



DYS Client Manager – Manage Medical Providers Job Aid

Users

- DYS Client Manager or DYS Client Manager Supervisor

Process

These Job Aid tables describe the actions needed to manage the medical providers from the Client Manager page.

Related Job Aids

- *TM DYS CM – Access/View Client Manager*

Introduction

- The worker is able to search and add an existing Provider Name which automatically populates their associated Agency Name, Address, and Phone Number/Extension.
- If the Provider Name does not exist, the worker is able to manually enter the Provider Name, Agency Name, Address, and Phone Number/Extension.

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Access and View Medical Providers

Steps/Output	Screenshot																																																																																												
<p>Refer to the <i>TM DYS CM – Access/View Client Manager Job Aid</i> for details on locating the desired Client Manager.</p>																																																																																													
<p>In the Left Navigation Panel:</p> <ol style="list-style-type: none"> 1. Click Medical Providers. <p>This navigates to the <i>Medical Providers</i> section.</p>	<table border="1"> <thead> <tr> <th>Provider Type</th> <th>Provider Name</th> <th>Agency Name</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>Physician</td> <td>Libacme Ores</td> <td>Cuevme Hjr</td> <td>1/13/2018</td> <td></td> </tr> <tr> <td>Dentist</td> <td>Libacme Dehs</td> <td>Cuevme Gcc</td> <td>1/13/2018</td> <td></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> <th>Reason for Security Level</th> <th>Initial Security Level</th> <th>Modified Security Level</th> <th>Date of Commitment</th> </tr> </thead> <tbody> <tr> <td>1/25/2018</td> <td></td> <td></td> <td>Secure</td> <td></td> <td>1/10/2018</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Change Date</th> <th>Reason</th> <th>Mandatory Parole Start Date</th> <th>Projected Parole</th> <th>Projected Discharge Date</th> </tr> </thead> <tbody> <tr> <td>12/17/2019</td> <td>Parole</td> <td>12/17/2019</td> <td>11/11/2017</td> <td>9/17/2020</td> </tr> <tr> <td>8/8/2019</td> <td>Escape</td> <td>12/17/2019</td> <td>11/11/2017</td> <td>8/17/2020</td> </tr> <tr> <td>7/27/2019</td> <td>Escape</td> <td>12/12/2019</td> <td>11/11/2017</td> <td>8/12/2020</td> </tr> <tr> <td>1/10/2018</td> <td>New</td> <td>12/11/2019</td> <td>11/11/2017</td> <td>8/11/2020</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>CJRA ID</th> <th>Calculation Date</th> <th>Client ID</th> <th>Prescreen Date</th> <th>Case ID</th> <th>Risk Level</th> <th>Created By</th> <th>Entered</th> </tr> </thead> <tbody> <tr> <td>1097764</td> <td>12/5/2017</td> <td>1698247</td> <td>12/5/2017</td> <td>1849509</td> <td>High</td> <td>SB-94</td> <td>Brianna F</td> </tr> <tr> <td>1097529</td> <td>12/1/2017</td> <td>1698247</td> <td>12/1/2017</td> <td>1849509</td> <td>High</td> <td>SB-94</td> <td>Cristen S</td> </tr> <tr> <td>1086204</td> <td>10/2/2017</td> <td>1698247</td> <td>10/2/2017</td> <td>1849509</td> <td>High</td> <td>SB-94</td> <td>Angela Lu</td> </tr> <tr> <td>1065224</td> <td>7/19/2017</td> <td>1698247</td> <td>7/18/2017</td> <td>1849509</td> <td>High</td> <td>SB-94</td> <td>Richard F</td> </tr> </tbody> </table>	Provider Type	Provider Name	Agency Name	Start Date	End Date	Physician	Libacme Ores	Cuevme Hjr	1/13/2018		Dentist	Libacme Dehs	Cuevme Gcc	1/13/2018		Start Date	End Date	Reason for Security Level	Initial Security Level	Modified Security Level	Date of Commitment	1/25/2018			Secure		1/10/2018	Change Date	Reason	Mandatory Parole Start Date	Projected Parole	Projected Discharge Date	12/17/2019	Parole	12/17/2019	11/11/2017	9/17/2020	8/8/2019	Escape	12/17/2019	11/11/2017	8/17/2020	7/27/2019	Escape	12/12/2019	11/11/2017	8/12/2020	1/10/2018	New	12/11/2019	11/11/2017	8/11/2020	CJRA ID	Calculation Date	Client ID	Prescreen Date	Case ID	Risk Level	Created By	Entered	1097764	12/5/2017	1698247	12/5/2017	1849509	High	SB-94	Brianna F	1097529	12/1/2017	1698247	12/1/2017	1849509	High	SB-94	Cristen S	1086204	10/2/2017	1698247	10/2/2017	1849509	High	SB-94	Angela Lu	1065224	7/19/2017	1698247	7/18/2017	1849509	High	SB-94	Richard F
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Add Medical Provider

Steps/Output	Screenshot
<p>In the <i>Medical Provider</i> section:</p> <ol style="list-style-type: none"> 1. Click the Actions drop-down arrow in the <i>Medical Provider</i> section header. 2. Select Add Medical Provider. <p>The <i>Add Doctor/Dentist</i> pop-up window displays.</p>	
<p>In the <i>Add Doctor/Dentist</i> pop-up window:</p> <ol style="list-style-type: none"> 3. Click the Provider Type* drop down arrow. 4. Select the appropriate option. 	



