

# **Palm Applications Addendum**

## **MS\*Health/CMHC 5.5**

**Social Services & Behavioral Healthcare Management Software**

**MS\*Health Software Corp.**

# MS\*Health/CMHC 5.5

## Social Services & Behavioral Healthcare Management Software

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# Introduction

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## MS\*Health for Palm Applications

MS\*Health for Palm Applications extend and enhance the functionality of our desktop applications. Here are only a few of the many reasons that you should use MS\*Health/CMHC for Palm Applications:

- **Improve efficiency** - The MS\*Health/CMHC 5.5 Palm Interface provides accessibility to important client data, service history, and appointments when you need it, wherever you are.
- **Increase revenue** - Therapists are privy to information such as service data, diagnosis, etc. Sharing the service information and diagnostic data with billing is crucial to a strong accounts receivable and accurate reporting. Automating service and client data on the Palm reinforces accurate and complete service data with billing and data entry personnel. Plus it reduces the data entry associated with billing and services entry.
- **Security** - MS\*Health/CMHC 5.5 security ensures only authorized therapists can download client data to the Palm. Coupled with Palm OS security, Palm data provides greater security than written or printed materials such as charge slips, appointment lists, etc.

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## Important Menus

**Maintenance** contains options to Client Registration and Appointment Scheduling as well as other data tables that can be modified by the user.

**Billing/Activities** menu is the home to services and charge entry, etc., plus Staff/Activities which can be used by a clinician to view their caseload, open treatment plans, schedules, etc.

**Reports** menu is used to print, fax, e-mail, or view system reports.

**Admin** menu contains options to get your client data ready to hot sync with your Palm device.

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## Where to Go from Here

Here's the approach we recommend for using the *Palm Applications Addendum*:

- If you are unfamiliar with MS\*Health/CMHC 5.5 review the *User Guide Overview* chapter to experience the concepts of how MS\*Health/CMHC 5.5 works. Otherwise you may wish to jump right in with the Setup chapter.
- Clinical application validation tables should be in place. If not, review the Validation Tables section of the MS\*Health/CMHC 5.5 Implementation Guide.

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## Training Services

Because MS\*Health/CMHC 5.5 is such a flexible product, there are quite a few different ways an organization may choose to use it. Be sure to have your staff properly trained. There is nothing as frustrating as attempting to implement and use a product you are not familiar with.

Regularly scheduled classes are offered at our New Jersey training facility to ensure your staff's knowledge and confidence in MS\*Health/CMHC 5.5. For organizations beyond reasonable travel distance MS\*Health staff are also available to provide training at your location.

Visit the MS\*Health Web page at [www.mshealth.com](http://www.mshealth.com) for class schedules and information or call us at 908-850-5564

# Installation

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## MS\*Health/CMHC 5.5 Palm Applications

The terms “Palm” and “Palm device” used throughout the documentation refer to any Palm or Palm compatible PDA. The MS\*Health/CMHC 5.5 Palm extensions let staff take their caseload on the road with them. In addition, staff have access to client history, a note pad, and schedules. After appointments are kept the staff can "hot sync" their Palm with the desktop computer. Any appointments, notes, or client data changes will update the desktop and make the data available for billing, tracking, and reporting.

### What's included:

- MS\*Health/Palm Interface – Files and programs needed to interface Palm applications with MS\*Health/CMHC 5.5
- MS\*Health/Palm Sync - A set of software modules which allow the Hot Sync Manager, shipped with Palm devices, to integrate with MS\*Health/CMHC 5.5 data.
- MS\*Health/Palm Scheduler - This Palm app has been included as a full featured example of how the Palm platform can be used to extend and enhance the functionality of MS\*Health/CMHC for Windows. It allows for Palm-top management of client information and staff schedules. Client data and appointments can be downloaded to the Palm, updated, and Hot Sync'd with the MS\*Health/CMHC database.

