New Jersey Division of Developmental Disabilities

Documents

DDD IT Department

Table of Contents

Documents

An exciting update is now available on iRecord. As part of an ongoing process, we are pushing forward with a completely redesigned interface to manage the documents relevant to the participant's support coordination services. This is available from **Documents** on the **Main Toolbar**.

The interface offers intuitive navigation and additional features, matching the user experience of the other screens on iRecord. The main feature of **Documents** is the responsiveness, providing a similar interface and a near identical experience on any device. The documents are available on a grid layout, which displays the total number of available documents. The grid layout of the documents provides a cleaner interface and faster navigation.

Some of the new features include:

- Filter grid
- Sort grid
- Export grid to a file
- Upload additional file types
- E-mail documents

Document Types

iRecord defines the documents based on the document type. The available types are:

- NJISP

- PCPT

- AGRMT

- AAF

- HIPAA

- Legal Guardian

- Monthly Contact

- Other

NJISP

NJISP is an acronym for the New Jersey Individualized Service Plan.

The NJISP is developed through a Person-Centered Planning Process. Once assigned, the Support Coordinator plans with the participant and his/her identified team members through regular contact and communication. Through the use of information provided from the NJ Comprehensive Assessment Tool (NJ CAT), the Person-Centered Planning Tool (PCPT), and any other discovery tools that have been utilized, the Support Coordinator builds an NJISP. Development of the NJISP drives the outcomes and services implemented in order to meet the needs of the individual.

PCPT

The Person-Centered Planning Tool (PCPT) is a mandatory discovery tool used to guide the person-centered planning process and assist in the development of the NJISP. The Support Coordinator facilitates the development of the PCPT with input and guidance from the identified team members.

AGRMT

This is the document type for the participant enrollment agreement. To enroll into a Waiver Program, the Support Coordinator must obtain a signed enrollment agreement from the participant or guardian. The Support Coordinator explains the enrollment agreement before obtaining the signature.

AAF

AAF is an acronym for the Agency Assignment Form.

The participant or one of his/her representative completes the form and sends it to DDD before assigning the participant to an agency. The user at DDD uploads this form with Support Coordination Agency assignment.

HIPAA

The participant's written authorization for release of information must be obtained before any protected health information can be shared. To meet with HIPAA compliance, it is mandatory to obtain this authorization from the participant for a contact. HIPAA type refers to these documents. The document name is appended with the last name of the contact.

Legal Guardian

Legal Guardian is the official documentation required to show that the contact is the legal guardian of the participant.

HIPAA authorization must be obtained separately even for a legal guardian.

Monthly Contact

Monthly Contact is conducted within 30 days of NJISP approval and within every 30 day timeframe thereafter. This involves a personal meeting with the participant or, in certain acceptable cases, a telephone contact. Any other mode of communication is not accepted to meet the mandatory monitoring requirements. Information gathered or observed must be documented.

Other

This is the category for any additional documents that are relevant to the participant's support coordination services.

Documents Screen

Documents on the **Main Toolbar** provide the options to upload a document and/or view any document that was uploaded previously. There are additional options available with each document as well.

The documents are available on a grid layout. The **Documents** screens are shown in the following figures.

