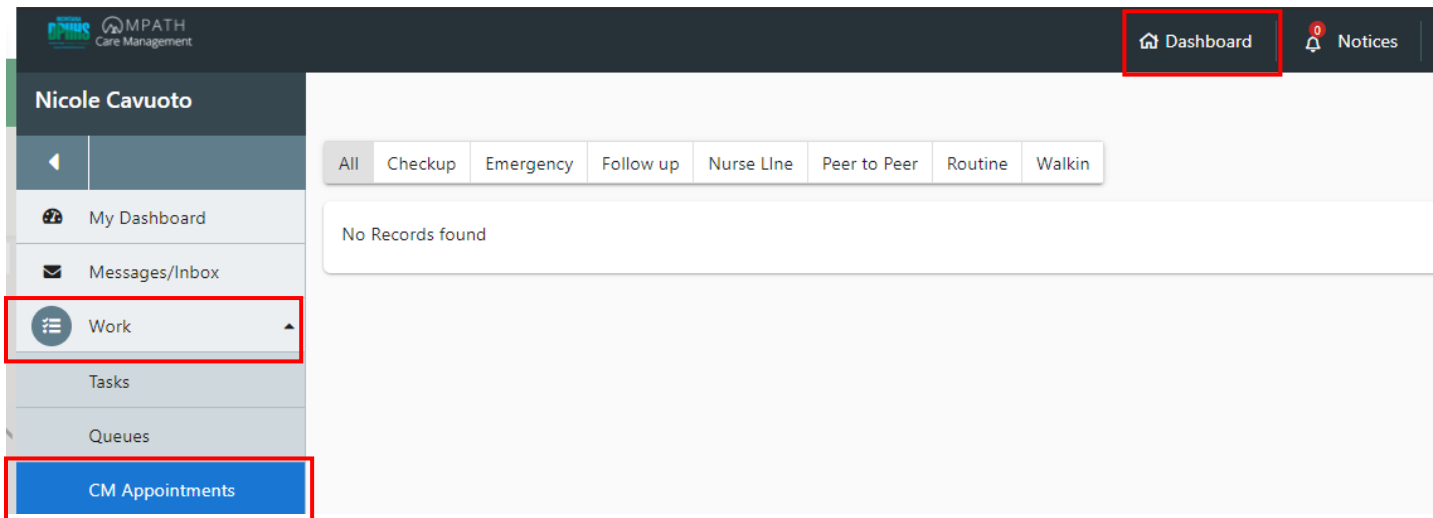
Select **Set Availability** underneath your name in the top right corner
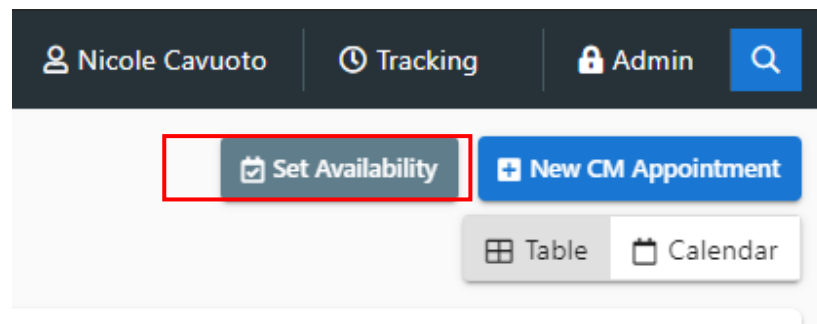
You will be navigated to your availability schedule. To set your availability select the blue pencil icon for each given day.

Click (+) Add. Set your available time and click **Save.**

Viewing an Appointment

As stated, you may be asked to join meetings concerning the member and the plan of care. When your care team schedules a meeting, it will appear under your CM appointments pane located on your dashboard. When you click into the appointment you will be routed to the appointment details screen. Here you will see the organizer, which in this case is the case manager. The member (Kristen Bell) and a guardian that serves her (Laurie Taylor). You will also notice the appointment type, subject, duration of the meeting, where the meeting will take place and start and end date.

Caseload

Members whose care is being managed by you will appear in your caseload pane. (Note: only members you manage will appear in your caseload. To view your caseload, navigate to your **Dashboard > Caseload.** You can navigate to a member in the list simply by clicking on the name.

