FOTO OUTCOMES MANAGER

PRACTICE ADMINISTRATOR TRAINING GUIDE

FOCUS ON® THERAPEUTIC OUTCOMES INC

OUTCOMES MANAGER

Version 032717

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Why FOTO?

FOCUS ON® THERAPEUTIC OUTCOMES INC

BENEFITS FROM MEASURING OUTCOMES WITH FOTO

Medicare Compliance

FOTO is the tool to assist with the new Claims-Based Outcomes Reporting (CBOR) required for all Medicare B patients. FOTO has measures – both Functional Status (FS) Measures developed by FOTO and additional measures like NeuroQOL, ABC Scale, ADL Module, etc. – to calculate functional modifiers for all the G-Codes defined in the rule.

More Efficient Evaluations

At Intake, your patient spends a few minutes at the computer answering questions about how well they are able to do their usual activities. This information is printed on a report that the therapist has immediate access to and can use to focus the patient evaluation quickly.

Better Patient Management

The Patient Specific Reports that print as each survey is completed help clinicians monitor patient progress against the risk adjusted (age, severity, acuity, body part) aggregate in FOTO's database. Immediately identifies if the patient is not achieving expected functional change.

Better Patient Communication

The Patient Specific Reports can be used to better communicate with patients about expectations for progress and the course of treatment. One client reports that using the predictive information on number of visits and duration to gain patients' buy in has resulted in a reduction of no show / cancellation rate to 4%.

Better Communication with Referring Physicians and Payers

The Patient Specific Reports can be used to fortify communication with Referring Sources, Physicians and Payers. The Functional Health Status Summary provides a very easy to read graph – if it is going up, the patient is getting better. Some clients circle the graph and the measure of patient satisfaction – very quick recap of progress with patient episode.

Enhanced Marketing to Referral Sources

The Outcomes Profile Reports provide a unique Marketing Opportunity to Referring Physicians and Payers. To begin with, many clients send the first graph page of the reports with a letter to their referral sources explaining that their top priority is providing quality care for their patients and that they can prove it. That page compares the percent of physical functional change, average visits, functional change per visit, average duration, and patient satisfaction to the national aggregate. You can go a step further than that and use custom referral tracking in the software to actually provide an outcomes profile report sorted only for the patients from that referral source. This encourages the referral source to send more of their referrals to you because this is information they would have difficulty obtaining elsewhere.

▶ Enhanced Marketing Directly to Patients

FOTO provides awards and recognition for excellence in patient care. These can be displayed in your facility. We also provide press release templates that have been very effective in announcing honors to your local news media and articles generated from that. That is the kind of press that has a credibility that money can't buy.

INDUSTRY TRUSTED

FOTO is the trusted choice for measuring rehabilitation outcomes . . .

▶ Endorsed by the National Quality Forum

FOTO's Functional Status Change Measures have been endorsed by the National Quality Forum (NQF) whose mission is to improve the quality of American healthcare. NQF sets national priorities and goals for performance improvement, endorses national consensus standards for measuring and publicly reporting provider performance and promotes the attainment of national quality goals through education and outreach programs.

▶ Chosen by CMS to Measure Value-Based Purchasing

FOTO conducted a CMS-funded study on the feasibility and impact of implementing a pay-for-performance for patients receiving physical or occupational therapy services under Medicare Part B using FOTO's Value Purchasing Payment Algorithm, which is based on measuring treatment effectiveness (functional improvement) and efficiency (resource utilization).

▶ Approved for CMS' Physician Quality Reporting System (PQRS)

FOTO's Functional Status Change Measures have been accepted into PQRS and are recognized as valid, reliable and responsive outcomes measures. PQRS is a reporting program that uses a combination of provider (eligible professional) payment adjustments to promote reporting of quality metrics describing care. FOTO is also an approved data registry for PQRS.

▶ Recommended by CMS for Functional Limitation Reporting

The Congressional and CMS mandate for 2013 (CMS-1590-FC) required therapy providers to report patients' functional limitations using a severity modifier and a G code to identify the most important impairments. FOTO was recommended by CMS to determine and report functional status.

▶ Recommended by CMS for Documenting Medical Necessity

In CMS Transmittal 63 (Outpatient Therapy Cap Exceptions Process for Calendar Year 2007), FOTO was identified as an approved tool to provide documentation of medical necessity when care exceeds the Medicare therapy cap.

. . . FOTO is the Outcomes Measurement Standard

measure outcomes | manage quality | market strengths

ENDORSEMENTS

FOTO *IS* THE STANDARD FOR MEASURING PATIENT OUTCOMES IN PHYSICAL REHABILITATION

FOTO is a private sector outcomes measurement company that has been selected by many national organizations and publications:

- **ENDORSED BY AMERICAN PHYSICAL THERAPY ASSOCIATION (APTA) SECTIONS**
  The APTA Private Practice Section and Section on Women's Health have endorsed FOTO as the recommended tool for their members in measuring outcomes.

