

# Documents

DDD IT Department

Author:DDD IT DepartmentTitle:DocumentsApplication:iRecord

Date: 10/15/2015 Page: 1 Version: 1.0



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## 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.

## РСРТ

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.

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## 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**

Luna Haman	nie		ing	AND			
James Harmony	Demographics	Plans =	Documents	Notes			
ID: 431005			Docum	nents			-
DOB : 9/2/1982	E Filter					Upload Docume	ent 🗖
County : Middlesex Program : Supports Program	Туре	Nan	ne	Upload By	Doc Date 🔹	Upload Date	Mo
SSN : *** - ** - 9629 🛱	NJISP	NJISP_2.00		RAME I HAR III	09/28/2015	09/28/2015	10
Medicaid ID :	MONTHLY CONTACT	MONTHLY CONTACT_09252	015	Holden Britten	09/25/2015	09/25/2015	5
edicaid Type : Categorically Needy Disability As	OTHER	Abc		House and	09/24/2015	09/24/2015	300
Eligibility : Age FC Medicaid	PCPT	PCPT_9.00		R	09/24/2015	09/24/2015	10
• • •	PCPT	PCPT_10.00		R	09/24/2015	09/24/2015	24
	PCPT	PCPT_7.00		Remain	09/23/2015	09/23/2015	1
	PCPT	PCPT_8.00		Reaming	09/23/2015	09/23/2015	10
	MONTHLY CONTACT	MONTHLY CONTACT_092320	015	Hindard, Rep.	09/23/2015	09/23/2015	20
	OTHER	TestDoc09		HOSEINEL POLICE	09/23/2015	09/23/2015	10
	MONTHLY CONTACT	MONTHLY CONTACT 092320	115	House and the	09/23/2015	09/23/2015	20



## **Grid Columns**

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

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



### Features

The features available on the grid are:

Demographics	Plans ≡	Documents	Notes			
ß		D	locuments			_ 🗆
Filter					Upload Docume	nt 🛱
Туре	Na	me	Upload By	Doc Date 🔻	Upload Date	More
NJISP	NJISP_2.00		R	09/28/2015	09/28/2015	<u>ين</u>
MONTHLY CONTACT	MONTHLY CONTACT_09252	2015	Hereiter	09/25/2015	09/25/2015	۲ŷ۶
OTHER	Abc		Himmen	09/24/2015	09/24/2015	र्ेंट्रे
PCPT	PCPT_9.00		Ramon	09/24/2015	09/24/2015	۲ŷ۶
PCPT	PCPT_10.00	PCPT_10.00		09/24/2015	09/24/2015	्रि
PCPT	PCPT_7.00		Ra	09/23/2015	09/23/2015	्रि
PCPT	PCPT_8.00		R	09/23/2015	09/23/2015	ŝ
MONTHLY CONTACT	MONTHLY CONTACT_09232015		Himmer	09/23/2015	09/23/2015	ŝ
OTHER	TestDoc09		Himan Rose	09/23/2015	09/23/2015	ŝ
MONTHLY CONTACT	MONTHLY CONTACT_09232	2015	H	09/23/2015	09/23/2015	्र
Showing 1 to 10 of 89 result	5					>

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.

Demographics	Plans ≡	Documents	Notes	Testino	
R		De	ocuments		60

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.