Clicking on any name in the list will open the member's record.

Health 360

Health 360 contains health data about the member. Choices include Health Summary, Allergies, Medications, Immunizations, Metrics, Lifestyle, History, and Diagnoses. When a member is opened from the dashboard caseload pane the Health Summary tab is the landing spot. The Member Banner stretches across the top of the record, displaying basic demographic information about your member. This page is meant to provide you with a quick, meaningful view of what is known about that member in MedCompass. You will not have access to enter any new information but will be able to review all data within these fields.

The Panes currently available for display on the Health Summary are:

Pane	Description
Allergies	A list of the member's allergies and what type of allergen it is.
Medications	Displays both Rx and OTC medications taken by the member.
Immunizations	Displays the members immunization records.
Metrics	Displays the members health metrics
History	This pane displays the members family history.

Diagnosis	Displays known, active diagnoses. First and Last Identified Dates will also show.

Demographics: Profile

If you select Demographics from the members left navigation pane, 5 tabs used to collect demographic information will display. Those are: Profile, Contacts, Legal Information, Employment, and Living Arrangements. You will not have access to enter any new information but will be able to review all data within these fields.

Care Team

The Care Team provides a view of all the staff that are involved with your Member. The records capture name, role, and start and end dates. This assures two things:

1. All staff know who is working with the Member, and in that capacity.
2. Any Notifications/Alerts that are triggered by Member data can be directed to all applicable staff.

Care Providers

To view you members, Care Providers navigate to the **Members Health 360 > Care Team > Care Providers.** You will be able to see all active and inactive care providers serving your member. You will also notice you will be added on the Care Provider screen as well with a **Guardian/Parent/Family Role.**

Care Staff Members

To view you members Staff Care Members, navigate to the **Members Health 360 > Care Team > Staff Members**

You will be able to see all active and inactive staff members serving your members, such as Case Managers. You will also notice you will be added on the Care Team as well with a Guardian/Parent/Family Role.

Activities
The Activities section documents activities that are related to the member- whether entered by a user or system generated.

Case Notes
Case Notes are narrative records documenting the actions of Users. Case Notes may be added on many screens within MedCompass: but will always appear here under **Activities > Case Notes.** Guardians will not be allowed to create a case note and will only have access to a select few case notes.
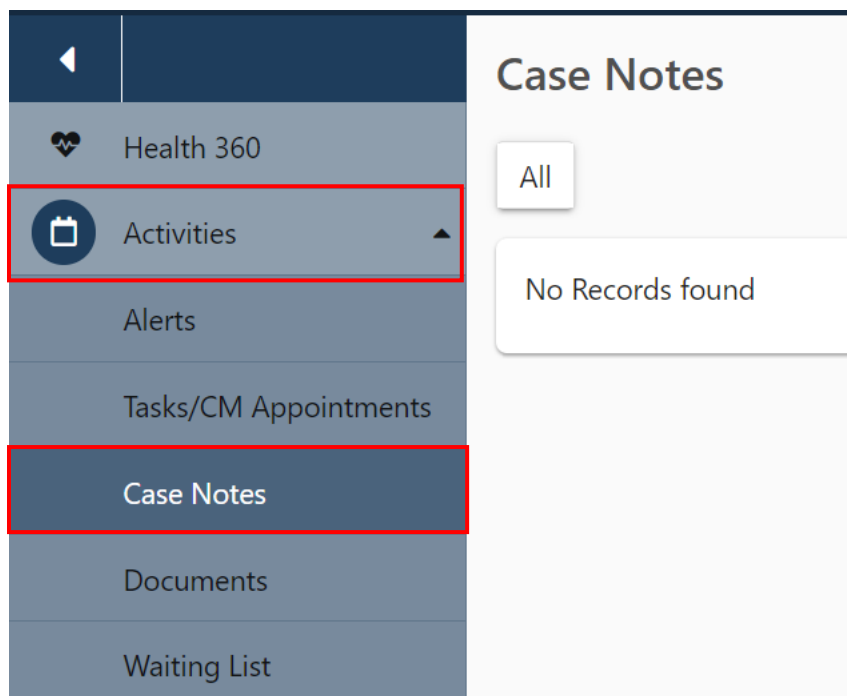
Document Center
Like Case Notes, a Document may be added on most screens in MedCompass but will always appear here under **Activities > Documents.** This tab will contain every attachment, letter and fax entered for the member regardless of the screen on which it was added. Guardians will not be allowed to attach a document, however, will be