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## Installing MS\*Health/CMHC 5.5 Palm

*Before you can use MS\*Health/CMHC for Palm Applications, you must install it on your desktop and Palm devices.*

### Installation

There are several steps in the installation. MS\*Health/Palm Interface installs files and programs needed to interface Palm applications with MS\*Health/CMHC 5.5, and installs the Scheduler files that will later be HotSync'd with the Palm devices. MS\*Health/Palm Sync updates each desktop computer that will HotSync with a Palm device running

MS\*Health for Palm applications, and is installed in two phases. After running the desktop installation, it will be necessary to install the MS\*Health/Palm Scheduler application each Palm device, if desired.

## To install MS\*Health/Palm Interface

This procedure will install files and programs needed to interface Palm applications with MS\*Health/CMHC 5.5, and installs the Scheduler files that will later be HotSync'd with the Palm devices. This procedure only need to be performed once.

1. Point your web browser to <http://downloads.mshealth.com/c55palm.exe>  
You will be prompted for your support ID and password, which you should have received via e-mail from MS\*Health Technical Support.
2. When prompted, select "Run this program from its current location"
3. When prompted for an installation folder, browse to or your \CMHC55\DATA\PALM folder. If this folder does not exist, enter it in the dialog. Substitute the correct CMHC 5.5 installation folder name if necessary.
4. Click the "Unzip" button.  
You will be advised of successful completion. If the update fails, or any error messages appear, please call technical support for further assistance.

## To install MS\*Health/Palm Sync

### Phase 1

This procedure will install files and make the necessary registry entries required for any MS\*Health for Palm application, and it should be performed on every desktop computer that will HotSync with a Palm device running such applications. The computer must have the HotSync manager already installed.

1. Point your web browser to <http://downloads.mshealth.com/c55palm1.exe>  
You will be prompted for your support ID and password, which you should have received via e-mail from MS\*Health Technical Support.
2. When prompted, select "Run this program from its current location"
3. If prompted, leave the installation folder blank.
4. Click the "Unzip" button.

You will be advised of successful completion. If the update fails, or any error messages appear, please call technical support for further assistance.

## **Phase 2**

This procedure will install the MS\*Health for Palm Hotsync interface for the MS\*Health/Palm Scheduler application, and should be on every desktop computer that will Hot Sync with a Palm device running the application. It must be run only after the MS\*Health/Palm Sync I installation, above, has been run.

1. Point your web browser to <http://download.mshealth.com/c55palm2>.
2. When prompted, select "Run this program from its current location"
3. If prompted, leave the installation folder blank.
4. Click the "Unzip" button.

You will be advised of successful completion. If the update fails, or any error messages appear, please call technical support for further assistance.

## **To install the MS\*Health/Palm Scheduler**

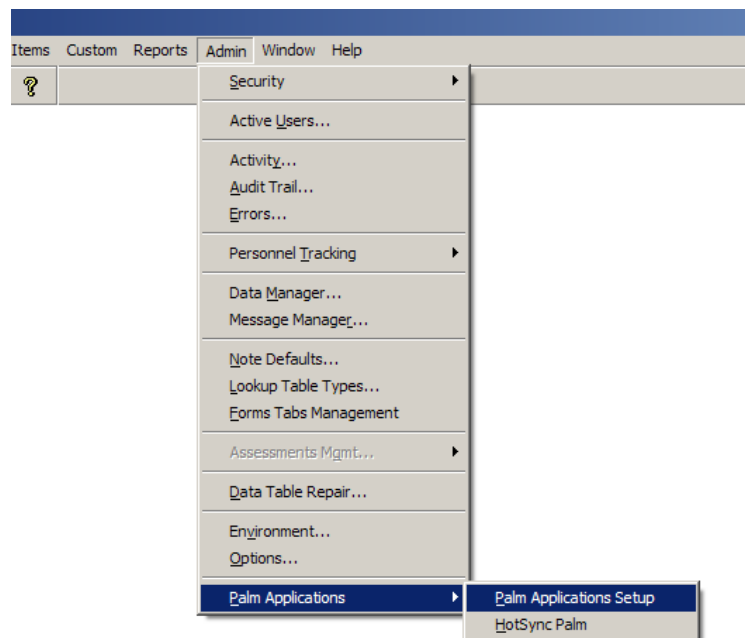
This procedure should be run for every Palm device that will be running MS\*Health/Palm Scheduler.

