eEvaluation: Documenting the Evaluation
Contents

General Recommendations ............................................................................................................. 3
Important Notes.............................................................................................................................. 3
How to Sync ................................................................................................................................... 4
Installing App Updates .................................................................................................................... 4
Starting an Evaluation .................................................................................................................... 5
Required Documentation ................................................................................................................ 5
Unanswered Questions ................................................................................................................... 6
  How to locate an unanswered question in the assessment ............................................................ 6
Member Review ............................................................................................................................. 7
  Incorrect DOB.............................................................................................................................. 7
  Incorrect Gender ......................................................................................................................... 7
  Adding a PCP ............................................................................................................................... 7
Medical Diagnoses Impacting this Member’s Care ........................................................................ 8
Delete Function ............................................................................................................................. 8
Over the Counter Medicine .......................................................................................................... 9
Physical Exam/Review of Systems ................................................................................................ 9
  Memory Test and Timer .............................................................................................................. 9
  Screening Labs ........................................................................................................................... 10
Diagnoses ..................................................................................................................................... 10
  Diagnosing Eye Conditions ...................................................................................................... 10
Care Plan Tab ................................................................................................................................ 10
  Counseling Section .................................................................................................................... 10
  Special Report ........................................................................................................................... 11
PDF View ...................................................................................................................................... 11
PDF Slide Bar and Navigation Buttons ........................................................................................ 12
Member Signature Process .......................................................................................................... 12
Member Declines to Sign the eEvaluation .................................................................................... 13
Evaluator Signature ....................................................................................................................... 14
Submitting Your Evaluations ......................................................................................................... 15
  How do you know your evaluations were submitted? .............................................................. 15
Troubleshooting Measures .......................................................................................................... 16

Proprietary and Confidential Information
© 2013 EMSI-Leprechaun  Page | 2
General Recommendations

- Sync up with EMSI nightly to ensure that all completed evaluations are uploaded.
- Charge your iPad nightly so that you begin your evaluations with a full battery charge.
- Bring your power cord as a backup.
- **Check the leave-behind page** (last page) to see if there are any special instructions or additional leave-behinds for this member. This includes checking for members that have been selected for Horizon’s Medication Therapy Management Program.

Important Notes

**Print the PDF form for ALL appointments**

- Remember to always print your forms on the portal and take them with you.
- This will be your paper back-up if there are technical issues while in the member’s home.
- **Check the leave-behind page** (last page) to see if there are any special instructions or additional leave-behinds for this member. This includes checking for members that have been selected for Horizon’s Medication Therapy Management Program.
- Give the member the leave behind page.

**For cases complete on paper and submitted to EMSI via fax:**

- If the case is still listed on the iPad you can delete the case by finger swiping the case from right to left. This will bring up a red delete button on the far right of the case. Press the delete button to delete the case from your iPad.
  - **Please use extreme caution** to avoid deleting any pending evaluations that have been completed but not signed. We will not be able to recover the data if you delete a file with data that has not been submitted.
  - If you delete a case with a future appointment date by mistake, please contact me or your provider manager so we can reset the case for download again.

**Rescheduling appointments:**

- Do **not** reschedule any appointments on your calendar for evaluations that you have already completed on your iPad. You will risk losing data because a reschedule triggers a new form for download that will overwrite any updates you have made.
- If you need to reschedule an appointment please do **so at least one day in advance**.
- If you are not able to reschedule a day in advance, leave the appointment on the calendar and status the case as appointment met on a different date on your open case list.
- Remember, you can always add more available hours if you want to accept new appointments on a calendar date.
How to Sync

You should sync at least once daily in order to refresh your current appointments and upload your completed evaluations.

- Connect to Wi-Fi.
- Login to the eEvaluation app.
- Tap the Sync icon at the top right of the Appointments bar.

- Wait for the sync to complete. This may take several minutes.

