GCM BASIC USER TRAINING

Welcome to extendedReach!

Agenda

- Accessing extendedReach
- System Structure & Navigation
- Getting Started
- Support Resources

What is extendedReach?

Introduction

CASE MANAGEMENT SOFTWARE

extendedReach is case management software for agencies that offer child welfare, community-based, and/or behavioral health programs.

HOW IT HELPS

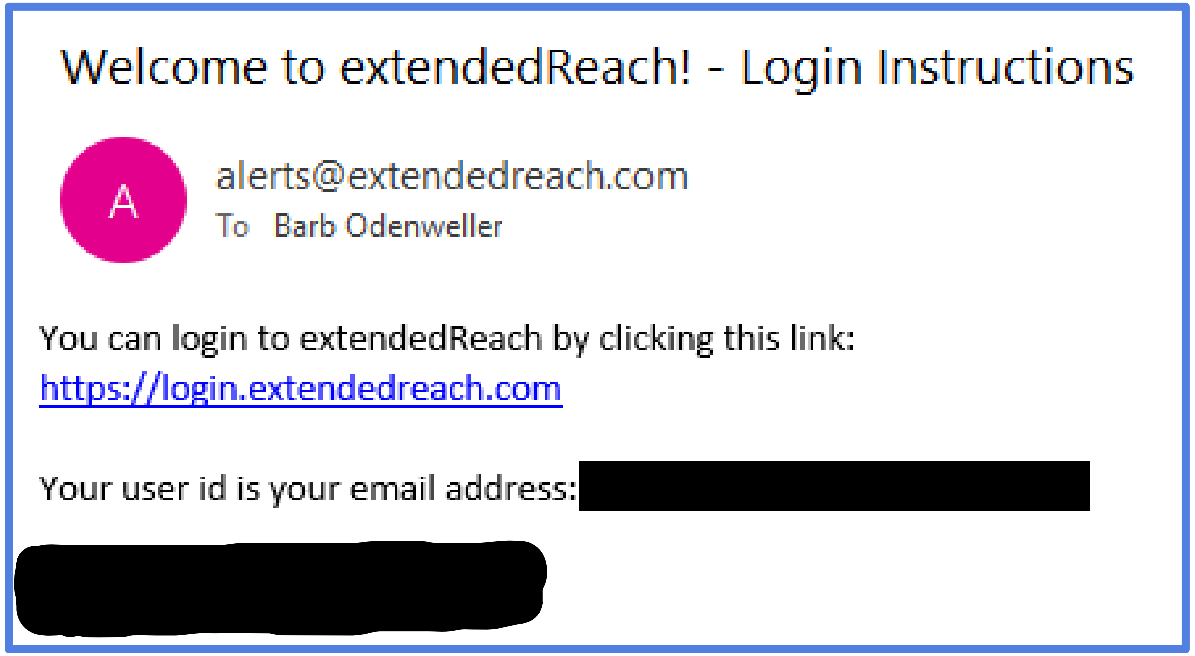
extendedReach helps agencies track case information, social work contacts, documents, and billing.

COMPLIANCE

Keeps agencies compliant with due dates and regulations.

Accessing extendedReach

- https://login.extendedReach.com *or* https://[SYSURL].extendedReach.com
- Welcome email from alerts@extendedreach.com
- Temporary password - prompted to reset password upon first login
- If forget password, use link on login page that will send email with your password.


Welcome to extendedReach! - Login Instructions

A

alerts@extendedreach.com

To Barb Odenweller

You can login to extendedReach by clicking this link:
https://login.extendedreach.com

Your user id is your email address: [redacted]

[redacted]

System Structure

Cases

- Clients in Care
- Each client is a single case
- Each family member is a separate case; Cases can be linked

Program(s)

- Links a Case to a Program
- Cases can be in multiple programs

System Structure

Activities

- Events that occur at a certain point in time
- Collateral contacts such as phone calls, letters, or email
- Usually have an associated narrative and/or file attachment
  - Cases – medical appointments, therapy/counseling sessions, ongoing documentation

Reports

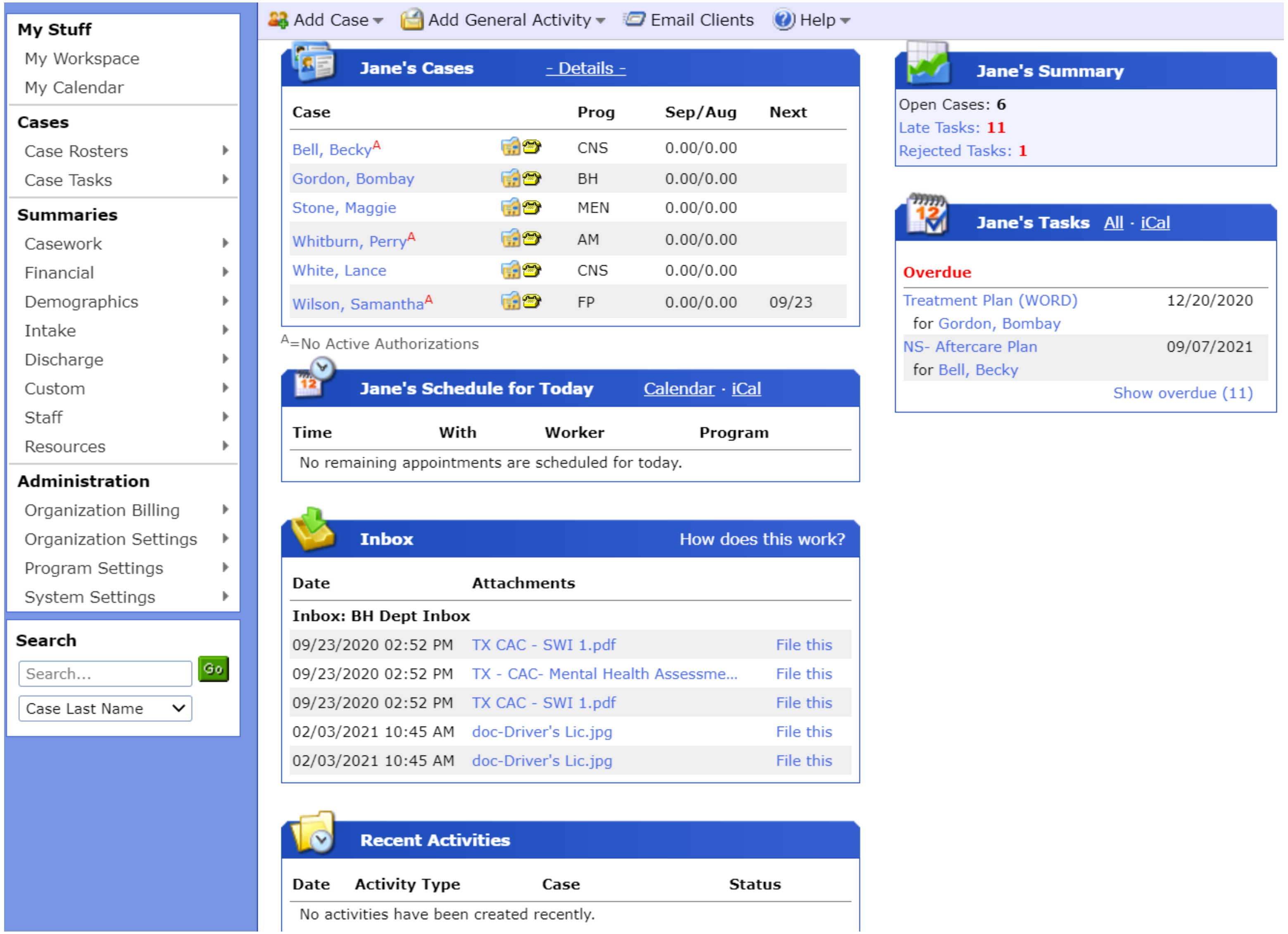
- Documents collected or written by staff, often with a due date and an associated file
  - Cases – assessments, treatment plans, incident reports, birth certificates, referring agency paperwork, school documentation

