

Supporting Documents



Supporting Documents

Supporting documents can be uploaded to CHOICES and attached to an individual's record. The document then resides in CHOICES, and is available to be viewed by an authorized user in the future.

NOTE:

The following file types are allowable in this system

Text & Documents		Graphic Formats	
.txt	Text File	.gif	Graphic Interchange Format
.pdf	Portable Document Format	.jpg / .jpeg	Joint Photographic Experts Group
.doc / .docx / .xml	MS Word	.png	Portable Network Graphics
.wps	MS Works	.tif / .tiff	Tagged Image File Format
.rtf	Rich Text Format		
Spreadsheets			
.xls / .xlsx / .xml	MS Excel		
.wks	MS Works		

The Maximum file size for the system is 50 Megabytes

Documents are uploaded to CHOICES by clicking the **Supporting Documents** button. This can be found in 2 places depending on whether the document is associated with a particular form, or simply uploaded as a reference document for the individual. Both will be shown below.

Supporting Documents – Attach directly to a Form

To upload a supporting document to a particular form, the user must first complete and **Save** the form.

In this example, a DDP1 will be completed and all necessary supporting documents that are required by the DDSO will be required to be uploaded to the form to complete the packet.

A DDP1 to add an Individual to a Respite program *may* only require a transmittal; but another add to program, MSC, will require at a minimum 3 supporting documents, a completed copy of the MSC with the Family or Advocate's signature, the Ongoing and Comprehensive form, current Psychological Evaluation.

NOTE: Please contact your local DDSO for the exact documents required if you are unsure.

Example DDP1: Complete the form

DDP1 - Registration/Movement Form

File DDP1 - Registration/Movement Form Form Actions

Save Save & Close Save

Sharing - Copy a Link E-mail a Link Collaborate

Run Workflow Process Start Dialog Run Report - Data Help On This Page Help

Information

General

Notes

Related

Common

Activities

Closed Activities

Supporting Documents

Processes

Workflows

DDP1 - Registration/Movement Form

New

General

Purpose Of DDP1

Purpose * Add

Demographic Data Change No Yes

Individual Information

Individual NEIRS.MALA

Last Name * NEIRS

Middle Initial

Sex *

Social Security Number * 112-60-3386

Ethnicity/Race White

Individual's Residence Type

County Of Residence ONONDAGA

Address Line 1 5750 EAST SENECA TURNPIKE

City JAMESVILLE

Zip 13078

TABS ID * 4962

First Name * MALA

Date Of Birth * 3/27/1959

Medicaid Number * ALM42256G

Specify Other Residence Type

Address Care Of

Address Line 2 *

State NEW YORK

Date of Registration 7/13/1971

Agency / Program Information

Agency Name BROOKLYN DEVELOPMENTAL CENTER

Add TABS Program Code REHABILITATION SERVICES WAC -- 02352000

Remove/Add Date * 9/4/2012

Current TABS Program Code

DDSO BROOKLYN DDSO

Remove TABS Program Code

Date of Death

Disabilities (Check All That Apply)

Developmental Delay No Yes

Autism No Yes

Mental Retardation No Yes

Cerebral Palsy No Yes

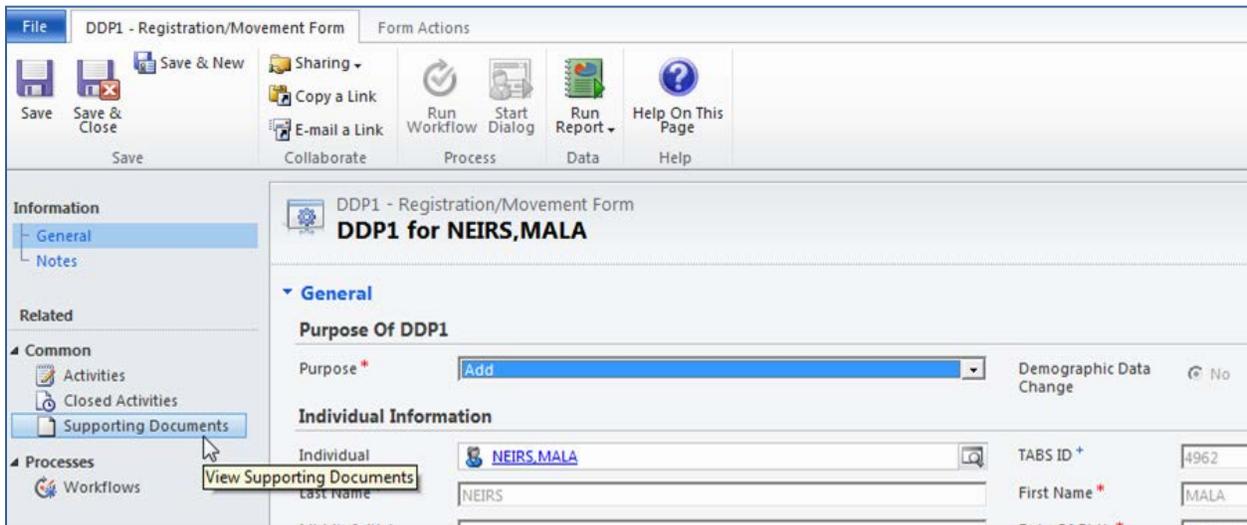
Status Active



Once all required fields are completed, click the **Save** button on the left side of the top ribbon.

The Supporting Documents button will become available in the left column of the form.

Click the Supporting Documents button



The Supporting Documents section of the DDP1 displays.

In the *content pane*, (upper left corner) is a **New** button, click the **New** button to begin to upload.

