

INTRODUCTION

These instructions are written for those in the mental health community who are new to the SOQIC E-forms and to update those who participated in the pilot test groups.

The SOQIC forms have been developed using IBM® Workplace Forms™ Designer (formerly PureEdge) software and are being provided to agencies at no cost. Each form includes the IBM® Workplace Forms™ Viewer, which enables the use of the form. Each form is individually licensed so that anyone can use them.

Features of the e-forms include the ability to tab from field-to-field, expandable fields, auto-fill of selected fields, check boxes, drop-down menus, and other features that enable easy navigation through the forms.

All SOQIC forms are designed to enable providers to meet the various certification, national accreditation and Medicare/Medicaid compliance requirements, as well as all ODMH and ODADAS rules and standards.

While these forms do not include a database, the forms are available with a XML (Extensible Markup Language) data model component that will enable organizations, with XML parser tools, to extract the data from the forms for import into a database. Some software vendors are incorporating the SOQIC forms into the systems currently used by providers in the mental health community. For more information contact your Information Technology or Information Systems provider or administrator.

For assistance contact Susan Kaderly at the Ohio Department of Mental Health by email at kaderlys@mh.state.oh.us or by phone at 614-466-4189.

EQUIPMENT SPECIFICATIONS

Please note: To comply with HIPPA guidelines and to limit agency liability, operating systems must be supported by the manufacturers' security updates when used with Personal Health Information. Therefore, ODMH cannot support an operating system not supported by the manufacturer (e.g. Microsoft '98 and Windows NT).

- Operating Systems supported:
 - Windows 2000 sp2, sp3, sp4
 - Windows XP sp1, sp2
- Hardware Requirements:
 - Processor – 500Mhz
 - Ram – 256 MB
 - Disk Space – 200 MB
 - Resolution – 800 X 600 in 16 bit color
- Web Browsers supported:
 - Internet Explorer 5.5 sp2, 6 sp1
 - Netscape 7, 7.1, 7.2

E-FORMS VIEWER & FORM INSTALLATION

Please follow the installation instructions below exactly as written for a successful installation.

The IBM Workplace Forms Viewer and the SOQIC forms are located at <http://www.mh.state.oh.us/cmtymh/soqic/soqic.eforms.html>. Before downloading the Viewer software you must save the Viewer software to your computer and unzip the file. The complete Viewer installation consists of three files that must be installed for the Viewer to work properly.

- To access the Viewer for installation, copy the SOQIC.zip folder onto your local hard disc:
- Extract or unzip the file to the location selected by the extraction software
- Open Install folder and Double click on WFServer_250_API_Win32.exe and follow instructions;
- Double click on WFViewer_250_Win32.exe and follow instructions;
- Double click on PostInstall.bat and follow instructions
- You have now successfully installed the Viewer!

After the Viewer has been installed, save the desired electronic forms (e-forms) to a designated location on the computer or system by highlighting the form number on the right hand side, right click, select either Save or Save Target As to a folder of your choice.

PRINTING PROCESS

It is very important that prior to printing the forms the user

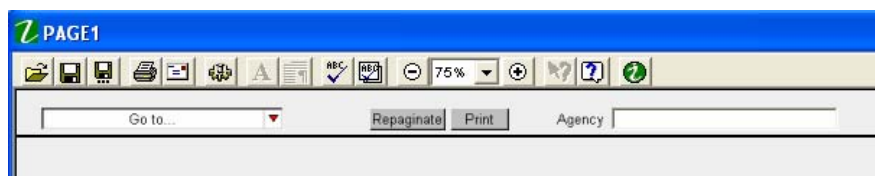
- **Repaginate**
- **Print**
- **After document has printed, select Save**

If after printing, you need to edit and print the form again, this process must be repeated in exact order or you will lose the changes made during editing.

GETTING STARTED


The electronic forms must be saved to a folder on your computer before opening them with the Viewer. To save the form, right click on the form number and either Save As or Save Target As in the newly created folder.

IBM® Workplace Forms™ Viewer Toolbar





Open Form – To complete or view a SOQIC form you must first open it in the IBM® Workplace Forms™ Viewer using one of the following methods:

If the IBM® Workplace Forms™ Viewer is stored on your desktop, just double click to open the Viewer. Click on the  icon and locate and select the form using the Open Form dialog box.