able to view them. If you want to open a document from the Summary, click on 'View' in the lower left corner of the record.
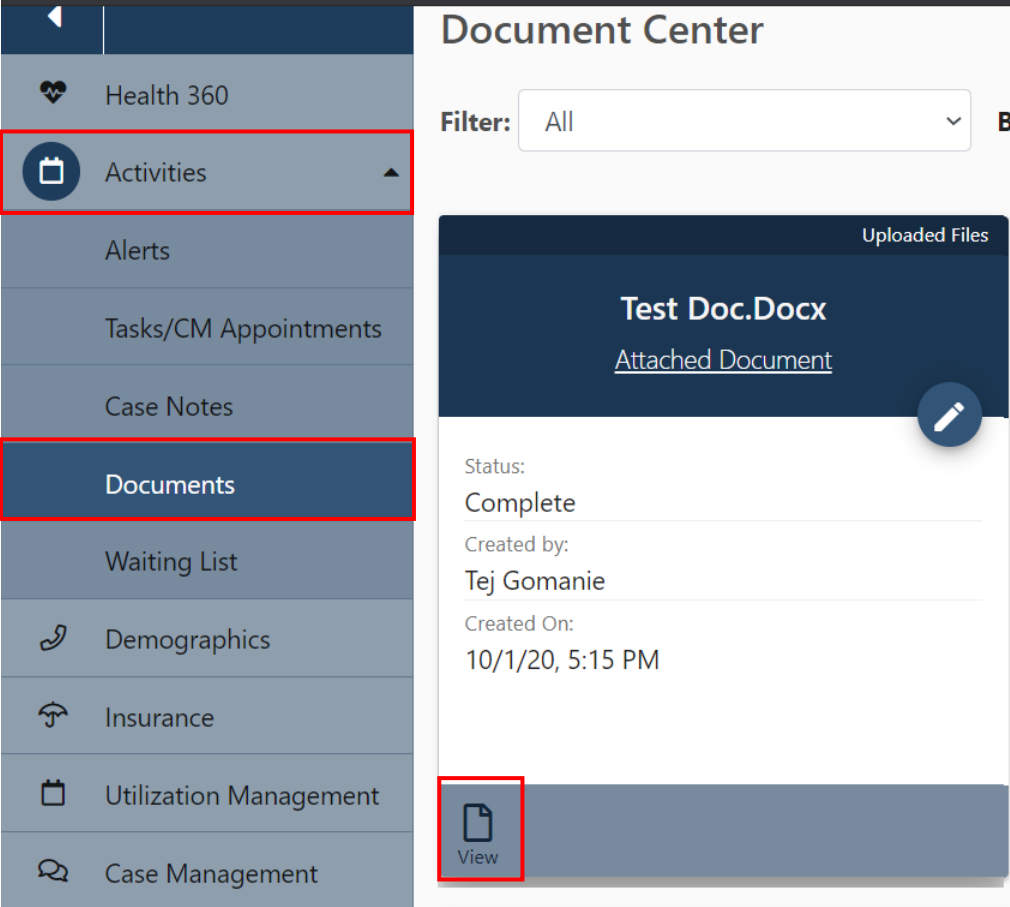
When the document opens, it will be in a viewer window.

Preview Document

Test Doc

Close

Waiting List

Parents and guardians will be able to view if their member is on the waiting list. To view your member on the waitlist navigate to your members **Dashboard > Activities > Waiting Lists.** The Waiting List will contain various information such as the Region you member is in, Priority, Reason for Removal, Date Placed on Waiting List and Date Removed from Waiting List. For more information regarding your members placement on the waiting list, contact your case manager.

Assessments & Forms

Parents and guardians will be able to view and sign assessments as requested by the Case Manager. At least annually, a parent/ guardian will be asked to review and sign the Freedom of Choice and Consent Form and the Personal Support Plan.