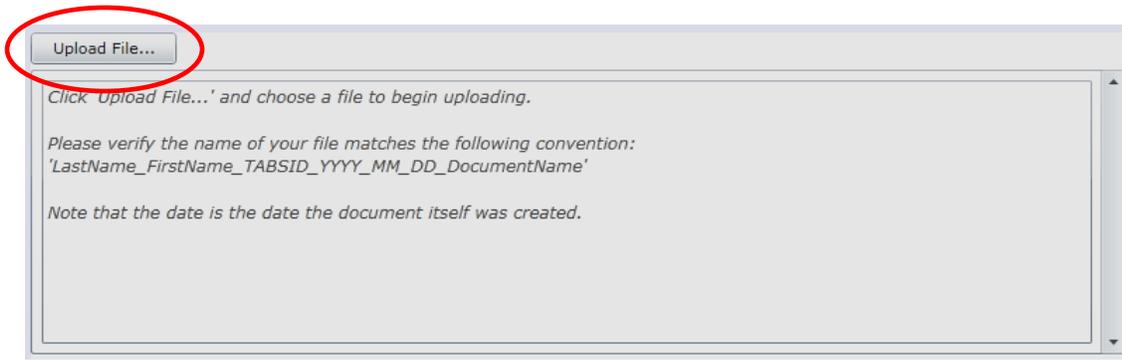


NOTE: Before any document can be uploaded into CHOICES, it must be saved in the correct naming convention as shown below. This will also display on the Upload File box each time you do an upload.

LastName_FirstName_TABSID_YYYY_MM_DD_DocumentName

Example: Consumer_Jon_12345_2012_09_01_transmittal

The following screen displays when the **New** button is clicked.

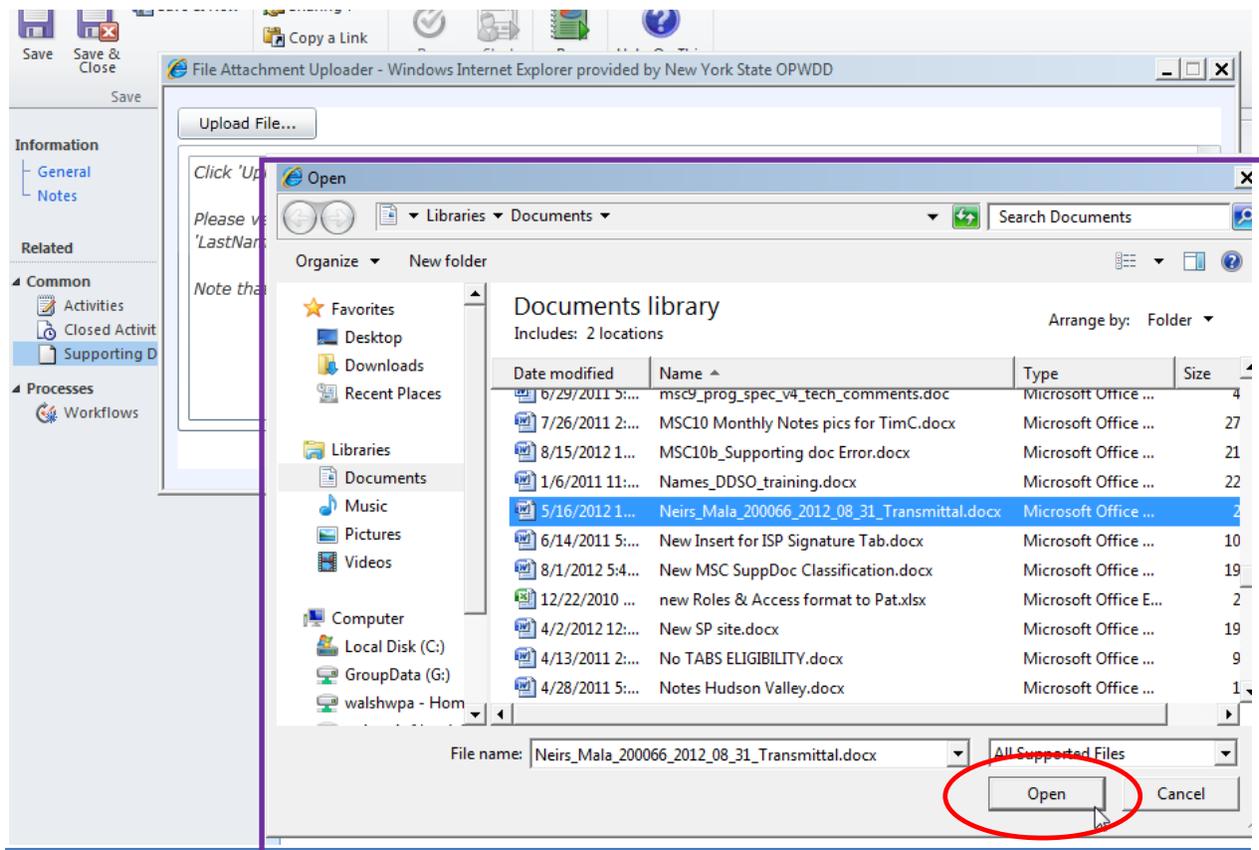


Click **Upload File...**

A **dialog box opens**, from which you will browse your computer folders to select the correct file or document

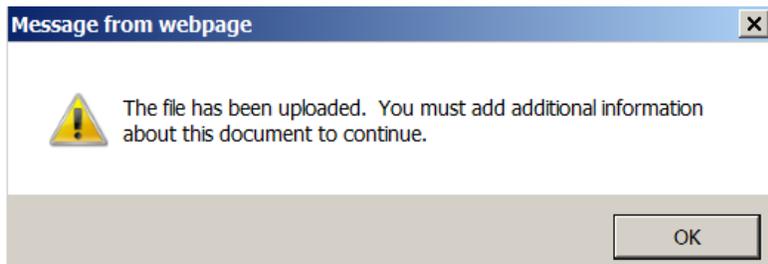
Click on the correct document to highlight

Click the **Open** button. This will actually "Upload" the document.