Getting Started – Features

- Consolidated Files
  - Client Case File – Go to one record to add/upload/view all documents, add/change programs, etc. for one client
- Personalized Workspaces
- Scanner Inbox
- Agency Address Book
- Shared Forms & Files
- Email Alerts
- Appointment Calendar

Workspace

- Workers*
- Cases – assigned cases (caseload)
- Today's Schedule*
- Pending Referrals*
- Inbox
- Awaiting Approval*
- Recent Activities
- Summary –
  - Late Tasks
  - Rejected Tasks
- My Tasks – Reminders

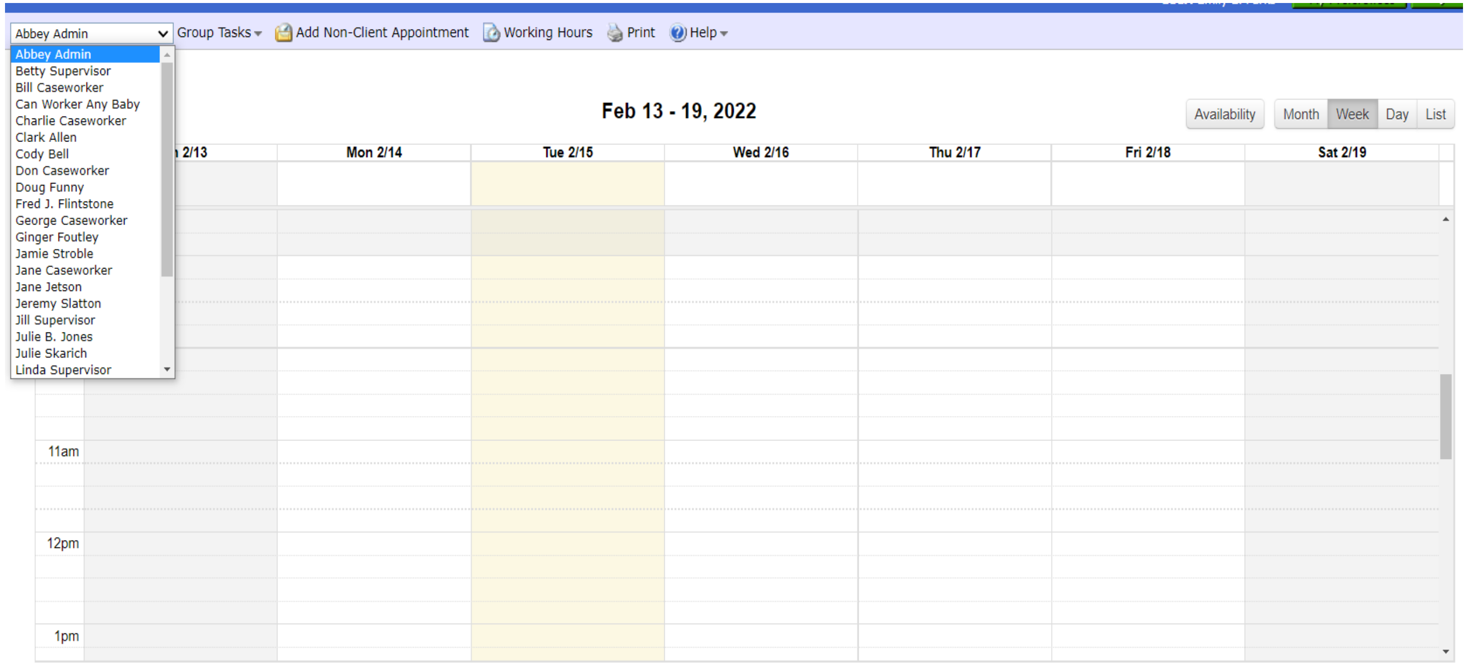


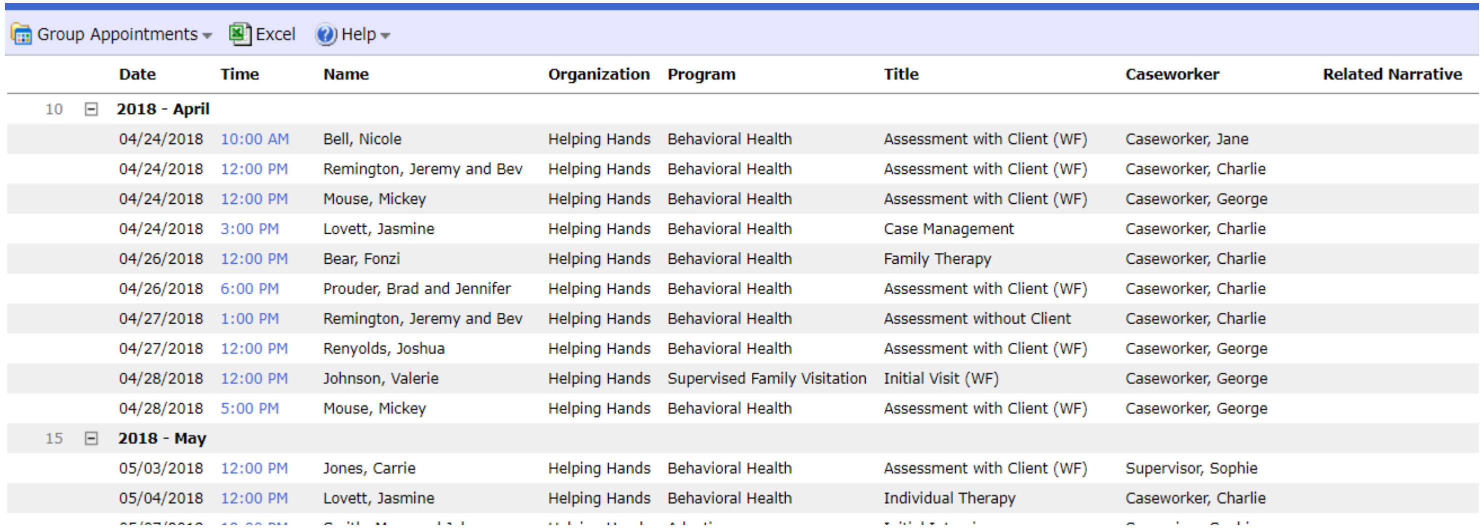
General Activities

- Activities that can be created that are not Client activities and do not live in the Client record.
- Can create custom forms
- Staff typically fill out General Activities
- All completed General Activities in the left-hand menu>Casework>General Activities

