PACE User Guide

December 2011

For internal use by the Department of Medical Assistance Services (DMAS).

Table of Contents

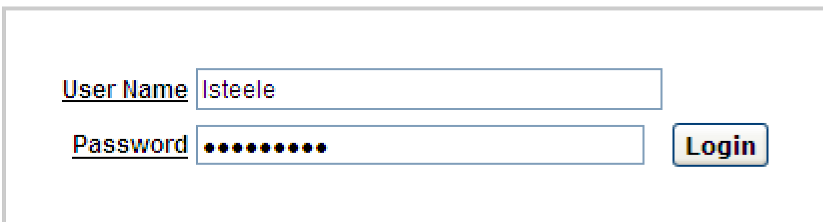
Logging in to the Web-based PACE Database

Do the following to log into the PACE database:

- Copy (Ctrl + C) the URL below and paste it (Ctrl + V) into your Browser:

http://dmasaws2.ad.dmas.virginia.gov:7778/pls/apex/f?p=205:1:1681051049686525:::::

- At the login page, type your LAN username and password (e.g., the one you use to log into your computer every day) at the prompt, as shown below:



- Click the “Login” button.

Make a “Favorite” out of the above page, so that you can always access it quickly and easily.

Navigation Basics

The row of page links across the top of the screen is the best way to navigate to a desired screen. You can also click the “Back” arrow at the top of the screen.

Unlike other Oracle databases you may have used at DMAS, this system is Web-based and provides navigation similar to what you are accustomed to from browsing the Web, in the form of hyperlinks.

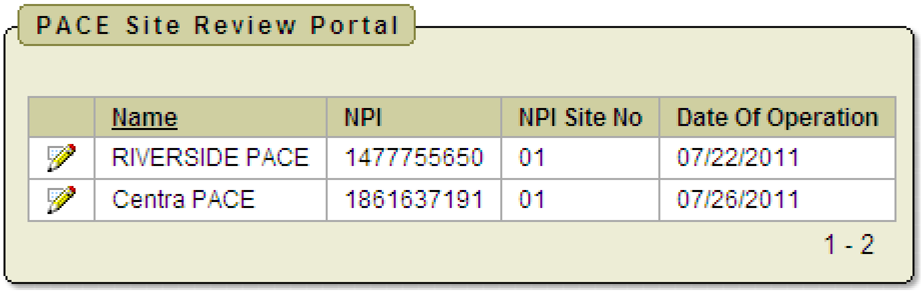
Working with PACE Reviews

This section describes how to add a new Review (and its various components, such as Reviewers and Violations) and how to edit an existing Review.

Adding a New Review

Do the following to add a new Review.

- On the main screen, click the pencil icon (shown in Figure 1 below) for the PACE Site you want to add a Review for.



PACE Site Review Portal

	Name	NPI	NPI Site No	Date Of Operation
	RIVERSIDE PACE	1477755650	01	07/22/2011
	Centra PACE	1861637191	01	07/26/2011

1 - 2

Figure 1. Pace Site Review Portal (featuring "pencil" edit icon.)

- On the next screen, click the "View or Create Reviews for this Provider" button (shown in Figure 2 below).

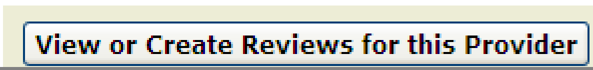


Figure 2. Pace Site Review Portal (featuring "pencil" edit icon.)

- On the next screen, click the "Create Review" button. (If there are no existing Reviews for this Provider, the button will be the only thing you see; if one or more Reviews exist, it will be to the far-right on the screen.)
- On the Create/Edit Review screen (shown in Figure 3 below), fill in all of the data fields, following these additional instructions:
    - For the date fields, click the calendar icon to the right of the field and choose the date.
    - For the "Review Type" field, click the list icon and choose the type of Review from the list.
    - Do not supply a "CAP Accepted Date" or "CAP Released Date" until later, when those things apply.
    - Supply the name of the person who should receive the post-Review mail correspondence by entering his or her name in the "Contact Name" field; supply CC persons in the "CC Name field." NOTE: If you do not supply a Contact Name, correspondence will be sent to whomever is named as the ATTN_LN person in VaMMIS.

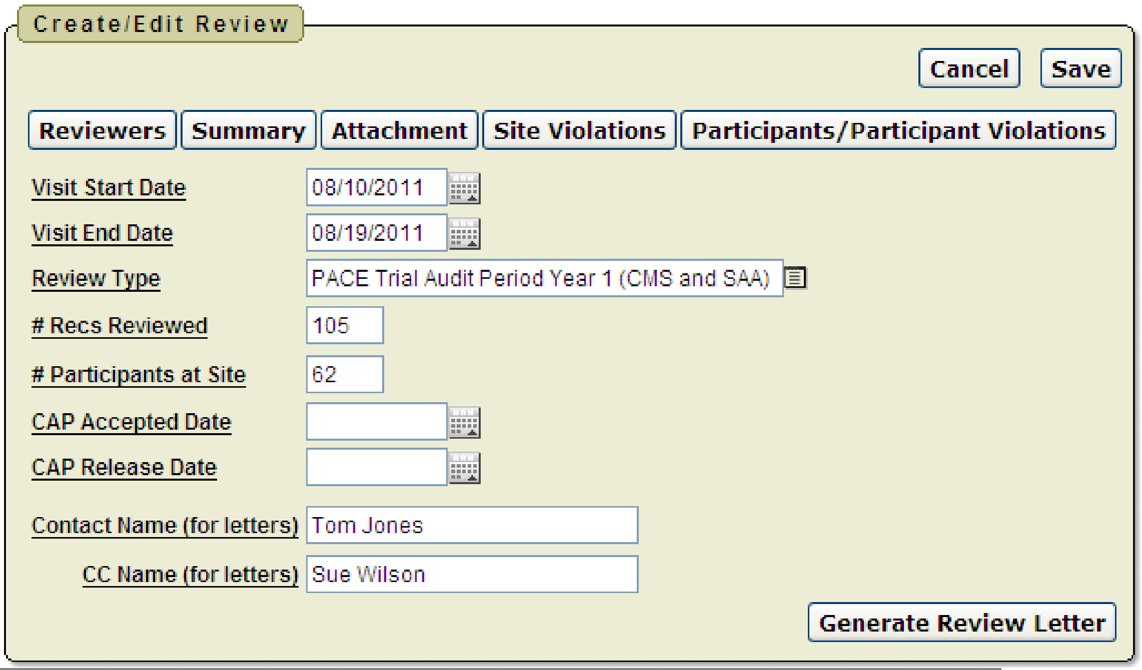


Figure 3. Create/Edit Review Screen.

- Click the "Save" button on the screen. Doing this will display the new Review record as shown in Figure 4 below, with the "Action Processed" message at the top:

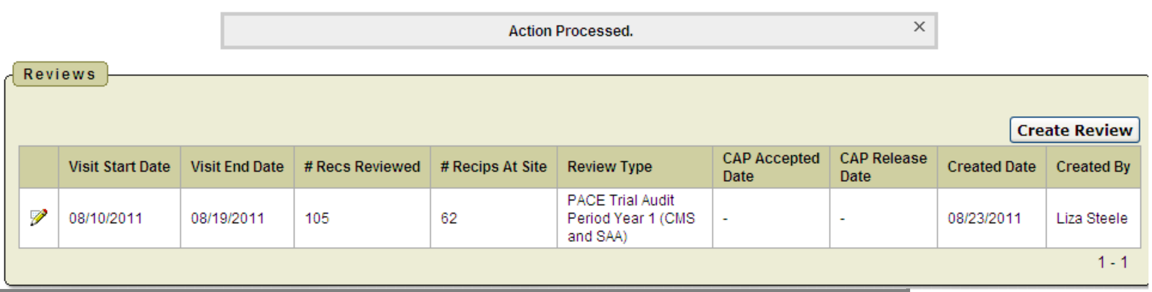


Figure 4. Confirmation of Save: "Action Processed".

- Click the pencil icon for the review to return to the Review page shown in Figure 3 above. ☞ **<u>NOTE</u>: This is a rare instance where you have to be returned to the previous screen before being able to proceed.**
- Follow the instructions below to add the various Review components represented by the buttons across the top of the "Create/Edit Review" screen (Figure 3 above):

Add Reviewers

Reviewers are the DMAS person(s) who participated in the PACE Site Review. Do the following to associate one or more Reviewers with a Review:

- On the “Create/Edit Review” screen (Figure 3), click the “Reviewers” button at the top-left area of the screen.
- On the “Reviewers” screen, click the “Attach a New Reviewer to this Review” button.
- On the “Create Reviewers” screen (shown in Figure 5 below), click the list icon to the right of the “Reviewer ID” field and click on the desired name. ☞ NOTE: This will return a ***number***, not a name, to the “Reviewer ID” field. The name will appear when you return to the “Reviewers” screen.