- **MANDATED BY THE PHYSICAL THERAPY PROVIDER NETWORK (PTPN)**
  PTPN, the country's first and largest network of independent rehabilitation therapists in private practice, has required the use of FOTO since 2007 for Quality Assurance and for participation in Pay-for-Performance Initiatives.

- **CHOSEN BY INSURANCE COMPANIES FOR PAY-FOR-PERFORMANCE**
  FOTO's Outcomes Measurement Tools and Reporting Services are currently being used in Pay-for Performance initiatives by HealthPartners (Minnesota) and Louisiana Blue Cross Blue Shield. Additional projects with health insurance plans are in development.

- **INTEGRATED WITH ELECTRONIC HEALTH RECORD VENDORS**
  FOTO has all the essential elements to accomplish integration with any electronic health record, documentation or billing system. Currently, nine EHRs have live integrations with FOTO, and development is ongoing.

- **PUBLISHED IN RESPECTED SCIENTIFIC JOURNALS**
  FOTO currently has 87 articles published in peer-reviewed journals including:
  - American Journal of Occupational Therapy
  - Archives of Physical Medicine & Rehabilitation
  - International Journal of Therapeutic Rehabilitation
  - Journal of Clinical Epidemiology
  - Journal of Hand Therapy
  - Journal of Manual & Manipulative Therapy
  - Journal of Occupational and Environmental Medicine
  - Journal of Orthopedic and Sports Physical Therapy
  - Journal of Prosthetics and Orthotics
  - Journal of Rehabilitation Outcomes
  - Measurement
  - Medicine
  - Physical Therapy
  - Physiotherapy Canada
  - Quality of Life Research Applied Measurement
  - Spine

CHECKLIST

GETTING YOUR CLINIC READY

As the owner/manager of your organization, you have the ability to clearly define and implement work-flows and procedures in your clinics. The better FOTO is implemented into the work-flow of your clinics, the more value it delivers and the less effort it requires.

There are several questions to consider/answer before getting started using the FOTO Outcomes Measurement System:

COMMUNICATE THE **WHY**

As the decision maker in your organization, you understand the importance of the FOTO Outcomes Measurements System. But what about your staff? Our experience shows that successful FOTO implementation works best when all members of your staff are not only trained to use the FOTO system, but also are aware of their role in the data collection process and how it will affect patient outcomes.

DETERMINE THE **HOW**

Decide how your patients will complete the surveys. By tablet or kiosk at the clinic? By email at home prior to their first appointment? Do you have the necessary equipment? It takes on average 5-7 minutes for your patient to complete the intake survey. It is always a good idea to request that your patients arrive a few minutes before the scheduled appointment so that they have plenty of time to complete the survey prior to seeing the Clinician.

ASSIGN THE **WHO**

- Identify your FOTO Administrator. This person's main role is to set-up and manage employee registrations, select default settings, receive and review quarterly reports.
- Delegate who is responsible for patient set-up in the FOTO system, who is responsible for administering Intake and Status Surveys, and who is responsible completing for Staff Discharge.
- Recommend establishing a FOTO Champion team on staff comprised of at least one support staff member and one clinician who can serve as the "Go To" staff in your organization for FOTO process issues.

ESTABLISH THE **WHEN**

It is important that support staff and Clinicians understand the importance of when to collect each of the surveys required to complete an episode. By setting your expectations or establishing a set collection procedure, this allows for a higher completed episode rate and more data collected.

The Intake Survey- It should be given before the patient begins treatment, ideally before meeting the Clinician. This allows the Clinician to have access to the important information on the survey report and helps establish the expectations and goals of therapy sessions.

The Status Survey- When will your patients take their status survey? Once a week? Every _ visits? The #1 recommendation is to get at least 1 status on an interim basis, in addition to the final/discharge status. Research suggests that having at least 2 total status' is associated with better outcomes. It may be because this gives the therapist an opportunity to make sure the therapists' perception of the patient's function matches the patient's perception, to facilitate communication with the patient, and be a tool to help inform clinical decision-making just like other tests and measures would be utilized throughout the course of the patient's care. So, a general guideline might be "every 5th visit". However, your clinic will need to establish the standard that works best for you.

The Final Status Survey- It is very important that the final status survey be taken as close to the date of the last appointment. Ideally the survey is taken either at check-in or check-out the day of the last appointment.

The Staff Discharge- When will your staff record patient discharge information in the FOTO system? The day of the final visit just after completion of the Final Status Survey? A specified day of each week? An episode in FOTO will not be complete until the Patient has completed a status survey and your staff has recorded the discharge in the FOTO system.

Are you ready to start using FOTO?

☑ Checklist to get Started

☐ Identify who at your organization will fill the role of FOTO Administrator

☐ Identify your FOTO Champions

☐ Identify and purchase (if needed) required computers or tablets

☐ Arrange for your Information Technology staff or department to set up computers and tablets and connect them to Internet if needed

☐ Participating Staff and Clinicians fully understand the WHY, the HOW, the WHO, and the WHEN and are comfortable with their new responsibilities

☐ Complete FOTO orientation for you and your staff either by:

☐ Registering for one of the **online open trainings** at:

http://www.fotoinc.com/customers/new-users-training

Viewing the **On-Demand Training Module** at:

http://www.fotoinc.com/training

Scheduling a training time with your FOTO Provider Representative.