Calendar

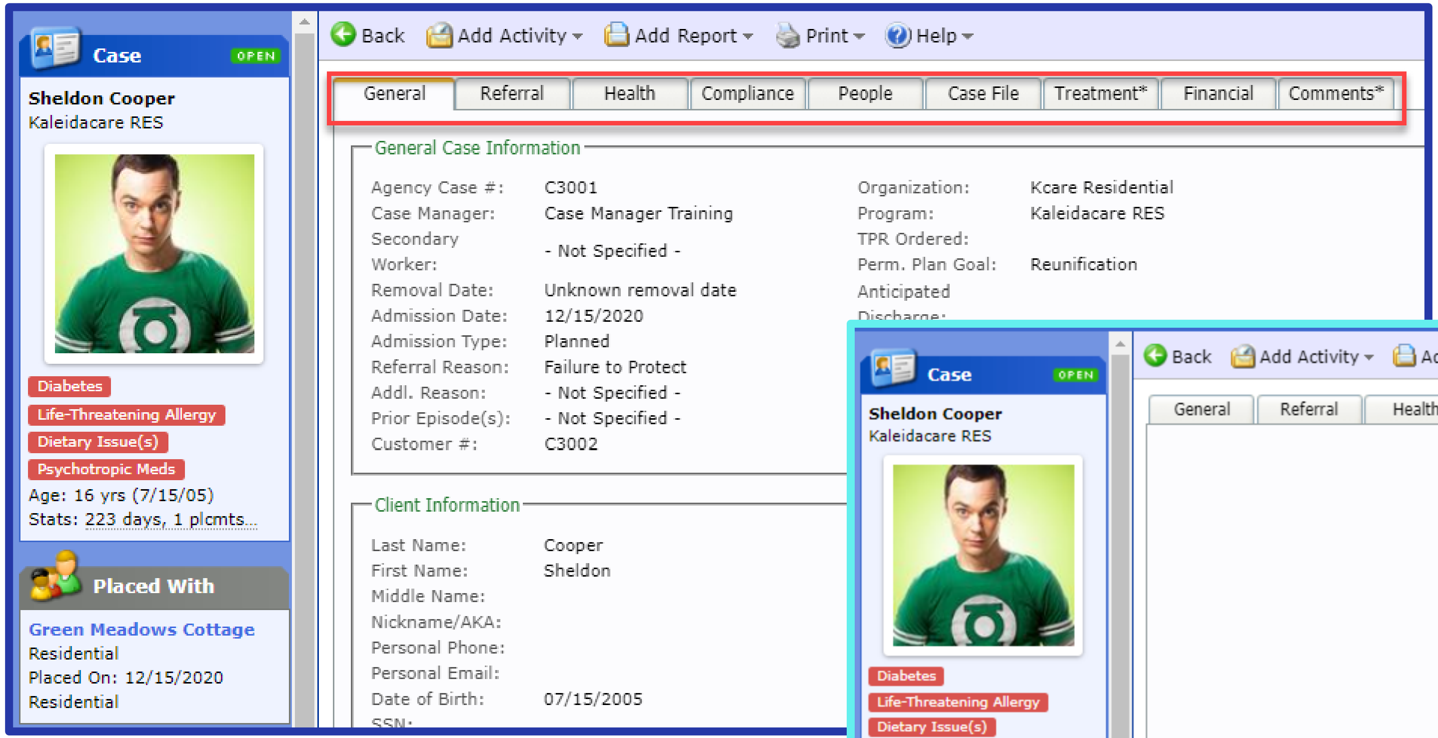
- Track Non-Client appointments for staff
- Track working hours for staff
- Track client appointments
- Can allow admins to schedule appointments for staff
- Pull reports of all appointments for the day
- Text reminders to client

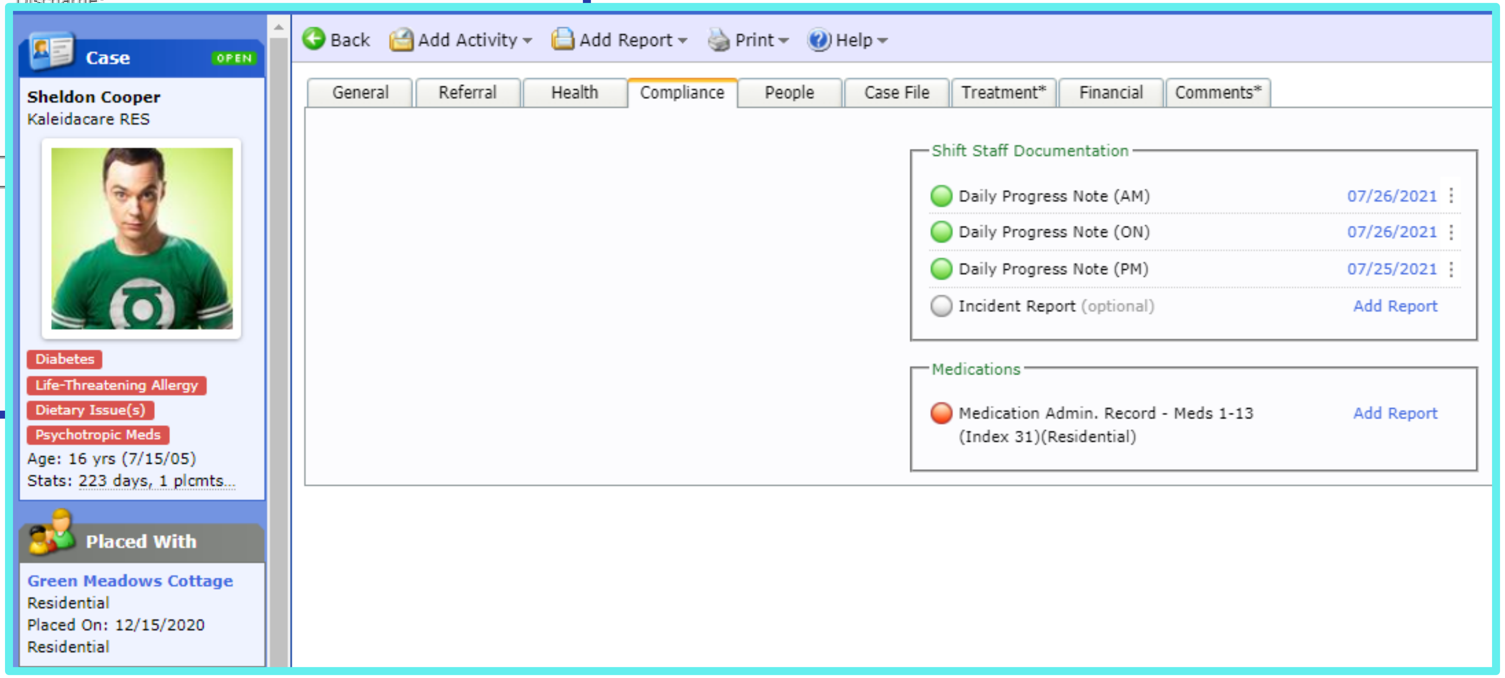




	Date	Time	Name	Organization	Program	Title	Caseworker	Related Narrative
10	**2018 - April**							
	04/24/2018	10:00 AM	Bell, Nicole	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, Jane	
	04/24/2018	12:00 PM	Remington, Jeremy and Bev	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, Charlie	
	04/24/2018	12:00 PM	Mouse, Mickey	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, George	
	04/24/2018	3:00 PM	Lovett, Jasmine	Helping Hands	Behavioral Health	Case Management	Caseworker, Charlie	
	04/26/2018	12:00 PM	Bear, Fonzi	Helping Hands	Behavioral Health	Family Therapy	Caseworker, Charlie	
	04/26/2018	6:00 PM	Prouder, Brad and Jennifer	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, Charlie	
	04/27/2018	1:00 PM	Remington, Jeremy and Bev	Helping Hands	Behavioral Health	Assessment without Client	Caseworker, Charlie	
	04/27/2018	12:00 PM	Renyolds, Joshua	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, George	
	04/28/2018	12:00 PM	Johnson, Valerie	Helping Hands	Supervised Family Visitation	Initial Visit (WF)	Caseworker, George	
	04/28/2018	5:00 PM	Mouse, Mickey	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, George	
15	**2018 - May**							
	05/03/2018	12:00 PM	Jones, Carrie	Helping Hands	Behavioral Health	Assessment with Client (WF)	Supervisor, Sophie	
	05/04/2018	12:00 PM	Lovett, Jasmine	Helping Hands	Behavioral Health	Individual Therapy	Caseworker, Charlie	