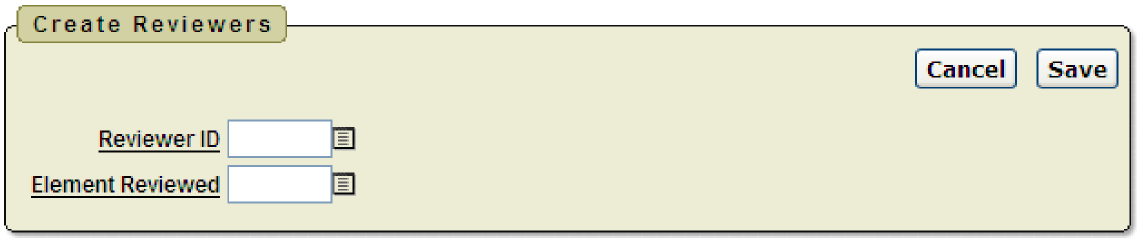


Figure 5. Create Reviewers Screen.

- Next, click the list icon next to the “Element Reviewed” field (shown above), and click on the element reviewed by the person you chose.
- Click the “Save” button.
- Return to the “Reviewers” screen by clicking Cancel OR by clicking the “Reviewers” link at the top of the screen.
- To add additional Reviewers, click the “Attach a Reviewer to this Review” button again, and repeat the steps above, for as many Reviewers as you need to add.
- To return to the Review to add additional Review elements, click the “Create/Edit Review” link at the top of the page.

Add Summary

The Review Summary is a single, text-based, narrative description of the pertinent aspects of the Review as dictated by departmental guidelines. Do the following to add a Summary:

- On the “Create/Edit Review” screen (Figure 3 above), click the “Summary” button at the top-left area of the screen.
- On the “Summary” screen, click the “Create Summary” button.
- On the “Create Summary” screen (shown partially in Figure 6 below), type the summary information.

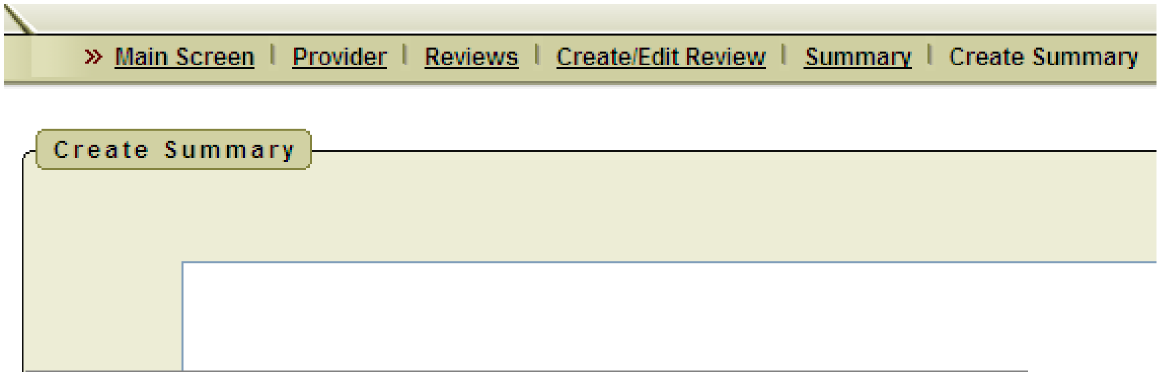


Figure 6. Create Summary Screen.

- Click the "Save" icon to be returned to the "Summary" screen as shown in Figure 7 below. Note that the system automatically returns you to the previous screen, since there is only ever ONE Summary.

Figure 7. Summary Screen.

- Click the page link that represents the page you want to go to. Page links are shown in Figure 8 below. HINT: You are always on the page for whatever link is NOT underlined. Currently, you would be on the "Summary" page, since it is not underlined (as shown below). You would click "Create/Edit Review" to add more components to this Review, or you could click "Main Screen" to return to the main page.

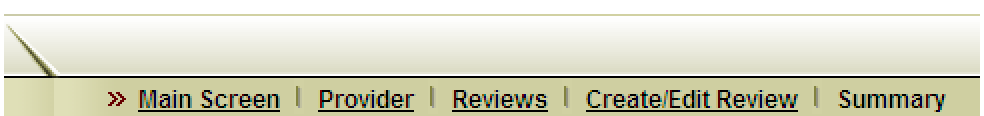


Figure 8. Page Links on Summary Screen: Click the desired page's link.

Add an Attachment

Use the "Attachment" screen to add CMS documents and or files (of any kind) that should be associated with a Review. The system *accepts any file type* for attachments. Do the following to add an attachment to a Review:

- On the “Create/Edit Review” screen (Figure 3 above), click the “Attachment” button at the middle of the top of the screen.
- On the “Create Attachment” screen (shown in Figure 9 below), click the “Browse” button to browse for the desired attachment.

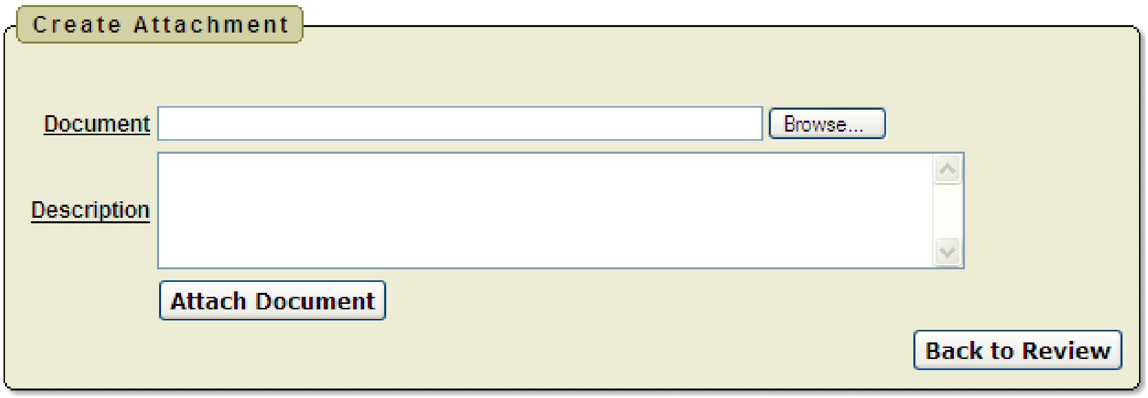


Figure 9. Create Attachment Screen.

- Add a short narrative description of the attachment in the “Description” field.
- Click the “Attach Document” button.
- Click the “Back to Review” button to return to the “Create/Edit Review” screen.

<u>Deleting an Attachment</u>

Sometimes it is necessary to delete an Attachment that was added in error. Attachments that have been added for a Review appear on the Attachment screen as shown below in Figure 9a.

To delete an Attachment, do the following:

- Click the checkbox for the Attachment you want to delete (as shown below).
- Click the “Delete” button to execute the deletion.

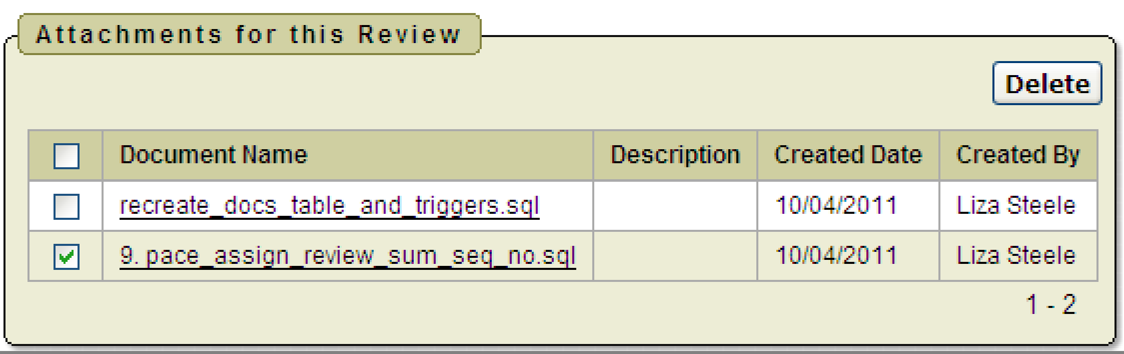


Figure 9a. Deleting an Attachment.

Adding Site Violation(s)

Site Violations are at the core of PACE Reviews. Any given PACE Review can yield zero or more Site Violations, as well as zero or more *Participant Violations*, which this section handles separately below. *Refer to that section ("Add Participant Violation(s)") now if the violation you need to enter meets the departmental rules a Participant Violation.* Otherwise, do the following to add one or more Site Violations to a Review:

- On the "Create/Edit Review" screen (Figure 3 above), click the "Site Violations" button at the middle of the top of the screen.
- On the "Site Violations" screen, click the "Create Violation" button.
- On the "Create Site Violations" screen (shown in Figure 10 below), click the list icon beside the "Composite ID" field and click on the desired statute or statute segment to select it.