HOW TO INTRODUCE FOTO TO YOUR STAFF

A successful implementation of FOTO at your organization depends on a team approach. We suggest you plan to hold several meetings with your staff.

- Staff Introduction to FOTO
- Planning for FOTO kick-off
- Group training
- Follow-up meetings

The number of meetings required varies from one organization or clinic to another, but these meetings are vital to establishing best practices for outcomes collection with your organization. Your FOTO Provider Relations Representative will be happy to assist in planning, be available by teleconference or online to attend these meetings, help introduce the Outcomes Measurement System to your staff, as well as to train them in their roles.

FOTO INTRODUCTION

THE WHAT:

When introducing FOTO, it may be a good time to distribute the materials in the FOTO welcome pack.

It is important that your staff understands the WHAT and WHY. WHAT exactly is the FOTO Outcomes Measurement System? The better your staff understands the WHAT and WHY and how Outcomes will improve quality of care for your patients, the more excited they will be to use Outcomes Measures.

FOTO outcomes will assist with:

- Improving Quality of Patient Care through Evidence Based Practice
- Facilitating Research and Advocacy Opportunities
- Marketing Services to Patients

Since 1992, FOTO has established an impressive track record of delivering comprehensive, cost-effective, and high-quality outcomes analysis. FOTO combines integrity, dedication and state-of-the art methods to develop measures that are precise, efficient, valid and reliable. Using the most sound and defensible science, we provide analysis and assistance to clinicians facilitating the most effective rehabilitation therapy.

What is the FOTO Outcomes Measurement System?

The FOTO Outcomes Measurement System determines, very efficiently, three primary scores for your patient:

- The **initial** functional status measure,
- The **predicted** change in functional status measure, and
- The **actual** change in functional status measure.

When you understand these three main measures, and how they work together, you will begin to discover the power and value of the FOTO Outcomes Measurement System to your outpatient rehabilitation practice.

Initial Functional Status Measure

At admission, the patient completes an assessment specific to the body part or impairment that needs treatment. From these responses the functional status measure score is calculated. This is a score between 0-100 that represents the patient's functional ability.

Predicted Change in Functional Status Measure

FOTO uses 1O risk-adjustment criteria to ensure that the predictions we make are reflective of the patient's characteristics. This is important both for accuracy and precision in national comparative and functional limitation reporting.

Actual Change in Functional Status Measure

Patients complete an assessment as needed during care and on the last visit to track the improvement of function. That amount of change is then compared to risk-adjusted national predictions from FOTO, providing a measure of treatment effectiveness.

THE WHY:

The Power and Value of Outcomes

Value in Predicted Outcomes per Patient

Immediately after the initial survey, but before your patient begins treatment, we provide not only the functional status measure, but also, based on a very large data sample, we provide:

- A risk-adjusted, predicted change in function, and
- The average number of visits required to achieve that predicted outcome.

On a case-by-case basis, the predicted change and visits help set expectations and reasonable goals with your patient and contributes to improved compliance during the course of treatment. Of course, each case and patient will be different. Some will exceed the predicted outcome, some will not for various reasons. However, as the FOTO Outcomes Measurement System is adopted into the workflow of your practice, data accumulates and patterns begin to emerge. Here begins the payoff.

Power of Aggregated Outcomes

Each quarter, FOTO publishes outcome profile reports. Your outcomes are compared against a national mean of outcomes drawn from over 2700 other clinics. Since the comparison is a benchmark against a risk-adjusted mean, the comparison is a useful “apples-to-apples” one which is highly instructive.

Our scorecards and reports show the data multiple ways:

- by effectiveness (how much patients are improving),
- by efficiency (how many visits it takes to achieve that improvement),
- by utilization (how much improvement per visit), and
- by patient satisfaction.

Reports can be filtered or grouped by clinician, clinic, and organization, as well as by care type, body part or impairment, etc.

PLANNING FOR FOTO KICK-OFF

Now that your staff understands the WHAT and WHY, it is time to progress to the planning stages for the FOTO Kick-off. This is a good time to communicate the WHO, HOW, and WHEN of FOTO. Or get your staff feedback in this planning process. They might have ideas that you hadn’t thought of.

THE WHO:

Announce WHO will be your FOTO Administrator and FOTO Champion team. By communicating the WHO to your entire staff, as well as explaining their roles and responsibilities, everyone will know the correct individual to contact for all things related to FOTO. Additional questions to address at this time are:

- Who is responsible to setting up the intake survey? Support staff?
- Who is responsible for the status surveys? Support staff or the clinician?
- Who is responsible for patient discharge? If it is support staff, how does the clinician communicate when a patient is ready for discharge?

