Patient Contact Utility
Help File

Contents

Login

1. Double click on the **Patient Contact Utility (PCU) icon** to launch the application.
2. Enter or select your Login Name from the drop down select list.
3. Enter your Password, and then click the **OK** button.
    a. **NOTE**: Passwords can contain letters (upper and lower case), numbers and the following keyboard special characters (!@#$%^&*+_).

Admin – Involuntary Discharge (IVD) Data Import

1. Browse to your Network's directory and locate the IVD Excel Tracking Document.xlsx. The MS Excel document can be opened by double clicking the file.
2. Browse to your Network's shared Network directory and launch the Import_File.xls by double clicking the file.
3. Click the **Options** button located on the *Security Warning* banner, and then click the **OK** button.
4. Review the seven steps associated with the IVD Import formatting process prior to starting this effort.
5. On your keyboard, press the *Ctrl + Shift + S* keys at the same time to launch the **Import Worksheet** tool.
6. Select the four worksheets used in the IVD Excel tracking Document.xlsx, and then click the Import button.
7. When the IVD formatting is complete, a yellow box displays. Close Microsoft Excel and complete the import process within the Network Contacts Utility.

Admin – Network Custom Fields

1. Launch the application. The Network Contacts Utility is displayed.
2. Enter your utility Administrator's account and click **OK**.
3. Select the Administration tab located along the top of the utility.
4. Select the sub-tab **Lookup Tables 3** located at the top of the *Administration* tab.
5. Select the **IVD Misc.** Lookups table on the Lookup Tables 3 tab. Although the table is associated with involuntary discharge tracking, it can be used for other purposes.
    a. The following actions can be performed on the IVD Misc. Lookup Table:
        i. Add Field Values
        ii. Edit Field Values
        iii. Retire Field Values
        iv. Delete Field Values (not recommended)

1. Add Field Values:
    a. Select the last row in the list and enter appropriate values. There are four required fields to add a value to a customized drop down list.
        i. Screen_Source
            1. Patient
            2. Network

ii. Misc_Field
   1. 1 to 9
iii. Lookup_Value
   1. Any Value
iv. ORDER
   1. Number to order your list

2. Edit Field Value
   a. Any of the values associated with the lookup value, other than the ID, can be modified. It is recommended that a field is retired and a new field added instead of editing a field's Lookup Value.
3. Retire Field Value
   a. Any of the field values can be retired by checking the Retired field associated with the applicable value. When a field is retired, it is associated with past selections, but is not available for future selection.
4. Delete Field Value
   a. To delete a field value, select the values row in the *IVD Misc*. Lookup table and click **Delete** on your keyboard.

Admin – NWC Utility Install

1. Launch your Internet browser and enter ProjectCROWNWeb.org and log into the Learning Management System (LMS). Got to the Documents/Document portal for Network to download the zipped utility.
2. Open the downloaded zip file and extract the contents to your Network's designated **TRUSTED** network directory.
3. Browse to your Network's shared network directory and open the **Readme.docx** file. The readme document will contain any recent information on the utility. Launch the utility by double clicking the Network Contacts Utility.
4. The following tutorials will assist you in setting up your Network Contacts Utility prior to supporting daily network operations:
   a. SIMS Data Extract
   b. IVD Data Extract
   c. User Security
   d. Network Custom fields