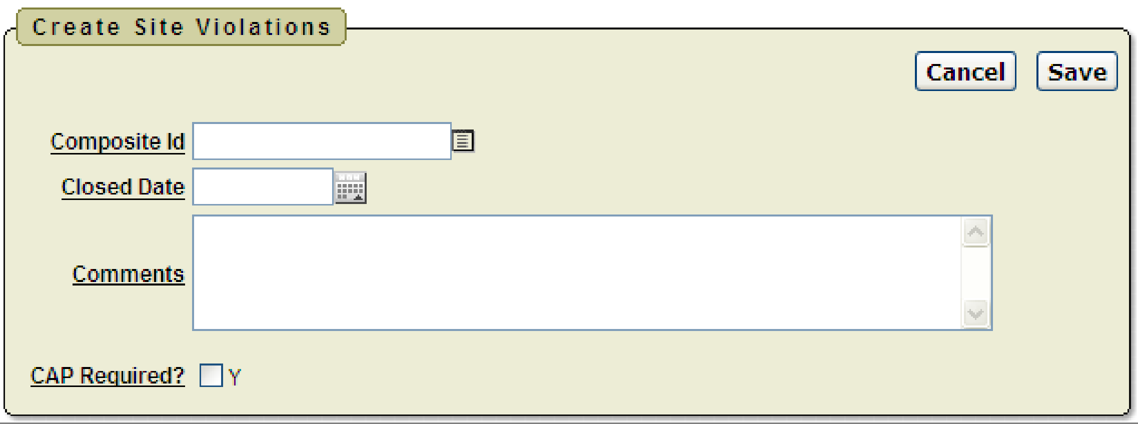


Figure 10. Create Site Violations Screen.

- Do <u>NOT</u> type a "Closed Date" value at this time, because you are newly opening the Violation. The rules affecting that field are as follows, and they differ on the basis of the "CAP Required?" indicator (shown in the figure above).

  <u>Rules Governing the Violation "Closed Date"</u>

  - If the Violation is NOT a CAP violation, then the "Closed Date" will automatically be filled in by the system on the day you generate the "Initial" feedback letter for the Provider.
  - If the Violation is a CAP Violation, you will go back and manually close the Violation in keeping with the business rules governing that process (e.g., notification from CMS or the like).

- Type any comments in the "Comments" field. Comments are not required but may be used to clarify, explain, justify, etc., in accordance with department business rules.
- If a Corrective Action Plan (CAP) is required, click the "CAP Required?" box to fill it with a checkmark. If a CAP is not required, leave that box blank.
- Click the "Save" button.

- Then, do whichever applies below, based on what you want to do next:

To Add Another Violation

Repeat the above process beginning with choosing the "Composite ID" value. Repeat the process for all Violations.

To Return to the Previous Screen or a Different Screen

Click "Cancel" to return to the previous screen, or go to a different screen by clicking its link at the top of the screen.

Adding Participants/Participant Violations

Before you can add a Participant Violation, you have to associate the affected Participant with the Review; then you can add the applicable Participant Violation(s). Follow the steps below to complete both steps:

Adding Participants

Do the following to associate a Participant with a Review in preparation for associating Participant Violations with that Participant:

- On the "Create/Edit Review" screen (Figure 3 above), click the "Participants/Participant Violations" button at the top right side of the screen.
- On the "Participant" screen, click the "Attach New Participant to this Review" button.
- On the "Create Participant" screen (shown in Figure 11 below), click the list icon beside the "LOCER Recip ID" field to produce a list of PACE-eligible people from the LOCERI database.

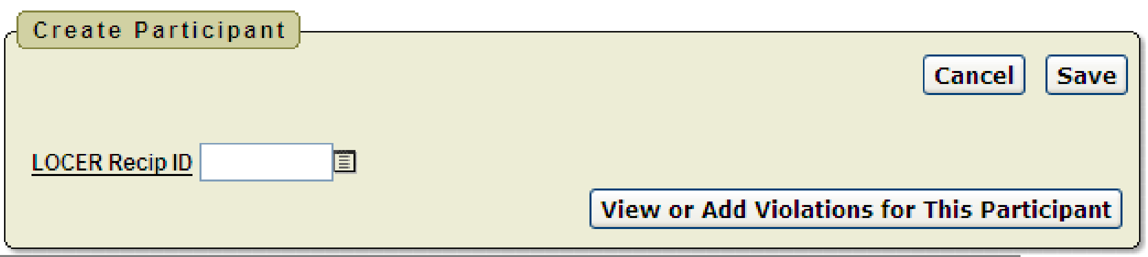


Figure 11. Create Participant Screen.

- Click on the desired name to select it. ☞ NOTE: The value returned to the screen will be a ***number***. You will see the person's name when you return to the "Participant" screen.
- Click the "Save" icon and proceed to the next subsection (directly below) to add one or more Violations for the Participant.

Adding Participant Violations

Now that you have added a Participant, do the following to add one or more Violations for that Participant. ☞ NOTE: Violations that affect more than one person should be entered as Site Violations. Participant Violations are reserved for infractions affecting a single Participant.

- Click the “View or Add Violations for this Participant” button to add the one or more Violations associated with this Participant.
- On the “Participant Violations” screen, click the “Create Participant Violation” button.
- On the “Create Participant Violation” screen (shown in Figure 12 below), click the list icon beside the “Composite ID” field to choose the violation.

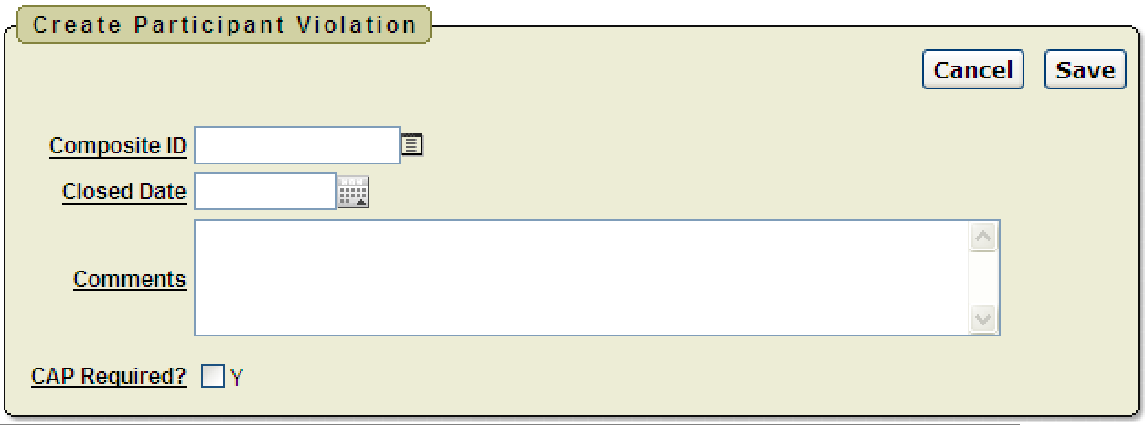


Figure 12. Create Participant Violation Screen.

- Do <u>NOT</u> type a “Closed Date” value at this time, because you are newly opening the Violation. The rules affecting that field are as follows, and they differ on the basis of the “CAP Required?” indicator (shown in the figure above).

Rules Governing the Violation “Closed Date”

  - If the Violation is NOT a CAP violation, then the “Closed Date” will automatically be filled in by the system on the day you generate the “Initial” feedback letter for the Provider.
  - If the Violation is a CAP Violation, you will go back and manually close the Violation in keeping with the business rules governing that process (e.g., notification from CMS or the like).

- Type any comments in the “Comments” field. Comments are not required but may be used to clarify, explain, justify, etc., in accordance with department business rules.
- If a Corrective Action Plan (CAP) is required, click the “CAP Required?” box to fill it with a checkmark. If a CAP is not required, leave that box blank.
- Click the “Save” button.
- Then, do whichever applies below, based on what you want to do next:

To Add Another Violation for the Same Participant

Repeat the above process beginning with choosing the “Composite ID” value.

To Add Another Participant

Click the “Create Participant” page link across the top of the screen. Add the Participant and repeat the steps in this section to associate any violations.

Return to the Previous Screen or a Different Screen

Click “Cancel” to return to the previous screen, or go to a different screen by clicking its link at the top of the screen

Editing an Existing Review

Do the following to add or change information associated with a Review that has already been created. For example, sometimes you might need to enter the main Review information (Figure 3 above) and then come back later to add its component pieces (e.g., Attachments, Site Violations, Participant Violations) or its “CAP Accepted Date” and “CAP Released Date”.

- On the main screen, click the pencil icon (shown in Figure 1 above) for the PACE Site you want to edit a Review for.
- Then, on the “Add Site Reviews / Edit Provider Info” screen (shown in Figure 13 below), click the “View or Create Reviews for this Provider” button.