THE HOW:

Show your staff how your patients will complete the surveys. By tablet or kiosk at the clinic? By email at home prior to their first appointment? Since it takes on average 5-7 minutes for your patient to complete the intake survey, it is always a good idea to have your staff start to request that your patients arrive a few minutes before the scheduled appointment so that they have plenty of time to complete the survey prior to seeing the clinician.

THE WHEN:

It is important that support staff and clinicians know when to collect each of the surveys required to complete an episode. By communicating your collection procedures, this allows for a higher completed episode rate and more data collected.

The Intake Survey- It should be given before the patient begins treatment, ideally before meeting the clinician. This allows the clinician to have access to the important information on the survey report and helps establish the expectations and goals of therapy sessions.

The Status Survey- Communicate when your patients should take their status survey. Every 5^{th} visit, every 4-6 visits, etc. The first recommendation is to get at least 1 status on an interim basis, in addition to the final/discharge status. Research suggests that having at least 2 total status' is associated with better outcomes. It may be because this gives the therapist an opportunity to make sure the therapists' perception of the patient's function matches the patient's perception, to facilitate communication with the patient, and be a tool to help inform clinical decision-making just like other tests and measures would be utilized throughout the course of the patient's care. So, a general guideline you may wish to adopt might be "every 5th visit".

Ideas for Status Assessment Frequency

- A standard # of visits throughout the episode (i.e.: every 6th visit) ***and*** on last date of service/or/ at least 1 status on an interim basis in addition to the final discharge status.
- Perhaps every Thursday & Friday are set as Status Assessments days (Thursday's for those patients who are seen 2x/week and Fridays for patients who are seen 3x/week)
- When the patient is returning to the MD
- Any visit when the clinician identifies significant change in physical activity status or achievement toward treatment goals
- At time of re-evaluation or when Plan of Care is revised
- Any time when the clinician suspects the patient may not return for continued care

The Final Status Survey- It is very important that the final status survey be taken as close to the date of the last appointment. Ideally the survey is taken either at check-in or check-out the day of the last appointment. Often, a patient will self-discharge, so you may not know when the actual last visit is. That is why we recommend you get the patient to complete a status survey once every 4-6 visits so you can still get an accurate outcome from patients who self-discharge.

The Staff Discharge- Communicate when your staff should record patient discharge information in the FOTO system. The day of the final visit just after completion of the Final Status Survey? A specified day of each week? An episode in FOTO will not be complete until the Patient has completed a status survey and your staff has recorded the discharge in the FOTO system.

STAFF TRAINING(S) FOR FOTO OUTCOMES

Provide FOTO Contact information to your staff. Your FOTO Provider Relations Representative is here to ensure your staff is trained on the FOTO System. Confirm that your Administration, Support Staff, and Clinicians have all signed up for a training webinar with the FOTO Provider Relations Representative. It might be beneficial to have separate trainings- one for admin, one for support staff, and one for clinicians.

FOLLOW-UP MEETINGS(S) FOR FOTO OUTCOMES

We suggest a monthly follow-up meeting for first quarter of your FOTO implementation. Your FOTO Provider Relations Representative will be happy to attend these meetings via conference call. This is when users have more in depth questions that the Provider Relations can address.

COMMON CONCERNS FROM STAFF

It is not uncommon to encounter some resistance from staff at first if they do not understand WHAT the FOTO Outcomes Measurement Systems is able to accomplish. Support staff often see it as more work in their already busy day. Clinicians can be reluctant because feel they are being "judged." As a result FOTO is not positively presented and explained to your patients. Patients will value what the staff values.

Addressing Support Staff Concerns:

How much time will this take?

The Intake survey takes an average of 5-10 minutes to complete. The Status Surveys take an average of 5-7 minutes to complete. The Staff Discharge can be completed in only 1 minute.

How do I schedule the time for patients to complete these surveys when they already have so much paperwork to fill out?

We recommend allotting this time prior to the appointment time with the clinician. For example, if the time to see the clinician is 10:30, why not confirm the appointment time with your patient for 10:15. Or suggest they arrive early. Even if you have sent out the survey for them to complete by email, this allows time should they have not completed it prior to their arrival.

How do I introduce this to Patients?

We recommend sharing the suggesting scripting in **"How to Introduce FOTO to your Patients"** with your support staff. This is available in the resource center for your use.

Addressing Clinicians Concerns:

I already use similar surveys so why repeat?

FOTO has many of the surveys that you may be using available as Optional Surveys in the FOTO system. Since the patient is able to complete the surveys electronically, this automatically scores the optional tool and prints the score on the FOTO Surveys. This not only saves valuable time, but is more efficient since all of your information is now on one report.

How will this be helpful?

Value in Predicted Outcomes per Patient

Immediately after the initial survey, but before your patient begins treatment, we know not only the functional status measure, but also, based on a very large data sample, we know

- A risk-adjusted, predicted change in function, and
- The average number of visits required to achieve that predicted outcome.

