

SECTION 800

PROVIDER SETTINGS

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SECTION 800: PROVIDER SETTINGS

801: Introduction

By clicking on the **Provider Settings** tab, the following information will be shown on the **Provider Settings** page for your agency:

1. Provider's Record
2. Primary Provider Contacts
3. Provider Sites (Site Administrator)
4. Custom Services (Custom Services Administration)
5. Add/Edit/Delete Townships

Only if you logged into ClientTracker as a **Primary Provider Contact**, you will be able to edit, add, and/or delete your agency's information.

802: Provider's Record

In this dialogue box you will see the following information for your agency:

Provider Name Web Address

802.1: Edit Provider's Record

If you are logged into ClientTracker as a Primary Provider Contact, you will be able to edit, add, and/or delete your agency's information.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Provider's Record** dialogue box, click on the **Edit Provider Record** link at the upper right hand corner of the dialogue box.
4. A window titled **Provider Record** will appear.
5. Select the **Provider Name:** and enter the correct **Web Address:** **http://**.
6. Click on the **Save** button.

803: Primary Provider Contacts

In this dialogue box you will see a listing of all agency staff that have been authorized as the **Primary Provider Contact** for your agency. In this dialogue box you will see the following information for all the **Primary Provider Contacts** for your agency:

Name	Email	Extension
Cell Phone	Pager	Job Role

In order to see all staff that have been authorized to utilize ClientTracker, click on the **User Administration** link at the upper right hand corner of the **Primary Provider Contact** dialogue box.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Primary Provider Contacts** dialogue box, click on the **User Administration** link at the upper right hand corner of the dialogue box.
4. The **User Administration** page will appear. In the **Current Staff List** dialogue box, you will see a listing of all agency staff that have been authorized to use ClientTracker.

803.1: Add Staff Member

You can use this function to add staff members to your current staff list in ClientTracker only if you are the **Primary Provider Contact** for your agency.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Primary Provider Contacts** dialogue box, click on the **User Administration** link at the upper right hand corner of the dialogue box.
4. The **User Administration** page will appear. In the **Current Staff List** dialogue box, you will see a listing of all agency staff that have been authorized to use ClientTracker.
5. Click on the **Add Staff** link at the upper right hand corner of the **Current Staff List** dialogue box.

6. An **Add Staff Member** content box will appear. You will be able to enter the following information for the new staff member:

*First Name	Middle Name	*Last Name
*Email	Extension	Cell Phone
Pager	*Job Role	*Site
*Primary Site Contact	*Primary Provider Contact	

**Denotes a required field.*

7. Click on the **Save** button.

803.2: **Edit Staff Information**

You can use this function to edit existing staff information only if you are the **Primary Provider Contact** for your agency.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Primary Provider Contacts** dialogue box, click on the **User Administration** link at the upper right hand corner of the dialogue box.
4. The **User Administration** page will appear. In the **Current Staff List** dialogue box, you will see a listing of all agency staff that have been authorized to use ClientTracker.
5. Click on the staff person's name which is highlighted/underlined in green in the **Current Staff List** dialogue box.
6. A window titled **Edit Staff** will appear. You will be able to edit the following information:

First Name	Middle Name	Last Name
Email	Job Role	Extension
Site	Cell Phone	Pager
Primary Site Contact	Primary Provider Contact	

7. Click on the **Save** button.

803.3: Delete Staff Member

Deleting users who are no longer authorized to use ClientTracker is an important part of system security. If a staff member leaves your agency or you don't want them to have access to ClientTracker, your agency's

Primary Provider Contact is responsible for deleting them from ClientTracker.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Primary Provider Contacts** dialogue box, click on the **User Administration** link at the upper right hand corner of the dialogue box.
4. The **User Administration** page will appear. In the **Current Staff List** dialogue box, you will see a listing of all agency staff that have been authorized to use ClientTracker.
5. Click on the **Delete Staff** link at the upper right hand corner of the **Current Staff List** dialogue box.
6. A **Delete Staff Member** content box will appear. Click in the box next to the name of the staff person you want to delete. (Note: You cannot delete **Primary Provider Contacts/Provider Administrators** or **Primary Site Administrators**. Please contact the Area Agency for assistance.)
7. Once you have selected all of the staff persons you want to delete, click on the **Save** button.