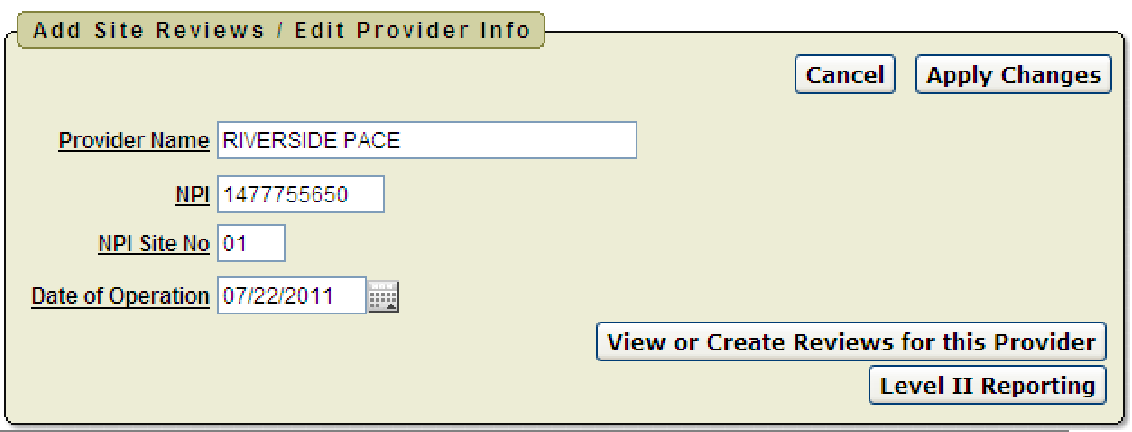
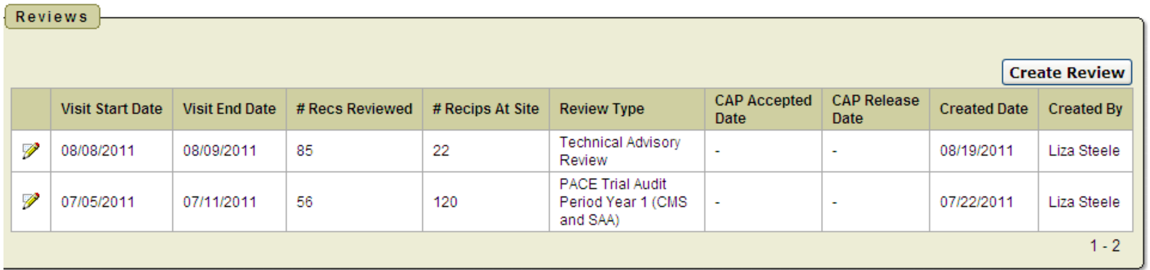


Figure 13. “Add Site Reviews / Edit Provider Info” Screen.

- On the “Reviews” page (shown in Figure 14 below), click the pencil icon for the Review you want to edit. ☞ <u>NOTE</u>: If there is more than one Review for that PACE site, the most recent one will appear at the top of the list—and more than likely you will want to edit that one, since it is most recent.



Reviews

Create Review

	Visit Start Date	Visit End Date	# Recs Reviewed	# Recips At Site	Review Type	CAP Accepted Date	CAP Release Date	Created Date	Created By
	08/08/2011	08/09/2011	85	22	Technical Advisory Review	-	-	08/19/2011	Liza Steele
	07/05/2011	07/11/2011	56	120	PACE Trial Audit Period Year 1 (CMS and SAA)	-	-	07/22/2011	Liza Steele

1 - 2

Figure 14. "Reviews" Page (for accessing and editing an existing Review).

- On the "Create/Edit Review" screen (shown again in Figure 15 below, with data this time), edit the main Review, **AND/OR** proceed to the other screens (Reviewers, Summary, Attachments, Site Violations, Participants/Participant Violations) as needed.

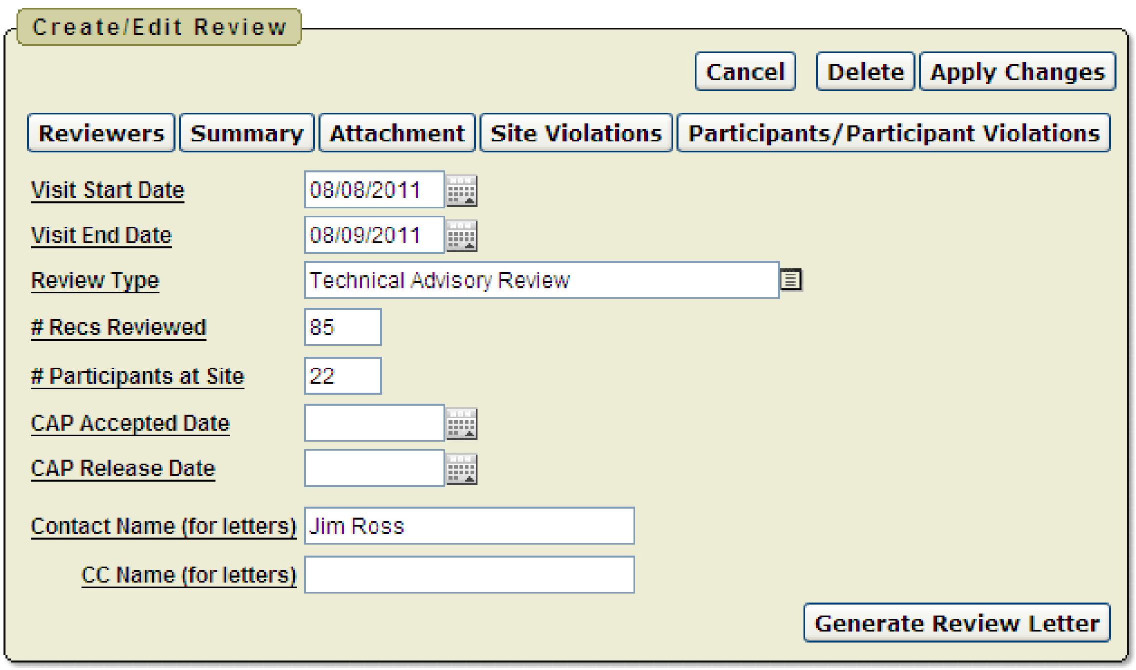


Figure 15. "Create/Edit Review" Screen (with Data).

- When finished with any edits on the "Create/Edit Review" screen, click "Apply Changes"
- Click "Cancel" to return to the previous screen, or click the link for the desired page.

Generating Correspondence: TAV Forms and QMR(SAA) Letters

The PACE database comes complete with a letter-generation module for QMR (SAA) visits and a TAV form generator for Technical Advisory Reviews. (Other types of visits, such as the Trial Audit Period visits, do NOT require follow-up forms or letters.)

The subsections below describe the system-generated correspondence for QMR (SAA) and Technical Advisory Reviews and explain when and how to send them, beginning with the TAV form.

Technical Advisory Reviews: TAV FORM

When you choose "Technical Advisory Review" as the Review Type (as shown in Figure 15a below), the two buttons in the lower-right area of the screen (STEP 1 and STEP 2) will appear.

Follow the instructions below to generate a TAV Form, beginning with "Completing Prerequisite Steps."

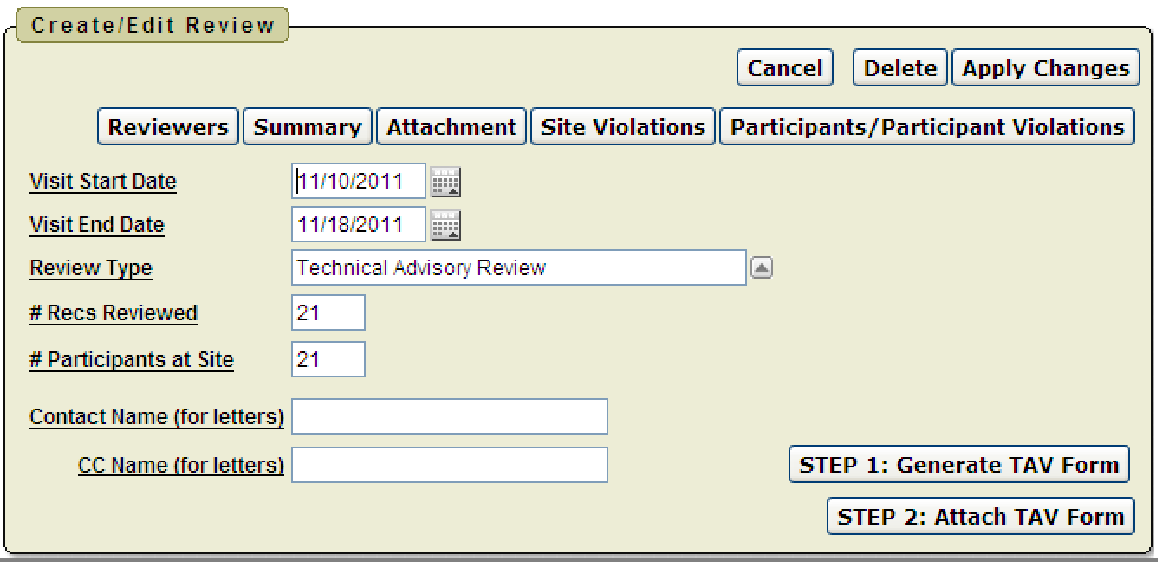


Figure 15a. Technical Advisory Review and Corresponding Screen Buttons.

Follow the instructions below to generate the TAV Form for a Technical Advisory Review, beginning with "Completing Prerequisite Steps":

Completing Prerequisite Steps

- Enter all of the Review information on the "Create/Edit Review" screen (Figure 15 above).
- Add all components (e.g., Reviewers, Summary, any Attachments, any Site Violations, any Participants and Participant Violations).