Consolidated Files

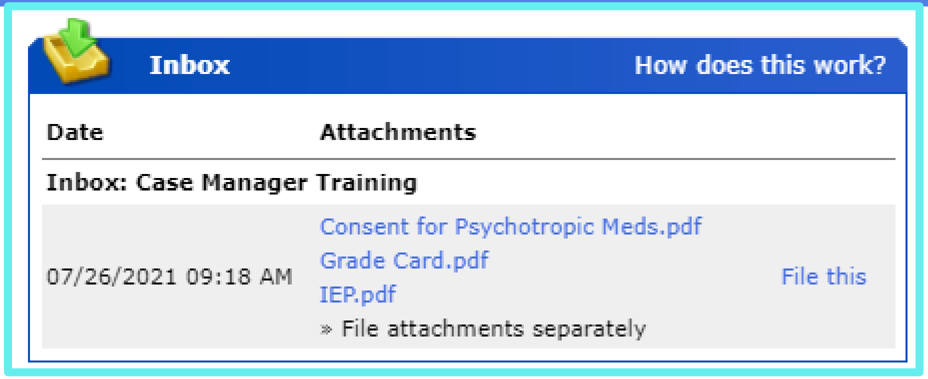


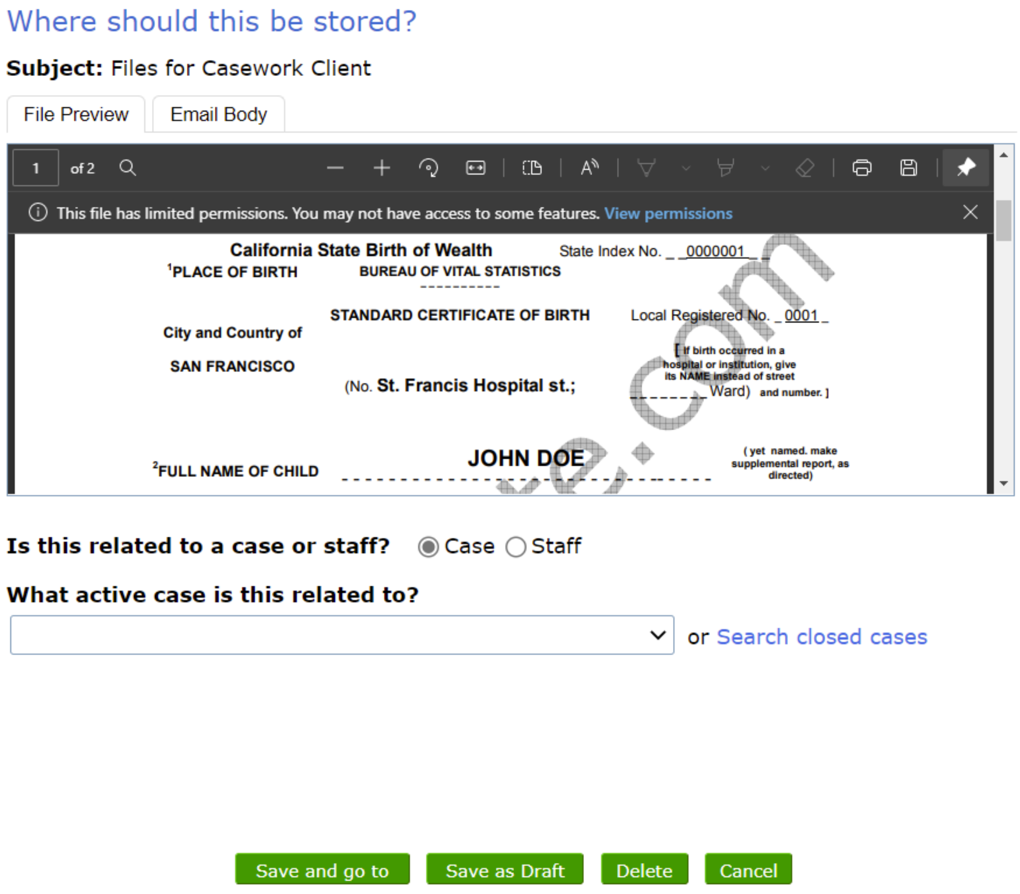


- Case record – tabs
- Compliance tab – Customized with forms needed for each program

Scanner Inbox

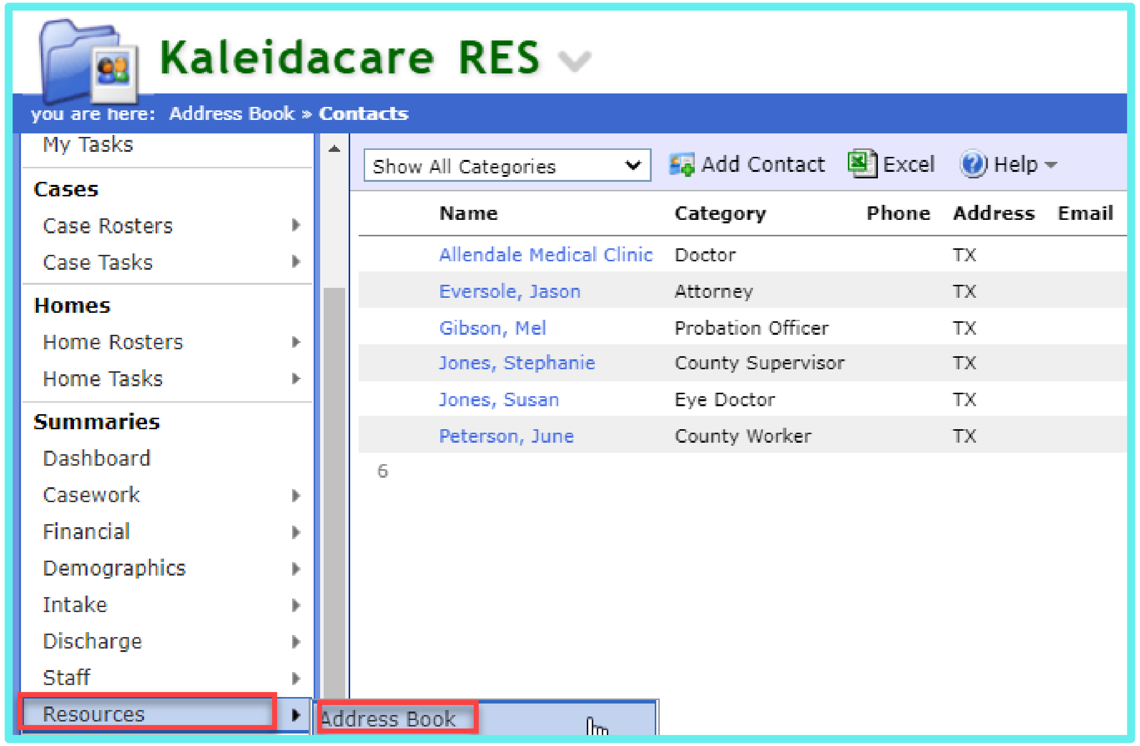
- Inbox –
  - Scan and email documents with an email-capable scanner directly to your Scanner Inbox (do not BCC) using the email address associated with your Scanner Inbox
  - Easily find the email address by clicking "How does this work."
  - Watch short video on workspace
  - File documents to case or staff file.