Once the document has finished uploading, the following message will display.

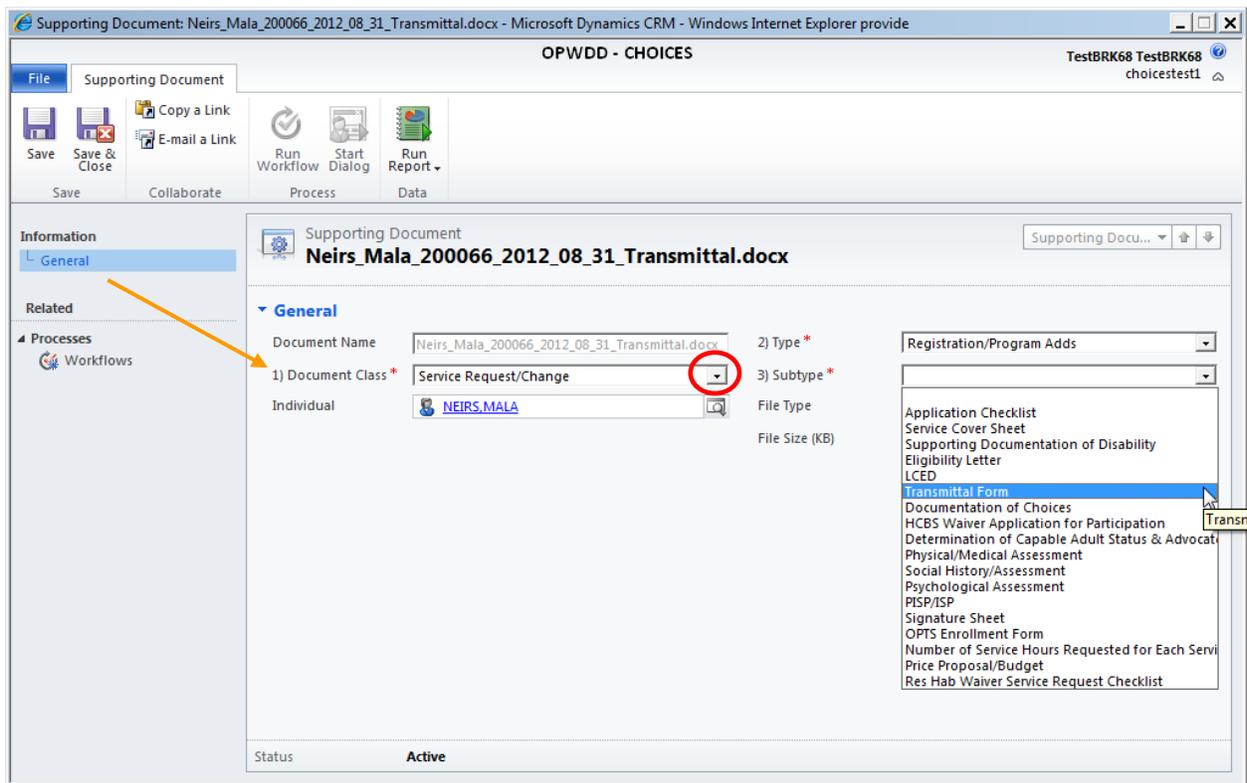
Click “OK” to close the dialog box.



The following screen is the additional information needed for the uploaded document.

This will classify, or categorize, the document that has been uploaded to the form.

Also, all documents attached *to a form* are copied over to the *Individual's record*.



Document Class, **Type** and **Subtype** are all **Required Fields** (*), you must fill them in.

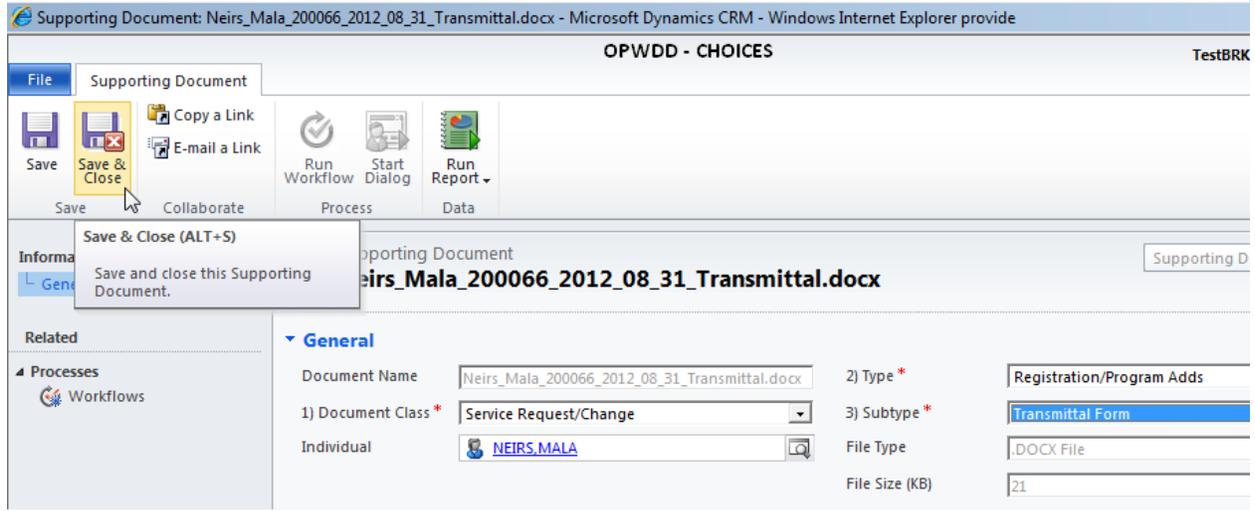
Start with **Document Class** by clicking on the down arrow and select the most appropriate Class from the list.