1. From the Palm Desktop, select "Install." Enter the appropriate user, if required, and add all the Palm files in "\cmhew55\data\palm" directory. Substitute the appropriate path if necessary.
2. Hot Sync the Palm device. This will copy the MS\*Health/Palm Scheduler to the Palm device.

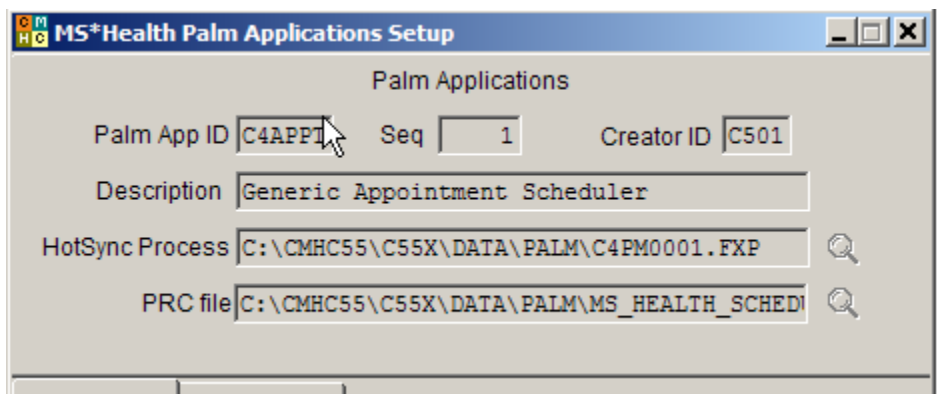
# Setup

## Preparing MS\*Health/CMHC 5.5 Palm Interface

Before you can Hot Sync data to your palm you need to let the desk top application know which staff's data you want on your Palm. Open the Palm Applications from the Admin pull down menu. Select Palm Applications Setup.



## Palm Application Setup Header Info



The entries show here are for the standard Palm Scheduler application and should only be changed to reflect the correct paths for your installation. Custom palm applications will differ.

## Palm Application Setup - Staff Access

Palm Applications

Palm App ID: C4APPT    Seq: 1    Creator ID: C501

Description: Generic Appointment Scheduler

HotSync Process: C:\CMHC55\C55X\DATA\PALM\C4PM0001.FXP

PRC file: C:\CMHC55\C55PALM\PALMDIST61\MS\_HEALTH\_S...

Staff Access | Palm Tables

Staff	Last Name	First Name	MI	Init
1001	Henry	John	B	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

To identify which Staff's caseload and appointments will hot sync with the Palm:

1. Click the New button on the lower portion of the form.
2. Enter or select a Staff code.
3. Initialize: Click the Init check box to overwrite the data on the Palm with the data from the desktop. This is only necessary if someone else has used your Palm and it may have another Staff's caseload and appointments on it.

Note that once this step is complete it is not necessary to repeat unless another staff uses the same computer to perform a Hot Sync.

## Palm Application Setup – Palm Tables

Table Name	Seq
C:\CMHC55\C55X\DATA\PALM\C4_CLIEN.DBF	1
C:\CMHC55\C55X\DATA\PALM\C4_SCODE.DBF	0
C:\CMHC55\C55X\DATA\PALM\C4_LOC.DBF	0
C:\CMHC55\C55X\DATA\PALM\C4_PAYTP.DBF	0
C:\CMHC55\C55X\DATA\PALM\C4_HIST.DBF	2
C:\CMHC55\C55X\DATA\PALM\C4_CAL.DBF	0

The entries show here are for the standard Palm Scheduler application and should only be changed to reflect the correct paths for your installation. Custom palm applications will differ.

This step determines which Staff's clients and appointments to hot sync. The next step determines which clients are assigned to the staff.

## Client's Assigned Staff

Each Client Registration record hosts a list of assigned Staff via the Staff button. The Staff button lists any Staff assigned, their assignment type, whether they are a primary provider, supervisor, and whether to allow the Staff Palm Access to this client's data and appointments.