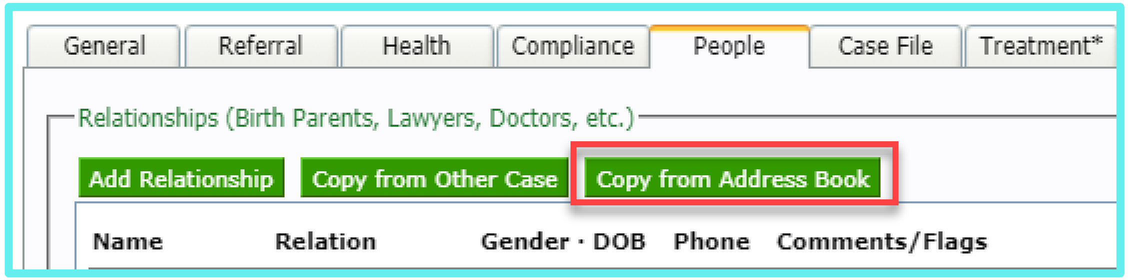




Agency Address Book

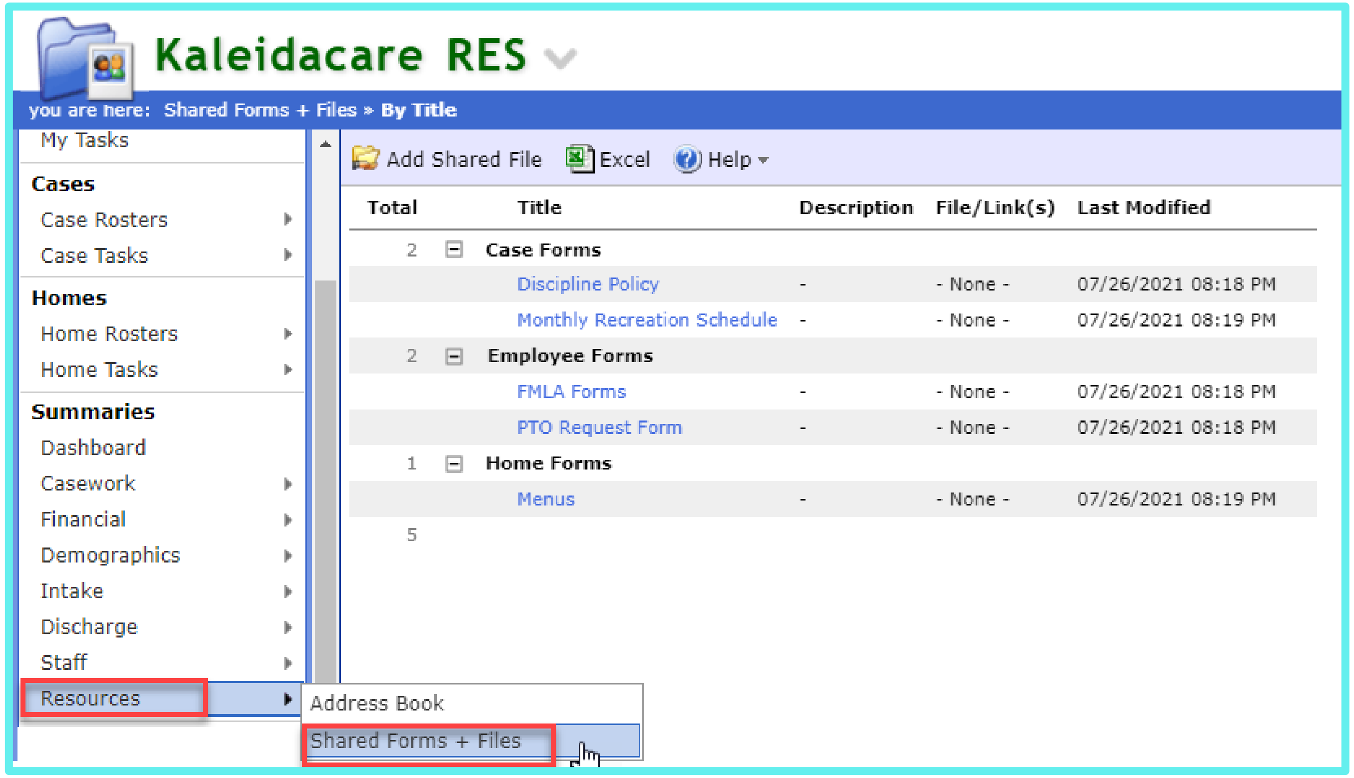
- Add clinical professionals, county/state workers, etc. to a central address book so can easily associate with cases and have one record to update if contact information changes.
- This also allows staff to view all clients who are associated with a particular contact.





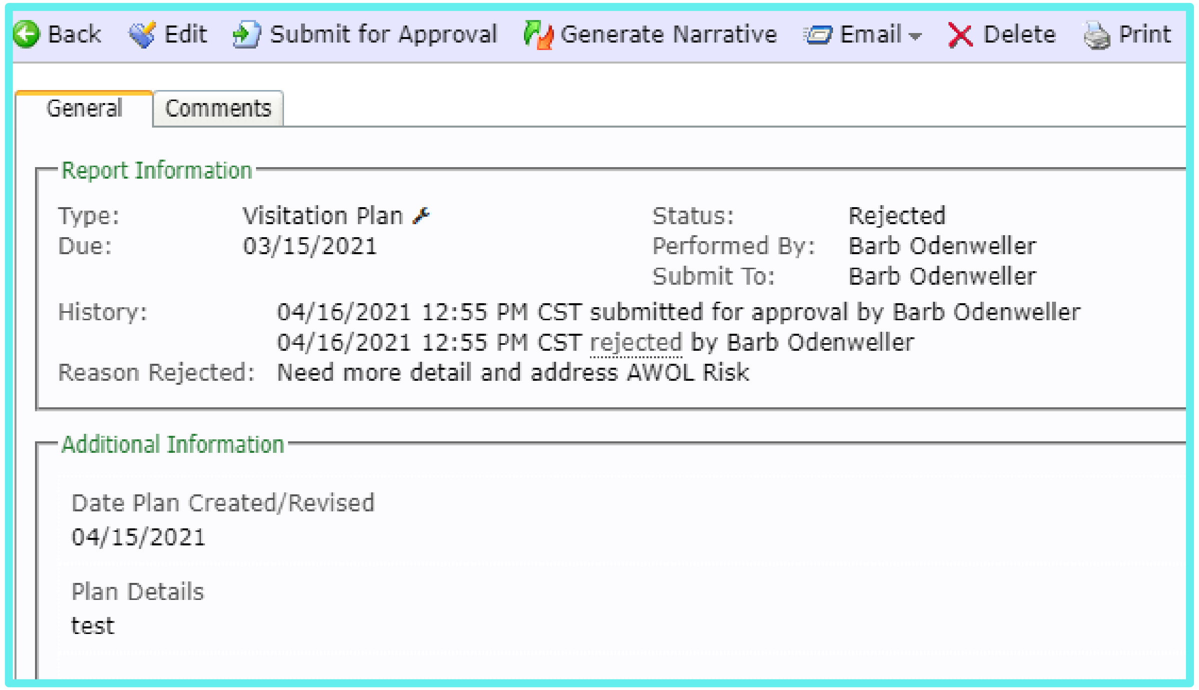
Shared Forms & Files

- A centrally located space for staff to access resources including web links and files. Examples:
  - HR forms
  - Policies and Procedures
  - Menus
  - Recreation calendars
  - Sample treatment goals



