|  |  |  |
| --- | --- | --- |
| **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:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_