To view an assessment, navigate to your **Members Health 360 > Case Management > Assessments and Forms.** Here the Guardian will find the associated documents where they will be required to sign the assessment upon completion. To sign an assessment, navigate to **the Members Health 360 > Case Management > Assessments and Forms.**

Once you click into the assessment you are to sign, in the top right you will see the **Sign** Button.

A signature window will now appear. Scroll to the Signer Role Denoted as **Guardian/Parent/Family**. Click **Apply.**

Your name and signature will now populate. Click **Save.**
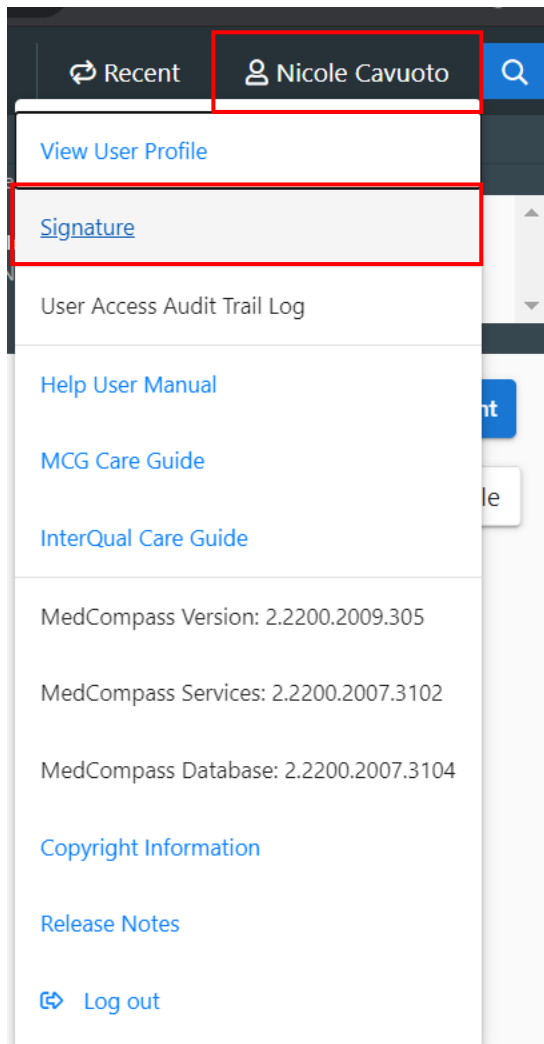

Note: You will not be able to sign the document if you have not created your signature in MedCompass. See Creating a Signature Section below.

Creating a Signature
In the top right corner, select your name and select signature from the drop down.

From here, you can electronically sign your signature which will be used when signing off on various assessments. Click **Sign.**
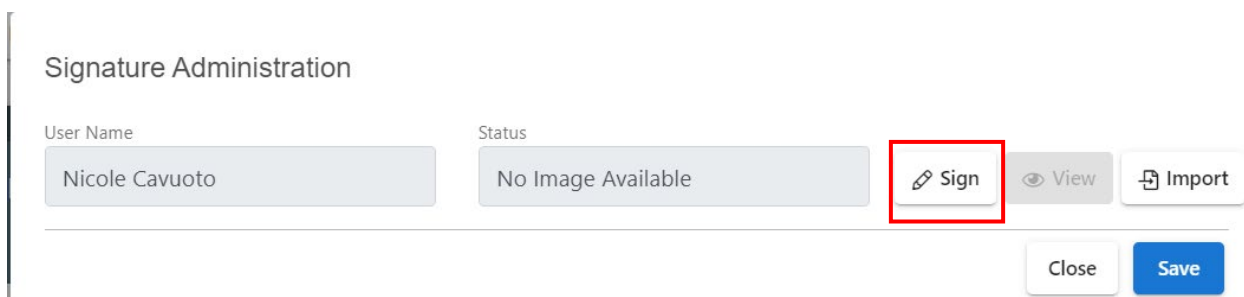
The Create Signature window will now appear. Sign in the box identified below using your mouse and click **Save Signature**.