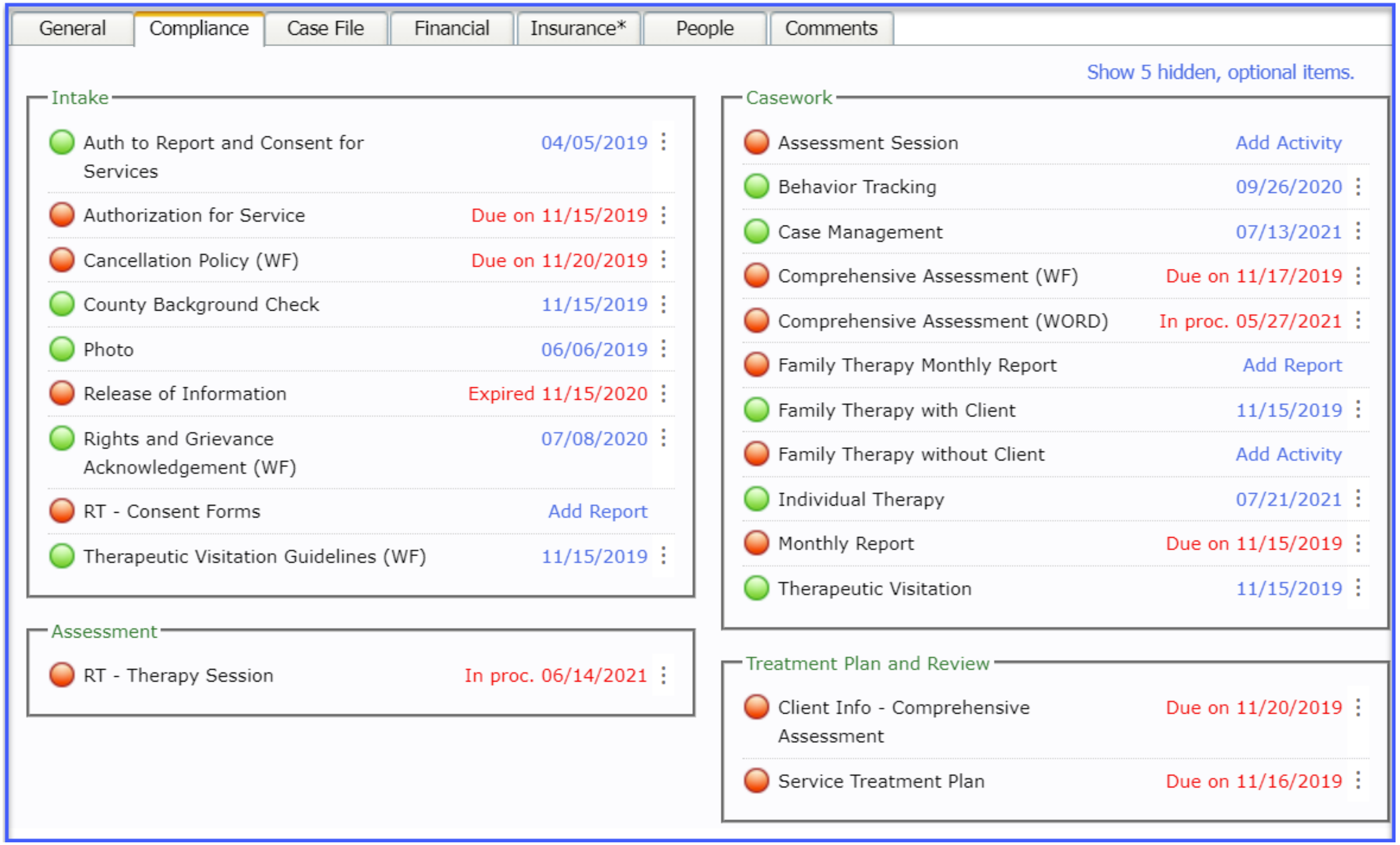
Email Alerts

- Email Alerts are pre-planned email messages created within eR announcing either an “Action-Based” Event or a “Scheduled” Event within cases and staff.
  - “Action-Based” events include workflow related user actions, such as approvals, placements, discharges, Incidents, etc.
  - “Scheduled” events include specific dates such as birthdays, court dates, medical appointments, etc.
- Screenshots show sample email and what appears when click the link (rejected report with reason).



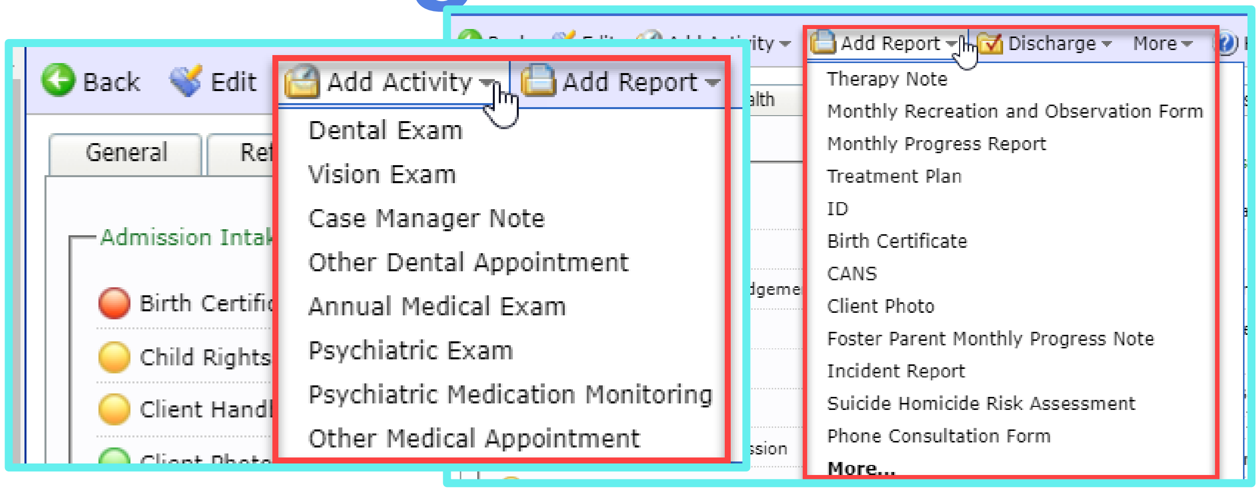
Compliance and Due Date Tracking

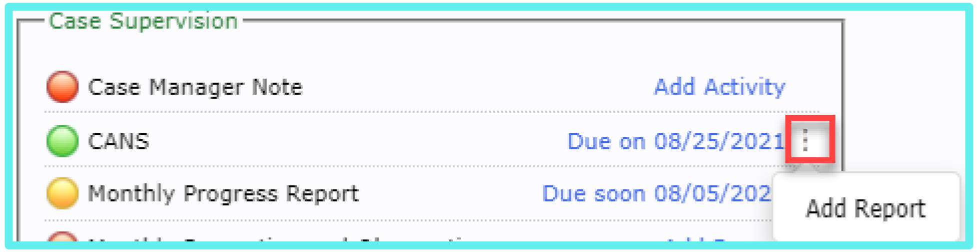
- Program rules are built in and dates are tracked
- High-level color-coded checklist to provide visual representation of last item completed with due or expiration dates
  - Red – missing or past due
  - Yellow – due soon
  - Green – current
  - White – optional

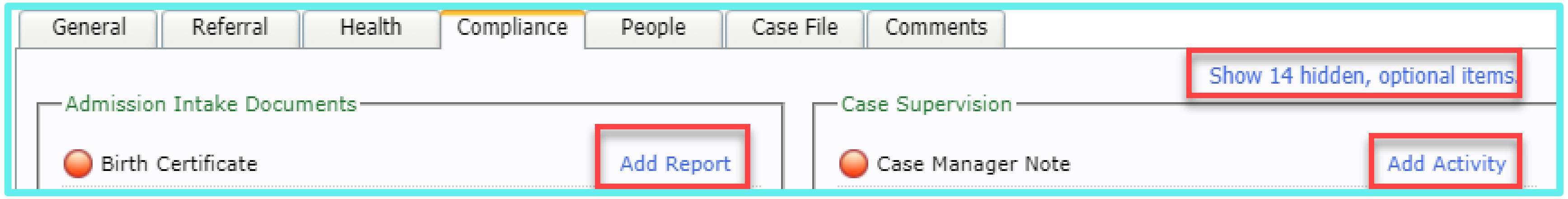


Compliance Tab – Adding Activities & Reports

- Add Activities and Reports from buttons on top menu bar
- Add using placeholders on the compliance screen next to each form name.
  - Note there are hidden optional forms that can be accessed by clicking that link.
- Use 3 dots to access add button and see a history of completed forms