804: Provider Sites

In this dialogue box you will see a listing of all of the provider sites for your agency. The following information will be displayed for each site your agency has entered into ClientTracker:

Site Name	Primary Provider Site	Address 1
Address 2	City	State
Zip Code	County	Phone 1
Phone 2	Fax	

View Services for this Site - In order to view all of the sites listed for your agency, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. Click on the **View Services for this Site** at the bottom of the **Provider Sites** dialogue box.
4. Once you click on **View Services for this Site**, a window will appear listing all the Service Offerings and Required Assessments (Nutritional Risk, ADL and IADL, Pre-Authorization) for that site.

804.1: Add Provider Sites

Only the **Primary Provider Contact** person(s) for your agency is able to add sites. In order to add a site, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Provider Site** dialogue box, click on the **Site Administrator** link at the upper right hand corner of the dialogue box.
4. The **Site Administration** page will appear. In the **Current Site List** dialogue box, you will see a listing of all of the provider sites registered in ClientTracker.
5. Click on **Add Site** link in the upper right hand corner of the **Current Site List** dialogue box.
6. **Add a Site** dialogue box will appear. Complete the following information as it applies to each site:

*Site Name	*Address 1	Address 2
*County/City/Zip	Phone 1	Phone 2
Fax	*Provides Services	ISP (Internet Service Provider)
*Frequency of Data Entry	*Focal Point	*Senior Center
Meal Route 1 (1)	Add Meal Route Line (1)	

****Denotes a required field.***

(1) See ***Meal Routes*** instructions on page 8 - 8.

7. Click on the **Save** button.

804.2: Remove Provider Sites

Only the **Primary Provider Contact** person(s) for your agency is able to remove sites. In order to remove sites, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Provider Site** dialogue box, click on the **Site Administrator** link at the upper right hand corner of the dialogue box.
4. The **Site Administration** page will appear. In the **Current Site List** dialogue box, you will see a listing of all of the provider sites registered in ClientTracker.
5. Click on the **Remove Sites** link in the upper right hand corner of the **Current Site List** dialogue box.
6. **Remove Sites** dialogue box will appear. You will be required to enter the following data before you will be allowed to remove the site:

Replacement Site Reassign Meal Routes* Reassign Staff

See **Meal Routes instructions on page 8 - 8.*
7. Once you have made your changes, select the site by clicking in the circle next to the appropriate site.
8. Click on the **Save** button.

804.3: Show/Hide Provider Sites

Only the **Primary Provider Contact** person(s) for your agency is able to show/hide sites. In order to show/hide sites, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.

3. In the **Provider Site** dialogue box, click on the **Site Administrator** link at the upper right hand corner of the dialogue box.
4. The **Site Administration** page will appear. In the **Current Site List** dialogue box, you will see a listing of all of the provider sites registered in ClientTracker.
5. Click on the **Show/Hide Sites** link in the upper right hand corner of the **Current Site List** dialogue box.
6. **Hide/Unhide Sites** dialogue box will appear. Choose which site you would like to hide or unhide by clicking in the circle next to the site name.
7. Click on the **Save** button.

804.4: Site Administration

On the **Site Administration** page, there are two (2) functions listed next to each site, **Edit this Site** and **Edit Services for this Site**. Only the **Primary Provider Contact** person(s) for your agency is able to complete these functions.