Installing App Updates

The eEvaluation app will be updated on occasion. These updates are “pushed” securely to your iPad through the Air Watch program. When you see the following message you MUST update. You will not lose any files that have not uploaded. See the document “Getting Started” for instructions on installing Air Watch and the initial eEvaluation app when you first begin or when you purchase a new iPad.

You only get one chance to do this. If you cancel the update, you will need to contact Provider Management to request the update again.
Starting an Evaluation

You will continue to go through the EMSI provider portal for scheduling. Please print the member’s PDF as a backup and for the leave behind page at the back of the Prospective form.

- Once you have synced and refreshed your current schedule, you do not need to be connected to Wi-Fi to perform the evaluation.
- When you login to the app, it may take a few minutes for your appointments to load.
- Select the member’s name in the list.
- The eform will open and you may start the evaluation.

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Scheduled Date</th>
<th>Time</th>
<th>Name</th>
<th>Address</th>
<th>Phone Number</th>
<th>Days to Expire</th>
</tr>
</thead>
<tbody>
<tr>
<td>A101212001</td>
<td>2012-11-16-05:00</td>
<td>06:00</td>
<td>Glenda Taylor</td>
<td>12179 Mt Pleasant Ave Denver NJ 11111</td>
<td>(555)111-1001</td>
<td>7</td>
</tr>
<tr>
<td>A101212002</td>
<td>2012-11-16-05:00</td>
<td>06:00</td>
<td>Gloria Seranne</td>
<td>12212 Delaware Avenue Denver NJ 11111</td>
<td>(555)111-1002</td>
<td>7</td>
</tr>
<tr>
<td>A101212005</td>
<td>2012-11-02-05:00</td>
<td>08:00</td>
<td>Beverly Nance</td>
<td>12209 Burlington Avenue Denver NJ 11111</td>
<td>(555)111-1006</td>
<td>7</td>
</tr>
<tr>
<td>A101212006</td>
<td>2012-11-02-05:00</td>
<td>09:00</td>
<td>Bobbi Ferror</td>
<td>12956 Cranbury Cross Rd Denver NJ 11111</td>
<td>(555)111-1006</td>
<td>7</td>
</tr>
</tbody>
</table>

Required Documentation

There is required documentation throughout the eEvaluation. You will not be able to start the signature process until all required items are completed.

The red asterisk indicates required information. However, not all requirements are marked with an asterisk.

Another indicator is the yellow warning triangle.
Unanswered Questions

You may check for missing required documentation by selecting the signature icon at the top right of the screen.

Any remaining documentation requirements will be listed. Notice in the example shown below that the tab name is first, followed by the section and the missing item. To return to the evaluation, select the Back button at the bottom of the screen.

BEST PRACTICE: Check the Unanswered Questions screen after finishing each main tab. It will make locating the missing item easier.

How to locate an unanswered question in the assessment

1. Look for empty text boxes (rectangular boxes) followed by an asterisk. Most of the text boxes will be on the right of the screen.
2. Look for empty radio buttons (the round ones). If a group of radio buttons display, most of the time you will need to select one.
3. If the issue is Medical Diagnoses Impacting this Member’s Care, look for:
   a. Chronic diagnoses with no Current Management checked.
   b. Any diagnoses not marked Chronic, History or Deny.
   c. An empty diagnoses box. If it’s a diagnoses item you accidentally added, use the Delete function to erase it or type “NA” in all the empty text boxes.
Member Review

Incorrect DOB
You will have the opportunity to enter a corrected date of birth. This will NOT appear on the pdf version of the form, but it will be noted in an addendum to the PEF.

Incorrect Gender
You will also be able to note an incorrect gender. Once again this will not change the pdf version of the form but it WILL affect questions on the form. Items that are gender specific in the Screening Review, such as PSA or mammogram, and the PE/Review of Systems, such as erectile dysfunction, will only display for the specified gender.

Adding a PCP
1. Tap the blue plus button to the left of the PCP dropdown.
2. Enter all the required information. If the member doesn’t know the address, type Unknown.
3. Tap the OK button.
4. Tap the PCP dropdown. The new PCP should be at the bottom of the list.
5. Select the new PCP and tap Done.

