

Maximus provides this user guide as an overview of system operations. Maximus will always support the current and most recent versions of Google Chrome or Microsoft Edge. Maximus recommends Adobe Reader 10 or later.

Ensure that your firewall does not block our URL.

To maintain proprietary content protection, this user guide does not capture all system fields.
All information appearing in this guide does not represent true and actual individuals.

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Admitting an individual in PathTracker

From the AssessmentPro Home Page

You must submit an Admission Notice on EVERY new resident, regardless of pay source or status.

STEP 1:

Click the **PathTracker** tab.

STEP 2:

Review the partial demographics provided in the **Admittance Queue** to determine if the person has arrived in your facility.

STEP 3:

Click **Admit** if the person has entered your facility.

STEP 4:

Complete the person's **last name** and **unique identifier**.

STEP 5:

Click **Continue** to proceed.

First Three Letters of First Name	First Three Letters of Last Name	Identification Type	Last Four of Identification Number	Date of Birth	Actions
BAR	BUT	AssessmentPro IID	5903	06/17/1962	Admit Remove from Queue
CHR	CHR	AssessmentPro IID	5904	07/17/1942	Admit Remove from Queue
FRA	FAI	AssessmentPro IID	5898	05/15/1955	Admit Remove from Queue
XXX	LAS	Social Security Number	1749	01/01/1950	Admit Remove from Queue

Admit to Facility

The first three letters of the individual's first name, the first three letters of the last name, and the last four digits of the individual's AssessmentPro IID are provided.

Complete the rest of the last name and AssessmentPro IID in order to proceed.

First name: BAR

Last name: BUT

AssessmentPro... 5903

Please confirm the individual's date of birth: 6/17/1962

Cancel Continue

Do not repeat information provided.

For example:

Information for last name given = **SMI**

Enter = **TH**

To complete the last name = **SMITH**

Information for the SSN = **last 4 digits**

Enter = **First 5 digits**

To complete the **9-digit number**

STEP 6:

Enter the **Admission Date** and **Expected Length of Stay**.

ADAMS HERITAGE

Edit Admission

Individual name : Tom Jones

Admitting facility : ADAMS HERITAGE
XXXXX
XXXXX
MONROEVILLE, IN 46773 - 9126

Admission date : 3/7/2...

Expected length of stay : Less than 30 days ▼

STEP 7:

Indicate if the person is being admitted from a known facility or other location.

Select the facility or location from the fields.

STEP 8:

Indicate the person's **PASRR status**. If the person had an exemption/categorical or Level II, they have an identified PASRR condition.

Is the individual being admitted from a ☒ Known facility
known facility? ☐ Other location

Known facility state : Indiana ▼

Known facility : PARKVIEW RANDALLIA H... x ▼

Show facility contact information...

What is the individual's PASRR condition?

- ☐ A mental health condition
- ☐ An intellectual disability
- ☐ A condition related to intellectual disability
- ☒ No known or suspected PASRR condition

Note: your facility will not appear in the dropdown. This is a list of locations where the person was before admission to your facility. If the facility does not appear in the list or the location is a community setting, select Other location and enter the related information.

STEP 9:

Select the associated **Level of Care (LOC)** assessment for this admission. **Failure to select the LOC can delay CORE updates and related payment.**

If no LOC was required for this admission, select the associated PASRR screen.

If the assessment/screen associated with admission is not listed, enter the **date of determination**.

If no assessment/screen is on record, select this option and complete all needed screens to ensure your facility remains in compliance.

STEP 10:

Click **Submit** to complete the tracking notice.

The person's information will move from the Admittance queue to the Census queue.

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Select the assessment for this admission:

AID	Type	Outcome	LOS	Determinat...	End Date	Submitting Facility
4182477	Level I	No Level II Required - No SMI/ID/RC		08/14/2024		PARKVIEW RANDALLIA HOSPITAL
4182592	LOC Short	Skilled Nursing Facility - Short Term	60	08/16/2024	10/13/2024	PARKVIEW RANDALLIA HOSPITAL

☐ Assessment not listed
☐ Date of assessment not known
☐ No assessment was submitted for this admission

Date of determination:

Completed by: Stephanie NF Phone: (555) 555-5555 E... Date: 8/1/

Admission ID: 1868429

Cancel Submit 10

Allow 72-hours after submitting the PathTracker notice with the Level of Care indicated for any CORE updates to be completed before submitting a ticket, unless there is a clear issue identified.

Your facility is responsible for ensuring accurate screening completion to ensure compliance with state and federal regulations.