Once a Class is selected, the *dependent field* of **Type** will be available with the appropriate list relative to the Class you selected. Click on the **Type** down arrow and make the proper selection.

Do the same for “**Subtype**”.

In this example, we are completing a DDP1 for an Add to Program. This particular program add requires a transmittal as a supporting document.

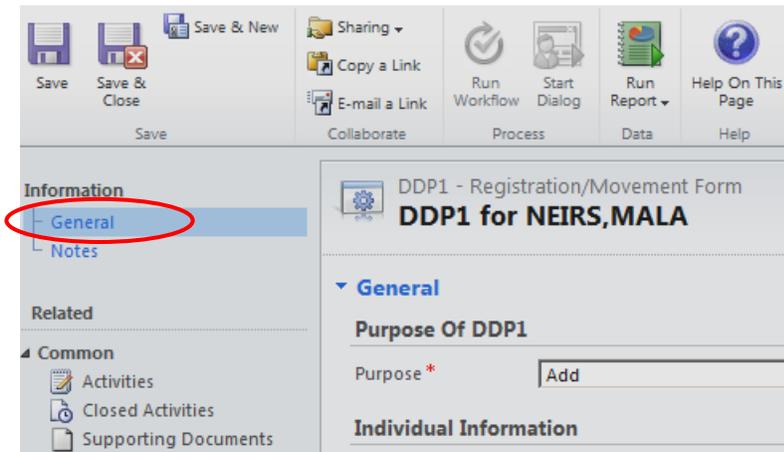
1. Class – our DDP1 is a Service Request so - Service Request/Change is appropriate
2. Type – our DDP1 is an add to program so – Registration/Program Adds is appropriate
3. Subtype – the supporting document is clearly a transmittal



After completing the 3 sections, **Save & Close** the classification screen.

NOTE: Be cautious that you are using the **Save & Close** on *this screen* and *not the DDP1*. If you use the wrong, Save & Close, you will close the DDP1 and wonder “what happened?” or “where is my form?”

After uploading all necessary supporting documents, click **General**, under **Information**, to return to the form’s information page.

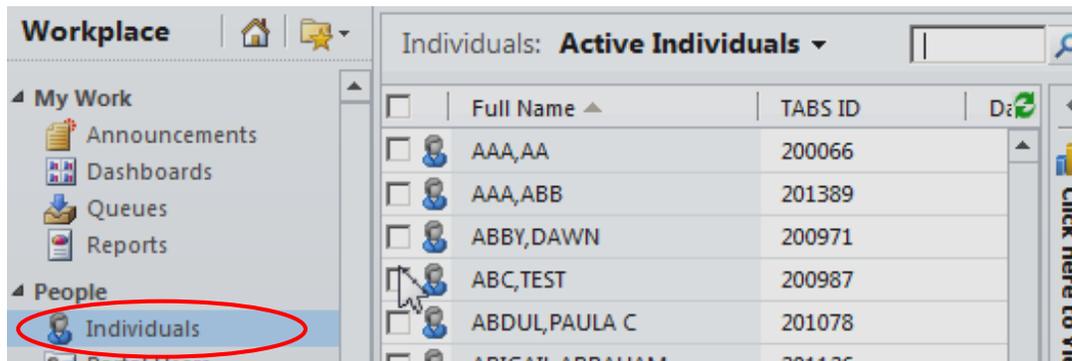


You can now Submit the form, go to, **Form Actions**, on the ribbon, and click **Submit** .

Supporting Documents for an Individual

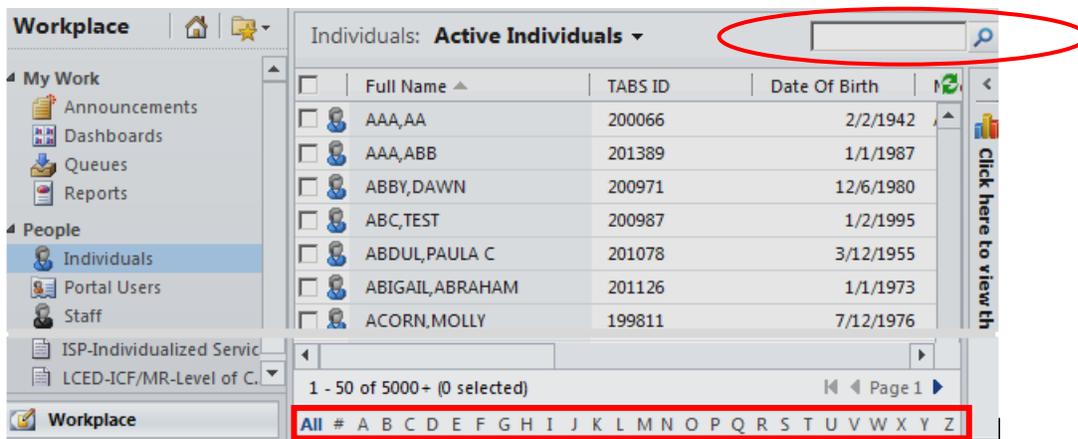
To upload supporting documents for an individual that is not attached to a particular form you must first search for and open that individual's record.