![PCP dropdown]

6. The new PCP name appears in the box and on the pdf.

![New PCP name]

**Medical Diagnoses Impacting this Member’s Care**
- Diagnoses are arranged by date – most recent to least.
- No more than 30 diagnoses are displayed. Once the diagnoses (pre-populated plus any you add) reaches 30, you will not be able to add any more.

**Delete Function**
A delete function is available in a few locations. For the most part, if a section allows you to add an item using the green plus symbol, you can use the delete function to delete a row you added accidentally. You will not be able to delete any pre-populated data.

![Medical Diagnoses]

- Swipe your finger lightly from right to left on the row you need to delete.
- Tap the delete key.
**Over the Counter Medicine**

There are text boxes for Brand, Dosage and Frequency. Complete all three text boxes for each OTC the member takes. You do not need to mark each type of medication, just the ones the member takes.

![OVER THE COUNTER MEDICINE](image)

**Physical Exam/Review of Systems**

Perform and document the PE/ROS as usual. For each system, the app displays the Physical Exam questions first, followed by the Review of System questions.

**Memory Test and Timer**

- There is a digital timer located in the Constitutional section which is set for 5 minutes. Tap the Start Timer button to begin the timer.
- You will use the three words on the form for the test for everyone: glasses, pencil, shoe.

![Memory Test](image)

- After 5 minutes, an alert will pop up on your screen. Ask the member the 3 words. This will not necessarily occur at the same time you are at the member test section of the exam. You may need to scroll forward to record the member’s results.
- It’s acceptable to start the timer when you judge appropriate. It’s placed in the Constitutional section so that it is easy to find.
Screening Labs

- Pt Glucometer: Select “Unable to Obtain” if the member is diabetic and either refuses the blood test or you are unable to draw a sufficient sample.
- If the member is not diabetic or does not have a glucometer:
  - Pt Glucometer: Select “N/A”. This will not populate on the PDF, but will not be QC’d as incorrect.
  - Other blood sugars (from logbook): Check “Unable to Obtain”.

Diagnoses

Diagnosing Eye Conditions
Since you will no longer perform a fundoscopic exam, eye diagnoses, such as diabetic retinopathy, must be supported by prior claims data. It’s important to know how it’s being treated.

Care Plan Tab

Counseling Section
This section allows you to record any counseling offered the member. For instance, did you discuss the importance of preventative vaccinations? Or the importance of annual foot and eye exams with a diabetic member? Please mark any of the items that you discussed with the member.
Special Report
The special report isn’t labeled as such on the app, but it follows the last CPR, just as it does on the paper form.

Use this area to report an incident, whether it is for the member, such as a fall during the assessment, or it is for you, such as a belligerent or abusive family member, bite from a dog, etc.

PDF View
You can view your documentation on the PDF document at any time during the evaluation. Your documentation appears in red.
PDF Slide Bar and Navigation Buttons

You can navigate the PDF several ways.

<table>
<thead>
<tr>
<th>Navigation tool</th>
<th>What it does</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="&lt; &gt; navigation buttons" /></td>
<td>Go backward or forward by one page.</td>
</tr>
<tr>
<td><img src="image" alt="7 grey circle along bar" /></td>
<td>Choose a page by sliding the grey circle along the bar. The last page of this document contains a table of PDF page numbers and the corresponding sections in the eEvaluation.</td>
</tr>
<tr>
<td><img src="image" alt="To First Page To Last Page" /></td>
<td>Go to the first or last page.</td>
</tr>
</tbody>
</table>

Member Signature Process

Once you have completed the eForm and there are no outstanding undocumented issues, when you select the Signature icon the member signature page will display. Have the member or the history source read the Acknowledgement or you may read it to the member or history source.

The history source should sign this acknowledgement. You MUST choose one prior to signing.