Removing an Individual from the Admittance Queue

From the PathTracker Admittance Queue

If the person identified in the **Admittance queue** is unfamiliar or is not admitting to your facility:

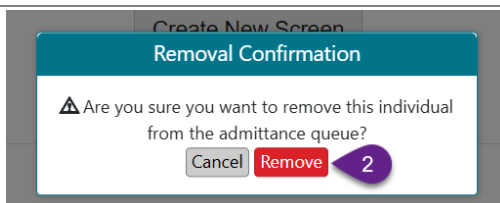
STEP 1:

Select **Remove from Queue**.

First Three Letters of First Name	First Three Letters of Last Name	Identification Type	Last Four of Identification Number	Date of Birth	Actions
BAR	BUT	AssessmentPro ID	5903	06/17/1962	Admit Remove from Queue 1
CHR	CHR	AssessmentPro ID	5904	07/17/1942	Admit Remove from Queue
FRA	FBI	AssessmentPro ID	5898	05/15/1955	Admit Remove from Queue
XXX	LAS	Social Security Number	1749	01/01/1950	Admit Remove from Queue

STEP 2:

Click **Remove to confirm selection**. This will permanently remove the person's information from your facility's Admittance Queue.



Searching for an Individual to Admit in PathTracker

From the PathTracker Admittance Queue

If the person admitting to your facility does not appear in your Admittance Queue:

STEP 1:

Select **Individual not shown?** **Click here to search.**

First Three Letters of First Name	First Three Letters of Last Name	Identification Type	Last Four of Identification Number	Date of Birth	Actions
BAR	BUT	AssessmentPro ID	5903	06/17/1962	Admit Remove from Queue
CHR	CHR	AssessmentPro ID	5904	07/17/1942	Admit Remove from Queue
FRA	FBI	AssessmentPro ID	5898	05/15/1955	Admit Remove from Queue
XXX	LAS	Social Security Number	1749	01/01/1950	Admit Remove from Queue

STEP 2:

Select your **search criteria** from the dropdown.

STEP 3:

Enter the **search information** to begin the search.

PathTracker Search

The search results will appear in a table.

STEP 4:

Click **Admit** and follow the process outlined in **PathTracker—Admitting an individual in PathTracker**

PathTracker Search

First Three Letters of First Name	First Three Letters of Last Name	Date of Birth	Identification Type	Last Four of Identification Number	Actions
TOM	JON	01/01/1950	Social Security Number	1438	Admit 4

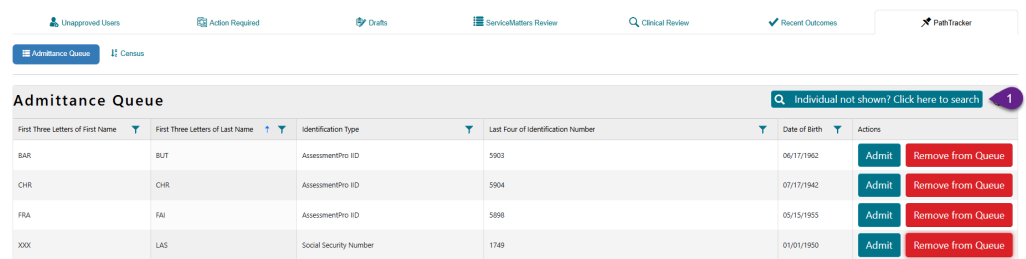
Adding an Individual to Admit in PathTracker

From the PathTracker Admittance Queue

If the person admitting to your facility does not appear in your Admittance Queue:

STEP 1:

Select **Individual not shown?**
Click here to search.



First Three Letters of First Name	First Three Letters of Last Name	Identification Type	Last Four of Identification Number	Date of Birth	Actions
BAR	BUT	AssessmentPro ID	5903	06/11/1962	Admit Remove from Queue
CHR	CHR	AssessmentPro ID	5904	07/11/1942	Admit Remove from Queue
FRA	FAI	AssessmentPro ID	5898	05/15/1955	Admit Remove from Queue
XXX	LAS	Social Security Number	1749	01/01/1950	Admit Remove from Queue

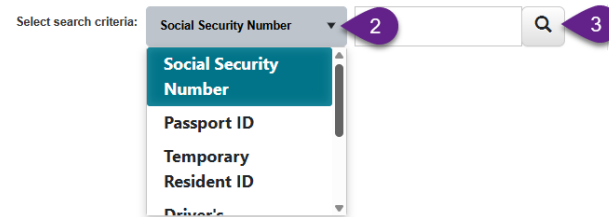
STEP 2:

Select your **search criteria**
from the dropdown.

STEP 3:

Enter the **search information**
to begin the search.

PathTracker Search



Select search criteria: Social Security Number 2 Q 3

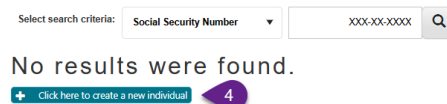
- Social Security Number
- Passport ID
- Temporary Resident ID
- Driver's License

If no results are found, the person has not been screened through AssessmentPro using the specified search criteria. Repeat the process using an alternate unique identifier or add the person's information to AssessmentPro with the following steps.