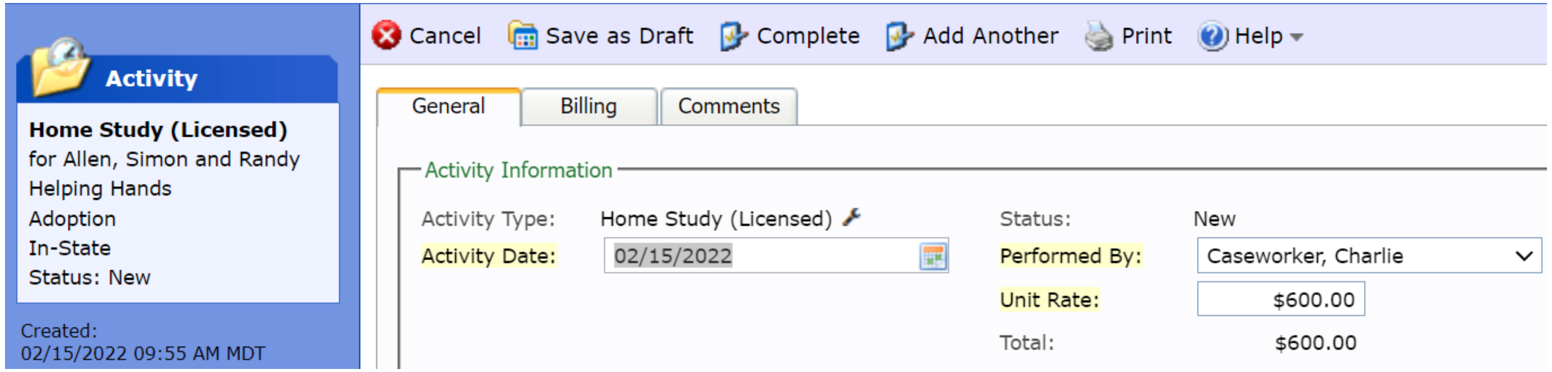
Compliance Tab – Billable Activities

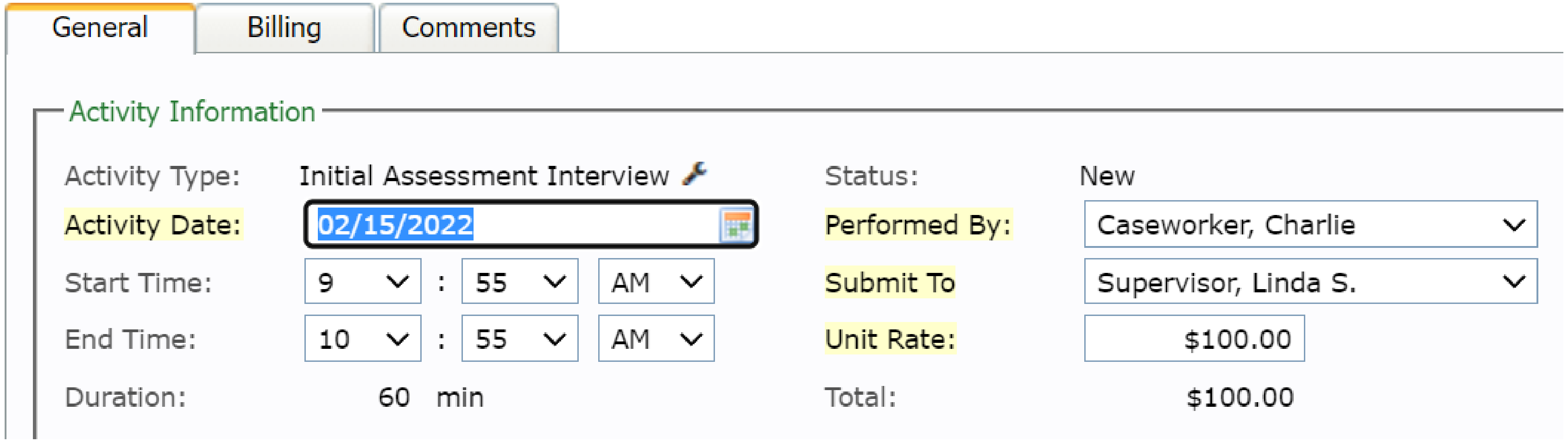
- Activities must be used to track billable services
- Unit based billing
- Encounter based billing
- Medicaid 8 minute rule
- Track time, duration, $ amount

Unit Length:	60	minutes
Unit Type:	Individual	
Rate:	$87.00	

- [ ] Daily activity (completed Sun-Sat)
- [ ] Daily activity (completed Mon-Fri)
- [ ] Unique activity
- [x] Can schedule
- [ ] No show
- [ ] Requires approval
- [ ] Group activity
- [x] Record units
- [ ] Record units using start and end days (vs. time)
- [ ] Units and fee (if applicable) are encounter-based (not based on duration)
- [ ] Use quarter hour periods when recording time
- [ ] Use formula to determine units
- [ ] Use Medicaid 8-minute rule for units
- [ ] Record duration with start and stop times
- [ ] Record duration without start and stop times
- [x] Record fee
- [ ] Rate varies based on level
- [x] Include in case note summary
- [x] Save and add another
- [ ] Use Custom Form Builder
- [ ] Check for duplicate activity type on same day
- [x] Use system assigned abbreviation
- [ ] Show in compliance checklist

