



ASSESSMENTPRO USER GUIDE
Connecticut District Office

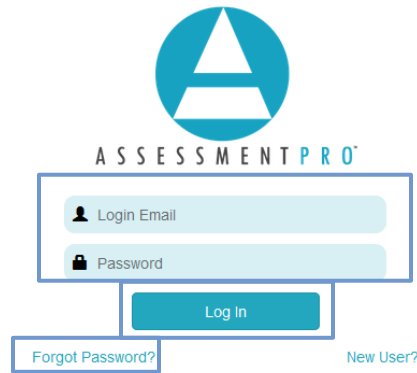
Developed: 10.30.20
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Contents

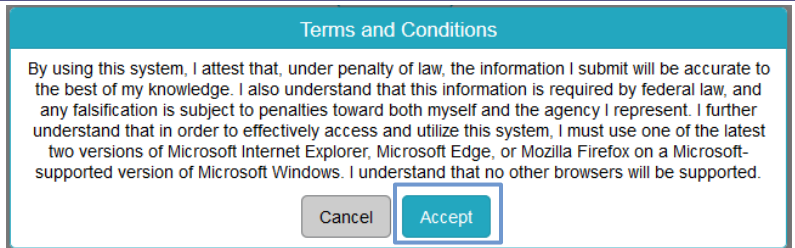
LOG IN	3
SYSTEM NAVIGATION	3
ASSESSMENTPRO DEFINITIONS	3
NAVIGATING PATHTRACKER	4
CLAIMING/ASSIGNING MULTIPLE	10
ADD RECORD TO PATHTRACKER INDIVIDUAL MANAGEMENT	13

LOG IN



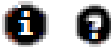
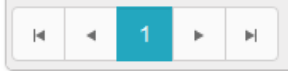
1. Visit www.assessmentpro.com
2. Maximus will register your access. You will receive an email from AssessmentPro to establish your password.
3. Enter your **Login Email** and **Password**.
4. Click the **Forgot Password** link if your password does not work or you forget it. Ascend does not have access to your password.
5. Click Log In.



6. Review the Terms and Conditions.
7. Click **Accept** to close the **Terms and Conditions** box. *This will only occur the first time you log in or with changes to the terms and Conditions.*



SYSTEM NAVIGATION

	<input type="text" value="Search site..."/>	<input type="text" value="Level II Review"/>
Returns to Home screen	Search for individuals, system users, and facilities	Lists assessments pending determination
		
Access Reports	Hover over for additional information about content	Page change navigation

ASSESSMENTPRO DEFINITIONS

AID	Assessment ID; the number associated with the specific review. Each assessment will have a unique ID number.
IID	Individual ID; formerly known as client ID or Ascend ID. Each person will have an assigned number that remains the same throughout each assessment

NAVIGATING PATHTRACKER

1. Navigate to the Unassigned Individuals queue to view and claim individual assignments.

The screenshot shows the Maximus PathTracker interface. At the top left is the 'MAXIMUS' logo. To the right, there is a navigation bar with a home icon, a location indicator 'CT District Office - Bridgeport', the user name 'PathTracker Reviewer Ryan', and a search bar. Below the navigation bar, there are two tabs: 'Action Required' and 'Individual Management'. The 'Unassigned Individuals' tab is selected and circled in red. Below the tabs is a table with the following columns: Individual ID, Medicaid ID, Individual Name, Date of Birth, Referral Facility, Facility ID, and Claim. The table contains four rows of data. At the bottom of the table, there is a pagination control showing '151 152 153 154 155 156' and a total count of '2326 - 2329 of 2329 items'.

Individual ID	Medicaid ID	Individual Name	Date of Birth	Referral Facility	Facility ID	Claim
1001138	555555	XXXXX LastName452711605	01/01/1990	Valerie Manor	215	
862968	555555	XXXXX LastName205551293	01/01/1990	Valerie Manor	215	
828341	555555	XXXXX LastName810105149	01/01/1990	Valerie Manor	215	
961319	555555	XXXXX LastName117821035	01/01/1990	Branford Hills Health Care Ctr.	29	

2. Click the **Claim** icon in the Unassigned Individuals queue to claim and individual to manage.

This is a close-up view of the 'Unassigned Individuals' queue. The table has columns for 'Referral Facility', 'Facility ID', and 'Claim'. The 'Claim' column contains four blue circular icons with a white download symbol. A red box highlights the 'Claim' column, and a mouse cursor is pointing at the top icon. Below the table, there is a pagination control showing '2326 - 2329 of 2329 items'.