A. Edit this Site

In order to edit site information for a particular site, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Provider Site** dialogue box, click on the **Site Administrator** link at the upper right hand corner of the dialogue box.
4. The **Site Administration** page will appear. In the **Current Site List** dialogue box, you will see a listing of all of the provider sites registered in ClientTracker.
5. Click on **Edit this Site** link next to the provider site you want to edit.

6. **Edit a Site** content box will appear. You will be able to edit the following information for this site:
- | | | |
|-----------------------------------|------------------------------------|--|
| *Site Name | *Address 1 | Address 2 |
| *County/City/Zip | Phone 1 | Phone 2 |
| Fax | *Provides Services | ISP <small>(Internet Service Provider)</small> |
| *Frequency of Data Entry | Meal Route 1 ⁽¹⁾ | Replacement |
| Delete Meal Routes ⁽¹⁾ | Add Meal Route Line ⁽¹⁾ | |

****Denotes a required field.***

(1) See *Meal Routes* instructions below.

7. Click on the **Save** button.

B. Edit Services for this Site

In order to edit custom services for a particular site, complete the following steps: (Please note: Area Agency services can not be edited by a provider.)

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Provider Site** dialogue box, click on the **Site Administrator** link at the upper right hand corner of the dialogue box.
4. The **Site Administration** page will appear. In the **Current Site List** dialogue box, you will see a listing of all of the provider sites registered in ClientTracker.
5. Click on **Edit Services for this Site** link next to the provider site you want to edit.
6. **Service Names** and **Current Services** will appear for that site. If your agency did not authorize Custom Services for your agency and/or site, then nothing will appear on this page. (If you would like to add Custom Services, please see **Add Custom Services** instructions below.)
7. However, if your agency did authorize Custom Services for your agency, this is where you can **Add** or **Delete** those Custom Services.

To **Add** to your **Current Services** listing, click on the service listed under **Service Names** and then click on the **Add>>** button.

To **Delete** services from your **Current Services** listing, click on the service you want to delete under **Current Services** and then click on the **<<Delete** button.

804.5: Meal Routes

This function allows you to add **Meal Routes** to each Nutrition site. In order to assign meal routes on the **Client Information** page, you must complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Provider Site** dialogue box, click on the **Site Administrator** link at the upper right hand corner of the dialogue box.
4. The **Site Administration** page will appear. In the **Current Site List** dialogue box, you will see a listing of all of the provider sites registered in ClientTracker.
5. Click on **Edit this Site** link next to the provider site you want to add a Meal Route(s).
6. **Edit a Site** content box will appear. At the bottom of the **Edit this Site** content box, type your meal route in the designated box next to **Meal Route 1:**. If you wish to add another meal route for this site, click on the **Add Meal Route Line** button.
7. Once you've completed adding **Meal Route(s)**, click on the **Save** button and the following statement will appear in the **Edit a Site** content box, **Site Edited Successfully.**
8. The **Meal Route(s)** you added to this site will be displayed under **Delete Meal Routes:**.

805: Custom Services

In this dialogue box you will see a listing of all **Custom Services** your agency added to ClientTracker. Each agency has the option to create their own **Custom Services** if they would like to use ClientTracker to track other services besides ECIAAA funded services. All services funded by ECIAAA are authorized/entered into ClientTracker by ECIAAA staff.

805.1: Add Custom Services

In order to add custom services, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Custom Services** dialogue box, click on the **Custom Services Administration** link in the upper right hand corner of the dialogue box.
4. **Custom Services Administration** page will appear.
5. In the **Custom Service List** dialogue box, click on **Add** link in the upper right hand corner of the dialogue box.
6. **Add Custom Service** dialogue box will appear. The following information is required when adding a custom service:

Service Name ⁽¹⁾	Service Code	Unit Type
Requires ADL Assessment	Requires IADL Assessment	
Requires Federal Code	Requires Nutritional Risk Assessment	
Requires Pre-Authorization		

(1) Service Name - Do not use a service name identical to Area Agency authorized services.