Demographics	Plans ≡	Documents	Notes			
		D	locuments			
Filter				<b>&gt;</b> (	Upload Documer	it 🛱
Туре	Na	ame	Upload By	Doc Date 💌	Upload Date	More
NJISP	NJISP_2.00		R	09/28/2015	09/28/2015	ŝ
MONTHLY CONTACT	MONTHLY CONTACT_0925	2015	Hilling and a line	09/25/2015	09/25/2015	÷
OTHER	Abc		Himmer	09/24/2015	09/24/2015	۲ <u>ې</u>
PCPT	PCPT_9.00		R	09/24/2015	09/24/2015	<u>ي</u>
PCPT	PCPT_10.00		R	09/24/2015	09/24/2015	<u>ين</u>
PCPT	PCPT_7.00		Ramo	09/23/2015	09/23/2015	<u>ين</u>
PCPT	PCPT_8.00		Ra	09/23/2015	09/23/2015	<u>ين</u>
MONTHLY CONTACT	MONTHLY CONTACT_09232015		Himsenson	09/23/2015	09/23/2015	<u>ي</u>
OTHER	TestDoc09		However, Pass	09/23/2015	09/23/2015	ŝ
MONTHLY CONTACT	MONTHLY CONTACT_0923	2015	Himmer	09/23/2015	09/23/2015	<u>ين</u>
Showing 1 to 10 of 89 results	5			· · · · · · · · · · · · · · · · · · ·		>

• Export the grid to an Excel file using the 🕅 icon. Click 🕅 and iRecord opens the **Save As** dialog box on your device as shown in the following figure (for the Windows OS).

Demographics	Plans	Ξ D	ocuments	Notes					
<u>∎</u>	ſ	C fam da						_ 0	-
Filter		Save As		← 4 Search Sample	م		Upload Docume	nt 🛱	
Туре		Organize 👻 New folder				Date	Upload Date	More	ri
MONTHLY CONTACT	MONTHLY	Favorites	Name	^ Date modifie	ed Type	5/2015	09/25/2015	ŝ	50
MONTHLY CONTACT	MONTHLY	E Desktop		No items match your search.		3/2015	09/23/2015	ŝ	
MONTHLY CONTACT	MONTHLY	Downloads Recent Places				3/2015	09/23/2015	ŝ	
MONTHLY CONTACT	MONTHLY	_				3/2015	09/23/2015	ŝ	
MONTHLY CONTACT	MONTHLY	Documents				6/2015	09/16/2015	ŝ	st
MONTHLY CONTACT	MONTHLY	J Music				6/2015	09/22/2015	ŝ	
MONTHLY CONTACT	MONTHLY	Videos	<	m	,	1/2015	09/23/2015	ŝ	
MONTHLY CONTACT	MONTHLY	File name: Docum	nentsSearchResults.csv		•	1/2015	09/24/2015	ŝ	
MONTHLY CONTACT	MONTHLY	Save as type: Micros	oft Excel Comma Separa	ated Values File	•	1/2015	09/23/2015	ې چې	ri
MONTHLY CONTACT	MONTHLY	Hide Folders		Save	Cancel	1/2015	09/23/2015	<u>ي</u>	50
Showing 1 to 10 of 33 result	s (filtered fro	Grideroldels			i			۲	
in	e S		ng	ing			ing		4

• 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.

	ini						Ų
James Harmony	Demographics	Plans ≡	Documents	Notes			
ID: 431005	Do l		Docur	nents			_ (
DOB : 9/2/1982	E Filter				(	Upload Docume	ent 🗖
County : Middlesex Program : Supports Program	Туре	Nam	e	Upload By	Doc Date 👻	Upload Date	Mor
SSN : *** - 9629	NJISP	NJISP_2.00		Research .	09/28/2015	09/28/2015	10
Medicaid ID :	MONTHLY CONTACT	MONTHLY CONTACT_092520	15	Herselet Barriss	09/25/2015	09/25/2015	()
Medicaid Type : Categorically Needy Disability As	OTHER	Abc		Handsonianillass	09/24/2015	09/24/2015	5
Eligibility: Age FC Medicaid	PCPT	PCPT_9.00		Research	09/24/2015	09/24/2015	{ <u>0</u>
	PCPT	PCPT_10.00		Reasonan Ingeneral	09/24/2015	09/24/2015	1
	PCPT	PCPT_7.00		Research	09/23/2015	09/23/2015	6
	PCPT	PCPT_8.00		Reason	09/23/2015	09/23/2015	10
	MONTHLY CONTACT	MONTHLY CONTACT_092320	15	Holes in the	09/23/2015	09/23/2015	6
	OTHER	TestDoc09		Hennessen	09/23/2015	09/23/2015	10
							-0-

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.