To attach new Supporting Documentation to an Individual we will start in the **Workplace** section under **People**, click the “**Individuals**” link:



The Individuals section displays everyone that is known to TABS.

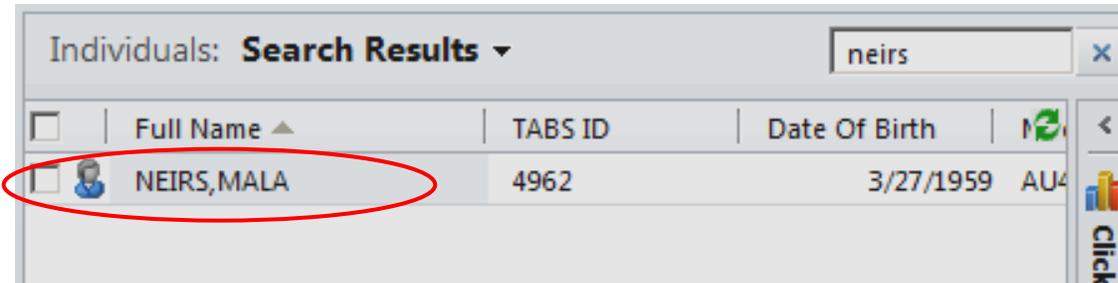
In the Individuals section, you can search either by name, type the last name in the blank field, shown below in the red oval, or you can narrow the search down by clicking a letter at the bottom of the screen.



For this example we will show how to locate a certain individual by typing the name 'Neirs' in the Search for records section. Then click the **Search** button .

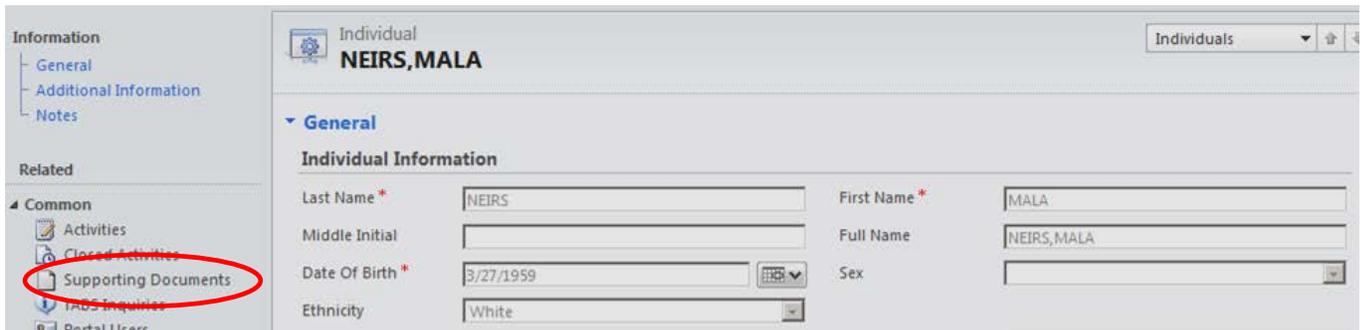
A list matching our search displays.

To start attaching documentation for “Mala Neirs,” click on her name to open her record.



A screen appears with her information pulled directly from TABS.

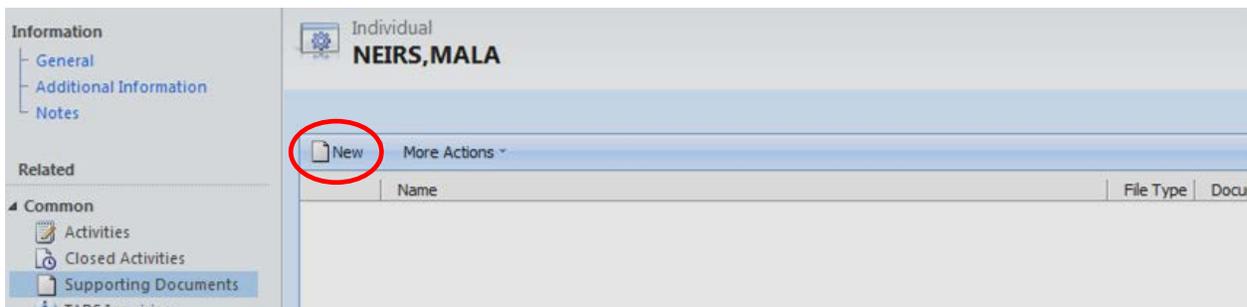
Under **Common**, Click **Supporting Documents** to go to that section of the Individual's record.



The Supporting Documents section for Mala Neirs appears.

Currently, there is no Supporting Documentation for Mala Neirs.

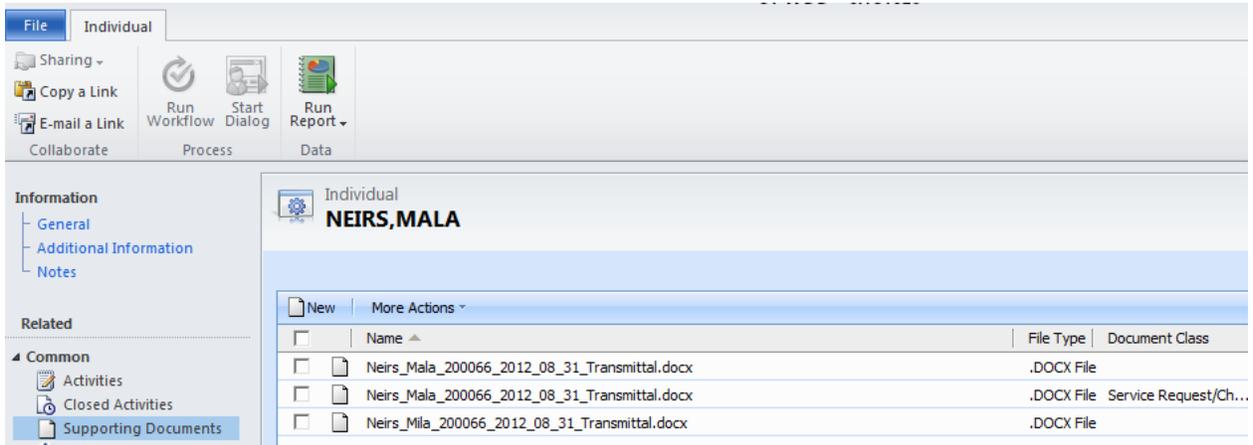
To attach a new Supporting Document click the “**New**” button.