If the IBM® Workplace Forms™ Viewer is stored in your Programs file, click Start>IBM Workplace Forms Viewer x.x>IBM Workplace Forms Viewer; Open Form dialog box opens; select the form you want to view and click Open.

You can open multiple forms at one time. However, each appears as a new document in the Viewer.



Save Form – This Icon is selected to save or replace existing forms.



Save As – Saves the current form with a file name you select. The Save Form dialogue boxes opens. Browse to select the place you wish to store the form. Enter the name of the file in the File Name box and click Save.



Print Form –Use this icon to print the Demographic Information form only. Use the “Print” button located in the space at the top of the form on all other forms.



Email Form –Emails the current form



Preferences – The selections have been pre-set for each form and should not be changed.

Font – Not Active

Paragraph – Not Active



Check Spelling – Check the spelling in a single field by selecting the text you wish to check and clicking the Check Spelling icon on the toolbar. The Check Spelling dialog box will appear for you to select the correct action for your needs. When the spelling check finishes, a confirmation message will appear. Click OK to end the spell check.



Check All Spelling on Page – To check the spelling of all input text in the current page, click Check All Spelling icon on the toolbar. The dialog box will assist you in choosing the correct action for your needs. When the spelling check finishes, a confirmation message will appear. Click OK to end the spell check.



Zoom Out – Decreases the screen size



Select Zoom Factor – Allows user to select screen size



Zoom In – Increases the screen size

Help Mode – Not Active



Viewer Help – This icon opens the View Help page that contains very useful important information. We suggest that all users print this screen to use as a quick-reference.



About – Display information relating to Viewer version and registration.

PLEASE NOTE:

It is very important that prior to printing the forms the user

- **Repaginate**
- **Print**
- **After document has printed, select Save**
- **If after printing, you need to edit and print the form again, this process must be repeated in exact order or you will lose the changes made during editing.**

After repaginating and printing the multiple page forms you may notice that some pages have excessive white space. This is caused by the placement of section breaks which allows all of the information contained in a field to print on the same page. The Forms Review Committee will address the problem when changes are made to the e-forms.

ADDITIONAL INFORMATION

Header & Footer: Each printed document contains a header consisting of the Form Name and Number, the Agency Name, Client Name and Client Number. The Footer consists of the Form Name and Form Number, the Client Name, Client Number and the Page Number. Multiple page forms will auto-fill Client Name and Client Number entered on Page 1 in the header and footer and the Billing Strip.

Yellow background indicates that the field must be completed. If these fields are not completed an error message will appear.

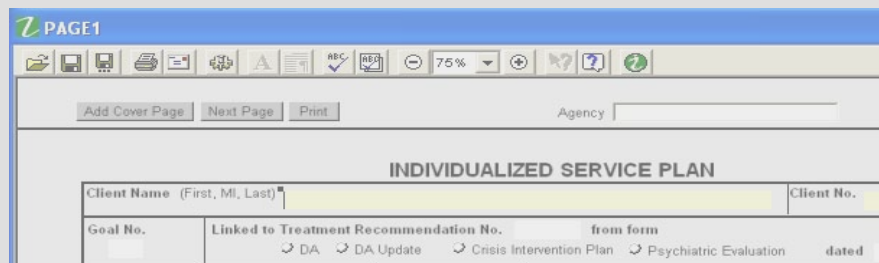
To correct data, you may either backspace, or highlight the text and press the Delete key.

Long and Short Forms - The paper-based versions of the Medical Somatic/Nursing Progress Note and Community Psychiatric Supportive Treatment Progress Note are offered in both long and short formats. The e-form version of these progress notes is only available in the long format.

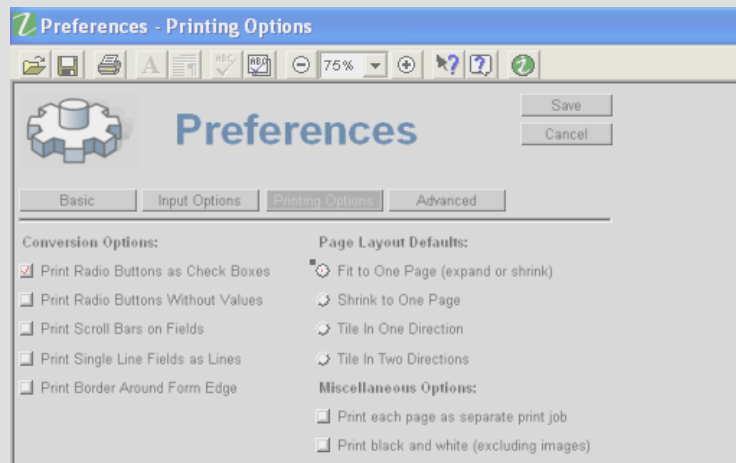
Digital Signatures and Form Security: Digital Signature is a unique digital code added to a document for security purposes that identifies the signer and authenticates a document's data. If the document is changed, the signature is broken and all subsequent users of the document are alerted that changes have been made.