			M1155				
Demographics	Plans $\equiv$ Doc		Plans Ξ Documents Notes				
D2			Docun	nents			_ □
Filter					(	Upload Docum	ient 📑
Туре		Na	ame	Upload By	Doc Date 💌	Upload Date	More
NJISP	NJISP_2.00			California (California)	09/28/2015	09/28/2015	<u>ين</u>
MONTHLY CONTACT	MONTHLY C	ONTACT_0925	2015	The second second	09/25/2015	09/25/2015	ŝ
PCPT	PCPT_9.00			Ø	09/24/2015	09/24/2015	۲ <u>۵</u>
PCPT	PCPT_10		Upload Document		09/24/2015	09/24/2015	<u></u>
OTHER	Abc			a dia mana	09/24/2015	09/24/2015	ŝ
PCPT	PCPT_7.0	Upload	Select file to upload	distribution in the second	09/23/2015	09/23/2015	<u>ين</u>
PCPT	PCPT_8.0	Туре	Document Date		09/23/2015	09/23/2015	<u>ي</u>
PCPT	PCPT_4.0		Notes		09/23/2015	09/23/2015	(j)
MONTHLY CONTACT	MONTHLY		110100	A. R Margin	09/23/2015	09/23/2015	۲ <u>۵</u>
OTHER	Sample De			a no demo	09/23/2015	09/23/2015	{¢}
Showing 1 to 10 of 88 result	ts						3

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								
Туре	Select the app The options an • PCPT • Month • Other Select <b>Other</b> a pop-up contro Mandatory/O	propria re: hly Co and the bls. ptiona	ntact e <b>Nam</b> Il: Mar	e of do <b>e</b> field idator	ocume l appea y	nt fro ars on	m the the <b>U</b>	drop-o	Jown list. Document
	Enter the date or Select the dat shown below.	e of do e of do 0 Su	ocumer ocume Jun Mo	nt com nt cor	npletio npletic 20 We	n with on usir 015 <b>Th</b>	nin the ng the	text b calenc O Sa	ox. lar controls,
			1	2	3	4	5	6	
Document Date		7	8	9	10	. 11	12	13	
		14	15	16	17	18	19	20	
		21	22	23	24	25	26	27	
		28	29	30					
	Select the mo section. Click a Mandatory/O Date format: I	nth an and se ptiona MM/D	id year lect th il: Mar D/YYY	from e date dator Y	the dr e. y	op-do	wn lis	ts on t	he top



Field	Description						
	This field only appears with the selection of <b>Other</b> for the <b>Type</b> drop- down list. The <b>Name</b> field with the selection of <b>Other</b> is shown in the figure below.						
	Upload Document						
	Upload Select file to upload						
	Other						
Name	Name						
	Notes						
	Enter an appropriate name for the document within the text box.						
	Mandatory/Optional: Mandatory Max limit: 50 characters						
	Enter any relevant notes related to the uploaded document.						
Notes	Mandatory/Optional: Mandatory Max limit: 5000 characters						

3. Click **v** 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 vithout meeting the conditions discussed in **Select file to upload**. An example is shown in the following figure for an unsupported file type.



Upload	sample.abc
Selected file ty DOC, DOCX, TX file type to uplo	oe is not supported. Please select (T, TIF, PDF, JPG, JPEG, PNG or GI bad.
PCPT	• 09/09/2015
	Notes

### **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 is and view additional options. Click View/Download to view or download the document.