Referral Facility	Facility ID	Claim
Valerie Manor	215	
Valerie Manor	215	
Valerie Manor	215	
Branford Hills Health Care Ctr.	29	

- View the individual claimed from the **Unassigned Individuals** queue. They will leave the *Unassigned Individuals* queue and move to the *Individual Management* queue.

The screenshot shows the 'Unassigned Individuals' queue. At the top, there are three tabs: 'Action Required', 'Individual Management', and 'Unassigned Individuals'. Below the tabs, there are two buttons: 'My Assignments' (highlighted in blue) and 'Agency Assignments'. The main content area shows a table titled 'My Assignments' with the following data:

Individual ID	Individual Name	Medicaid ID	Date Of Birth	Facility Name	Facility ID	Date of Admission	Notes	Remove
961319	XXXXX LastName117821035	555555	01/01/1990				+	-

At the bottom right of the table, it says '1 - 1 of 1 items'.

- Click on **My Assignments** to view your current caseload.

The screenshot shows the 'My Assignments' button highlighted in a red box. Below it, the 'My Assignments' table is visible with the following data:

Individual ID	Individual Name	M
961319	XXXXX LastName117821035	55

- Click on **Agency Assignments** to view the caseloads for the entire District Office.

The screenshot shows the 'Agency Assignments' button highlighted in a red box. Below it, the 'Agency Assignments' table is visible with the following data:

Individual ID	Individual Name	Medicaid ID	Date
1207707	L1LOCBase U Test	55555555	11/11/
1207720	PTAgency U Test	55555555	11/11/

At the bottom of the table, there is a pagination bar showing '21 22 23 24 25 26'.

- Click the **Notes** icon to view and enter notes for the individual in question.

The screenshot shows the 'My Assignments' table with the 'Notes' icon highlighted in a red box. The table has the following data:

Individual ID	Individual Name	Medicaid ID	Date Of Birth	Facility Name	Facility ID	Date of Admission	Notes	Remove
961319	XXXXX LastName117821035	555555	01/01/1990				+	-

At the bottom right of the table, there is a small text 'Add notes...'.

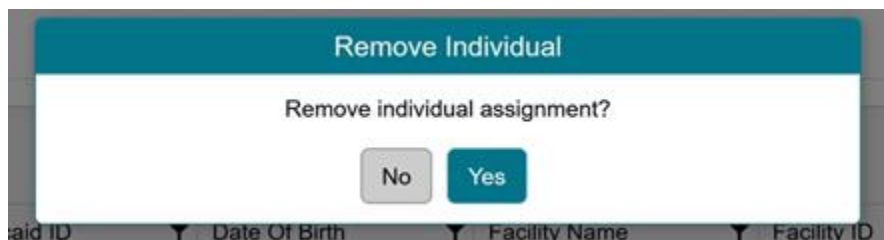
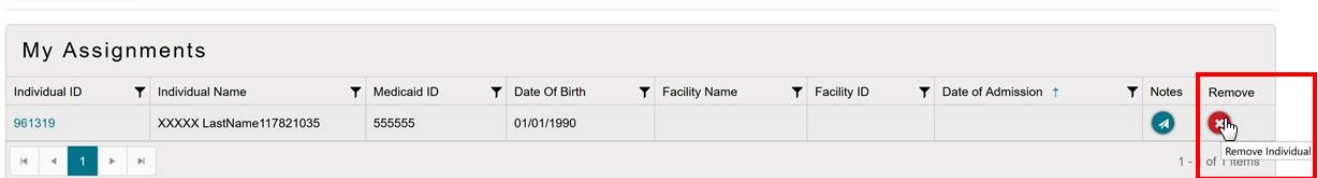
- 7. Click the **Send Note** icon or press Enter to enter a Note.



- 8. Once a Note has been entered, the icon will change in the **Individual Management queue**. If you hover over it, you can view the last Note for the individual in question.