Create Signature

The file will then be uploaded to your user account. Select View. To view your signature.

View Signature
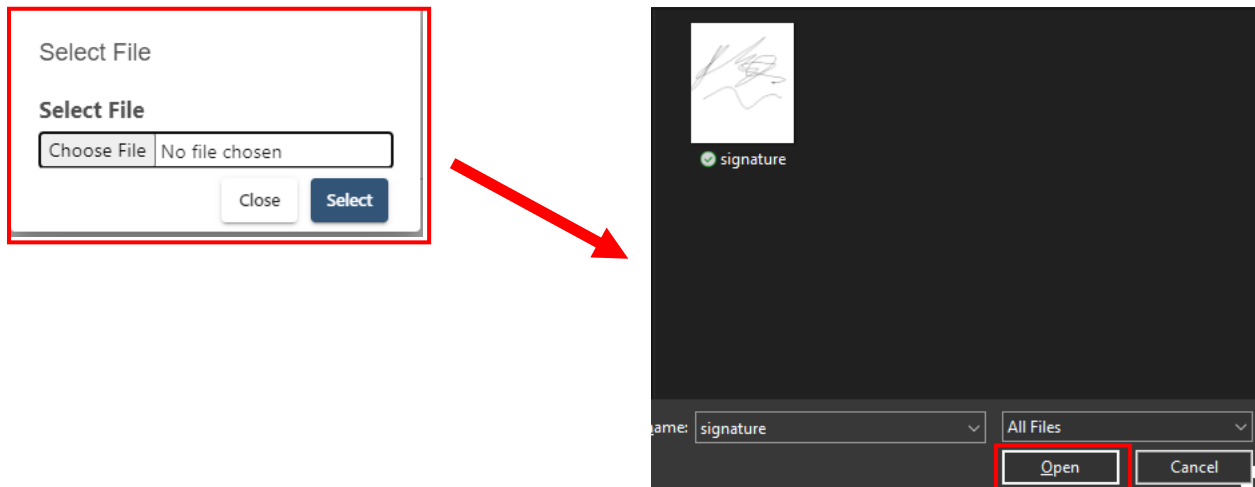
Uploading a Signature

You also have the option of uploading a signature you may have saved on file. If you choose to go this method you will select import, instead of sign.
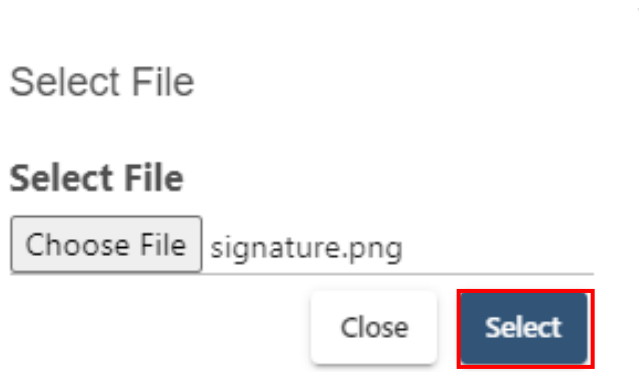

Signature Administration

From here a select file window will open. Select Choose File.

Navigate to the file containing your signature on your desktop and click open.

The file will now display. Hit select.

The file will then be uploaded to your user account. Select View. To view your signature.
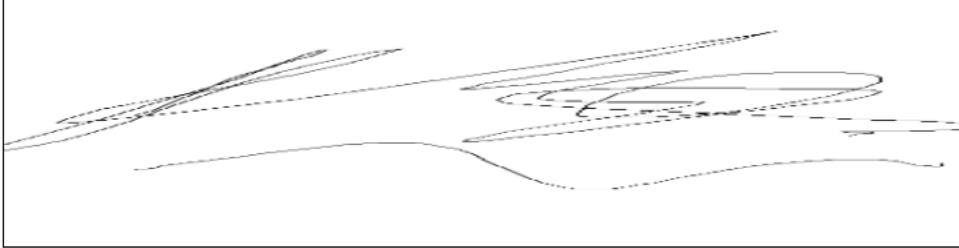
View Signature

User Name

Nicole Cavuoto

Status

No Image Available

🖉 Sign   👁 View   Import

Close