

# WebSPOE Updates

Release Date: April 30, 2019

## System Enhancements

**Progress Notes – Add Save Draft Button and Draft Status**

**Impacted Users: Providers, Agency**

**MWS-9622**

A Save Draft button will be added to both the Daily Therapy Log and Monthly Progress Notes entry pages. The current “Save” button will be renamed and display as “Confirm”.

With the new Confirm and Save (Draft) buttons, an informational “i” will appear beside each button to give the user an explanation of explanation of each button.

The save draft button is an optional button that will allow Providers and Agencies to save incremental data entered on a progress note. Only the Provider and Date of Service fields are required to save a draft.

### Daily Progress Note – Save Draft Button

The screenshot displays a web form for entering a Daily Progress Note. At the top, there are several required fields: \*Provider (with a redacted name), Provider Specialty (Speech Language Pathologist, E...), \*Date of Service (MM/DD/YYYY), and Entry Date (4/18/2019). Below these are checkboxes for 'No Service Delivered', \*Time in (hh:mm AM/PM), \*Time out (hh:mm AM/PM), and \*Service Setting (a dropdown menu). A 'View Active Outcomes' button is located to the right of the Service Setting field. The form contains two large text areas: '\*Visit Summary:' and 'Provider Comments:'. At the bottom of the form, there are three buttons: 'Confirm Therapy Log' (with an information icon), 'Save(Draft)' (with an information icon), and 'Cancel'.

**Monthly Progress Note – Save Draft Button**

The screenshot shows a web form for entering a Monthly Progress Note. At the top, there are fields for Provider (redacted), Provider Specialty (Speech Language Pathologist, E...), Entered By (redacted), and Entry Date (4/18/2019). Below these are fields for Month (April) and Year (2019). A section for Date(s) of Service includes a checkbox for 'No Services Delivered' and a list box with '<< Add' and '>> Remove' buttons. A text area asks if visits were canceled or made up. Another text area is for the Progress Summary. A larger text area is for Provider Comments. At the bottom right, three buttons are visible: 'Confirm Progress Note', 'Save(Draft)' (highlighted with a blue arrow), and 'Cancel'.

The Progress Notes grid will also be updated to display the status of Daily Therapy Logs and Monthly Progress Notes. Notes in draft status will only display in the Agency and Providers grid and will show a status of “Draft”.

The Progress Notes Due homepage query will not remove children from the list when only a draft note is entered. They will be removed from the query when the note is confirmed (i.e., the provider is done entering the note).

**Progress Notes Grid – New “Status” Column**

| Progress Notes                 |                |                                       |   |  |  |  |
|--------------------------------|----------------|---------------------------------------|---|--|--|--|
| Provider: <input type="text"/> |                |                                       |   |  |  |  |
| Date: MM/DD/YYYY               | To: MM/DD/YYYY | <input type="button" value="Search"/> | <input type="button" value="Print List"/> | <input type="button" value="Add Daily Therapy Log"/> | <input type="button" value="Add Monthly Progress Note"/> |  |
| Month                          | NoteType       | Provider                              | Discipline                                | Status   | ReviewedDate   |  |
| 4/11/2019                      | Daily          |                                       | Speech Language Pathologist, EI Examiner  | Draft  |  |  |
| 3/1/2019                       | Monthly        |                                       | Speech Language Pathologist, EI Examiner  | Reviewed   | 4/1/2019   |  |
| 2/1/2019                       | Monthly        |                                       | Speech Language Pathologist, EI Examiner  | Reviewed   | 3/6/2019   |  |
| 1/1/2019                       | Monthly        |                                       | Speech Language Pathologist, EI Examiner  | Reviewed   | 1/31/2019  |  |
| 12/1/2018                      | Monthly        |                                       | Speech Language Pathologist, EI Examiner  | Reviewed   | 12/27/2018   |  |
| 11/1/2018                      | Monthly        |                                       | Speech Language Pathologist, EI Examiner  | Reviewed   | 12/3/2018  |  |

(6 items)

**Progress Notes – Add Outcomes Popup**

**Impacted Users: Provider,  
Agency, SPOE**

**MWS-9623**

A pop-up window will be added to the Daily Therapy Log and Monthly Progress Notes pages to allow the user to view the active outcomes associated to the IFSP period for the progress note date of service for the child. The button will be inactive until the date of service is entered. Once a date of service is entered, the pop-up window will display the active outcomes as “view only”.