When this Staff performs a Hot-Sync, the data for the client selected will be sent to and from the Palm.

Staff ID: 12345 Yamakuchi, Cindy

Type: PRI Primary Responsible Clinician

Primary Provider  Supervising Psych  Palm Access

## Priority of Data

By default the data on the Palm will overwrite the data on the desktop. It is expected that since the therapist is providing face-to-face service that he or she has access to the most current and accurate data. This data includes:

- Name.
- Address.
- Appointment completion.
- New appointments.
- Palm note.

# Operation

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## Sample Palm Usage

- MS\*Health/CMHC 5.5 Palm Desktop and Palm software are installed.
- Assign Staff to clients using the Registration Staff button, checking the Palm Access option as appropriate.
- Prior to heading out to appointments the therapist performs a HotSync as previously described.
- As appointments are kept each Client Appointment on the Palm is checked as complete, or cancelled, as appropriate.
- The therapist may schedule the next appointment and add it to the Palm.
- The therapist may update any client data on the Palm.
- Upon return to the office or docking center the therapist performs a HotSync. The new and revised Palm data will update the desktop.
- When Billing personnel perform Convert Appointments to Billing A/R records any updated appointment will convert for data entry. Therefore updating the service history, which will update the Palm upon the next HotSync.

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## Using MS\*Health on the Palm

The MS\*Health/CMHC 5.5 Palm Interface allows you to take your caseload data and appointments with you. In addition, any new Appointment data added or edited or client data updated on your PDA will update the desktop MS\*Health/CMHC 5.5 Scheduler and Client Registration.

What your System Administrator must do before you can successfully HotSync:

- Install the Palm Software on your Palm device according to the installation instructions in this guide.
- Update your security User record with your Staff ID.
- Add your Staff ID to the list of authorized Palm users on the Admin Pull-down Palm Applications Set-up option.

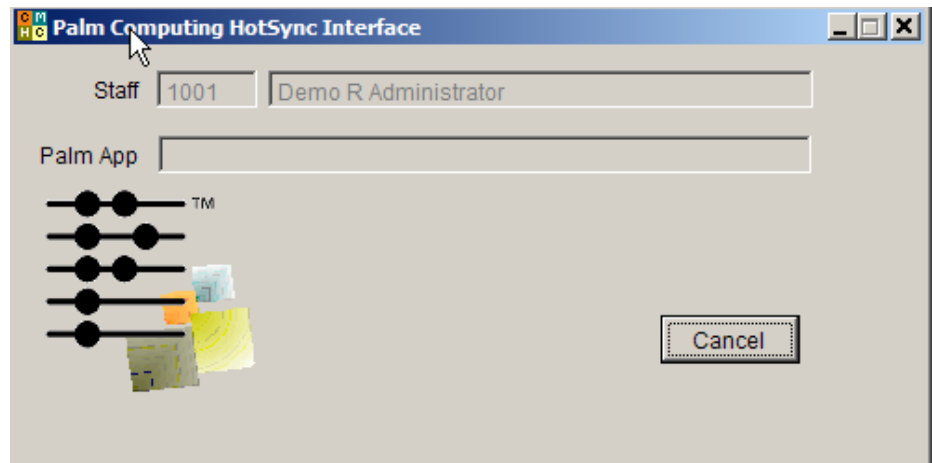
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## Using the MS\*Health Palm application

### HotSync the Data

Before you can see client data or appointments on your Palm device you must perform a HotSync.

1. From the Admin pull-down menu select HotSync Palm option.



2. Place your Palm in the sync cradle or attach the sync cable, and press the HotSync button as indicated in your PDA user's guide.
3. The client and appointment data for the staff who is currently logged into CMHC 5.5 (as indicated in the HotSync Interface

form) will be updated from the Palm, and any new data entered into the desktop will be transferred to the Palm.

### Using the Palm Data

Open MS\*Health on your Palm by touching the shortcut with your stylus.

A caseload list will display as follows:

Simulated Palm screen.  
Note that client list is scrollable.