- 9. Click the **Remove Individual** icon to remove the individual from your caseload.



10. Navigate to the **Action Required** queue to view alerts for your claimed individuals.

Individual ID	Individual Name	Medicaid ID	Date of Birth	Facility Name	Facility ID	Alert Type	Alert Date	View	Actions
1207718	PTAgency Test	55555555	11/11/1974	60 West	423	Continuing Stay	10/22/2020 10:08 AM		
1207720	PTAgency Test	55555555	11/11/1976	60 West	423	Admission	10/22/2020 10:14 AM		

11. Click the **View** icon to view the event which triggered the alert.

Alert Date	View	Actions
10/22/2020 10:08 AM		
10/22/2020 10:14 AM		
10/22/2020 10:15 AM		
10/23/2020 03:47 AM		

**** An Admission Form box will appear for you to view. When done select *Cancel* at the bottom to close out box.**

Admission Form

Individual Name
PTAgency Test

Admitting Facility
60 West
XXXXXX
XXXXXX
XXXXXX
Bethel, CT 55555

Admission Date
10/22/2020

Expected Length of Stay
Less than 30 days

Admitted From
Hospice Care Facility
Mailing Address 1
Mailing Address 2
City 1, CT 55555
Phone: (111) 111-1111

Completed By
Cody Fox Facility
10/22/2020
Phone: (111) 111-1111 Ext.11111

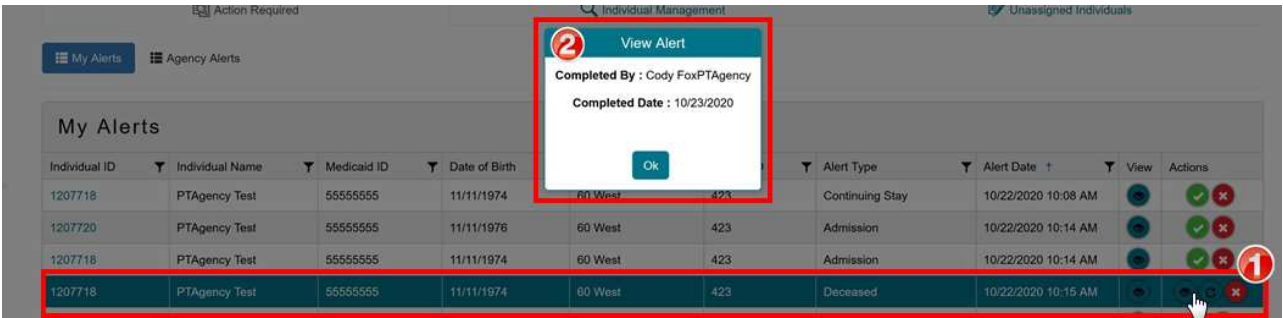
Cancel

12. Click the **Complete** icon to mark the alert as 'Completed'
This replaces the 'Entered Into EMS' check box from the legacy system).

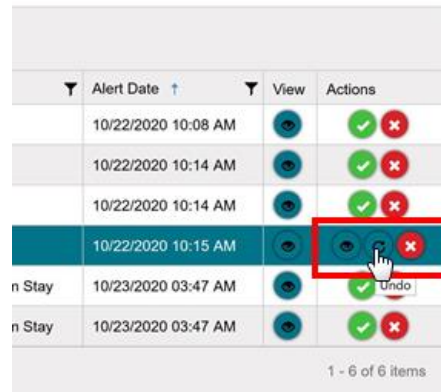
Date	View	Actions
2020 10:08 AM		
2020 10:14 AM		
2020 10:14 AM		
2020 10:15 AM		
2020 03:47 AM		
2020 03:47 AM		

1 - 6 of 6 items

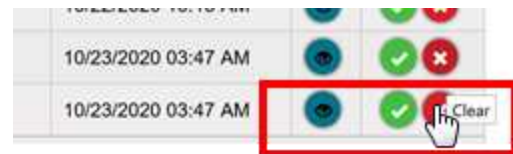
13. Click the **View** icon to view the completed alert details.



