Broker's Guide to PrecisionCare

Accessing the Site:

1. Head to www.precisioncare.com/HaloNetworkInc
2. Input your Username & Password
    a. If password has been reset, click login and system will prompt you to create a new password
3. Set you Electronic Signature
    a. Click Menu, Progress, Set Electronic Signature Password
    b. Click the red banner to dismiss the message
    c. Input password and click the floppy disk to save

Uploading Documents to the Participant:

1. Click Menu, Individual, View/Attach File
2. Select the Participant

To View a File:

In the 1st field, select the file type

1. Click the print button to view the file

To Upload a File:

In the 2nd field, select the type of file

1. Write a description of the file (ex. Signed Hab Plan – 10/26/2018)
2. Click Choose File and find the file in your system
3. Click the Blue Arrow on the top right to upload the file to the participant

Creating Community Habilitation Plan:

1. Click Menu, Service Plans, Community Habilitation
2. Click the Green Plus (on the top right corner, under the heading "Individual Community Habilitation Plan Select")
3. Select the type of plan by clicking the green check
    a. First Check – Create a blank plan (not linked to service)
    b. Second Check – Create a blank plan (linked to service)

   c. Third Check – Crate a plan based on the existing plan (pulls goals and safeguards)
4. Click the Green arrows to continue and Click OK to create the plan
5. Update Safeguards by clicking the field and typing
6. To Create a new plan goal:
   a. Click the Green Plus next to the goals window
   b. Update the goal Effective Date to the Plan Effective Date (by clicking the calendar)
   c. Set Duration as On-Going
   d. Type Periodic Staff Support, Valued Outcome, and Staff Support & Services in the fields.
   e. Select the Allowable Service
   f. Set Frequency as As Needed
   g. Click the floppy disk to save
7. To Remove an Achieved goal:
   a. Click the green pencil next to the goal
   b. Set the Status as Discontinued
   c. Input the Discontinued Date and Input a Discontinued Note
   d. Set Display Number as 20.
   e. Click the floppy disk to save
8. Switch Plan Status from DRAFT to REVIEW
9. Click Floppy disk to E-Sign & Save Plan
10. Your FI will Certify the plan

Taking Notes in PrecisionCare:

1. Click Menu, Progress, Data Collection
2. Select the Service Type – SUPPORT BROKER
3. Select the Service – SUPPORT BROKER – FI
4. Select EXPAND ALL to open the calendar for each participant on your caseload
5. Click the date that the service was delivered
6. Select the plus next to the outcome that you worked on with the participant
7. Input your Time In & Time Out
8. Select the Service Provided from the drop down menu
9. Input the Staff Response
   a. **Staff Response: An explanation of what you did with/for the participant that relates to the service you provided**
10. Review the Note
11. Click OK
12. Input your E-Signature

Taking Notes in PrecisionCare using DATA COLLECTION EXCEPTION:

1. Email/Call to request Data Collection Exception permission
2. Click Menu, Progress, Data Collection Exception
3. Select the Service Type – SUPPORT BROKER
4. Select the Service – SUPPORT BROKER – FI
5. Switch the month by clicking the field under date and use the calendar to click any day in the month you are switching to
6. Select EXPAND ALL to open the calendar for each participant on your caseload
7. Click the date that the service was delivered
8. Select the plus next to the outcome that you worked on with the participant
9. Input Exception Note
    a. **Reason why the note was not input within the 2 week period**
10. Input your Time In & Time Out
11. Select the Service Provided from the drop down menu
12. Input the Staff Response
    a. **An explanation of what you did with/for the participant that relates to the service you provided**
13. Review the Note
14. Click OK
15. Input your E-Signature

Viewing Community Habilitation Notes by SHSS

1. Click Menu, Progress, Data Collection
2. Select Service Type – Community Habilitation
3. Select Service – FI Community Habilitation
4. Select EXPAND ALL to open the calendar for each participant on your caseload
5. Click the date that the service was delivered (Dates that have numbers underneath)
6. Click the eye icon next to outcome that has notes

Reviewing & Signing Broker Invoice

1. Click Menu, Progress, Support Broker Invoice
2. Set the Billing Period (1st day of the month to End of Month)
3. Click the Printer Icon to generate the invoice & click yes
4. Review the Invoice & Total Amount
    a. If there is an error on the invoice, there is an error in the notes. You **must** email and request for Data Collection Exception to fix the error
5. Click the floppy disk with the key & input your E-Signature to sign the Invoice