MS*Health/CMHC (About)	
Clients	
10001	Susan Abbott
10015	Robert Bender
10029	Robert Cheswick
10056	Bill Harding
90082	Brian Logan
56820	Susan Barnes
Seq. <input type="checkbox"/> ID (All Appts)	
<input type="checkbox"/> Name (Select)	

**Changing the caseload list sort order:** By default clients will display in Client ID order. Tap the Seq. Name box to change the sort to name, tap the Seq. ID box to revert to sort by Client ID.

#### Accessing client data:

1. Use the scrollable list to locate a client and tap on the client name or ID. The client name, address, phone numbers, etc., will display.
2. Once selected you may also choose to display a client's service history by tapping the History button, or client appointments by tapping the Appts button.

Any modifications to the client's data or appointments will update the desktop the next time you perform a HotSync.

**Adding a new client appointment:**

1. Use the scrollable list to locate a client as indicated in Accessing Client Data above.
2. Tap the Appts button.
3. Tap the New button.
4. Complete the fields as follows:

<b>Palm device Appointment Fields</b>	
Field Name	Description
Date	Tap to display the calendar. Tap on a date to select.
Time (from) – (to)	Tap to display the numeric keypad.
Client	The client previously selected defaults. Tap to display the caseload list or select a different client.
Service	Tap to display a list of all services.
Loc	Tap to display a list of all Location Codes. The code should reflect where the service would be rendered.
Dept	Tap to display a list of all Department Codes. The code should reflect the department in which the service will be rendered.
CT	Tap to display a list of all Charge Types.
TX Plan ID	Tap to display a list of Treatment Plans available. The plan under which the service will be provided should be selected.
Canc	Tap to display a list of cancellation codes (primarily used during appointment editing).
<input type="checkbox"/> Bill	Tap to indicate the service is billable or should be converted to client service history during conversion from appointments to Charge/Service entry.

5. Tap Done to save.

Simulated Palm appointment entry screen.

Appointment  
 Date: \_\_\_\_\_  
 Time: \_\_\_\_\_  
 Client: ▼ Robert Cheswick  
 Service: ▼  
 Loc: ▼  
 Dept: ▼  
 CT: ▼  
 TX Plan ID: ▼  
 Canc: ▼  
 Bill

(New) (Delete) (Done)

**Viewing all appointments:**

1. From the Caseload list tap the All Appts button.
2. A listing of all scheduled appointments will display similar to the one below:

Appointments

Date	Time	Svc
02/07/01	8:00 am	Donna Burke
02/07/01	8:30 am	Sue Barnes
02/07/01	11:00 am	Robert Cheswick
02/07/01	01:30 pm	Deborah Clark
02/07/01	03:30 pm	Barbara Ong
02/07/01	05:00 pm	Staff Meeting
02/08/01	01:30 pm	Donald Angst
02/08/01	03:30 pm	Betty White
02/08/01	03:30 pm	Arnold Hoggett
02/08/01	05:00 pm	Staff Meeting
02/09/01	01:30 pm	Angela Corr
02/09/01	03:30 pm	Dorothy Barr
02/09/01	03:30 pm	Mary Smith
02/09/01	05:00 pm	Staff Meeting

(Filter) (Select) (New) (Close)

Simulated Palm All Appointments screen.

Use the scrollable list to locate an appointment and tap the appointment or the Select button to edit or display the appointment details.

**Filtering Appointments:**

You can use the Filter button to control which appointments will display. Example: in the prior display appointments for several days and multiple clients display. You can use the Filter option to display specific days or clients.

1. Tap the All Appts button from the caseload list.
2. Tap the Filter Button.
3. Enter a beginning date in the From Date field.
4. Enter an ending date in the To Date field.
5. Optionally select a client.
6. Tap the (Set Filter) button.
7. The filter will remain in effect until (Clear Filter) or the (Done) button is tapped.

**Updating the client service history:**

The next time you HotSync any completed appointments or appointments marked Cancelled will be available to convert to charge and service history by your organizations billing staff. Therefore be sure to update the appropriate fields on the appointments prior to performing a HotSync.