No available documents

Available documents
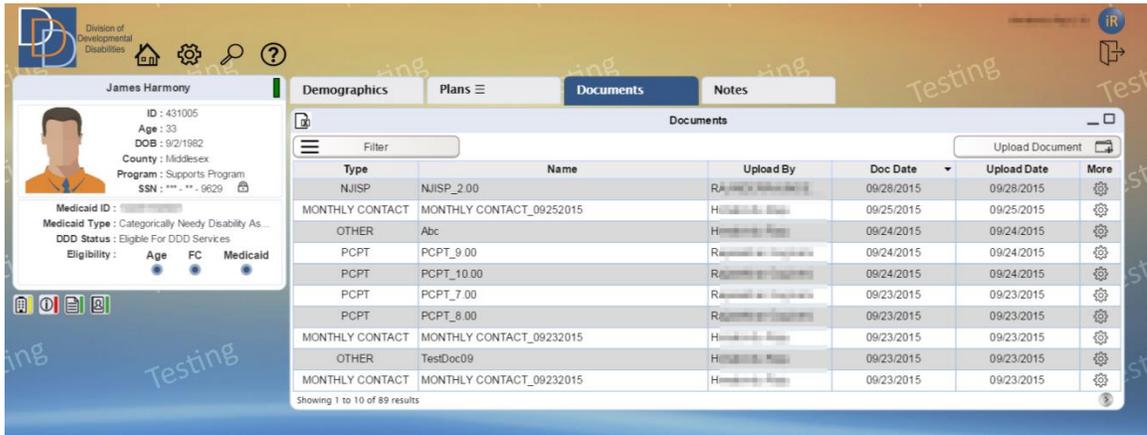
Grid Columns

The table below describes the columns on the **Documents** grid.

Column	Description
Type	View the type of uploaded document. The type of document is one of the following: • NJISP • PCPT • AGRMT • AAF • Monthly Contact • Legal Guardian • HIPAA • Other
Name	View the name of the document. The name of the document is the type of document appended with the document identifier. An example of the name for each document type: • NJISP document for Plan 1.00 displays as NJISP_1.00. • PCPT document displays it in the numerical order of the PCPT upload, such as PCPT_2.00 (for the second uploaded PCPT). • Monthly Contact displays the document completion date, such as MonthlyContact_07062015. • Legal Guardian and HIPAA display the last name of the contact, such as HIPAA_Harmony. • AGRMT and AAF are shown likewise, without any identifier. • The user enters the name for the Other document type.
Upload By	View the user that uploaded the document.
Doc Date	View the date of document completion.
Upload Date	View the date that the document was uploaded to iRecord.
More	Click ⚙ to view the following options for each document: • View/Download • Send Doc • View Notes

Features

The features available on the grid are:

- By default, the grid displays a maximum of 10 rows. At the bottom of the grid, view the total number of results. Click ⊛ to view the next 10 results. Click ⊛ to view the previous 10 results (when applicable).

- Click ▬ to minimize the tile or click ☐ to maximize the tile. At the minimized or maximized state, click ⬚ to restore the tile to the default state. The figure below displays the tile in the minimized state with ⬚ (restore) and ☐ (maximize) buttons.
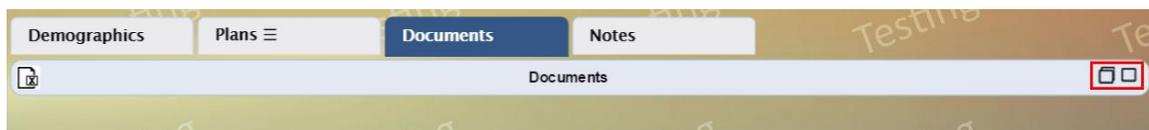
- Sort the grid from any column in ascending or descending order. By default, the grid is sorted in the descending order of **Doc Date**. View ▼ or ▲ adjacent to the column header that sorts the grid (the grid is sorted according to the column that displays the icon). ▼ represents a descending order sort and ▲ denotes an ascending order sort.

- Export the grid to an Excel file using the [x] icon. Click [x] and iRecord opens the **Save As** dialog box on your device as shown in the following figure (for the Windows OS).
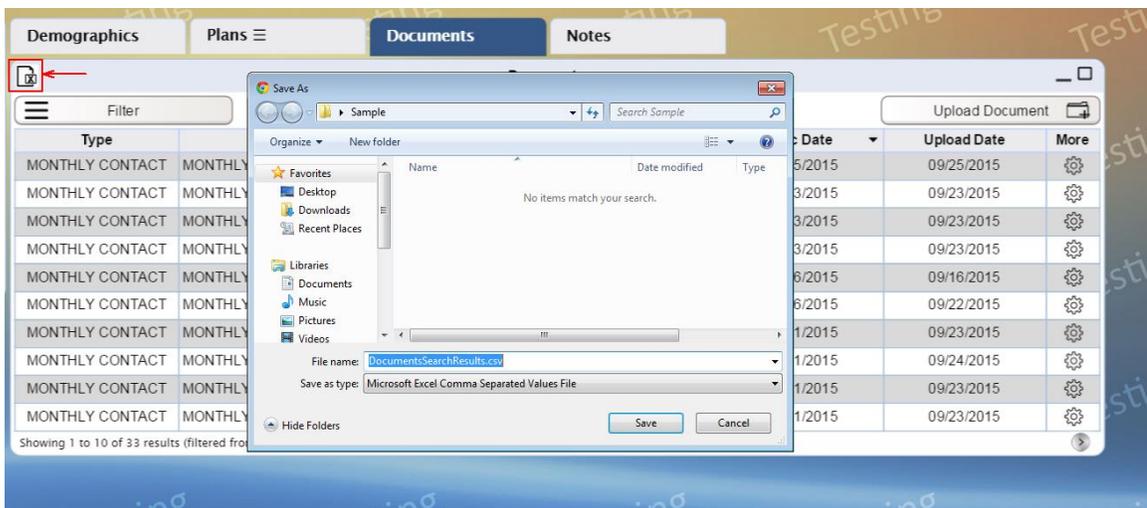
- Hover over an ellipsis within the grid and view a tooltip that displays the complete details.

