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| --- | --- | --- |
| **Subject** | **Checklist** | **Comments/Notes** |
| **Training**  **Database Access** | * [**https://login.pointclickcare.com/**](https://login.pointclickcare.com/)   **Username: csctrain.social**  **Password: Hello123** |  |
| **EHR Support** | * Resources available- Guides and Solutions * FAQS: Submitting Tickets, Calling the Hotline, New User Request and Process, After Hours Support.   Link to [Frequently Asked Questions](https://cfc.freshdesk.com/support/solutions/folders/156088) |  |
| **Basics** | **Navigation**  **Home**   * Facility Bulletin Board   **Clinical**   * People: Resident List: All New, Current, Discharged * Care Management: Communications (View, New and Edit) |  |
| **Resident Chart:**  **The Basics** | * Photo * Resident Header (Primary DX, Diet, Advanced Directives, Allergies, Special Instructions, admission/discharge dates) * Demographic Data |  |
| **Profile** | * Contacts * Medical Professionals * External Facilities * Reports: Admission Record (Facesheet) & Transfer/Discharge Record |  |
| **Census** | * Viewing History of Census Activity (room changes, transfers, discharges, readmits). |  |
| **Medical Diagnosis** | * View diagnoses |  |
| **Immunizations** | * View Immunizations |  |
| **Orders** | * View orders (filters) * Reports: Order Summary, Order listing |  |
| **Weights/Vitals** | * View Vitals |  |
| **Assessments** | * Next Assessments Due * New * Errors * Edit an In Progress * Save/Sign/Lock or Strike Out/Close * See documentation guide for list UDAs |  |
| **Prog Note** | * All topics that do not have a UDA * Filters: View all, date ranges, Custom etc. |  |
| **Care Plan** | * View the Care plan * Edit the Care Plan * Focus, Goals, Interventions, Tasks * Custom Focus, Goals, Interventions * PN regarding care plans * Care Plan Reviews |  |
| **Tasks** | * View tasks |  |
| **Misc** | * View and Upload documents |  |
| **Clinical Dashboard** | * Edit Layout * Incomplete Admissions   \*Client Demographic Data   * Care Plan Reviews * Daily Summary * ADT in the last “0-7” days |  |
| **UDA Portal** | Scheduled   * Filters 0 Days, Unit, Floor, Filter * Color coding, Black, Gray, Red   In Progress   * Finding your in-progress UDAs to complete/sign/strike out   Completed   * View completed UDA's |  |
| **MDS Portal** | * In Progress * Data Entry and Work Flow * MDS population from UDA   \*Must check auto populated answers   * Sections to be completed * CAAs to be completed |  |
| **Secure Conversations** | * Sending messages to individuals * Sending messages to groups |  |
| **Reports** | * Resident List Report * ADT and others |  |
| **Resources** | * [IDT Process and UDA MDS Supplemental](https://cfc.freshdesk.com/support/solutions/articles/4000190852-idt-process-and-uda-mds-supplemental) * [Social Services Documentation Guide](https://cfc.freshdesk.com/support/solutions/articles/4000191772-social-services-documentation-guide) |  |

**Employee Name & Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Employee Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Trainer Name and Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Trainer Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_