14. Click the **Undo** icon to undo an alert which was marked as 'Completed'.



15. Click the **Clear** icon to remove an alert from the Action Required queue.



16. Click on **Agency Alerts** to view alerts for the entire District Office.



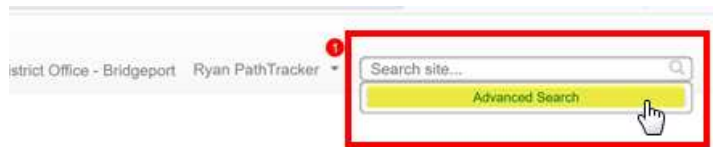
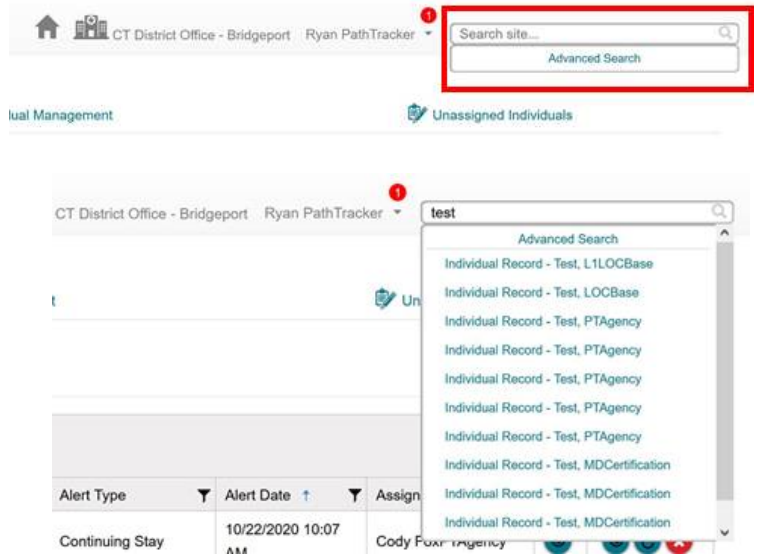
17. Click the **Switch Agency** icon to switch from one District Office to another.



18. Choose an agency from the **Choose an agency** dropdown. Click **Switch** after you selected the desired agency.

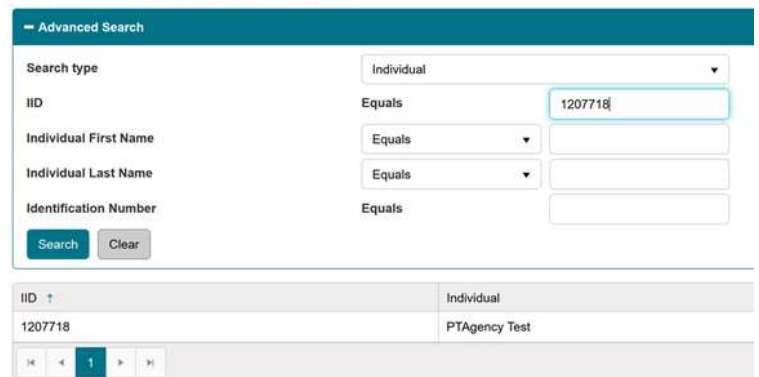


19. Click inside the **Search Site** function to search for individuals across the State.



20. Select the **Advanced Search** function inside Search Site to search by a wider range of parameters.

Advanced Search



Advanced Search	
Search type	Individual
IID	Equals 1207718
Individual First Name	Equals
Individual Last Name	Equals
Identification Number	Equals
<input type="button" value="Search"/> <input type="button" value="Clear"/>	
IID ↑	Individual
1207718	PTAgency Test
1	

CLAIMING/ASSIGNING MULTIPLE

1. Navigate to the Unassigned Individuals queue in AssessmentPro.

ASCEND A MAXIMUS COMPANY

CT District Office - Bridgeport Ryan PathTracker

Search site...