STEP 4:

Select **Click here to create a new individual.**

PathTracker Search



Select search criteria: Social Security Number XXXX-XX-XXXX Q

No results were found.

[Click here to create a new individual](#) 4

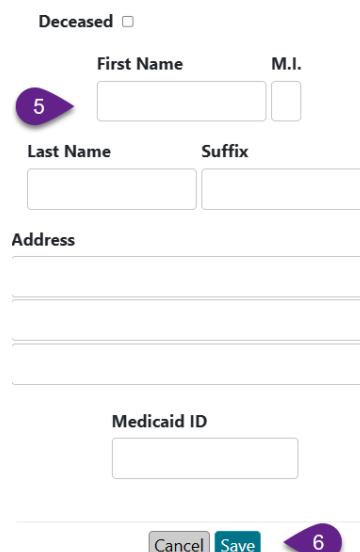
STEP 5:

Complete the demographics
information.

STEP 6:

Click **Save** to add the new
record.

Create a New Individual Record



Deceased ☐

First Name M.I.

5

Last Name Suffix

Address

Medicaid ID

6

STEP 7:

You will receive an alert there is no Level I screen in AssessmentPro. If you have a confirmed Level I (and LOC, as applicable), you can select **Admit Without Level I Screen**. This will prompt you to complete an admission notice. If you are unsure the required screens are complete, select **Create New Screen** to submit a new PASRR and/or LOC.

Your facility is responsible for state and federal compliance with screening requirements.

Refer to the user guides on completing screens for assistance.

Admit to Facility

Warning: There is no Level I screen in AssessmentPro.

If the nursing facility has a prior and accurate Level I screen, proceed with admission. If an screen is needed, click *Create New Screen*.

Cancel

Create New Screen

Admit Without Level I Screen

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Troubleshooting

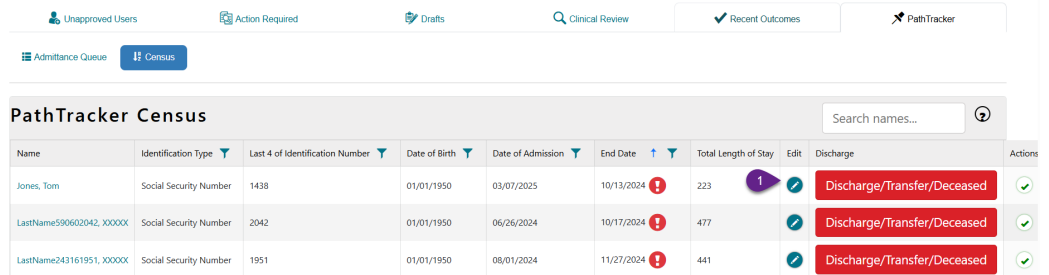
From the PathTracker Census Queue

Identified Error:

Information on Admission Notice is incorrect, e.g., wrong screen chosen, wrong admission date, wrong PASRR condition, etc.

STEP 1:

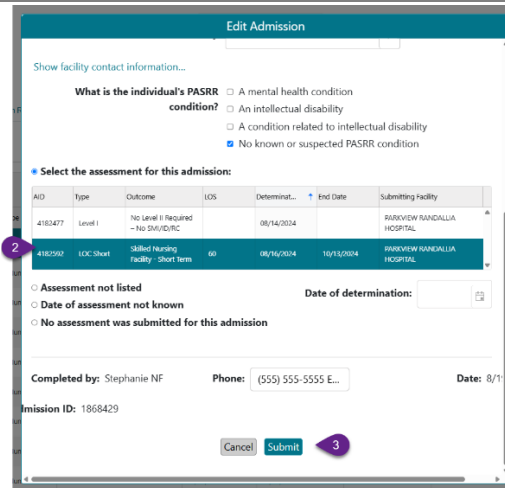
Click the pencil icon associated with the person's record.



Name	Identification Type	Last 4 of Identification Number	Date of Birth	Date of Admission	End Date	Total Length of Stay	Edit	Discharge	Actions
Jones, Tom	Social Security Number	1438	01/01/1950	03/07/2025	10/13/2024	223		Discharge/Transfer/Deceased	
LastName590602042, XXXXX	Social Security Number	2042	01/01/1950	06/26/2024	10/17/2024	477		Discharge/Transfer/Deceased	
LastName243161951, XXXXX	Social Security Number	1951	01/01/1950	08/01/2024	11/27/2024	441		Discharge/Transfer/Deceased	

STEP 2:

Make the necessary edits on the admission notice. Ensure the correct LOC is chosen to minimize any potential CORE delays.



Edit Admission

Show facility contact information...