Admin – SIMS Data Import

1. The Network Contacts Utility Login will be displayed. Enter your utility's *Administrator* account and click **OK**.
2. Select the Administration tab located along the top of the utility.
3. Select the sub-tab SIMS Data Import located at the top of the **Administration** tab.
4. Review all five steps associated with the SIMS import process prior to starting this effort.
5. Select the **Extract** button located in the top right corner of **Step 2**. It is important to note that the tables listed in this step are required tables for import into the utility.
6. By default the **Get External Data – ODBC Database** dialog has the *Import the source data into a new table in the current database* selected. Please click **OK**.
7. On the **Select Data Source** dialog, select the **Machine Data Source** tab and select the **CMS-ESRD-SIMS (Local SIMS Database)** data source name. Once completed, click OK.
8. On the **SQL Server Login** dialog, enter your **SIMS User Name** and **SIMS User Password**, and then click **OK**.
9. On the **Import Objects** dialog, select the required tables as defined in **Step 2**, and then click **OK**.
10. The **Import Objects** dialog will display each table as it is being imported into the utility.
11. It is not necessary to save the import steps. Select **Close** to close the dialog and complete **Step 2** of the import process.
12. In preparation to import the SIMS data, **Step 3** will remove all data from specific tables in the utility. Click the **Cleanse** button to start this process.
13. Step 4 by default is populated with the following:
    a. A cutoff year of 2000
    b. The next sequential number to be used for ongoing contacts. The default information may be modified to your choosing. Your Network's ESRD number must be entered. For example:
        i. The number 5 is entered for ESRD Network 5
        ii. The number 910 is entered for ESRD Nedtw3ork 9/10
14. After required data is entered, select the **Synch** button on **Step 4** to start the synchronization process.
15. Step 5 is the final step in the SIMS Data Import Process. This step will remove the temporary SIMS tables and requires the system to be closed and reopened. Select the **Remove** button to start the process.

Admin – Trusted Location

1. Browse to your Network's shared network directory and launch the utility by double clicking the Network Contacts Utility. When first launching the Network Contacts Utility, the Security Warning message may be displayed.
2. You will not be able to select any features in the Network Contacts Utility other than the Security Warning. Click the **OK** button to close the dialog.
3. Click the **Options** button located on the *Security Warning* banner. Select **Enable this Content**, and then click **OK**. The *Security Warning* dialog will re-launch automatically with a **Data Access Security Warning**. Click **OK** to enter the system.
4. The Network Contacts Utility Login will be displayed. Enter your utility **Administrator** account and click **OK**.
5. The Network Contact Utility enables Microsoft Access administrative functionality when the Administrator account logs into the utility. The Administrator must close and re-login to use the Microsoft Access administrative functionality.
6. On the top left corner of the utility, select the **Microsoft Windows** image and then click the **Access Options** at the bottom of the dialog.
7. On the left menu list, click **Trust Center**, and then click the **Trust Center Settings** button on the right panel.
8. Select **Trusted Locations** in the left menu and then on the right panel **Allow Trusted Locations on my network** and select **Add new location**.
9. Browse to the network directory that you chose to trust, optionally trust all the subfolders and then select **OK** at the bottom of the dialog.
10. Select the OK button at the bottom right corner on the Access Options screen to close the dialog.
11. An information dialog will be displayed indicating that the database must be closed to have settings take effect. Select **OK** to close the dialog.

Change Login Information

1. The utility may force you to change your information.
2. The Login Name must be entered and the Full Name displayed to confirm a correct Login Name selection displayed to confirm a correct Login Name selection.
3. A valid Password must be entered for the selected Login Name.
4. The Change Login Information option must be selected
5. Changing the Login Name is optional.
6. The password must be entered twice.
7. A password can contain letters (uppercase & lowercase), numbers, and the following keyboard special characters: !@#$%^&*+=? characters:!@#$%&+?.

Import Queries Reports

1. Launch the utility. The Security Warning dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click OK.
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Right click the *Administration* tab.
8. Click **Close All**.
9. Open the *Navigation Pane*.
10. Click the **External Data** tab.
11. Under the **Import Group**, click **Access**.
12. Click **Browse** and navigate to the desired file. Click **Open**.
13. Once the desired file name has been selected, click **OK**.
14. The *Import Objects* dialog box displays. Click the **Queries** tab.
15. Click **Select All**.
16. Click the **Reports** tab.
17. Click **Select All**.
18. Click **OK**.
19. The *Save Import Steps* dialog displays. Click **Close**.
20. If applicable, delete the old version of the new file just imported and rename the imported file to get rid of the 1 at the end of the file extension.
21. Close and restart Access.

IVD Data Import

1. Complete the IVD data formatting process
2. Login to the utility as the Administrator.
3. Select the Administration tab and then the IVD Data Import tab.
4. Review Steps 1 to 5 before starting the process.
5. Complete Step 2, the IVD extract, remembering to repeat for each worksheet.
6. Complete Step 3, clearing out existing utility data.
7. Complete Step 4 synch data.
8. Complete Step 5, to remove temp tables and restart the database.