Demographics	Plans Ξ	Documents	Notes	Test	alio	TE	estine
Da l	-		locuments			_0	
E Filter					Upload Docum	ent 🛱	
Туре		Name	Upload By	Doc Date 🔹	Upload Date	More	ring
NJISP	NJISP_2.00		R	09/28/2015	09/28/2015	<u>نې</u>	55
MONTHLY CONTACT	MONTHLY CONTACT_	09252015	Harakan da Alima	09/25/2015	09/25/2015	<u>ين</u>	1000
PCPT	PCPT_9.00		R	09/24/2015	09/24/2015	ېنې ۲	
PCPT	PCPT_10.00		R	09/24/2015	09/24/2015	<u>ين</u>	
OTHER	Abc		Hereiter	09/24/2015	09/24/2015	۵. ۲	STINO
PCPT	PCPT_7.00		R	09/23/2015	09/23/2015	<u>ي</u>	
PCPT	PCPT_8.00		Research	09/23/2015	09/23/2015	ې بې	
PCPT	PCPT_4.00		Hereine	09/23/2015	09/23/2015	<u>نې</u>	
MONTHLY CONTACT	MONTHLY CONTACT_	09232015	Hereiter	09/23/2015	09/23/2015	500	ing
OTHER	Sample Document		House has	09/23/2015	09/23/2015		/iew/Download
Showing 1 to 10 of 88 result	5						/iew Notes



**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.

Demographics	Plans ≡	Documents	Notes			
<u>k</u>		D	locuments			_ 0
Filter				(	Upload Docum	ent 🛱
	R	Name	Upload By	Doc Date 🔻	Upload Date	More
Clear Filters	A ;00		R	09/28/2015	09/28/2015	٢ <u></u>
Туре	LY CONTACT	_09252015	Househouse	09/25/2015	09/25/2015	<u>ين</u>
Upload By	•		Hereiter auf	09/24/2015	09/24/2015	۲ <u>ې</u>
PCPI	PCP1_9.00		R	09/24/2015	09/24/2015	<u>ي</u>
PCPT	PCPT_10.00		Resident	09/24/2015	09/24/2015	(j)
PCPT	PCPT_7.00		Repairing in particular	09/23/2015	09/23/2015	ŝ
PCPT	PCPT_8.00		Resident Tag for	09/23/2015	09/23/2015	(j)
MONTHLY CONTACT	MONTHLY CONTACT	09232015	Hereiter	09/23/2015	09/23/2015	<u>ين</u>
OTHER	TestDoc09		Harada da Maya	09/23/2015	09/23/2015	ېنې ۲
MONTHLY CONTACT	MONTHLY CONTACT	_09232015	Hennes	09/23/2015	09/23/2015	ŝ
Showing 1 to 10 of 89 result	s					>

- 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).



Demographics Plans Ξ		ns ≘	Documents	Notes	Tes			
La			C	)oc uments			_0	
Filter						Upload Docum	ent 🛱	
mon	Q	N	ame	Upload By	Doc Date 🔻	Upload Date	More	ct
Clear Filters	8	LY CONTACT_092	52015	Handsonds-Frank	09/25/2015	09/25/2015	<u>ي</u>	50
Туре		LY CONTACT_092	32015	With the state	09/23/2015	09/23/2015	ې ۲	
Upload By	-	LY CONTACT_092	32015	Street or Arrest	09/23/2015	09/23/2015	۲ <u>۵</u>	
Онылын		LY CONTACT_092	32015	State State Street	09/23/2015	09/23/2015	ණ	
R		LY CONTACT_091	2015	Horacona, Ana	09/16/2015	09/16/2015	<u>ين</u>	St
RUNTEL CONTACT	MONTH	LY CONTACT_091	2015	and the second second	09/16/2015	09/22/2015	<u>ين</u>	
MONTHLY CONTACT	MONTH	LY CONTACT_090	12015	monatoria; Aug.	09/01/2015	09/23/2015	ŝ	
MONTHLY CONTACT	MONTH	LY CONTACT_090	12015	installands-Rises	09/01/2015	09/24/2015	<u>نې</u>	
MONTHLY CONTACT	MONTH	LY CONTACT_090	12015	PERSONAL PROPERTY.	09/01/2015	09/23/2015	٢ <u>٢</u>	r
MONTHLY CONTACT	MONTH	LY CONTACT_090	12015	And the second second	09/01/2015	09/23/2015	<u>ين</u>	22
Showing 1 to 10 of 33 result	ts (filtered f	rom 89 total entries)					>	
	g		sting	Testing	Tes	ting	TE	

• 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).