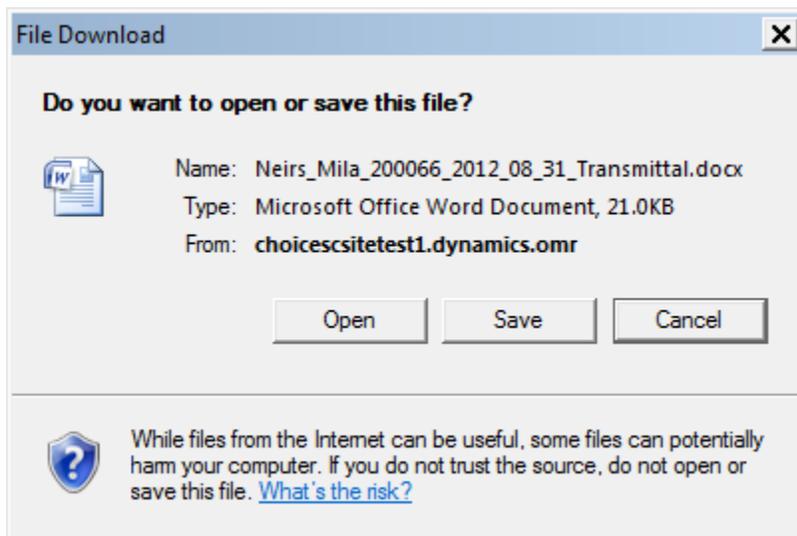
Follow the same steps as outlined for forms starting on Page 4.

Open a Supporting Document either on a Form or in the Individual's Record

Once at the Supporting Document section, **double click** on the document to open.



The following dialog box displays. Click **Open**



Closing the Supporting Document

Click the  in the top right hand corner to close the Supporting Document you opened.

The Supporting Document(s) is now listed in the Individual screen for Mala Neirs. You can open up any document by just double clicking on the name of the document.

NOTE: Supporting Documents cannot be edited or modified in any way once they are uploaded.

More Actions

Under the “**More Actions**” button you can *Edit Supporting Document*. This is only for editing the categories selected.

NOTE: Once the document is uploaded it cannot be removed by the end user; contact the DDSO or IMS-Help Desk for assistance if the document *must* be removed. This will only be done if there is a HIPAA violation!

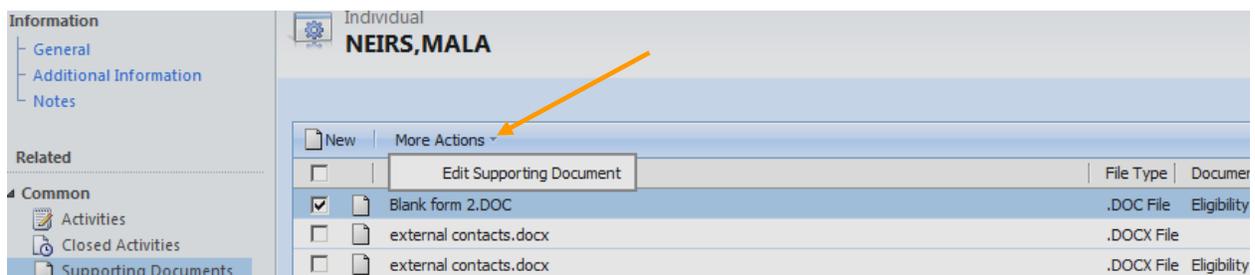
To edit the classification

If there is more than one document listed:

Place a checkmark, click inside the box, in front of the document, to select it

Click the arrow next to More Actions

Click Edit Supporting Document

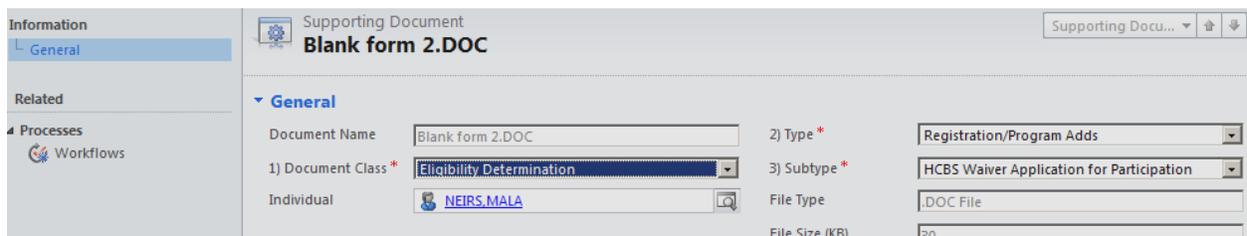


The document you selected is now opened to the category window.