Action Required Individual Management Unassigned Individuals

Claim Assign

0 selected individuals

Individual ID	Medicaid ID	Individual Name	Date of Birth	Referral Facility	Facility ID	Alternate Facility ID	Remove
1243500	555555	LastName163101129, XXXXX	01/01/1990	Bridgeport Hospital	000000340		✖
1179833	555555	LastName163151011, XXXXX	01/01/1990	Ludlow Center for Health & Rehabilitation	000006080	1013947795	✖
990029	555555	LastName164723478, XXXXX	01/01/1990	Paradigm Healthcare Center Norwalk, LLC	000020016	1528293818	✖
975713	555555	LastName187123811, XXXXX	01/01/1990	Valerie Manor	000010702	1184729485	✖
973741	555555	LastName188164987, XXXXX	01/01/1990	St. Joseph's Manor Rehabilitation & Nursing Center	000006841	1740228964	✖
991396	555555	LastName205691917, XXXXX	01/01/1990	Bridgeport Hospital	000000340		✖
1216506	555555	LastName206691010, XXXXX	01/01/1990	Carrollton Chronic & Conv. Hosp.	000006064	1093712325	✖
1079319	555555	LastName391151799, XXXXX	01/01/1990	Charlotte Hungerford Hospital	000000249		✖
960444	555555	LastName398105652, XXXXX	01/01/1990	St. Joseph's Manor Rehabilitation & Nursing Center	000006841	1740228964	✖
1134074	555555	LastName398134312, XXXXX	01/01/1990	Nathaniel Witherell Home	000005645	1396741872	✖
911459	555555	LastName440142977, XXXXX	01/01/1990	Filosa Conv., Inc.	000004614	1386613388	✖

2. Click the check box next to the individual record needing to be claimed or assigned.

ASCEND A MAXIMUS COMPANY

CT District Office - Bridgeport Ryan PathTracker

Search site...

Action Required Individual Management

Individual ID	Medicaid ID	Individual Name	Date of Birth	Referral Facility	
<input checked="" type="checkbox"/>	1243500	555555	LastName163101129, XXXXX	01/01/1990	Bridgeport Hospital
<input checked="" type="checkbox"/>	1179833	555555	LastName163151011, XXXXX	01/01/1990	Ludlow Center for Health & Rehabilitation
<input checked="" type="checkbox"/>	990029	555555	LastName164723478, XXXXX	01/01/1990	Paradigm Healthcare Center Norwalk, LLC
<input checked="" type="checkbox"/>	975713	555555	LastName187123811, XXXXX	01/01/1990	Valerie Manor
<input checked="" type="checkbox"/>	973741	555555	LastName188164987, XXXXX	01/01/1990	St. Joseph's Manor Rehabilitation & Nursing Center
<input type="checkbox"/>	991396	555555	LastName205691917, XXXXX	01/01/1990	Bridgeport Hospital

3. To claim or assign all individual records displayed in the queue, click the check box in the column header shown below and click 'Claim' or 'Assign', respectively.

NOTE: This will select all individual records currently in the queue unless filtered by the user prior to clicking the check box.

ASCEND A MAXIMUS COMPANY

CT District Office - Bridgeport Ryan PathTracker

Search site...

Action Required Individual Management Unassigned Individuals

Claim Assign

9 selected individuals

<input checked="" type="checkbox"/>	Individual ID	Medicaid ID	Individual Name	Date of Birth	Referral Facility	Facility ID	Alternate Facility ID	Remove
<input checked="" type="checkbox"/>	975713	555555	LastName187123811, XXXXX	01/01/1990	Valerie Manor	000010702	1184729485	✖
<input checked="" type="checkbox"/>	1216506	555555	LastName206691010, XXXXX	01/01/1990	Carrollton Chronic & Conv. Hosp.	000006064	1093712325	✖
<input checked="" type="checkbox"/>	1079319	555555	LastName391151799, XXXXX	01/01/1990	Charlotte Hungerford Hospital	000000249		✖