Generating the Form

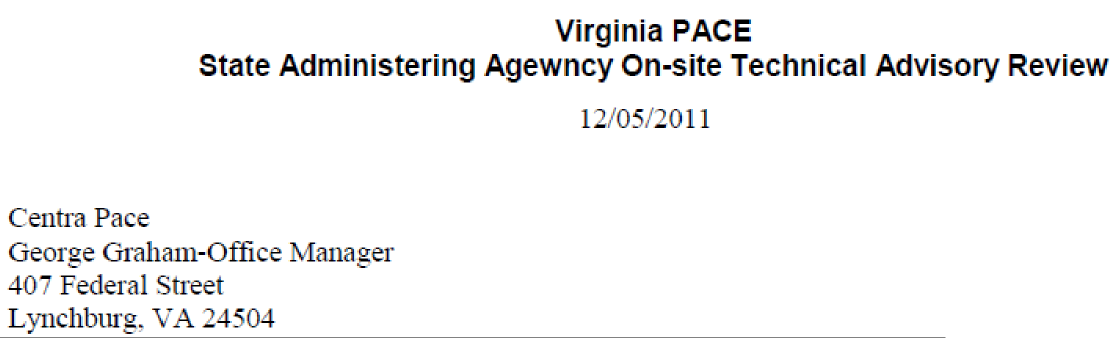
- Click the "STEP 1: Generate TAV Form" button (shown in Figure 15a above) to generate the TAV Form. (Note that it will list all violations on the first page and provide statute text for those violations beginning on the 2nd page.)
- When the TAV Form appears on the screen, click the "File" menu in the upper-left corner.

- Choose “Print” to print the form.
- After it has printed, click the “File” menu again and choose “Save As”.
- In the “Save in” field at the top of the dialog box that appears, choose the desired location to save the letter (e.g., this may be your Desktop, a folder on your machine, or it may be a shared drive somewhere).
- Using the information that is visible to you (as shown in Figure 15b below), type a name in the “File name” field using the following convention:

    - First word of Provider name (if more than one word)
    - Underscore
    - Provider Site No. (This is *not* visible on the TAV Form.)
    - Underscore
    - Current date without slashes
    - Underscore
    - “TAV”, to indicate that it is a TAV Form document.

    ☞ EXAMPLE: Centra_01_12052011_TAV.

- Leave the “Save as type” field as is.


Virginia PACE
State Administering Agewncy On-site Technical Advisory Review
12/05/2011

Centra Pace
George Graham-Office Manager
407 Federal Street
Lynchburg, VA 24504

Figure 15b. Example of Saving a TAV Form.

Using the example above, your file name would be as shown in Figure 15c below:

Figure 15c. Example of File Name

- Click “Save”.
- Click the left-pointing, blue “Back” arrow in the upper-left corner of the toolbar (shown in Figure 15d below) to return to the “Create/Edit Review” screen.

NOTE: Do NOT click the “X” in the upper-right corner of the screen. Doing that will exit you from the application!

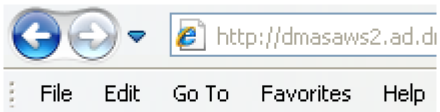


Figure 15d. “Back” Arrow on Toolbar.

- On the “Create/Edit Review” screen (shown in Figure 15a above), click the “STEP 2: Attach TAV Form” button in the lower-right corner.
- Follow the instructions in the “Add an Attachment” subsection of “Working with Reviews” to add the TAV Form as an Attachment to the Review.
- To avoid storing multiple copies of the .pdf file, minimize the PACE database using the “ – “ icon in the upper-right corner and delete the .pdf file you saved before you attached it.

QMR(SAA) Reviews: Initial, Follow-up, and Closing Letters

For QMR (SAA) Reviews, the three types of letters include Initial, Follow-up, and Closing. The letters represent the phases of correspondence follow-up after a Review. The instructions below describe how to generate each letter, and when.

Initial Letter

The Initial letter should be sent in a timely manner upon completion of the QMR(SAA) Review but should not be sent until ALL Violations associated with the Review have been entered into the PACE database.

Follow the instructions below to generate the Initial letter as *the first written correspondence following the entry of the Review data in the PACE database*, beginning with the “Completing Prerequisite Steps.

Completing Prerequisite Steps

- Enter all of the Review information on the “Create/Edit Review” screen (Figure 15 above).
- Add all components (e.g., Reviewers, Summary, any Attachments, any Site Violations, any Participants and Participant Violations).

Generating the Letter

- Also on the “Create/Edit Review” screen, click the “Generate Review Letter” button.
- On the “Generate Review Letter” screen (shown partially in Figure 16 below), click the “Initial” button in the “STEP 1” area of the screen.

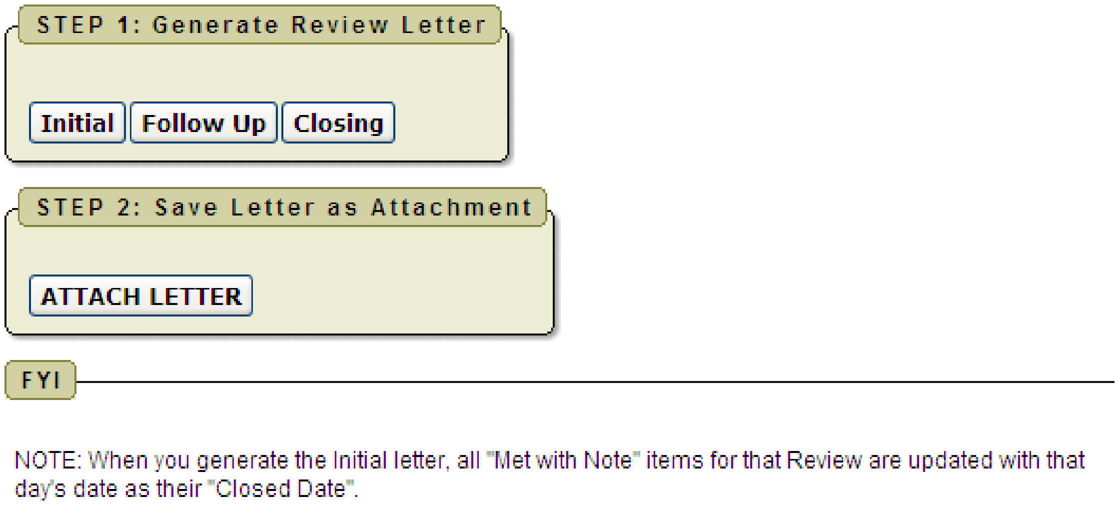


Figure 16. "Generate Review Letter" Screen.

- When the letter appears on the screen, click the "File" menu in the upper-left corner.
- Choose "Print" to print the form.
- After it has printed, click the "File" menu again and choose "Save As".
- In the "Save in" field at the top of the dialog box that appears, choose the desired location to save the letter (e.g., this may be your Desktop, a folder on your machine, or it may be a shared drive somewhere).
- Using the information that is visible to you (as shown in Figure 17 below), type a name in the "File name" field using the following convention:

    - First word of Provider name (if more than one word)
    - Underscore
    - Provider Site No. (This is not visible on the letter.)
    - Underscore
    - Current date without slashes
    - Underscore
    - "Initial", to indicate that it is an Initial letter.

      ☞ EXAMPLE: Centra_01_08252011_Initial.

- Leave the "Save as type" field as is.

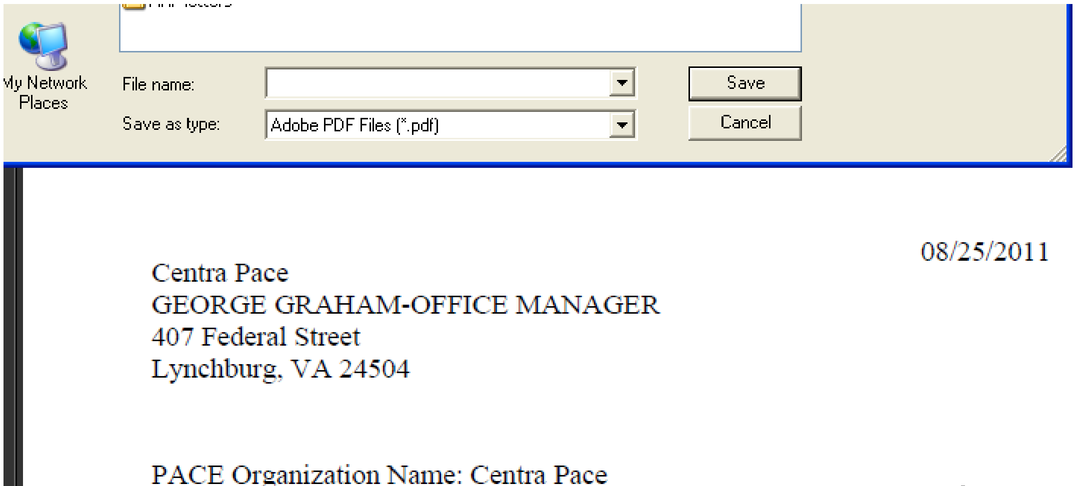


Figure 17. Example of Saving an Initial Letter.