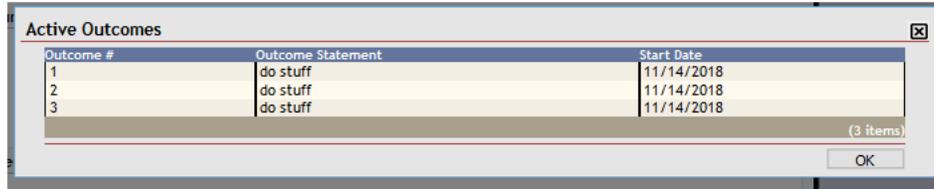
*Daily Therapy Log – View Active Outcomes button enabled when Date of Service entered*

The screenshot shows a form for a Daily Therapy Log entry. Fields include: Provider (redacted), Provider Specialty (Speech Language Pathologist, E...), Date of Service (04/03/2019), Entry Date (4/18/2019), Time in/out, and Service Setting. A "View Active Outcomes" button is circled in red. Below the form are sections for "Visit Summary" and "Provider Comments", and buttons for "Confirm Therapy Log", "Save(Draft)", and "Cancel".

*Monthly Progress Note – View Active Outcomes button enabled when at least 1 Date of Service entered*

The screenshot shows a form for a Monthly Progress Note. Fields include: Provider (redacted), Provider Specialty (Speech Language Pathologist, E...), Entered By (redacted), Month (April), Date(s) of Service (4/4/2019), Entry Date (4/18/2019), and Year (2019). A "View Active Outcomes" button is circled in red. A calendar for April 2019 is displayed, with the 18th highlighted. Below the form are sections for "Were any visits canceled or made up this month?", "Progress Summary", and "Provider Comments", and buttons for "Confirm Progress Note", "Save(Draft)", and "Cancel".

*Example:  
Active Outcomes Popup Window Displays Active Outcomes for the IFSP Period based on the entered  
Date of Service*



|   |   |                 |
|---|---|-----------------|
| <b>Progress Notes – Increase Max Characters</b> | <b>Impacted Users: Provider, Agency</b> | <b>MWS-9624</b> |
|---|---|-----------------|

A request was made to increase the space to enter data for Daily Therapy Logs and Monthly Progress Notes.

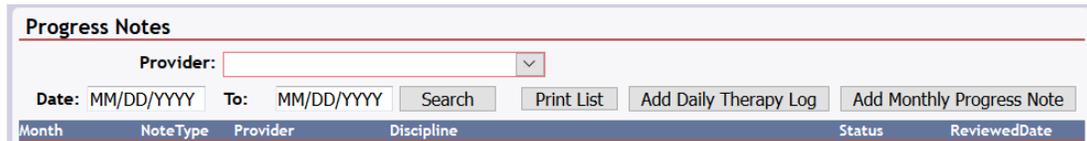
- Daily Therapy Logs: “Visit Summary” and “Provider Comments” fields increased to allow 8,000 characters.
- Monthly Progress Notes: “Were Any Visits Canceled or Made Up?”, “Progress Summary” and “Provider Comments” fields increased to allow 8,000 characters.

|                                     |   |                 |
|-------------------------------------|---|-----------------|
| <b>Progress Notes – Add Filters</b> | <b>Impacted Users: Provider, Agency, SPOE, CFO, State</b> | <b>MWS-9625</b> |
|-------------------------------------|---|-----------------|

Filters will be added to the Progress Notes Page to allow the user to search a date range or provider within the progress notes for a child.

The “Print List” report will be modified to generate the report based on the entered filters. When no filter is entered, the “Print List” will generate a report to print all progress notes.

*Progress Notes Filters*



**Bug Fixes**

|   |                               |                 |
|---|-------------------------------|-----------------|
| <b>Progress Notes – Provider Search</b> | <b>Impacted Users: Agency</b> | <b>MWS-9126</b> |
|---|-------------------------------|-----------------|

A bug was reported in the Provider Search on Progress Notes. When an Agency does a search by provider, the search results will display all First Steps providers that meet the search criteria. The system has been corrected to only display providers associated with the agency that meet the search criteria.

|   |   |                 |
|---|---|-----------------|
| <b>End Enrollment – Coordinator End Dates</b> | <b>Impacted Users: SPOE, State, CFO</b> | <b>MWS-9673</b> |
|---|---|-----------------|

A bug was reported that all Intake and Service Coordinator end dates were changed to the child’s end enrollment date. This occurred when the child’s record was closed. The system has been corrected to only end date active Intake and/or Service Coordinators with the child’s end enrollment date.