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5. Use the calendar option in **Start Date*** and select the appropriate date.

Note: The date fields can be entered manually.

The screenshot shows the 'Add Doctor/Dentist' form in the DYS Client Manager system. The form is open over a background of the system interface. The 'Start Date*' field is highlighted with a red box, and a calendar icon is visible next to it. The 'End Date' field is also highlighted with a red box and has a calendar icon. The 'Provider Name*' field contains the text 'Dr. Ois Ortho'. Other fields include 'Provider Type*' (Orthodontist), 'Date Seen' (MMDDYYYY), 'Agency Name' (Comfortable Dental), 'Address', 'Phone' (970-867-5309), and 'Provider/Services Comments' (asdf asdf/aspoef).

6. Click in the **Provider Name*** text field and enter the provider information.

The screenshot shows the 'Add Doctor/Dentist' form in the DYS Client Manager system. The 'Provider Name*' field is highlighted with a red box, and the text 'Dr. Ois Ortho' is visible. The 'Start Date*' and 'End Date' fields are also highlighted with red boxes and have calendar icons. Other fields include 'Provider Type*' (Orthodontist), 'Date Seen' (MMDDYYYY), 'Agency Name' (Comfortable Dental), 'Address', 'Phone' (970-867-5309), and 'Provider/Services Comments' (asdf asdf/aspoef).



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7. Continue completing the remaining fields.

When all information is completed:

8. Click **Save** to save the medical information or **Cancel** to close without saving.



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This saves the update and returns you to the *DYS Client Manager Detail – Medical Provider Screen.*

The screenshot shows the 'Medical Providers' section of the DYS Client Manager interface. The table below is a representation of the data shown in the screenshot:

Medical Provider	Dr. Osa Oshio	Comfortable Dental	End Date
Orthodontist	Dr. Osa Oshio	Comfortable Dental	3/2/2020
Orthopedics	Dr. Osa Oshio	Comfortable Dental	3/2/2020
Dentist	Libacme Delia	Cuevme Goc	1/13/2018
Physician	Libacme Oesa	Cuevme Hjr	1/13/2018

Below the table, there are sections for 'Security Level', 'Length of Stay', and 'CJRA PreScreening'. The 'Security Level' section shows a table with columns: Start Date, End Date, Reason for Security Level, Initial Security Level, Modified Security Level, and Date of Commitment. The 'Length of Stay' section shows a table with columns: Change Date, Reason, Mandatory Parole Start Date, Projected Parole, and Projected Discharge Date. The 'CJRA PreScreening' section shows a table with columns: CJRA ID, Calculation Date, Client ID, Prescreen Date, Case ID, Risk Level, Created By, and Entered.



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Edit Medical Provider

Steps/Output	Screenshot
<p>In the <i>Medical Provider</i> list:</p> <ol style="list-style-type: none"> Click the provider name link under the Provider Name column for the desired entry. <p>This opens the <i>Edit Medical Provider</i> pop-up window.</p>	
<p>In the <i>Edit Medical Provider</i> pop-up window:</p> <ol style="list-style-type: none"> Update Provider Type*, Start Date*, Provider Name*, and all other necessary fields. <p>Note: The date fields can be entered manually.</p>	



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When all changes are complete:

3. Click **Save** to save the changes or **Cancel** to close without saving.

This saves the update and returns you to the *DYS Client Manager Detail – Medical Provider Screen*.

Provider Type	Provider Name	Agency Name	Start Date	End Date
Dentist	Dr. Denny Dentist	Smiles Dental	4/1/2020	3/31/2021
Orthopedics	Dr. Otis Ortho	Comfortable Dental	3/2/2020	
Orthodontist	Dr. Otis Ortho	Comfortable Dental	3/2/2020	
Physician	Libacme Oexs	Cuewme Hxjr	1/13/2018	

Start Date	End Date	Reason for Security Level	Initial Security Level	Modified Security Level	Date of Co
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12/17/2019	Parole	12/17/2019	12/11/2017	9/17/2020
8/8/2019	Escape	12/17/2019	12/11/2017	8/17/2020
7/27/2019	Escape	12/12/2019	12/11/2017	6/12/2020
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