Compliance Tab – Billable Activities





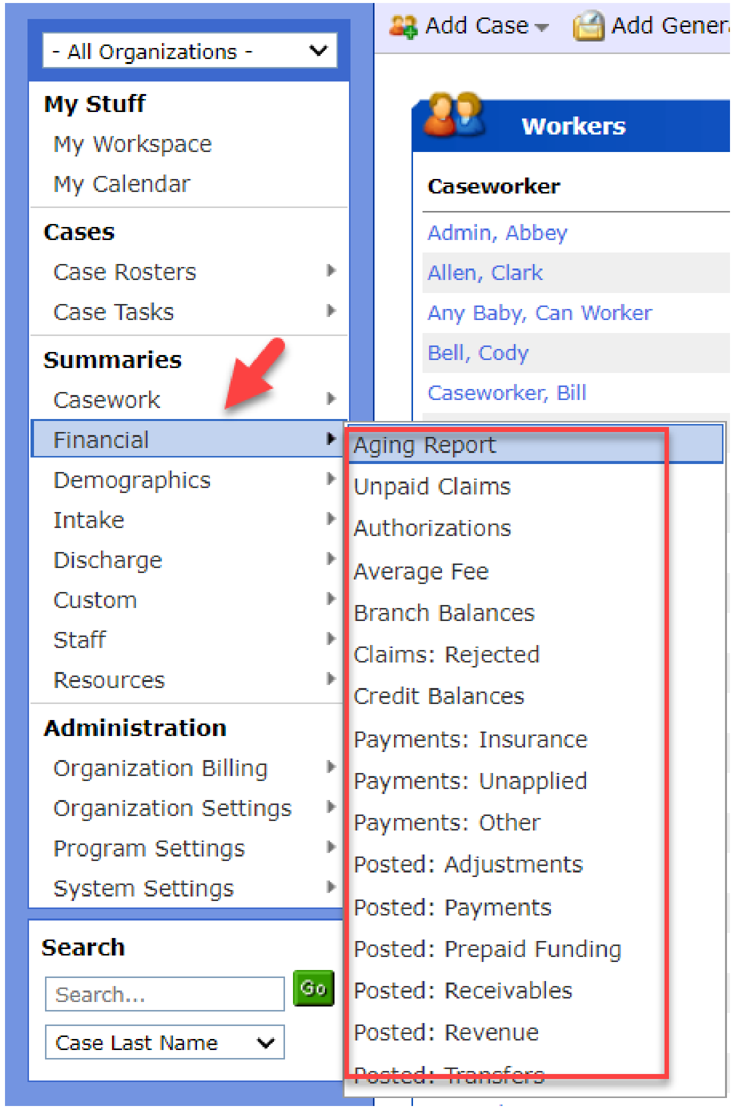
Casework Report– Units by Client

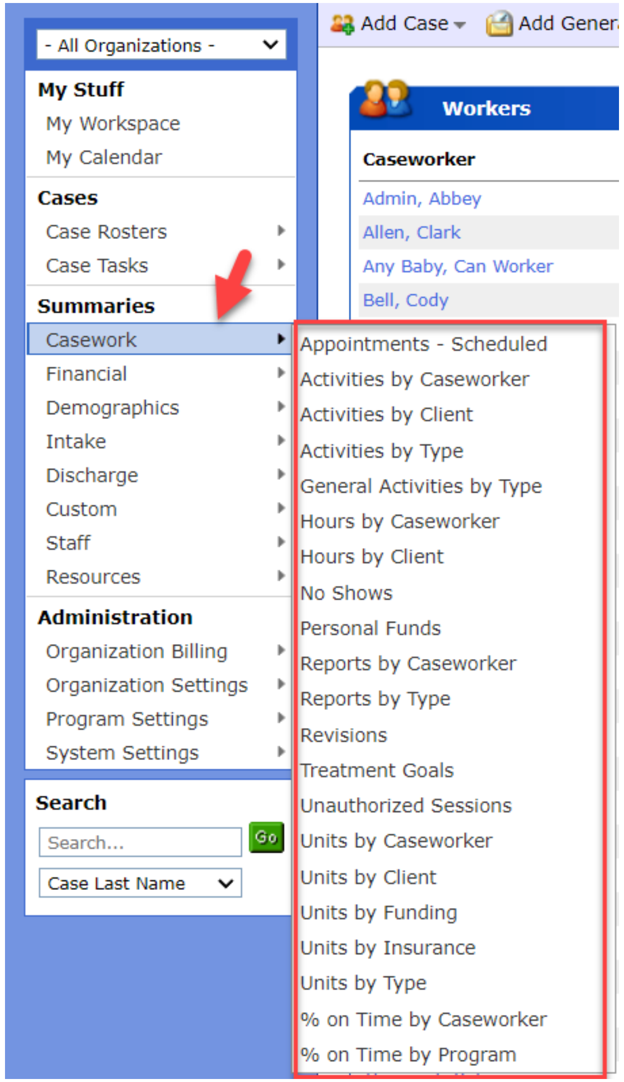
Expand All Excel Help

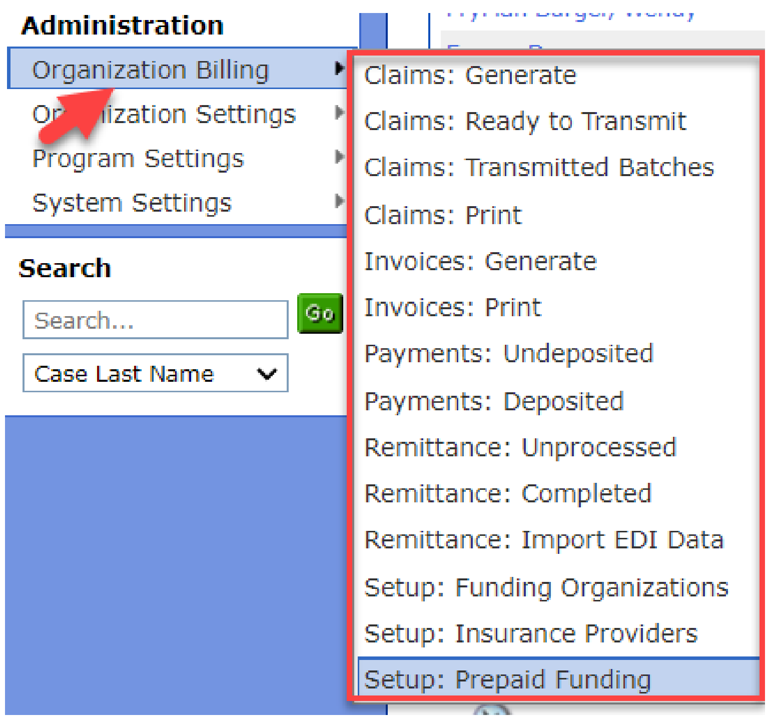
#	Units	Amount	Date	Jan		Feb		Mar		Apr		May		Jun		Jul		Aug	
4	4.33	$433.00	2022	4.33	$433.00	0.00	$0.00	0.00	$0.00	0.00	$0.00	0.00	$0.00	0.00	$0.00	0.00	$0.00	0.00	
111	171.49	$13,993.09	2021	7.80	$270.00	12.00	$1,453.98	2.33	$266.00	27.00	$6,850.00	24.00	$997.50	25.33	$791.50	3.33	$426.00	4.70	
43	38.00	$11,125.00	2020	1.00	$75.00	3.00	$245.00	0.00	$0.00	0.00	$0.00	0.00	$0.00	0.00	$0.00	1.00	$200.00	1.00	
17	19.67	$1,899.00	2019	1.00	$300.00	5.00	$420.00	0.00	$0.00	1.00	$20.00	0.00	$0.00	2.67	$304.00	3.00	$170.00	3.00	
65	68.75	$21,451.00	2018	0.00	$0.00	0.00	$0.00	5.00	$800.00	15.00	$3,200.00	12.00	$6,465.00	5.00	$725.00	1.00	$100.00	1.00	$
240	302.24	$48,901.09		14.13	$1,078.00	20.00	$2,118.98	7.33	$1,066.00	43.00	$10,070.00	36.00	$7,462.50	33.00	$1,820.50	8.33	$896.00	9.70	$

- Track units, duration, and billable services
- Sort billable services by client, worker, monthly, weekly

Financial Reports

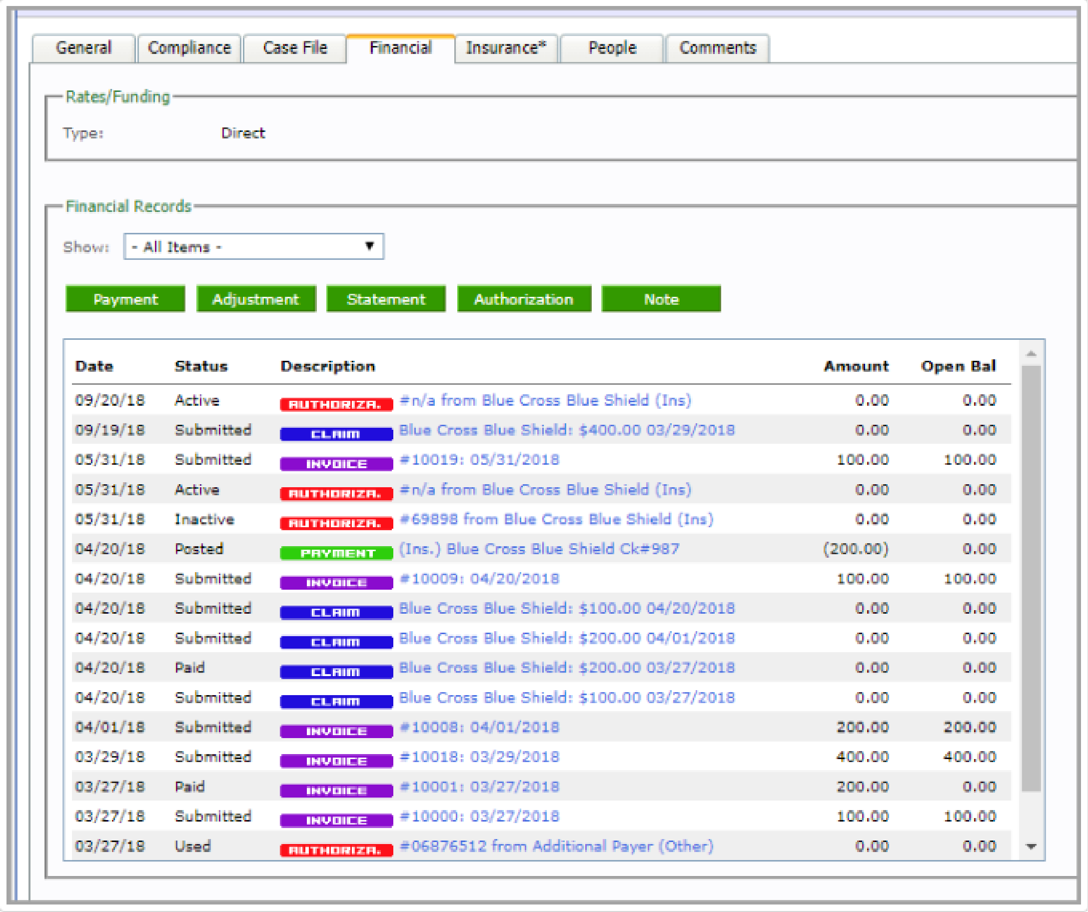






Enterprise Financials

- Track detailed invoices and claims
- Track payments, authorizations, insurance, and account balances
- Send financial summary data to your accounting system
- Works with Waystar Claims Management currently



Support Resources

Your Agency's System Administrator

Access the User Guide

Submit a Support Ticket

Contact your Customer Success Manager

Submit an Idea

Support Resources