What is the individual's PASRR condition?

- ☐ A mental health condition
- ☐ An intellectual disability
- ☐ A condition related to intellectual disability
- ☒ No known or suspected PASRR condition

Select the assessment for this admission:

AID	Type	Outcome	LOS	Determinat...	End Date	Submitting Facility
4180477	Level I	No Level I Required - No SMO/ID/RC		08/14/2024		RAMVIEW RANDALLIA HOSPITAL
4180292	LOC Sheet	Skilled Nursing facility - Short term	60	08/14/2024	10/13/2024	RAMVIEW RANDALLIA HOSPITAL

☐ Assessment not listed

☐ Date of assessment not known

☐ No assessment was submitted for this admission

Date of determination:

Completed by: Stephanie NF Phone: (555) 555-5555 E... Date: 8/1

Admission ID: 1868429

STEP 3:

Click **Submit** to save any changes.

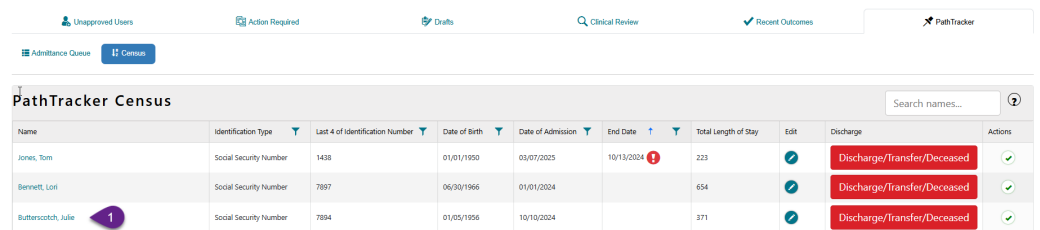
Identified Error: Duplicate Entries

The individual has more than one record under multiple unique identifiers

STEP 1:

Click the **person's name** to open the **demographics** page.

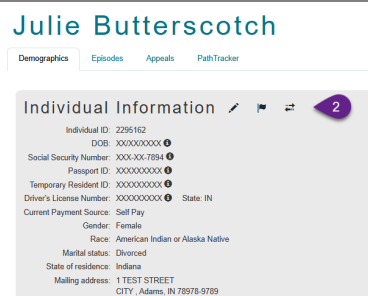
590-60-2042



Name	Identification Type	Last 4 of Identification Number	Date of Birth	Date of Admission	End Date	Total Length of Stay	Edit	Discharge	Actions
Jones, Tom	Social Security Number	1438	01/01/1950	03/07/2025	10/13/2024	223		Discharge/Transfer/Deceased	
Bennett, Lori	Social Security Number	7897	06/30/1966	01/01/2024		654		Discharge/Transfer/Deceased	
Butterscotch, Julie	Social Security Number	7894	01/05/1956	10/10/2024		371		Discharge/Transfer/Deceased	

STEP 2:

Click the **double arrows** to open the **merge record** feature.



Julie Butterscotch

Demographics Episodes Appeals PathTracker

Individual Information

Individual ID: 2295162

DOB: XXXX000000

Social Security Number: XXX-XX-7894

Passport ID: XXXXXXXXXX

Temporary Resident ID: XXXXXXXXXX

Driver's License Number: XXXXXXXXXX State: IN

Current Payment Source: Self Pay

Gender: Female

Race: American Indian or Alaska Native

Marital status: Divorced

State of residence: Indiana

Mailing address: 1 TEST STREET
CITY, Adams, IN 46017-9789

STEP 3:

Enter the IID or name of the confirmed record. Be sure to verify the accurate demographics. The person's information will appear in the table. This is the target record to which all information will be moved.

STEP 4:

Check the box in front of the name.

STEP 5:

Click Merge Records. You will be prompted to confirm this decision.

Access the demographics page of the target record to update any needed information.

Merge Record Split Record

Choose a target record to which this individual's episodes, PathTracker data and Legacy Assessments will be sent. Identification numbers will be added to the target record if no value already exists for the same identification type. Otherwise, no demographics information is updated on the target record.

Name	ID	Date of birth	Episodes	Last Episode
☐ LastName243161951_XXXXX X	2258857	01/01/1999	1	07/30/2024

1 - 1 of 1 items

Merge Records Cancel

Identified Error: Missing Assessment/Screen

A required PASRR or LOC screen is missing and the NF is out of compliance with State and/or Federal regulations. If the completed screen is not available in the *Admission Notice* table, you must submit a new screen to ensure your facility's compliance with State and/or Federal regulations.

STEP 1:

Click Create New Screen.

Refer to the guides on completing the Level I and/or Level of Care screen for assistance in submitting the required screening.

Create New Screen

Action Required Drafts Clinical Review Recent Outcomes PathTracker