Upload Document

There are three types of documents that you can upload using the **Upload Document**:

- • Monthly Contact
- • Other
- • PCPT

The remaining document types are uploaded either on **Plans** (NJISP, AGRMT, AAF) or **Demographics** (HIPAA, Legal Guardian).

The following instructions detail the procedure to upload Monthly Contact, PCPT or Other.

To upload a document

1. Click the **Upload Document** button, shown in the following figure.
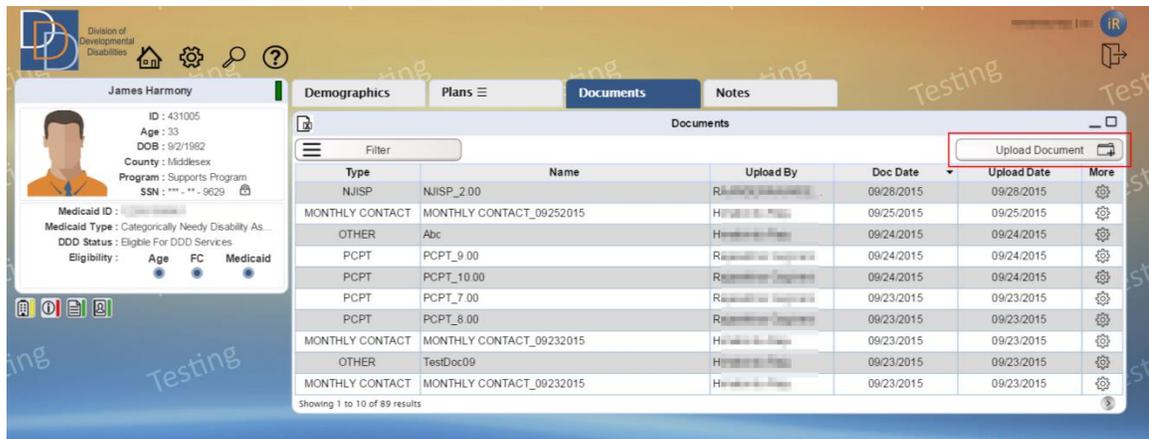
2. The **Upload Document** pop-up controls appear, as shown in the following figure. Enter the details for each field, refer to the next table.

Field	Description
Select file to upload	Click **Select file to upload** box and your system dialog box appears to browse the file. Locate the appropriate file and then select it. The document must have one of the following file extensions: • DOC • DOCX • TXT • TIF • JPG • JPEG • PNG • GIF • PDF iRecord does not permit you to upload the file and displays an error message (while saving) with any of the following conditions: • Incompatible file extension (see aforementioned extensions) • File size exceeds 4 MB • File name exceeds 150 characters Mandatory/Optional: Mandatory