Demographics	Demographics $Plans \equiv$		Documents	Notes				
				Documents			_0	
E Filter		)			(	Upload Docum	ent 🛱	
	Q	Na	ame	Upload By	Doc Date 🔹	Upload Date	More	ri
Clear Filters	A	2.00		R	09/28/2015	09/28/2015	۲ <u>۵</u>	50
Туре	-	LY CONTACT_0925	2015	History	09/25/2015	09/25/2015	ි	
AGRMT				Hannahan	09/24/2015	09/24/2015	ŝ	
HIPAA		.00		Reported in press	09/24/2015	09/24/2015	<u>ين</u>	
MONTHLY CONTACT		0.00		Resident for the	09/24/2015	09/24/2015	۲ <u>۵</u>	st
OTHER		.00		R	09/23/2015	09/23/2015	<u>ين</u>	
Other		.00		Research	09/23/2015	09/23/2015	٢ <u></u>	
PCPT		LY CONTACT_0923	2015	Handard	09/23/2015	09/23/2015	<u>ين</u>	
Lipload By		09		Hinduite	09/23/2015	09/23/2015	ŝ	-ri
MONTHLY CONTACT	MONTH	ILY CONTACT_0923	2015	Handland, Page	09/23/2015	09/23/2015	ŝ	50
Showing 1 to 10 of 89 result	s						>	
				Contraction of the local division of the loc				

• 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).



Demographics Pl		= Docur	nents Notes	Tes	tille	TO	sti
			Documents	10	and the second second		
			Documents		Lipload Docum		
	Q	Name	Upload By	Doc Date	Upload Date	More	
Clear Filters	7 1.00	D	RA	09/28/2015	09/28/2015	<u>ين</u>	SU
Туре	LY	CONTACT_09252015	Him	09/25/2015	09/25/2015	ې نې	
Upload By	-		Him	09/24/2015	09/24/2015	۲ <u>۵</u>	
Him	.00	)	Raj	09/24/2015	09/24/2015	<u>ين</u>	
RA	0.0	00	Raj	09/24/2015	09/24/2015	۲ <u>۵</u>	st
Rajana	1011_7.00	)	Raj	09/23/2015	09/23/2015	<u>ين</u>	
PCPT	PCPT_8.00	)	Raj	09/23/2015	09/23/2015	(j)	
MONTHLY CONTACT	MONTHLY	CONTACT_09232015	Him	09/23/2015	09/23/2015	<u>ين</u>	
OTHER	TestDoc09		Him	09/23/2015	09/23/2015	ŝ	ri
MONTHLY CONTACT	MONTHLY	CONTACT_09232015	Himmon	09/23/2015	09/23/2015	्रि	52
Showing 1 to 10 of 89 result	ts					>	
	g	Testing					

• 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  $\square$  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 🕸 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.



Demographics	$Plans \equiv$	Documents	Not	es				
		Do	ocuments				_ □	cting
Filter					(	Upload Docum	ent 🗐	22
Туре		Name		Upload By	Doc Date 🔻	Upload Date	More	
OTHER	TEST123		Н	and a strength	08/10/2015	08/10/2015	\$\$?	
PCPT	PCPT_22.p		- · ·	8	08/10/2015	08/10/2015	- - 	ing
OTHER	TEST0820	Send Document		n	08/06/2015	08/20/2015	Ś	SUM
HIPAA	HIPAA_Ha	Send Document To	•	-1,	08/05/2015	08/06/2015	<u>ين</u>	
NJISP	NJISP_3.1			-1.	08/04/2015	08/19/2015		
Legal Guardian	Guardians			-1/	08/04/2015	08/06/2015	-ç;-	
Other	AAF		_	-1.	08/04/2015	08/24/2015	ŝ	CTINE
HIPAA	HIPAA_Bo		\€∕	15	08/04/2015	08/05/2015	<u>ې</u>	, <b>3</b> -
HIPAA	HIPAA_Gillen		Т	Contraction of the local division of the loc	08/04/2015	08/05/2015	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	
Other	AAF		V	10000	08/03/2015	08/13/2015	- 	
Showing 11 to 20 of 634 re	sults						$\langle \rangle$	ing
Tesu		Tesuite	79	Scine	Tesu			