Using the example above, your file name would be as shown in Figure 18 below:

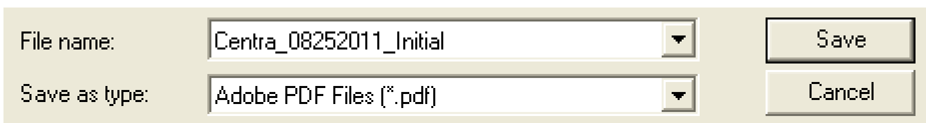


Figure 18. Example of File Name

- Click “Save”.
- Click the left-pointing, blue “Back” arrow in the upper-left corner of the toolbar (shown in Figure 19 below) to return to the “Generate Review Letter” screen.

  NOTE: Do NOT click the “X” in the upper-right corner of the screen. Doing that will exit you from the application!

Figure 19. “Back” Arrow on Toolbar.

- On the “Generate Review Letter” screen, click the “ATTACH LETTER” button in the “STEP 2” area of the screen.
- Follow the instructions in the “Add an Attachment” subsection of “Working with Reviews” to add the Initial letter as an Attachment to the Review.
- To avoid storing multiple copies of the .pdf file, minimize the PACE database using the “ – “ icon in the upper-right corner and delete the .pdf file you saved before you attached it.

☞ NOTE: You cannot generate an Initial letter more than one time for any given Review. If you click the "Initial" button a second time at any point after generating the Initial letter, you will receive an error message and the letter will NOT be generated.

Follow-up Letter

Follow-up letters should be sent when a PACE Provider has either:

- Responded to the Initial letter by addressing some, ***but not all***, CAP items such that some have received a "Closed Date" on the Site (or Participant) Violations screen, but one or more other Violations have not; or
- Not responded to the Initial letter at all.

The follow-up letter is designed to remind the Provider that one or more CAP responses is still required. *Also, one or more Follow-up letters may be required, depending on the timeliness and completeness of the PACE Provider's response to the Initial letter.*

Follow the instructions below to generate a Follow-up letter, beginning with the "Completing Prerequisite Steps.

Completing Prerequisite Steps

The only prerequisite step is that an Initial letter be sent and a reasonable amount of time be allowed to elapse after that, to give the Provider time to respond. *A Follow-up letter is the official response to an incomplete or tardy response to the Initial letter.*

Generating the Letter

- On the "Create/Edit Review" screen (shown in Figure 15 above), click the "Generate Review Letter" button.
- On the "Generate Review Letter" screen (shown partially in Figure 16 above), click the "Follow-up" button in the "STEP 1" area of the screen.
- When the letter appears on the screen, click the "File" menu in the upper-left corner.
- Choose "Print" to print the form.
- After it has printed, click the "File" menu again and choose "Save As".
- In the "Save in" field at the top of the dialog box that appears, choose the desired location to save the letter (e.g., this may be your Desktop, a folder on your machine, or it may be a shared drive somewhere).
- Using the information that is visible to you (as shown in Figure 17 above), type a name in the "File name" field using the following convention:

    - First word of Provider name (if more than one word), and an underscore
    - Current date without slashes, and an underscore
    - Follow-up

- Leave the "Save as type" field as is.
- Click "Save".

- Click the left-pointing, blue "Back" arrow in the upper-left corner of the toolbar (shown in Figure 19 above) to return to the "Generate Review Letter" screen.

    💣 NOTE: Do NOT click the "X" in the upper-right corner of the screen. Doing that will exit you from the application!

- On the "Generate Review Letter" screen, click the "ATTACH LETTER" button in the "STEP 2" area of the screen.
- Follow the instructions in the "Add an Attachment" subsection of "Working with Reviews" to add the Initial letter as an Attachment to the Review.
- To avoid storing multiple copies of the .pdf file, minimize the PACE database using the " – " icon in the upper-right corner and delete the .pdf file you saved before you attached it.

☞ NOTE: You cannot generate a Follow-up letter under either of the following circumstances:

- o An Initial letter has not yet been generated for that Review; or,
- o There are no Violations for that Review that don't have a "Closed Date."

Closing Letter

A Closing letter should be generated when either of the following is true:

- o The PACE site visit turned up zero Violations, and nothing further is required of the PACE Provider site; or,
- o All Violations associated with the Review have been closed according to proper procedure.

The Closing letter concludes the Review process and formally notifies the PACE Provider to this effect.

Follow the instructions below to generate a Closing letter, beginning with the "Completing Prerequisite Steps.

Completing Prerequisite Steps

The only prerequisite is that there not be an open Violation of any kind (Site or Participant) remaining for the Review. If any Violations remain open, either close them as appropriate, or send a Follow-up letter as the response.

Generating the Letter

Follow the steps in the "Generating the Letter" subsection above, clicking "Closing" in the "STEP 1" area of the letters screen and substituting "Closing" for "Follow up" in the file name. Be sure to attach the letter to the review using the "STEP 2" area of the screen.

Working with Maintenance Tasks

There are “behind-the-scenes” actions and pieces of data that make the main part of the application (“Working with PACE Reviews,” above) function smoothly. The “Maintenance” area of the main screen (shown in Figure 20 below) provides access to these things. Follow the instructions below that correspond to what you want to do.

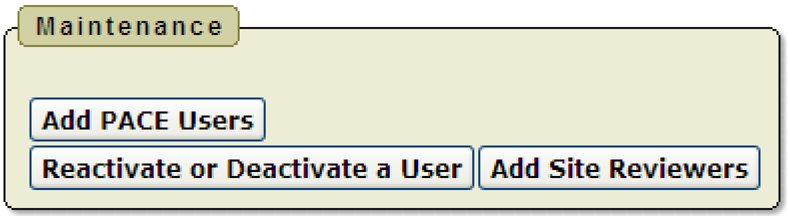


Figure 20. “Maintenance”.

Adding PACE Users

The system has to store the names of all PACE users so that when you save a record of any kind (Review, Attachment, Site Violation, etc.), the system can store your name in connection with that, and so that it can validate you as a proper user of the system. Anyone who will use the PACE database must first be added in accordance with the instructions below. ☞ <u>NOTE</u>: This is an Administrator task and should be handled by the user group’s manager.

- In the “Maintenance” are of the main screen, click the “Add Pace Users” button (shown in Figure 20 above).
- On the “Add User” screen (shown in Figure 21 below), click the list icon beside the “User ID” field to generate a list of active DMAS users.

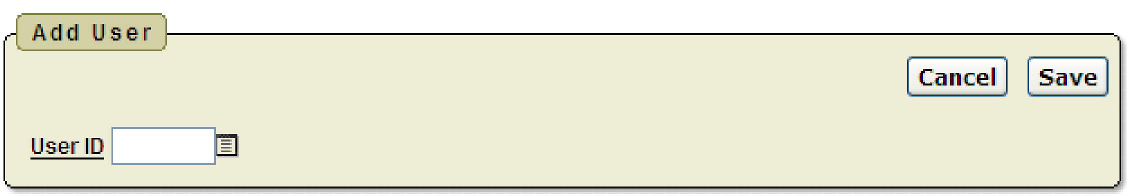


Figure 21. “Add User” Screen.

- Click the desired name to select it. ☞ <u>NOTE</u>: Doing this will return a ***<u>number</u>*** to the “User ID” field.
- Click “Save.” You will now see the actual name in the lower portion of the screen (“Existing Pace Users”).
- Click “Cancel” to return to the main screen.

Deactivating or Reactivating a PACE User

Instead of deleting PACE users or adding them again, you deactivate and reactivate them. Follow the instructions below for each action.

Deactivating a PACE User

Do the following to deactivate a PACE user, either because she has left DMAS permanently or because she will be temporarily unavailable for work:

- In the "Maintenance" are of the main screen, click the "Deactivate or Reactivate a PACE User" button.
- On the "Reactivate or Deactivate a User" screen, click the pencil icon for the person you would like to deactivate.
- On the next screen (shown in Figure 22 below), either click the list icon beside the "Active" field and click on "N" to select it, or simply type "N" in the "Active" field.

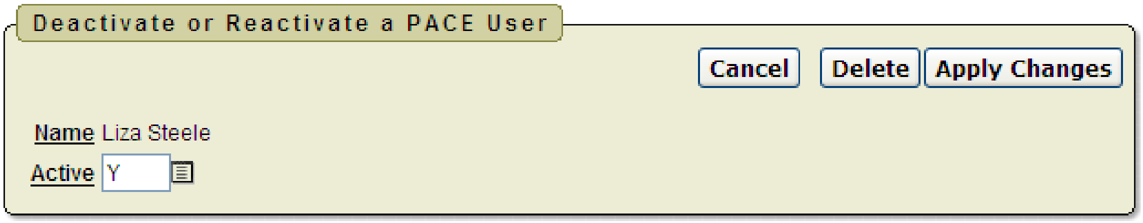


Figure 22. Deactivate or Reactivate a PACE User.

- Click the "Apply Changes" button to save the change and be returned automatically to the previous screen.
- Click the "Cancel" button to return to the main screen, or click the "Main Screen" link at the top of the page.

Reactivating a PACE User

Do the following to reactivate a PACE user who was previously deactivated:

- In the "Maintenance" are of the main screen, click the "Deactivate or Reactivate a PACE User" button.
- On the "Reactivate or Deactivate a User" screen, click the pencil icon for the person you would like to reactivate.
- On the next screen (shown in Figure 22 above), either click the list icon beside the "Active" field and click on "Y" to select it, or simply type "Y" in the "Active" field.
- Click the "Apply Changes" button to save the change and be returned automatically to the previous screen.
- Click the "Cancel" button to return to the main screen, or click the "Main Screen" link at the top of the page.