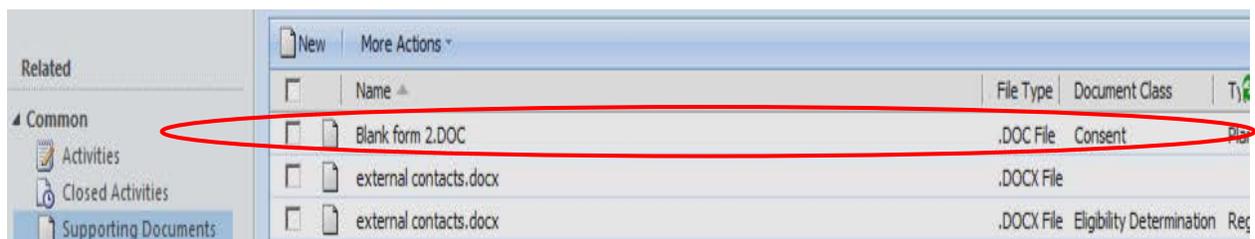
All fields are now unlocked.

Start with 1) **Document Class*** and continue until you complete **Subtype**.

Then click **Save & Close**



Once the change has been made, the new classification will display.



Linking Documents to a Form

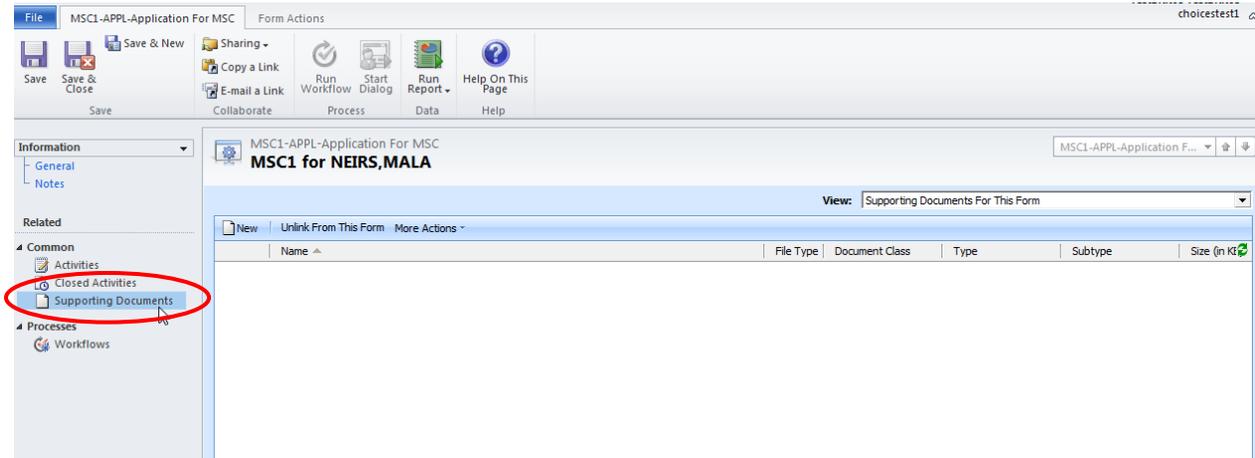
Especially necessary to read if Copying a returned form. Copies of any form **do not** keep the supporting documents attached.

To link supporting documents to a form, the supporting documents would have been previously uploaded to the Individual's record or automatically copied over to that section when previously attached to a form in CHOICES.

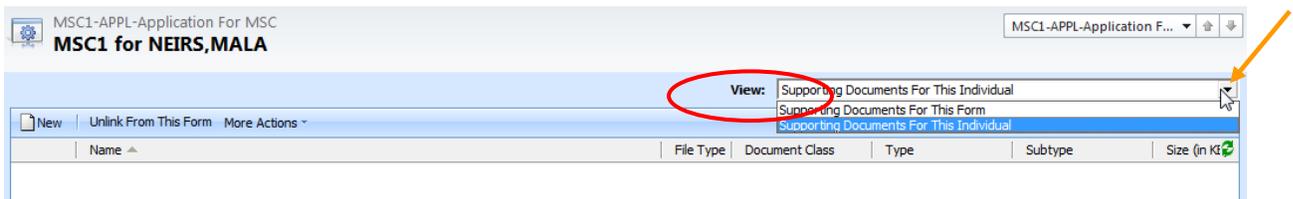
The supporting documents section for any form as two options for Uploading:

1. The **New** button, which was already shown in this Step by Step
2. Or **Link** to the form.

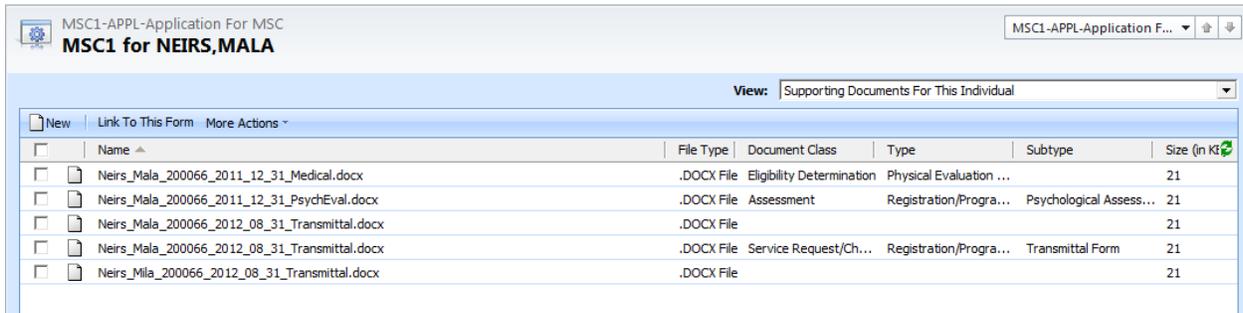
On the form, in this example a MSC1, go to the Supporting Documents section