7. Once you have entered the information, click on the **Save** button.

805.2: Edit Custom Services

You will only be able to use this function if you already have **Custom Services** entered into ClientTracker.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.

3. In the **Custom Services** dialogue box, click on the **Custom Services Administration** link in the upper right hand corner of the dialogue box.
4. **Custom Services Administration** page will appear.
5. Click on **Edit this Custom Service** link next to the **ACustom Service@** you want to edit.
6. **Edit Custom Service** dialogue box will appear. The following information is required when editing a custom service:

Service Name ⁽¹⁾	Service Code
Unit Type	Requires ADL Assessment
Requires IADL Assessment	Requires Federal Code
Requires Nutritional Risk Assessment	Requires Pre-Authorization

(1) Service Name - Do not use a service name identical to Area Agency authorized services.
7. Click on the **Save** button.

805.3: **Delete Custom Services**

You will only be able to use this function if you already have **ACustom Services@** entered into ClientTracker.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. In the **Custom Services** dialogue box, click on the **Custom Services Administration** link in the upper right hand corner of the dialogue box.
4. **Custom Services Administration** page will appear.
5. In the **Custom Service List** dialogue box, click on **Delete** in the upper right hand corner of the dialogue box.
6. The **Delete Custom Services** dialogue box will appear.
7. Click in the box next to the **ACustom Service@** you wish to delete from ClientTracker.

8. Click on the **Save** button.

806: Add/Edit/Delete Townships

This link will allow you to identify your own codes for Townships in your service area which can be used when registering clients. This function may be useful to providers in order to track of how many clients they serve for a particular Township they receive funding from. To see the Townships your organization has entered, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. Click on **Add/Edit/Delete Townships** link at the bottom of **Provider Information** page.
4. You will see a listing of all of the Townships, if any, that were entered by your agency. You have the option to edit, add, and/or delete Townships.

806.1: Add Township

If your agency would like to document in which Townships your clients reside, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. Click on **Add/Edit/Delete Townships** link at the bottom of **Provider Information** page.
4. You will see a listing of all of the Townships that were entered by your agency. You have the option to edit, add, and/or delete Townships.
5. Click on **Add** link in the upper right hand corner of the **Township** dialogue box.
6. **Add Township** dialogue box will appear. You will need to complete the following information:

Township Name	Township Code
---------------	---------------

7. Click on the **Save** button.

806.2: Edit this Township

You will only be able to use this function if you have Townships entered into ClientTracker.

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. Click on **Add/Edit/Delete Townships** link at the bottom of **Provider Information** page.
4. You will see a listing of all of the Townships that were entered by your agency. You have the option to edit, add, and/or delete Townships.
5. Click on **Edit this Township** link on the right side of the Township Name you want to edit.
6. **Edit Township** dialogue box will appear. You will be able to edit the following information regarding that Township:

Township Name	Township Code
---------------	---------------

7. Click on the **Save** button.

806.3: Delete Township

If your agency would like to delete a township that was entered by your agency, complete the following steps:

1. In ClientTracker, click on **Provider Settings** tab.
2. The **Provider Information** page will appear.
3. Click on **Add/Edit/Delete Townships** link at the bottom of **Provider Information** page.
4. You will see a listing of all of the Townships that were entered by your agency. You have the option to edit, add, and/or delete Townships.
5. Click on the **Delete** link in the upper right hand corner of the **Township** dialogue box.

6. **Delete Township** dialogue box will appear. You will only see the Townships your agency added to ClientTracker.
7. Click in the square on the left of the **Township Name** you wish to delete from ClientTracker.
8. **Choose Replacement** - you will use this function sparingly. You may use this function if a Township changes their spelling, name or if the Township is now part of another Township. If you know that you have some clients in ClientTracker registered under the Township you are deleting, then you need to replace it with another Township name. If you don't want to replace the Township, then skip the **Choose Replacement** function.
9. Click on the **Save** button.