On a case-by-case basis, the predicted change and visits help set expectations and reasonable goals with your patient and contributes to improved compliance during the course of treatment. Of course, each case and patient will be different. Some will exceed the predicted outcome, some will not for various reasons. However, as the FOTO Outcomes Measurement System is adopted into the workflow of your practice, data accumulates and patterns begin to emerge. **Here begins the payoff.**

I don't want to be judged?

Areas where you are not performing as well as the mean are revealed – these represent opportunities to manage and improve. "Bright spots" are easily identified – where you are doing better than the mean – and prove you have something you can market to referral sources and payers. One clinician in your organization may be doing well with back patients but not as well with knee patients. Another clinician may be doing well with knee patients but not as well with neck patients. Each report or scorecard is an opportunity to improve, or market, your clinic or organization.

How do I explain this to Patients?

We recommend sharing the suggested scripting in **"**STANDARDS FOR ADMINISTRATION OF ASSESSMENTS**"** with your clinicians. Again, this document is available in the resource center.

SYSTEM REQUIREMENTS

Basic system requirements are as follows:

- **Browser Compatibility**
  - Mozilla Firefox
  - Internet Explorer (v9 or later)
  - Chrome
  - Safari
- **JavaScript and cookies**
  - Must be enabled
- **Portable Document Format (PDF)**
  (Only required for viewing reports)
  - Any recent Adobe Acrobat Reader (with browser plugin)
  - Any 3rd-party compatible viewer (non-preferred)
  - Note that Chrome and Firefox browsers have built-in PDF rendering that satisfies this requirement

Whitelist Information

Please be sure to Whitelist the following for internet, email and at the organization server level if needed:

- Patient-inquiry.com
- Fotoinc.com
- Mandrillapp.com

Tablet Information

- Same as system requirements
- QR reader (recommended)

GETTING STARTED –

ADMINISTRATIVE LOGIN SCREEN

Initial Login

FOTO will register each company and clinic. The Administrator will receive a verification e-mail which contains a link to the login screen. Click on the link in this email to access the login screen.

The Administrator should use the password provided by FOTO to access the system initially.

Release Notes

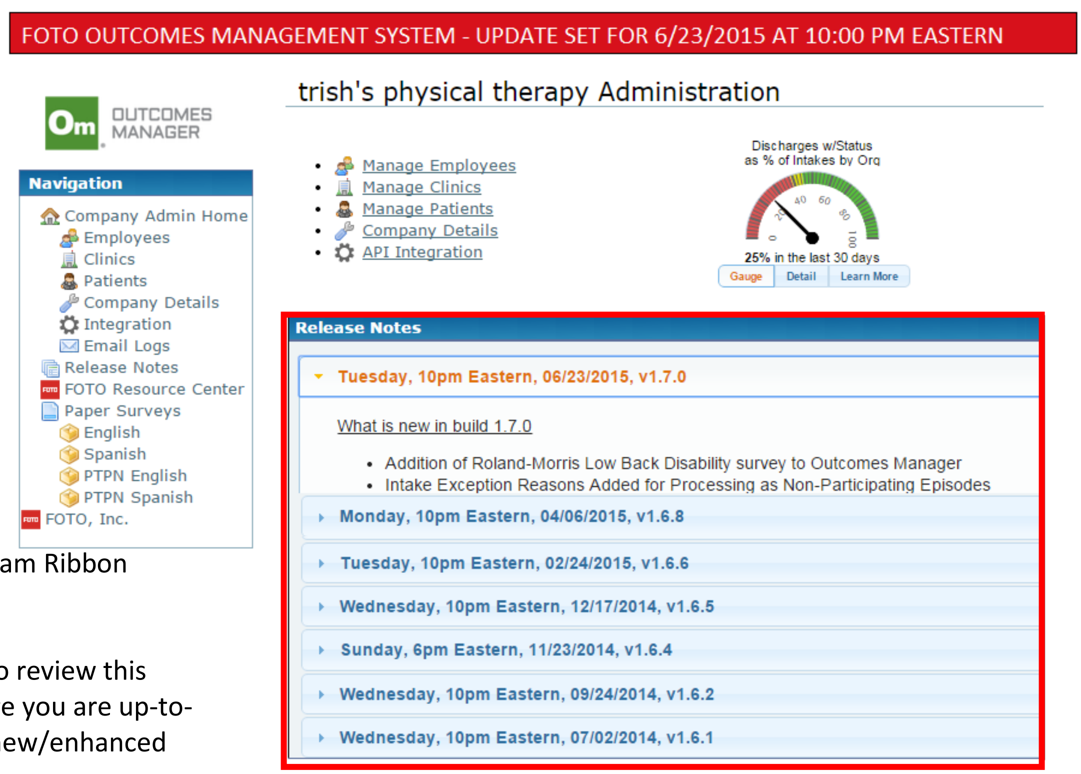
Once the Login button is clicked, the very first screen that opens is the Company Admin Home Screen which contains a section called "Release Notes".

As FOTO upgrades the system, the updates are downloaded to all FOTO Users.

