



Module 10 Course Outline: tcm 7 Basic

The course is designed for first-time users of tcm 7 software at organisations that use tcm 7 (but do not use the Programs module).

The course presumes participants have had no prior exposure to The Care Manager software (versions 6.11.x or earlier) nor tcm 7.

1. Welcome and Introductions

- Participants introduction
- Discussion of course outline
- Venue details, breaks etc

2. Getting help with tcm 7

- Accessing help files from with tcm 7 (Global Menu bar > Help > Contents)
- Downloading documentation and asking questions via the Bulletin Board.

3. Introduction to tcm 7 navigation

The features below are relevant to most Switchboards including Clients, Groups, Events and Client Contacts

Navigation Pane

- Purpose
- Navigation Pane buttons

Global Menu Bar

An alternative to the Navigation Pane to access all areas of the software.

Search Pane

- Searching search for clients at the Client Switchboard
- The Show All Episodes tick box
- Lower-half of Search Pane (Search by Programs) is not used as this course does not cover the Programs module.

Results Pane

- How to customise (adding columns etc)
- How to print a list
- Saving multiple views

4. Client Episodes

The model being taught in this session uses the concept of a single Episode of care for a client. Within this Episode, Milestone records track the status of the client.

Status changes occur for clients when:

1. They are first Registered (Status: Pending)
2. Then they are Accepted as a client (Status: Active, Care Management, Interim or Waiting List)
3. Services are Activated
4. During the period of being Active, the client's services can be temporarily suspended while the client is in hospital or on holiday (Status: On-Hold).
5. When the client is no longer receiving services, their Episode is Withdrawn by the Episode Completed Milestone. Should the client ever return for assistance, a new Episode can be created.

The underlying foundation of this model is that everything is recorded against a single Episode of care. This includes:

- The name of the care manager responsible for the client
- Team membership
- Planned services, cost-recoveries and Service Instances
- Incoming Referrals
- All documentation (Care Notes etc)m is stored in the one History screen
- All Planned Services are entered in the Episode Diary (irrespective of funding sources used)

5. Task button bars at the Client Switchboard

Task Bar at the Client Switchboard

- Refresh
- Preview
- Views
- Details: opens the client record
- Add New: adds a new client to the database
- New Event: creates all types of documentation from the Client Switchboard
- View Event: displays the most recent Client Event
- History: displays documentation created
- Diary: displays planned services
- Scheduled Events: displays reminders of future client events

6. Client Switchboard

- Basic searching and filtering for a particular client in the Search Pane
- Search and Clear buttons
- Show all Episodes tick box

7. Client Basics — Episodes, Status & Movements

- Concept of Episodes of care
- How and why tcm 7 tracks client Episode status
- Creating Episode Status Milestones

8. New Client button (from the Client Switchboard)

- Exploring the eight-tabbed Client Details record
- Auto-complete, drop-down calendars, drop-down lists, free text fields and the “i” button
- Participants to add a new client
- Accessing, editing and printing a client record

9. Client Contacts (created from the Client Switchboard)

A client has only one set of Contacts (family, friends etc).

- Adding a new contact (explanation of relationships and roles)
- Printing a contact record for one client from the Contacts box, or a selection of clients via the Reports screen.

10. Documentation

Created via New Event button on the Client Switchboard . Your organisation may not necessarily use the entire range of client Events below. Not every Client Event is covered in this course. Events marked with an asterisk are those generally covered.

- Episode Status Event *
- SCTT 2006
- HACC MDS
- Care Plan *
- Note *
- Note with Alert *
- CSTDA
- Referral (To/Outgoing and From/Incoming) *
- Emergency Plan *
- Medication List
- Diagnosis Lists
- Client Incident
- CIARR form
- Correspondence using Microsoft Word (overview) *
- Safety Issue*
- Attached Document
- Individual Program Plans
- Consent Event
- Court Order

11. Options available in some Client Events

- Spell Checker
- Revoking of records that cannot be edited or deleted (i.e. Notes, Safety Issues, Emergency Plans, Client Incidents, Medication Lists, Diagnosis Lists)
- Updating a Care Note
- Recording care management time in a Note
- Setting and clearing Alerts (Alerts can be activated on Notes, Incidents, Emergency Plans, Diagnosis List, Medication List and Safety Issues).
- Linking external documents in Notes, Care Plans, Referrals, Incidents and Safety Issues.