Member’s signature area. Use a stylus or have the member sign with a finger.
<table>
<thead>
<tr>
<th>Navigation buttons</th>
<th>What each does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept</td>
<td>Accepts the signature and applies it to the PDF.</td>
</tr>
<tr>
<td>Clear</td>
<td>Clears the signature and lets the member try again.</td>
</tr>
<tr>
<td>Return To Evaluation</td>
<td>Allows you to return to the eEvaluation PRIOR to signing. Once signed the member’s signature is complete.</td>
</tr>
<tr>
<td>Member Declines</td>
<td>If the member refuses to sign, this will allow you to initial the form, just as you would the paper form.</td>
</tr>
</tbody>
</table>

**Member Declines to Sign the eEvaluation**

Should the member or history source decline to sign the form, you must attest that the member or history source was informed of the acknowledgement and has refused to electronically sign the form.

- Select the “Member Declines” button on the Member Signature screen.
- Read the attestation to yourself and initial in the signature area.
- Your initials will be applied to the PDF.

The Member/Medical POA/Legal Guardian has been informed of the acknowledgement and has refused to sign acknowledgement.

**Evaluator Initials:**

![Initials](image)

<table>
<thead>
<tr>
<th>Navigation buttons</th>
<th>What each does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept</td>
<td>Accepts the signature and applies it to the PDF.</td>
</tr>
<tr>
<td>Clear</td>
<td>Clears the signature and lets the member try again.</td>
</tr>
<tr>
<td>Return To Member Signature</td>
<td>Allows you to return to the Member Signature screen PRIOR to signing. This is here in case the member changes his/her mind or the Member Denies button was selected by mistake.</td>
</tr>
</tbody>
</table>
Evaluator Signature

Before signing the eEvaluation, it’s advisable to review the PDF version of the form as a final check. Once you have signed and submitted your signature, you may no longer make any changes to the eEvaluation.

By submitting your electronic signature below, you deem that this evaluation is complete per your assessment of the member. You also acknowledge that no updates can be made to the electronic record.

Electronically signed by (evaluator signature):

NOTE: If you do not select your credentials, the “Save and Submit” button will be grayed out and you will not be able to submit the evaluation.

<table>
<thead>
<tr>
<th>Navigation buttons</th>
<th>What each does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save and Submit</td>
<td>Accepts the signature and applies it to the PDF. This member’s eform now moves to the Completed list and can no longer be updated.</td>
</tr>
<tr>
<td>Clear</td>
<td>Clears the signature and lets you try again.</td>
</tr>
<tr>
<td>Save without signing</td>
<td>Allows you to return to the eEvaluation. Even if you sign the screen, your signature will not be saved. The member signature WILL be saved.</td>
</tr>
</tbody>
</table>
Submitting Your Evaluations

Once you have finished the signature process and have selected the “Save and Submit” button on the Evaluator Signature Screen, the evaluation is moved to the Completed list on the Appointments page.

You may sync more than one completed evaluation at a time.

To see your completed evaluations:
1. Return to the Appointments screen. This is the first screen you see once you login. It’s also available from most screens by clicking the house icon at the top left.
2. Select the dropdown at the top right. Select Completed from the dropdown choices.

To submit your completed evaluations, you must sync with the EMSI computers:
1. Connect to Wi-Fi.
2. Login to the eEvaluation app.
3. Tap the Sync icon at the top right of the Appointments bar.
4. Wait for the sync to complete. This may take several minutes.

How do you know your evaluations were submitted?
- Once an evaluation is submitted to EMSI, it is removed from the “Completed” list and appears on the “Submitted” list.
- You can check the Submitted list by choosing “Submitted” from the dropdown box on the Appointments screen.
- After a few hours, check the EMSI site to see if the pdf has been received.

Remember: You MUST be connected to Wi-Fi to sync and upload!
Troubleshooting Measures

If you have problems uploading your completed cases, contact Provider Management.

- There is a method available to force a case to upload and to send the error log file.
- You will need WiFi to do either.
- You will need the appropriate access code for the Force Cases and email address for the Send Log File.
- Your Provider Manager will assist you with this or refer you to the appropriate person.