Adding a PACE Site Reviewer

PACE Site Reviewers may or may not also be PACE users. For this reason, this screen is manual data entry, rather than "list driven." ☞ NOTE: If you are entering a Site Reviewer who is also a PACE user, be sure to enter the name the way it appears on the PACE Users screen.

PACE Site Reviewers must be entered using the Maintenance option before they will appear in the list of Site Reviewers referenced just below Figure 4 in this manual.

Do the following to add a PACE Site Reviewer:

- In the "Maintenance" are of the main screen, click the "Add Site Reviewers" button.
- On the "Add Reviewer" screen (shown in Figure 23 below), fill in the fields according to their labels, making sure to use a capital letter only for the first letter of each field.

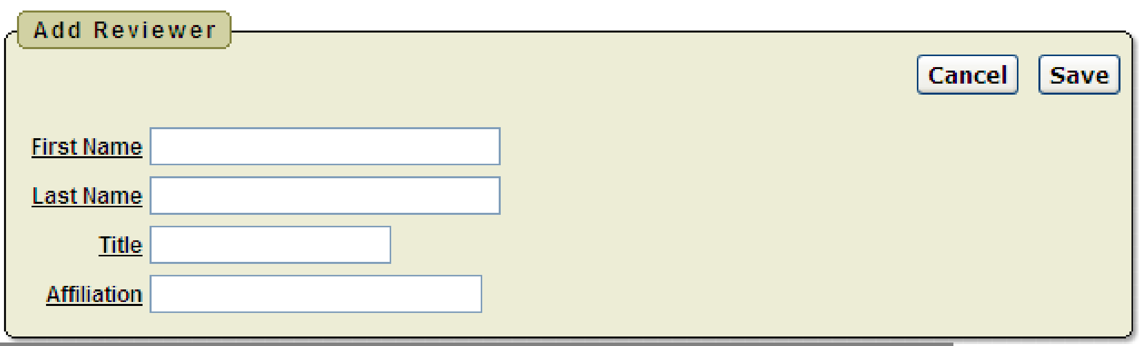


Figure 23. "Add Reviewer" Screen.

- Click the "Save" icon.
- Repeat the process for any additional Reviewers.
- Click "Cancel" to return to the main screen, or click the "Main Screen" link at the top of the page.

Working with Other Stuff

The "Other Stuff" area of the main screen provides access to screens you will use infrequently. They are sort of like maintenance items and address the tasks described below.

Creating a New Provider

As new PACE Providers come along, they need to be added to the database using the "Create a New Provider" button in the "Other Stuff" area of the main screen. After a Provider has been added, it will appear in the "PACE Site Review Portal" area of the main screen (shown in Figure 24 below) as long as it has an "Active" status.

PACE Site Review Portal

	PACE Site Name	NPI	NPI Site No	Date of Operation
	Centra PACE	1861637191	01	07/26/2011
	Riverside PACE	1477755650	01	07/22/2011

1 - 2

Figure 24. PACE Site Review Portal Displays Active Providers.

Do the following to create a new PACE Provider in the system:

- Click the "Create a New Provider" in the "Other Stuff" area of the main screen.
- On the "Add Site Reviews / Edit Provider Info" screen (shown in Figure 25 below), type the Provider name, NPI, NPI Site Number, and Date of Operation in the corresponding fields. ☞ NOTE: All fields are required.

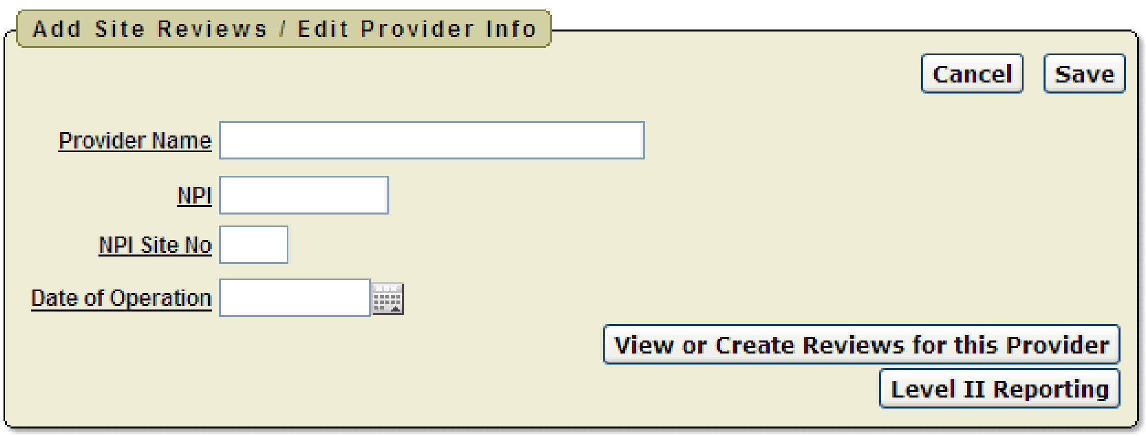


Figure 25. "Add Site Reviews / Edit Provider Info" Screen.

- Click the "Save" button.
- Click "Cancel" to return to the main screen.
- Repeat the process for as many PACE Providers as you need to add.

Deactivating or Reactivating an Existing Provider

By default, newly added PACE Providers have an "active" status in the system. The active status causes them to appear in the "PACE Site Review Portal" area of the main screen. If a Provider becomes inactive and no longer needs to appear in the list, you can designate that provider as "inactive," and that will prevent the Provider from appearing in the list. Likewise, you can reactivate a Provider that has previously been made inactive. Do the following to deactivate or reactivate a PACE Provider:

- In the "Other Stuff" area of the main screen, click the "Deactivate or Reactivate a Provider" button.

- On the “Deactivate or Reactivate a Provider” screen, click the pencil icon for the Provider whose status you want to change.
- On the next screen (shown in Figure 26 below), change to N to a Y or the Y to an N, depending on what you are doing. (N = inactive; Y = active). You can either type the letter or use the list button beside the field to choose it.

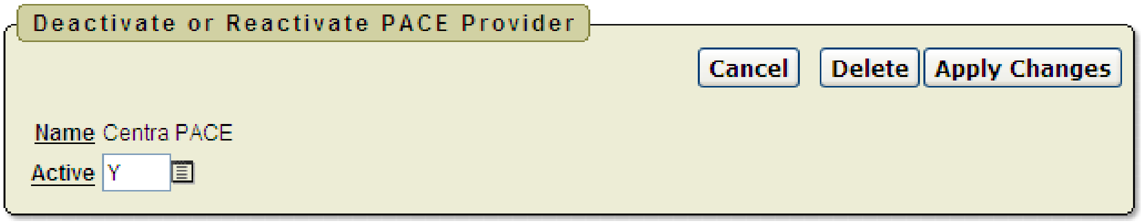


Figure 26. Deactivate or Reactivate a PACE Provider.

- Click “Apply Changes” to return to the previous screen.
- Click “Cancel” to return to the main screen.

☞ NOTE: Providers that are not active will NOT appear in the “PACE Site Review Portal” area of the main screen.

Adding/Editing PACE Statute Regulations

Statutes should be edited infrequently and rarely will there be new ones. Adding and editing statute regulations is a management task and *should be done by managers only.*

Once a statute has been added, it becomes immediately available to the “Composite ID” fields on the Site Violations (shown in Figure 27 below) and Participant Violations screens by way of the list icons beside those fields.

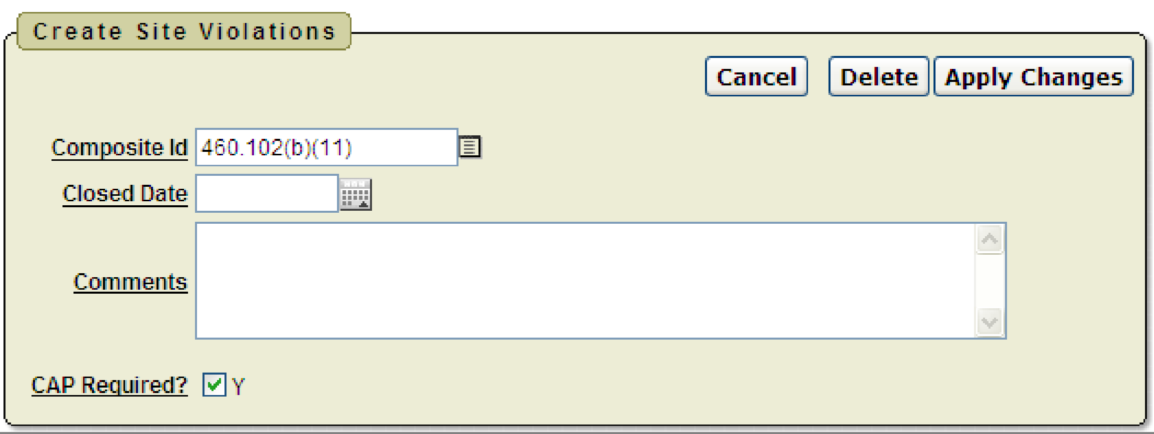


Figure 27. “Composite ID” field on the “Create Site Violations” Screen.