Missing Contact Classification

1. Launch the utility. The Security Warning dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click OK.
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Right click the *Administration* tab.
8. Select **Close All**.
9. Click the **Database Tools** tab.
10. Click **Visual Basic**.
11. Double click the desired file.
12. Select **Form**.
13. Enter appropriate code.
14. Click **Save**.
15. Click the **Microsoft Office** icon in the upper left corner of the screen.
16. Click **Close Database**.

Network Reports

1. Launch the utility. The Security Warning dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click OK.
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Click the **Administration** tab.
8. Click the **Network Reports** tab.
9. Open the **Navigation Pane**.
10. Click **All Access Topics**.
11. Click in the **Summary** field of the first blank line and enter the desired report name.
12. Tab to the **Description** field and enter a description of the information in the report.
13. Tab to the **Export Type** field and select either **Report** or **Query** from the drop down select list.
14. Click in the **Object Name** field and enter the name.
15. Click the **QPR** Refresh button.
16. A dialog box may display informing you that a file by that same name will be deleted. Click **Yes**.
17. Click **Run Export**. The Output to dialog box displays.
18. Select the desired format, and then click **OK**.
19. Select where you want to save the exported file, and then click **OK**.
20. Right click the **Administration** tab.
21. Click **Close All**.

Setup User Security

1. Launch the utility. The Security Warning dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click OK.
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Click the **Administration** tab.
8. Click in the **Staff Name** field.
9. Enter their **Staff Name**, **Login Name** and **email address**.
10. Select **tasks** this user may perform.
11. Click **Open Contact Dashboard**.

User Bypass Security Warning

1. When first launching the *Network Contacts Utility*, this *Security Warning* message may be displayed.
2. You will not be able to select any features in the *Network Contacts Utility* other than the *Security Warning*. Click **OK** to close the dialog.
3. Click the **Options** button located on the *Security Warning* banner. Click **Enable this content**, and then click OK.
4. The *Security Warning* dialog will re-launch automatically with a **Data Access Security Warning**.
5. Click ***OK*** after reading the *Security Warning* to enter the system.

User Contact Navigation

1. Launch the utility. The Security Warning dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click **OK**.
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Click **New Contact**.
8. Select the **User ID**.
9. Select the **Contact Classification**.
10. Enter the **Facility CCN** if applicable.
11. Select the **Facility Name** if applicable.
12. Select the **Type of Caller**.
13. Enter the **Name** of the Caller.
14. Enter the **email address** of the caller.
15. Select the **Area of Concern**.
16. Click in the **Description** field and enter the description.

17. Click **Save**.
18. Click **Close**.
19. Click the **Activity Log** tab.
20. Select **New Activity**.
21. Select the **User ID**.
22. Enter **Time Spent**.
23. Enter a **Description**.
24. Click **Save Activity**.
25. Click **Close Contact**.

User Dashboard

1. Launch the utility. The Security Warning dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click **OK.**
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Click the **New Contact** tab.
8. Select the **Contact Classification**. Enter the **Caller Name**.
9. Select the **Area of Concern**.
10. Click the **Patient Info** tab.
11. Enter the **Patient's Name**.
12. Click the **Inv. Discharge** tab.
13. Enter the **Date of Last Treatment**.
14. Enter the **Date Facility Notified Network**.
15. Enter the **Date of Anticipated Discharge**.
16. Click the **Contact Info** tab.
17. Click **Save Close Contact**.

User Query Manager

1. Launch the utility. The *Security Warning* dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click **OK**.
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Click the **Query Manager** tab.
8. Click in the **Description** field and enter the description.
9. Click in the **SQL field** and paste the **code** to be tested.
10. Enter the **Start Date** and your **Network Number**.

Utility Upgrade

1. Launch the utility. The *Security Warning* dialog displays.
2. Click **OK**.
3. Click **Options**.
4. Select **Enable this content**, and then click **OK**.
5. When the *Security Warning* displays, click **OK**.
6. Select your **Login Name** and enter your **Password**, and then click **OK**.
7. Click the **Administration** tab.
8. Click the **Utility Upgrade** tab.
9. Select the **areas** to be upgraded.
10. Browse to the **upgrade file** and select.
11. Click **Upgrade Now**.