4. Notice that the number of selected records will be displayed under the 'Claim' and 'Assign' buttons.

Individual ID	Medicaid ID	Individual Name	Date of Birth	Referral Facility	Facility ID	Alternate Facility ID	Remove	
<input checked="" type="checkbox"/>	1243500	555555	LastName163101129, XXXXX	01/01/1990	Bridgeport Hospital	000000340	<input type="checkbox"/>	
<input type="checkbox"/>	1179833	555555	LastName163151011, XXXXX	01/01/1990	Ludlow Center for Health & Rehabilitation	000006080	1013947795	<input type="checkbox"/>
<input checked="" type="checkbox"/>	990029	555555	LastName164723478, XXXXX	01/01/1990	Paradigm Healthcare Center Norwalk, LLC	000020016	1528293818	<input type="checkbox"/>
<input type="checkbox"/>	975713	555555	LastName187123811, XXXXX	01/01/1990	Valerie Manor	000010702	1184729485	<input type="checkbox"/>
<input checked="" type="checkbox"/>	973741	555555	LastName188164987, XXXXX	01/01/1990	St. Joseph's Manor Rehabilitation & Nursing Center	000006841	1740228964	<input type="checkbox"/>
<input type="checkbox"/>	991396	555555	LastName205691917, XXXXX	01/01/1990	Bridgeport Hospital	000000340	<input type="checkbox"/>	
<input type="checkbox"/>	1216506	555555	LastName206691010, XXXXX	01/01/1990	Carolton Chronic & Conv. Hosp.	000006064	1093712325	<input type="checkbox"/>

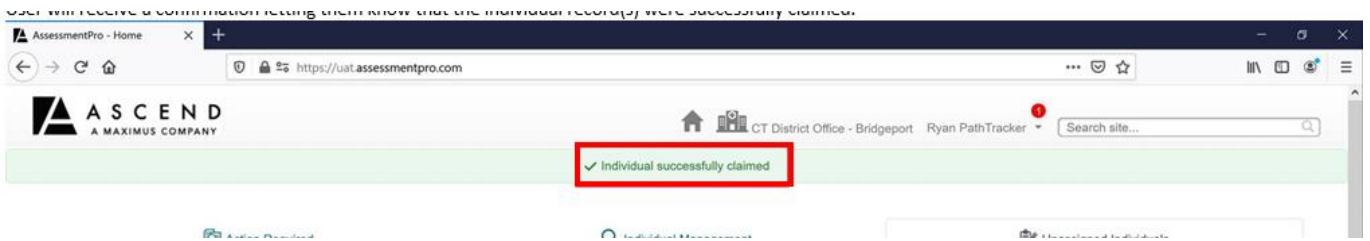
5. To claim the selected individuals, click the 'Claim' button.

Facility	Facility ID	Alternate Facility ID	Remove
Hospital	000000340		<input type="checkbox"/>
Center for Health & Rehabilitation	000006080	1013947795	<input type="checkbox"/>
Healthcare Center Norwalk, LLC	000020016	1528293818	<input type="checkbox"/>
Manor	000010702	1184729485	<input type="checkbox"/>
's Manor Rehabilitation & Nursing	000006841	1740228964	<input type="checkbox"/>
Hospital	000000340		<input type="checkbox"/>
Chronic & Conv. Hosp.	000006064	1093712325	<input type="checkbox"/>

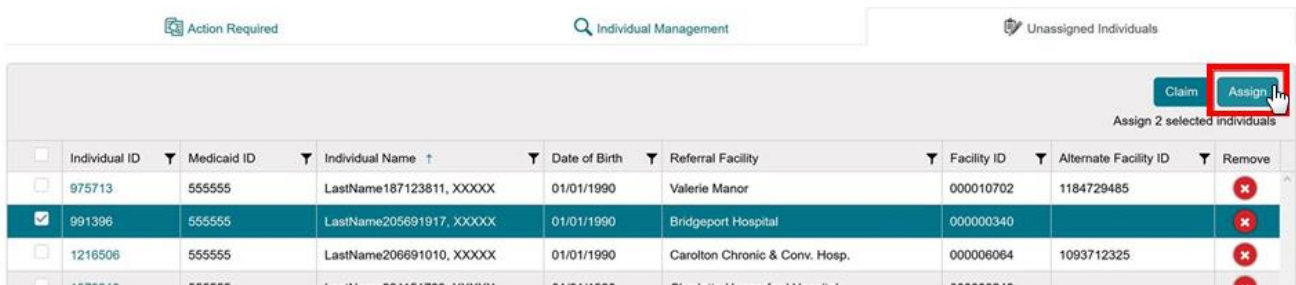
6. Click **Yes** on the confirmation modal to claim the selected individual records. Click **No** to cancel the claiming action.