3. Click **Send Document To** and view the list of available options. Scroll down to view additional options, if required.

Demographics	Plans =	Documents	Notes				
R .		De	ocuments			_ □	
Filter					Upload Docum	ent 🛱	
Туре		Name	Upload By	Doc Date 🔻	Upload Date	More	
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OTHER	TEST0820		n	08/06/2015	08/20/2015	<u> </u>	יכן
HIPAA	HIPAA_Ha	Send Document To	Η/	08/05/2015	08/06/2015	ද්රු	
NJISP	NJISP_3.1	A Grandfather	1/	08/04/2015	08/19/2015	र्े	
Legal Guardian	Guardians	Advoserv of New Jersey Inc.	1/	08/04/2015	08/06/2015	्रि	
Other	AAF	Arc of Ocean County Inc.	1/	08/04/2015	08/24/2015	<u>ين</u>	s۲
HIPAA	HIPAA_Bo	B : Friend	JSCHW	08/04/2015	08/05/2015	<u>نې</u>	
HIPAA	HIPAA_Gille	n	TE	08/04/2015	08/05/2015	2023	
Other	AAF		VI	08/03/2015	08/13/2015	<u>ېنې</u>	
Showing 11 to 20 of 634 r	esults					<	
162.		1650	162	162	<u>.</u>	16	

- 4. Select check box(es) and then click <sup>™</sup>.
- 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.

Plans ≡ Documents Documents P_8.03	Notes nts Upload By		Upload Documer	
Docume Name P_8.03	nts Upload By		Upload Documer	
Name P_8.03	Upload By	(	Upload Documer	
Name 8P_8.03	Upload By	De la Deta		n 🖵
\$P_8.03		Doc Date	Upload Date 👻	More
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SP_8.01	a second second second	09/21/2015	09/22/2015	2023
SP_8.0 Notes	Ø <sub>€</sub>	09/21/2015	09/21/2015	-{}
	nc	09/01/2015	09/21/2015	र्े
Date: 09/21/2015	nc	09/01/2015	09/21/2015	ŝ
Agency Assignment Notes	Pra		09/21/2015	ŝ
* vstem Generated Note *Assigned to primary	Pre		09/21/2015	<u></u>
agency preferred 'Brain Injury Alliance Of Nj Inc	A HA	08/24/2015	08/24/2015	Ś
'.User Note:**	HA	08/17/2015	08/24/2015	<u></u>
2M	T * ystem Generated Note:*Assigned to primary agency preferred 'Brain Injury Alliance Of Nj Ind '.User Note:**	T * ystem Generated Note.*Assigned to primary agency preferred 'Brain Injury Alliance Of Nj Inc. '.User Note.**	T * ystem Generated Note *Assigned to primary agency preferred 'Brain Injury Alliance Of Nj Inc. 'User Note.** 4 08/17/2015	T     * ystem Generated Note.*Assigned to primary agency preferred 'Brain Injury Alliance Of Nj Inc. '.User Note.**     >ref     09/21/2015       HA     08/24/2015     08/24/2015



## **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	V	V	V	V	V	V	V						
View NJISP, PCPT & Other								V	V	$\checkmark$			
Upload Monthly Contact, PCPT and Other				V									
Upload Other	$\checkmark$	$\checkmark$	V	V				$\checkmark$	1				

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