Adding

Do the following to add a new statute regulation.

- Click the “Add/Edit PACE Regulations” button in the “Other Stuff” area of the main screen.
- On the “Add/Edit Regs” screen, click the “Create Regulation” button in the upper-right corner.
- On the “Create Regulation” screen, fill in the Regulation Number, Element ID, and any additional components for the ID, such as “(a), or “i” or the like.

☞ NOTE: When you save the new Regulation, the “Composite ID” value is *automatically created by the system* as a combination of the following fields shown in Figure 27a below: “Reg Num,” “Id1,” “Id2,” “Id3,” “Id4,” and “Id5”, and that value must be unique, meaning you cannot add the same regulation twice. In the example below, you could not add 460.72(b)(1)(iii) a second time without receiving a system-generated error message.

Edit	Reg Num	Element	Title	Id1	Id2	Id3	Id4	Id5	Text	Composite Id
	460.72	ENV 01	Physical Environment	(b)	(1)	(ii)			(b) Fire safety-- (1) General rule. Except as otherwise provided in this section-- (ii) Chapter 19.3.6.3.2, exception number 2 of the adopted edition of the LSC does not apply to PACE centers.	460.72(b)(1)(ii)

Figure 27a. Example of New Regulation and Composite ID.

- Click the “Save” button to save the new regulation.
- Click “Cancel” to return to the previous screen.
- Click “Cancel” to return to the main screen.

Editing

Note that after you have saved a regulation, the only editable field is the text. This is because by that time, the regulation may have been saved as a Violation, and from that point on its identifying feature (the Composite ID, which is made up of the “Reg Num,” “Id1,” “Id2,” “Id3,” “Id4,” and “Id5”) cannot be changed.

Do the following to edit regulation text for a regulation:

- Click the “Add/Edit PACE Regulations” button in the “Other Stuff” area of the main screen.
- Find the desired regulation by sorting the list according to the “Element” or “Reg Num” field and advancing to the next page(s) as needed (using the “Next” link in the lower-right corner of the screen).
- When you have found the regulation you want to edit, click the pencil icon that corresponds to it.
- On the “Create Regulation” screen (shown in Figure 27b below), edit the text as desired. Note that the other fields are presented as “display only” because they are not editable after the regulation has been saved the first time.

Figure 27b. "Create a Regulation" Screen.

- After you have finished making your edits to the text, click the "Apply Changes" button (also shown in Figure 27b above) to return to the previous screen.
- Click "Cancel" to return to the main screen.

Reports

This section describes the various PACE reports.

Reviews Needing Closing Letters

This report automatically appears on the main page of the database and shows information about Reviews that still need a Closing letter. Note that Reviews are not eligible to show on this report until the "Visit End Date" for the Review 33 or more days in the past. When a Closing letter has been issued for the Review, it will drop off of the report.

Note that a Review appearing on this report doesn't mean that it doesn't ALSO need one or more Follow-up letters. It simply means that the Review has definitely not been closed out. To review the specifics of the Review, click the applicable Provider in the "PACE Site Review Portal" list, and choose the Review that corresponds to the "Visit Start Date" shown in the "Reviews Needing Closing Letters" report.

Error Messages

There are two kinds of error messages: System-generated, and programmatic. The subsections below explain them in some detail:

System-generated

System-generated error messages are those that respond to unexpected data entry errors such as the placement of alpha characters in a date field or some other data anomaly. These error messages were not programmed into the user interface by the developer of the PACE system, in other words. Accordingly, they have a less “user friendly” appearance, as shown in Figure 28 below.

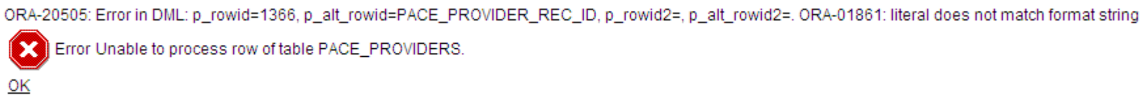


Figure 28. Example of System-generated Error.

Dismissing

Dismiss a system-generated error by clicking the “OK” link (as shown in Figure 28 above).

Programmatic

Programmatic error messages were created by the developer of the PACE system in anticipation of data-completeness errors and other data integrity issues. In other words, these errors have to do with completeness and/or accuracy of business, not the correctness of data in a given field type (e.g., date fields can only accept date-formatted entries).

An example of a programmatic error appears below:

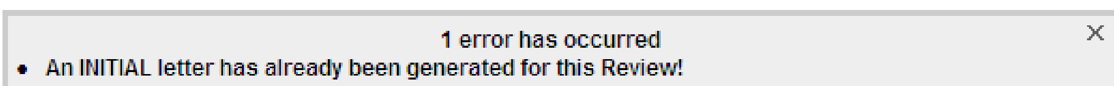


Figure 29. Example of Programmatic Error.

Dismissing

Dismiss a programmatic error by clicking the “X” in the upper-right corner, as shown in Figure 29 above.

Appendix A: Field and Button Suppression Based on Review Type

Some buttons and fields do not need to appear on screen when you have chosen a Review Type for which the button's functionality or the fields' values do not apply. Oracle gives us a handy way to "suppress" buttons and fields when they are not applicable to another on-screen item, such as Review Type.

The matrix (Figure A-2) below indicates with a checkmark ("✓") when you ***will see*** the "CAP Accepted Date", "CAP Released Date," "Generate Review Letter," and "Participants/Participant Violations" buttons shown on the "Create/Edit Review" screen depicted in Figure A-1:

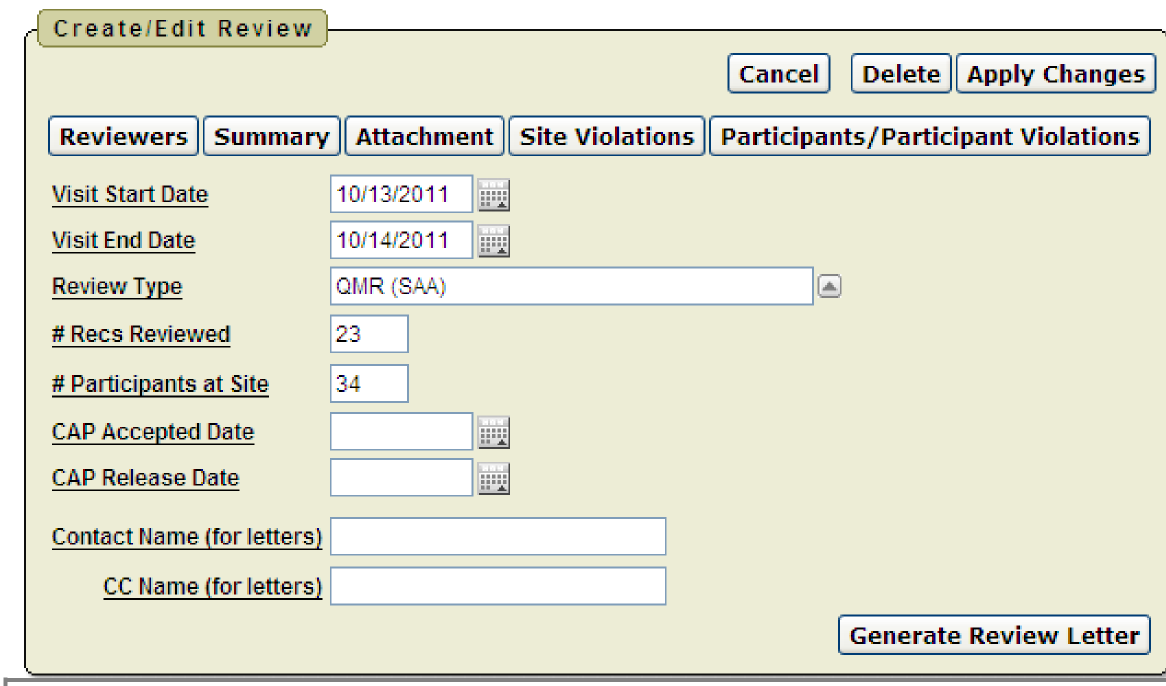


***Figure A-1**. "Create/Edit Review" Screen Showing all Fields and Buttons that can be Suppressed.*

The matrix below shows the Review Type for which you will see the fields shown above:

Key: ✓ = The button or field IS shown on the screen for the Review Type noted.

The button or field is suppressed if there is no checkmark for that button or field for the corresponding Review Type.

Review Type	***CAP Dates***	***Letters Button***	***Recipient Button***
PACE Trial Audit Period Year 1 (CMS and SAA)	✓		
PACE Trial Audit Period Year 2 (CMS and SAA)	✓		
PACE Trial Audit Period Year 3 (CMS and SAA)	✓		
QMR (SAA and CMS)	✓		
QMR (SAA)	✓	✓	✓
Technical Advisory Review		✓	✓
Technical Advisory Review (CMS and SAA)			

Figure A-2. ***Review Types and Corresponding Field/Button Suppression.***