Individual Name	Facility ID
LastName163101129, XXXXX	000000340
LastName163151011, XXXXX	01/01/1990
LastName164723478, XXXXX	01/01/1990
LastName187123811, XXXXX	01/01/1990
LastName188164987, XXXXX	01/01/1990
LastName205691917, XXXXX	01/01/1990
	Bridgeport Hospital
	000000340

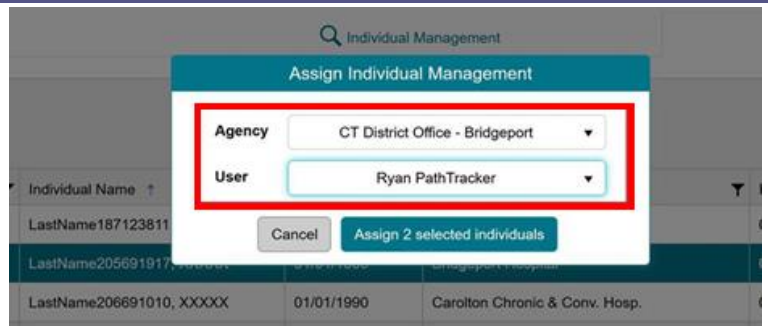
7. User will receive a confirmation letting them know that the individual record(s) were successfully claimed.



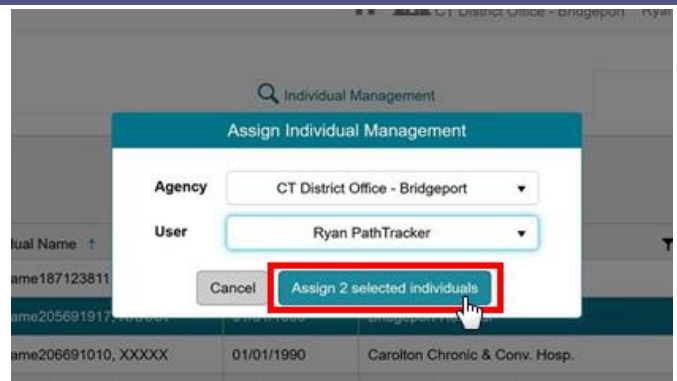
8. To assign the selected individual records, click the 'Assign' button *PathTracker Administrator users only.*



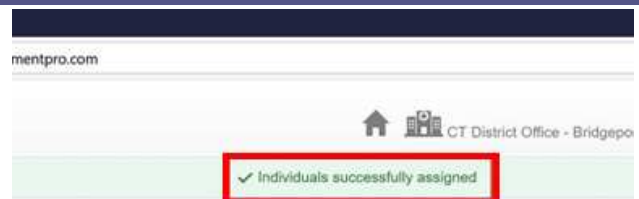
9. Select the 'Agency' and 'User' that the selected individual records should be assigned to.



10. Click the 'Assign x' number of selected records' button on the Assign Individual Management modal.



11. User will receive a confirmation letting them know that the individual record(s) were successfully assigned.



ADD RECORD TO PATHTRACKER INDIVIDUAL MANAGEMENT

1. Locate the individual in question using the Search site or Advanced Search options.

MAXIMUS

CT District Office - Bridgeport Ryan PathTracker 999997

Advanced Search
Individual Record - LastName304211459, XXXXX

Action Required Individual Management Unassigned Individuals

My Alerts Agency Alerts

Individual ID	Individual Name	Medicaid ID	Date of Birth	Facility Name	Facility ID	Alternate Facility ID	Alert Type	Alert Date	View	Actions
No items to display										

2. Click on the **PathTracker** tab on the Individual's profile.

MAXIMUS

XXXXX LastName304211459

Demographics Episodes PathTracker

Individual Information

Individual ID: 999997

SSN: XXX-XX-1459 ⓘ

DOB: XX/XX/XXXX ⓘ

Phone: (555) 555-5555

Mailing address: XXXXX XXXXX XXXXX
XXXXX, CT 55555

3. Click **Add** in the *Individual Management* grid.

MAXIMUS

XXXXX LastName304211459

Demographics Episodes PathTracker

Individual Management

Add

Contract	Is Managed?	PathTracker Agency	PathTracker

Admissions/Discharges/Transfers

Event Type	Facility Name	Facility ID	Alterna
Admission	Southington Care Center	20602	
Deceased			