Field	Description
Type	Select the appropriate type of document from the drop-down list. The options are: • PCPT • Monthly Contact • Other Select **Other** and the **Name** field appears on the **Upload Document** pop-up controls. Mandatory/Optional: Mandatory
Document Date	Enter the date of document completion within the text box. or Select the date of document completion using the calendar controls, shown below. Select the month and year from the drop-down lists on the top section. Click and select the date. Mandatory/Optional: Mandatory Date format: MM/DD/YYYY
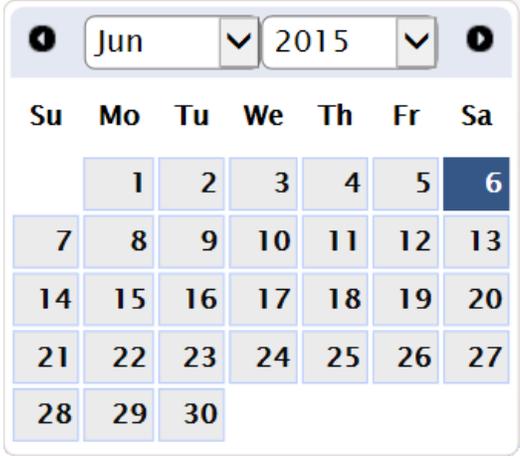
Field	Description
Name	This field only appears with the selection of **Other** for the **Type** drop-down list. The **Name** field with the selection of **Other** is shown in the figure below. Enter an appropriate name for the document within the text box. Mandatory/Optional: Mandatory Max limit: 50 characters
Notes	Enter any relevant notes related to the uploaded document. Mandatory/Optional: Mandatory Max limit: 5000 characters
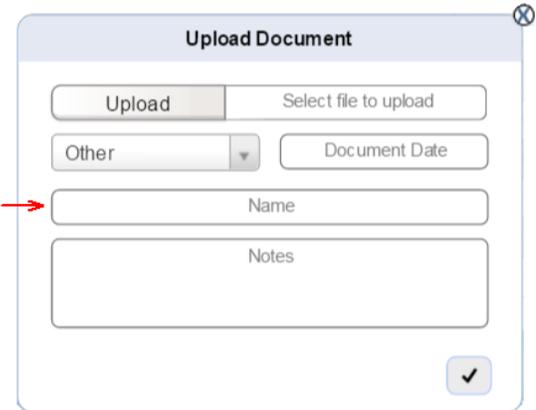
3. Click ✔ to save and close **Upload Documents**. View the **Documents** screen and the grid displays the saved document.

Note: An error message is shown when you click ✔ without meeting the conditions discussed in **Select file to upload**. An example is shown in the following figure for an unsupported file type.

View Document

Once any document is uploaded to iRecord, the document is available for viewing (based on your user role). The grid displays only those documents that your role permits you to view.

To view a document

- You can view a document from the grid in one of the following two methods:

  - Click a line item anywhere on the row and view the document.

  - Click ⚙ and view additional options. Click **View/Download** to view or download the document.

Note: In most cases, your browser opens a dialog box to open or save the document on your device (however, this depends on your device and browser).

Filter Document(s)

The three available options to filter documents are:

- Type
- Upload By
- User Defined

You can either filter by one of the options or use a combination to view the desired results. The grid displays the results instantly.

To filter for document(s)

1. Click the **Filter** button and view the available filter options, indicated in the following figure.
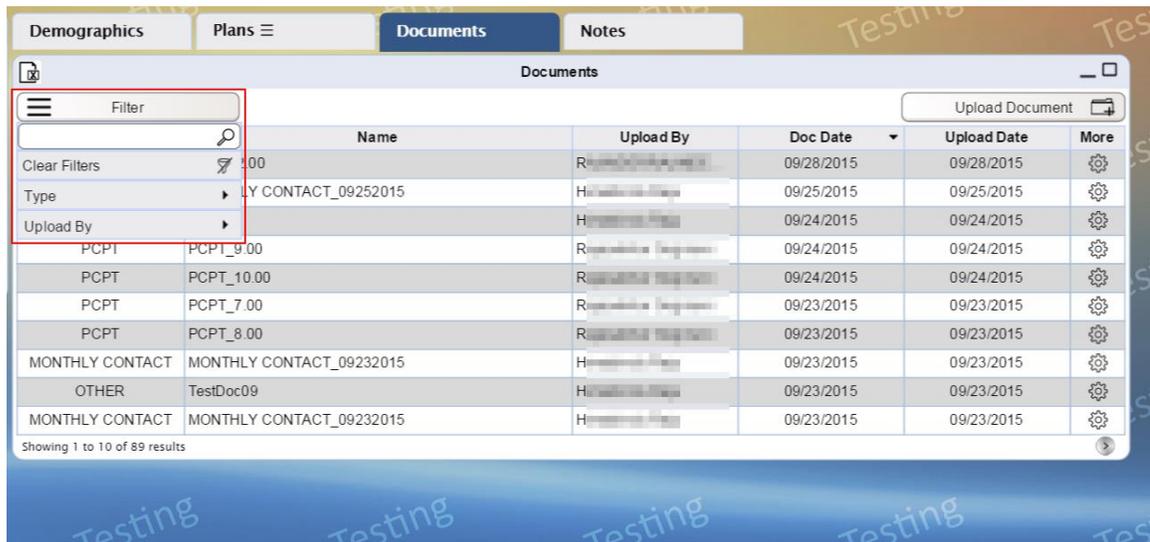
2. You can filter the document(s) in one of the following methods:

   - Enter the characters within the text box. The grid displays the line items containing the characters entered within the box.
     The following figure displays the line items that contain the characters **mon** (irrespective of the case).

- Click **Type** and view the options to filter based on the type of document. Select check box(es) to apply the filter. The grid displays the document(s) with the selected type(s).

- Click **Upload By** and view the options to filter based on the uploaded user. Select check box(es) and the grid displays according to the selected user(s).
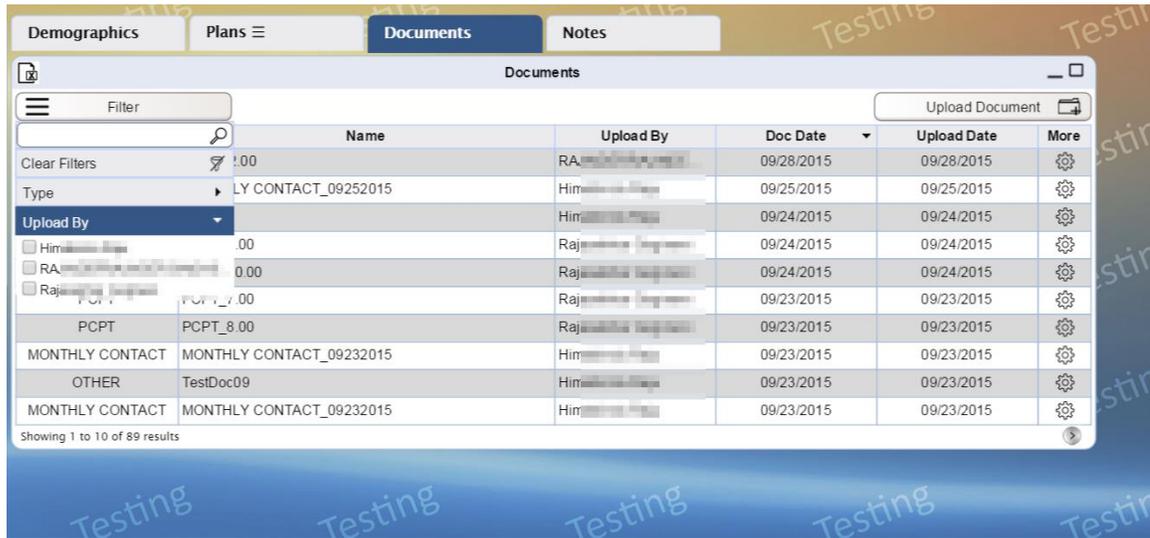
- Use a combination of the aforementioned options and apply a custom filter.

Note: You can also export the filtered grid to an excel file with the [icon] icon.

Send Document

iRecord provides the option to e-mail documents to multiple entities. The entities listed in alphabetical order include the participant, HIPAA contacts and the participant's current plan providers.

The e-mails are sent out from the following e-mail address: ddd.irecord@dhs.state.nj.us