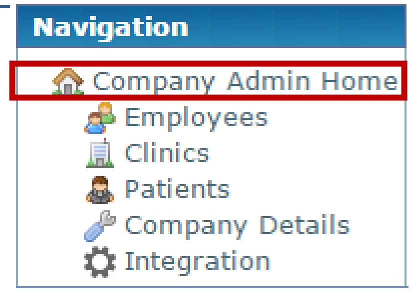
To keep you informed of these changes and provide you with instructional materials regarding these changes, the release notes will appear in the first login screen.

Notifications will appear about one week prior to upgrade releases in the Program Ribbon Bar at the top of your screen.

FOTO encourages our users to review this Release note screen to be sure you are up-to-date with any upgrades and new/enhanced features.



Navigation Bar: Company Admin Home



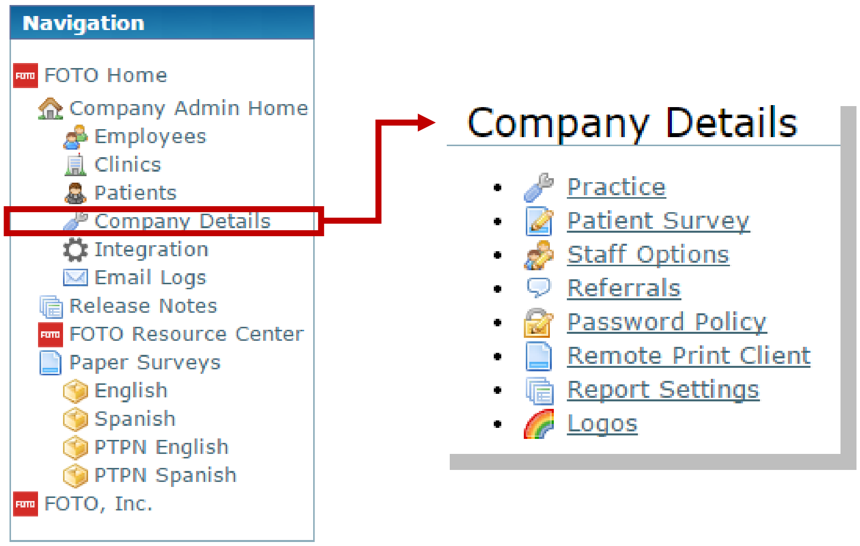
Administrative tasks will be completed at **Company Admin Home**, including:

- **Employees:**
  Registering & Managing Support Staff and /or Clinicians
- **Clinics** :
  Edit clinic details or revised email message defaults
- **Patients** :
  Delete "Test" patients and accessing Patient Management Information
  (requires signing in as Support Staff User)
- **Company Details** :
  Change or add company details, set survey assessment defaults, report defaults, etc.
- **Integration**
  API Code Links to integrate FOTO with other electronic vendor systems

Each of these Administrative Tasks will be described in the following sections.

COMPANY DETAILS

The following tasks are managed from Company Details:



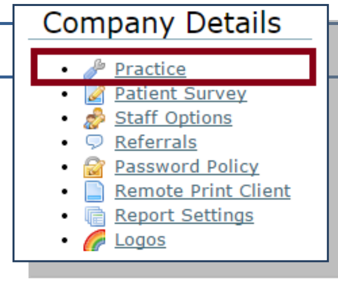
Defaults will be set in this area for your organization. Defaults set in these windows will apply to all of your clinics/ offices if you are a multi-site organization. The areas that can be accessed here include:

- **Practice** - This screen allows company details to be added / edited, including revising the Administrative Password and security question/response.
- **Patient Survey** – Preselect specific options and surveys to be completed for all patients.
- **Staff Options** – Select staff discharge and Care Type options.
- **Referrals** – This screen allows custom referral code entry to track Physician Referrals, Insurance Referrals, Employer Referrals, and Other Referrals.
- **Password Policy** – Allows the administrator to set the complexity level for all user passwords based on the security level required by the organization.
- **Remote Print Client** – Enable the print client to complete the auto print installation process
- **Report Settings** - select options for the presentation of patient specific reports
- **Logos** – Upload logos which will surface on your FOTO Web screens and Patient Specific Reports

Editing your password and validating the Practice Screen will be one of the first tasks an Administrator will complete. The remaining tasks in Company Details can be completed/revised at any time before or after initiation of data collection and will probably change as you mature in your data collection activities.

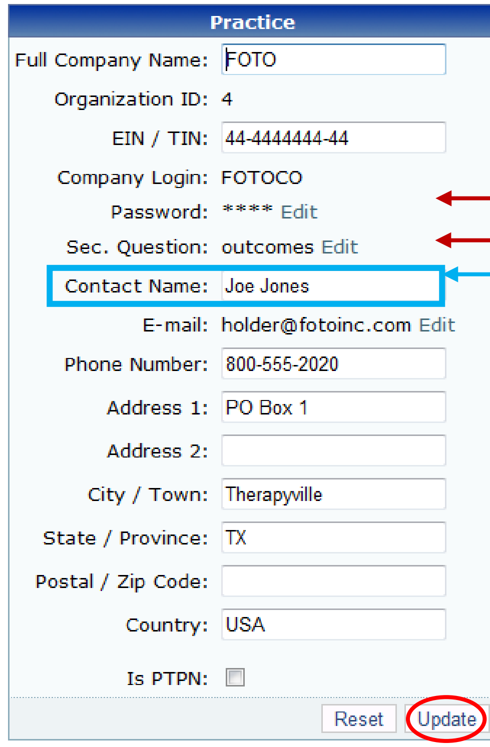
You may want to verify your Practice Screen and passwords and then move to EMPLOYEE REGISTRATION before completing the remainder of these default screens.