4. Fill out the information on the *Individual Management* modal and click **Save**.

5. Review the person's PathTracker Individual Management details displayed in the *Individual Management* grid.

Demographics Episodes PathTracker

Individual Management

Add

Contract	Is Managed?	PathTracker Agency	PathTracker Manager	Referral Facility	Admitting Facility			
Connecticut	Yes	CT District Office - MFP	PathTracker Bunty	Bayside Medical Center	Aaron Manor Nursing & Rehab Center			

Admissions/Discharges/Transfers

Event Type	Facility Name	Facility ID	Alternate Facility ID	Date Created	Effective Date	
Admission	Southington Care Center	20602		09/07/2016	08/07/2015	
Deceased				07/12/2017	07/10/2017	

*To change a person's listed PathTracker Individual Management details (Assigned District Office, Case Manager, Admitting Facility, etc), click the 'Edit' icon

XXXXX LastName304211459

Assign

Demographics Episodes PathTracker

Individual Management

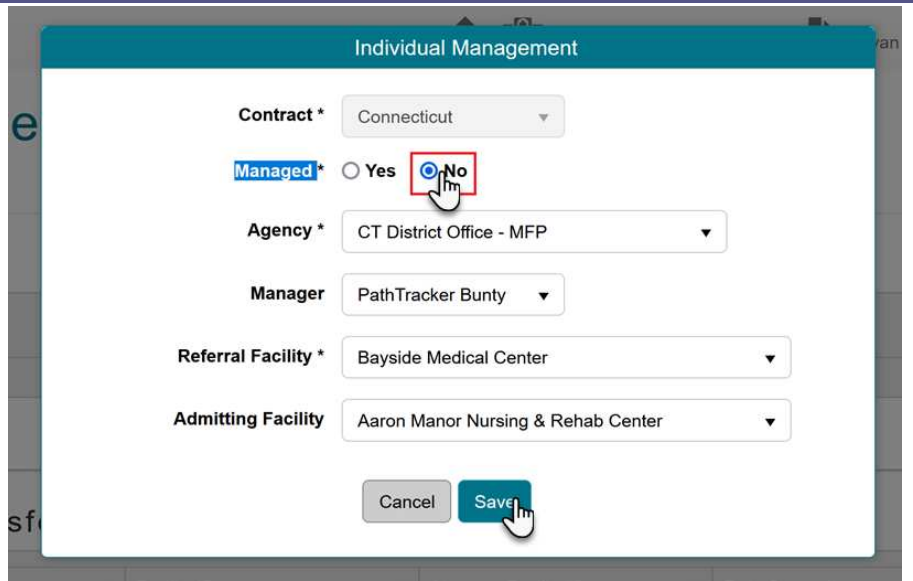
Add

Contract	Is Managed?	PathTracker Agency	PathTracker Manager	Referral Facility	Admitting Facility			
Connecticut	Yes	CT District Office - MFP	PathTracker Bunty	Bayside Medical Center	Aaron Manor Nursing & Rehab Center			

Edit

6. WHEN APPLICABLE

Remove a person from actively being managed in PathTracker *Individual Management*, change **Managed** from **Yes** to **No** and click **Save**.



7. WHEN APPLICABLE

Remove a person from *Individual Management* who was added by mistake, click the **Delete** icon and then click **Delete** again in the dialogue box that appears.

XXXXX LastName304211459

Assign

Demographics Episodes PathTracker

Individual Management

Contract	Is Managed?	PathTracker Agency	PathTracker Manager	Referral Facility	Admitting Facility		
Connecticut	No	CT District Office - MFP	PathTracker Bunty	Bayside Medical Center	Aaron Manor Nursing & Rehab Center		

Delete Individual Management rec

XXXXX LastName304211459

Assign

Demographics Episodes PathTracker

Individual Management

Delete Individual Management Record

Are you sure you want to delete this PathTracker Individual Management record?

Cancel
Delete

Contract	Is Managed?	Pa	ility	Admitting Facility
Connecticut	No	CT District Office - MFP	PathTracker Bunty	Bayside Medical Center
				Aaron Manor Nursing & Rehab