To send the document

1. Click [gear icon] of the appropriate document and view additional options:

    - View/Download
    - Send Doc
    - View Notes

2. Click **Send Doc** and iRecord displays the **Send Document** pop-up tile, as shown in the following figure.
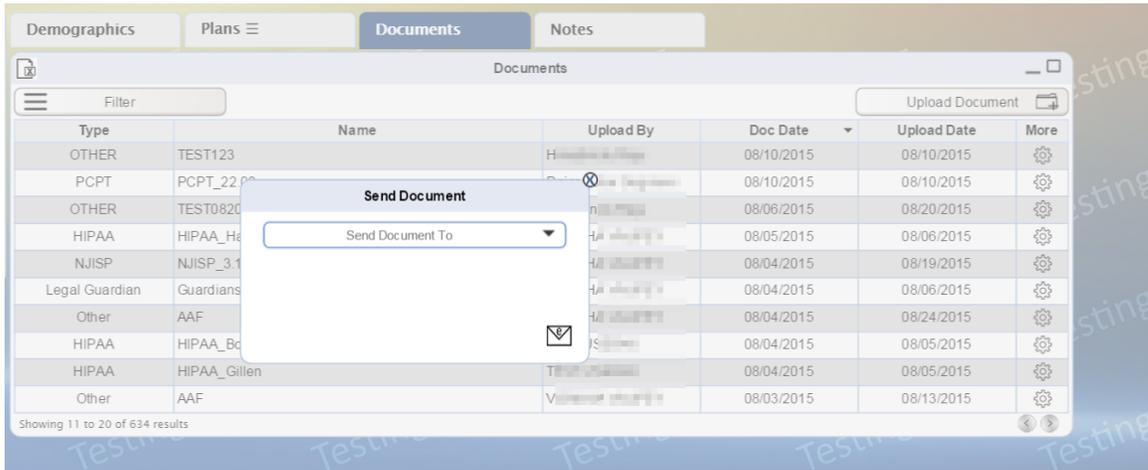
3. Click **Send Document To** and view the list of available options. Scroll down to view additional options, if required.
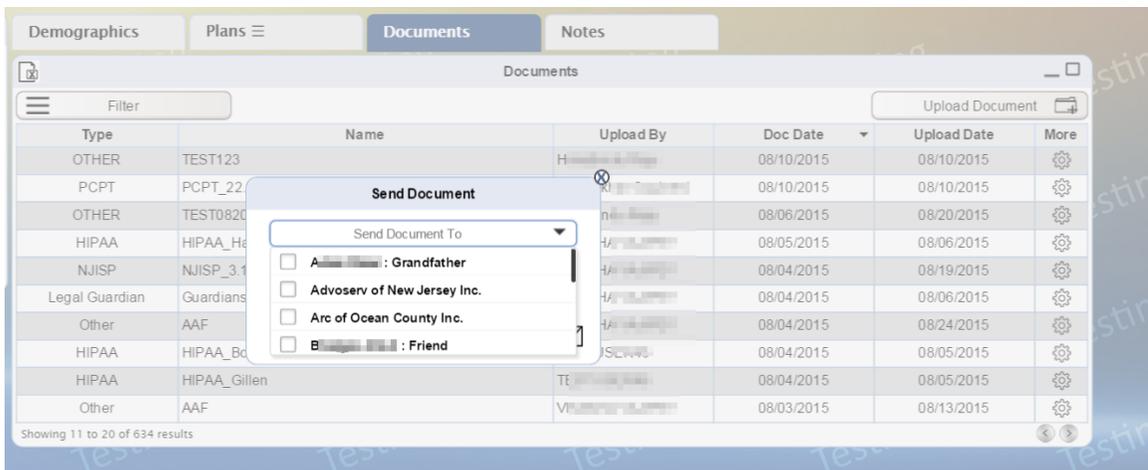
4. Select check box(es) and then click ✉ .

5. View a confirmation message, as shown in the following figure.

E-mail has been sent successfully.

View Notes

There is a system generated note for every uploaded document. It is also possible that the user entered a note during the document upload process. iRecord displays both of these notes with the **View Notes** option.

To view the notes

1. Click ⚙ of the appropriate document and view additional options:

   • View/Download
   • Send Doc
   • View Notes

2. Click **View Notes** and iRecord displays **Notes**, as shown in the following figure.

User Privileges

The table indicates the user role permissions for **Documents**.

Feature	SWAC	WAC	SCS	SC	SC-VO	VO	VO-TS	SFI	FI	FI-VO
Documents										
View All Documents	√	√	√	√	√	√	√			
View NJISP, PCPT & Other								√	√	√
Upload Monthly Contact, PCPT and Other				√						
Upload Other	√	√	√	√				√	√	

Note: For a user that can view the document, all menu options are available: View/Download, Send Doc, and View Notes.

Author: DDD IT Department   Date: 10/15/2015
Title: Documents   Page: 20
Application: iRecord   Version: 1.0