Practice Information & Administrative Password



Click on **Practice**, under Company Details: It is the Administrator's responsibility to assure that the practice Information is correct. Note, this is organizational information. If your organization has more than 1 clinic the individual clinic information will be verified under "Clinics" in Company Details, not in this "Practice Section".

Verify the following is accurate in the Practice Screen:



- **Full Company Name** – the name of the Group/Organization
- **EIN / TIN** – this area is for the Tax ID of your organization.
- **Password** – this is the Administrator password
  - Click **Edit** to change (*see Password Policy Defaults section*)
  - Note that the new password will need to be shared with other clinic Administrators, if any.
- **Security Question** – this is the Administrator security question and answer
  - Click **Edit** to change
  - The current password must be entered
- **Contact Name** - should be the name of the person serving as the main contact/administrator for the application.
- **E-mail and Phone Number** – should be for the person serving as the main contact/administrator.
  - Click **Edit** to change the E-mail
- Other fields should be updated as needed.

Click **Update** when finished

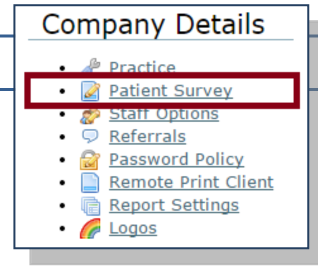
Note: Administrative Password and Security Question / Answer may be changed by clicking EDIT.

This person is the Administrator or "Contact" for the Practice.

The Password and Security Question/Answer initially provided by FOTO should be changed by clicking **Edit** in the Practice box under Company Details (as shown above). Please note the following:

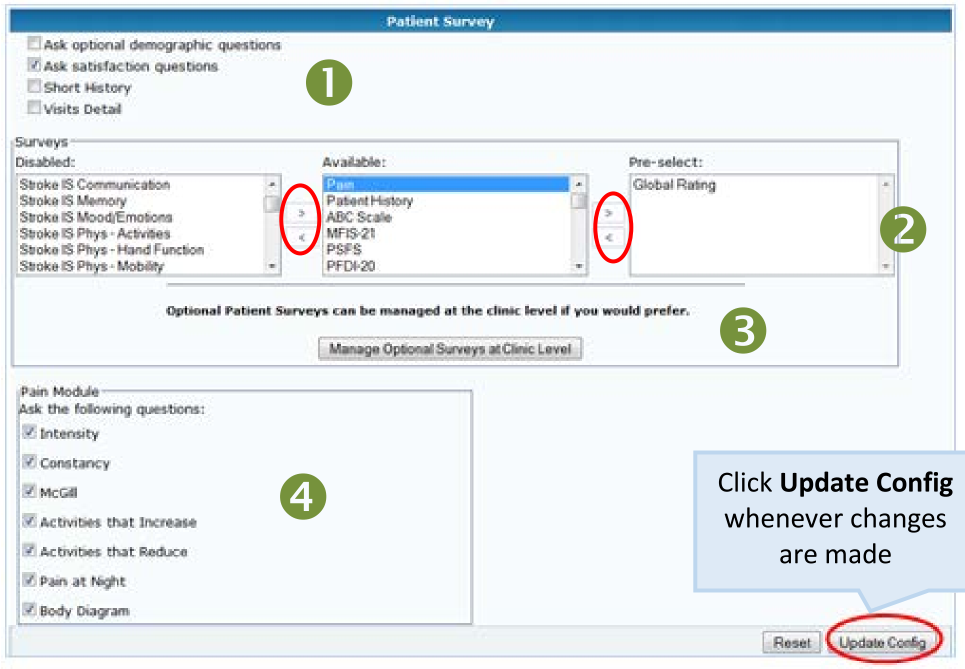
- **Do not share the Administrator login and password** with anyone other than those who will also serve as Administrators.
- The Administrator login should **NOT** be used by staff to routinely access the patient episode screens. This should be done through a Support Staff User login (See section, *Employees (Employee Management)*).
- **When an Administrator login is entered incorrectly five (5) times or more**, it will be locked out and can only be unlocked by FOTO. If everyone is using this login, everyone will be locked out.
  - FOTO will only give the admin login information to the Administrator or "Contact" for the Practice.

Patient Survey Default Settings



The **Patient Survey** section of Company Details allows the Administrator to set the Defaults for Optional Patient Surveys. **Defaults set in this screen will apply to ALL patient episodes**.