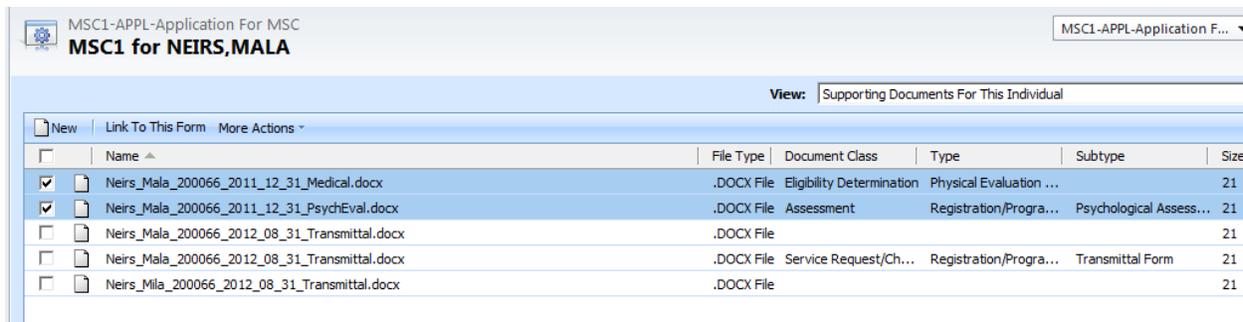
At the Supporting Documents section, on left side is **View**, click the down arrow to select "Supporting Documents for This Individual", once highlighted, click.



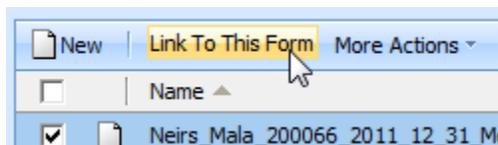
All supporting documents in the *Individual's record* will be displayed.



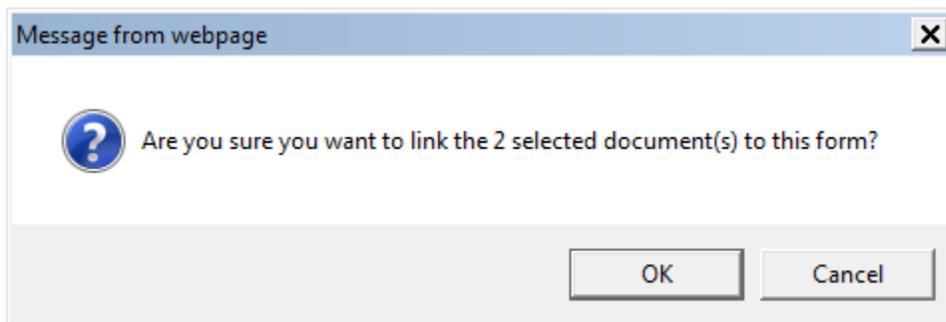
Click in the box in front of the one or multiple documents you need.



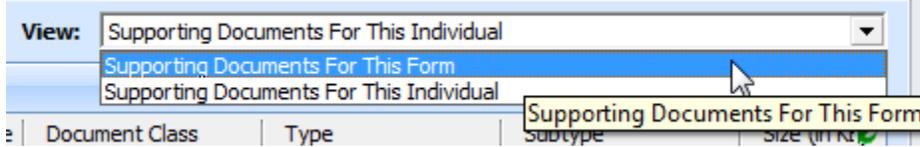
Hover over the button, Link To This Form, to highlight and then click



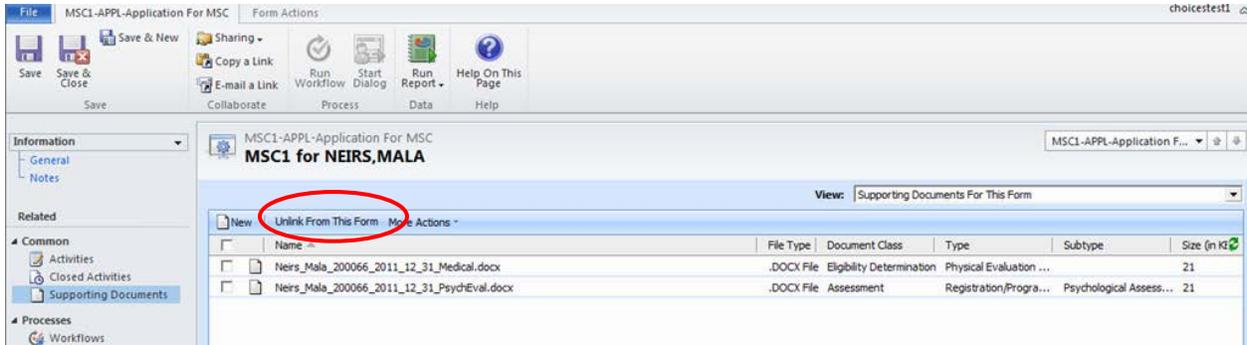
The following message will display, if your selection(s) are appropriate click **OK**.



Now return the **View** back to the View ...**For This Form**



The supporting documents have successfully linked to the form.



Notice there is also an “Unlink from this Form”, which will function the same to remove a document from a form.

NOTE: The “Unlink” function will not delete the supporting document from the Individual’s record; only remove it from the form!

Other Supporting Documents necessary to this form:

If besides the supporting documents, you reattached via Link To This Form, you can upload another document(s) via the **New** button process.

This can be done either, before or after, you have completed the Linking process.