12. View Event button (one-at-a-time only)

- Displays the newest (most recent) Event of one selected type.

13. Client Episode History screen (view all Events)

View documentation created via the New Event button.

- Navigating the History screen
- Various ways to view events (Summary and Details)
- The New Event menu is also available from the History screen.

14. Viewing, editing and printing Client Events

- How to access, view and print client records and other documentation
- Print Previewing
- Emailing and exporting to PDF and other formats

15. Client Diary

- Types of Diaries: Episode Diary and Group Diary (among others)
- Introduction to the Client Diary
- Navigating the Diary screen
- Navigation pane
- Date Navigator
- Timeline Ruler
- Different views via task bar
- Previous and Next Appointments

16. Diary Task bar options

- Refresh
- Preview
- Views
- Group by
- Go to Today
- Add New Note
- Service (add, edit, cancel, revise, terminate etc)
- Shift (used in rostering)

17. Open Calendar link

- Most Recent Used list
- Opening an Episode or Group Diary (and roster calendars)

18. Adding a Calendar Note

Calendar Notes are used to annotate a client's social or other appointments so that services are not scheduled for times the client is not home. A Calendar Note is not related to a funded service.

19. Adding a Planned Service

- How the Diary records a service, provider and cost allocations
- Service Delivery tab
- Travel tab
- Provision tab
- Rostering tab
- Cost Recovery tab

20. Service menu (via task bar or right-clicking a service)

Adding, cancelling, revising, terminating, copying and deleting planned services

- Add Planned Service (add anew planned service)
 - Edit Planned Variation (cancels or changes the service level for one appointment only)
 - Edit Planned Service (edits the entire service occurrence pattern)
 - Edit Service Instance (creates a Service Instance – occurred box will be ticked by default. If required, a variation can be recorded)
 - Cancel Occurrence (cancels the selected service without a form opening).
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- Allocate Purchase Invoice – confirm delivery of a service and allocate against a purchase order
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- Revise Service From (revise occurrence pattern of a service from a nominated date forward)
 - Terminate Service From (stop a service from a nominated future date)
 - Delete Planned Service (delete all planned services (will not delete occurrences already created)
 - Copy Planned Service (copies an existing service in the same diary to another time or day)
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- Show Planned Service Deliveries (provides global view of service activity. Does not show individual occurrences, lists only the planned services pattern valid during the selected date range)

21. Diary background colours

- How coloured backgrounds indicate the type of calendar being viewed

22. Service status colours

- How coloured ribbons on planned service indicate the status of that service (white, yellow, red, blue, green and grey)

23. Reports based on Planned Services

> Reports available from the Diary task bar > Preview > Financial

- Service Delivery Report
- Average Service Plan Cost

> Reports available from the Diary task bar > Preview > Service Instances

- Service Instance Report
- Service Report
- Client Weekly Schedule List

> Reports available from the Diary task bar > Preview > Rostering

- Variety of rostering reports available

> Reports available from the Reporting screen (Global menu > Home > Reporting

- Explore available reports

24. Other Reports – overview

Overview of other available reports

- Client folder
- Client Movement/Status folder
- Client invoicing folder
- Referrals folder
- Project Management: Client, Financial and Service Instances folder
- Listing folder

End of one-day Basic tcm 7 Course

The Care Manager

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Bulletin Board

The tcm bulletin board is a free, web-based forum that enables registered users to post questions and comments about any aspect of using the software. Responses are posted on the Board by other users from around Australia and from tcm Support desk.

Updated manuals and other documentation can be downloaded from the Board's user library. Users who have "subscribed" to the News Forum will automatically receive an email when new material is available plus other news about the software.

Use of the Bulletin Board is free to all licensed users of tcm 7 software.

Visit the Bulletin Board: <http://forum.thecaremanager.com.au>

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