The SOQIC e-forms can be secured using a digital signature. However, the IBM Workplace Forms Designer software does not offer a blanket solution to accommodate the individual digital signature needs of provider agencies. If you or your agency uses digital signatures, please consult with your provider agency's information technology or system administrator for more information on how to incorporate digital signatures into the forms.

Special Instructions for the Individual Service Plan:



- Text fields in the Individualized Service Plan are not expandable.
- Page 1 (cover page) addresses one goal with two objectives.
- To address a second goal or more than 2 objectives, select “Add Cover Page” button located at the top of the page and the additional cover page will appear after Page 1. When using an additional page for more objectives, indicate “Goal X continued.”
- Page 2 contains fields concerning other agency involvement and AoD Level of Care, pertaining to the goals and objectives.
- Printing the Individualized Service Plan – In the toolbar select the Preferences icon; select Printing Options and below Page Layout Defaults select – **FIT TO ONE PAGE**.



NAVIGATING THROUGH THE FORMS

Suggestion: Use the mouse or Tab key to navigate through the entire form to familiarize yourself with it before you begin to input information. A small cursor box will indicate your place in the form.

Tabs

Tabs are set according to certain rules (i.e. if “Not Applicable” is checked, the tab will skip to the next field). You can tab backwards by using the Shift key along with the Tab key. In some instances (usually when there are radio buttons - see information below) you will have to tab again to get to the next field.

AT THE TOP OF THE FORM



Go to: On forms with multiple pages, clicking on this box will allow you to select the form section you need to complete.



Repaginate: Forms with this icon must be repaginated before printing as this function separates the single page long forms into multiple pages for printing. This button does not appear on all forms.



Print Form: Prints the selected form after repagination. The print program does not allow the user to print selected parts of a form; the entire form will be printed.



Agency Name: The name of your agency or organization can be entered in this field and appears in the header when the form is printed.

COMPLETING THE FORMS

If you have tabbed to a text field simply start typing. If it is a check box or a radio button and you want to choose it, simply hit the space bar or click the mouse to make a selection.

Radio Button Choose only one selection. Your selection is indicated by a red dot in the button.

Check Box Allows multiple selections. If you want to change or clear your selection click the box selection. Selection is marked with either a red check mark or black X.

Popup List The contents are not always visible. To view the entire list, click on the arrow to the right and select the correct item from the list either by using the mouse or typing the first letter or two of your selection or using the arrow key on your keyboard to navigate to the desired selection and hit the space bar to enter that selection.

Combo-boxes Enables user to make a selection or type in text. Again click the arrow to the right to view list of selections.

Expandable fields: Allows the user to enter as much information as needed. As you are entering the information, the text will scroll up. To view the entire field, hit the Tab button and the field will expand.

Add A Line: Identified by two small boxes at the end of a field containing and . To add a new line, click the box. To delete a line, click the box. You may add as many lines as needed. When you have completed your last line simply tab through the boxes to the next field.

Date Fields: Record dates according to instructions found in the SOQIC User Manual. In instances where the full date might be unknown (i.e. Previous MH treatment) enter the year or month and year. Because it is a text field, it will not automatically correct for year (i.e. from 02 to 2002).

BILLING STRIP

Date of Service must be completed by the clinician

Staff ID No. is an alpha-numeric field

Procdr (Procedure) code is an alpha-numeric field

Mod (Modifier) is an alpha-numeric field

Start Time and Stop Time: Time may be entered as either military or clock time. This field auto-corrects - you can enter 3 p and it will enter as 3:00 PM when you tab to the next field.

Total Time auto calculates start and stop time except on the Partial Hospital and Crisis Intervention forms. On these forms you must manually calculate the total time from each Type of Service and enter it into Total Time.

Diagnostic code is an alpha-numeric field

Client Name and Number will auto-fill from the first page entry.