Before selecting optional Surveys to default, it is recommended the Optional Survey document be reviewed from the Resource Center to view the questions/scoring & references associated with the survey.



1 At the top of the screen, the check box may be selected to activate the following features:

- **Ask optional demographic questions** – the patient is asked 6 demographic items relating to prior and current military service, race, ethnicity, education level, and income level. However, the patient still has the option of bypassing these questions by selecting **Next**.
- **Ask satisfaction questions** – must be selected for satisfaction questions to be given on the Status Survey.
- **Short History** – This option shortens the Patient History optional survey if selected.
- **Visits Detail** – allows the clinician to track the number of visits by provider (PT, PTA, OT, COTA, etc.)

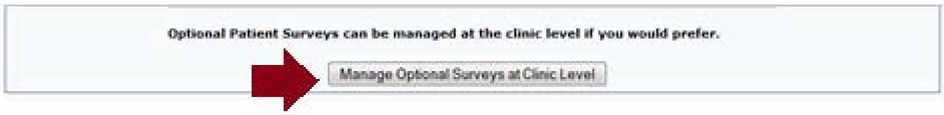
2 Optional Surveys may be set as Disabled, Available or Pre-selected. To Move a Disabled Survey to the Available box or to move an Available survey to the Pre-Selected box, simply click on the survey and use the **>** to move forward or **<** to move back.

Optional Surveys are ONLY available for collection with electronic survey collection with the exception of the PQRS Measure surveys which are available via paper forms for data entry.

- **Disabled** – Optional surveys in this field will not be available to add to the Patient Survey Episode.
- **Available** – Optional surveys in this field are able to be selected when creating each new patient episode. So even though they are not set as a default for all patients, they can be selected during the patient set-up process.
- **Pre-select** – Optional surveys in this field will be automatically appended to the Patient Survey Episode.

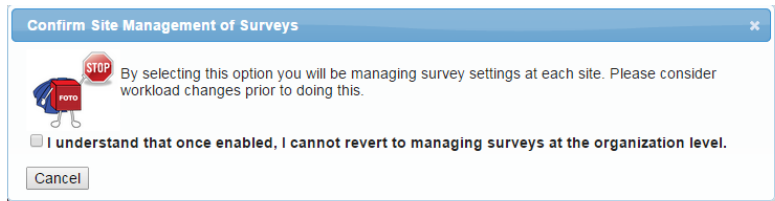
- Even though you have selected PQRS Measure surveys as pre-selected, the program will only include these in the episode <u>if the patient meets the criteria established for the measure by CMS (age and paysource)</u>.

❸ **Manage Optional Surveys at Clinic Level –** If you have a multi-site organization and the pre-selected or required optional surveys must be different for each clinic, the Administrator can opt to manage the survey defaults by each individual clinic. Click this button to manage these settings individually for each clinic.

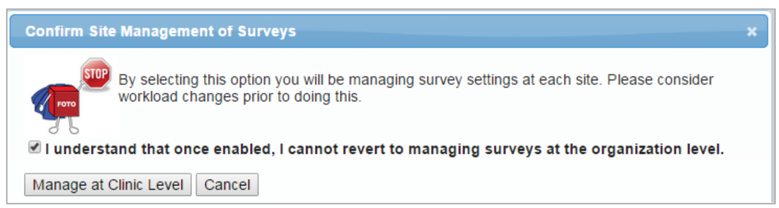


It is recommended that Administrators first set any standard optional surveys they may want to apply to all patients/sites *<u>BEFORE</u>* moving to setting defaults at the clinic level.

A warning message will appear notifying you that once you select clinic level default management, <u>you will be unable to return to the Organizational default settings for these surveys</u>.

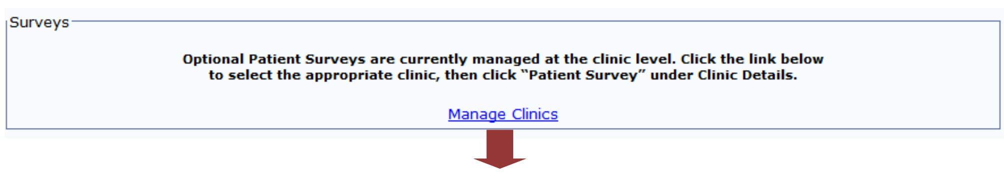


To confirm the clinic level selection, click in the box verifying your intent to set further defaults at the clinic level. Then select Manage at Clinic Level.

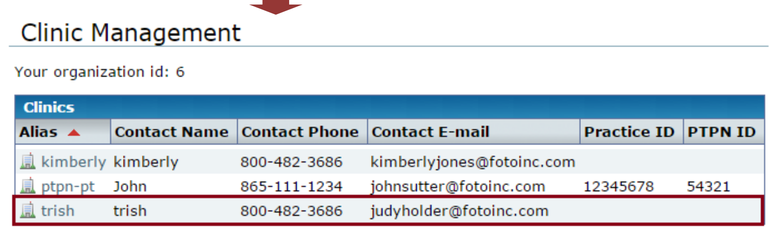


Once this selection is made, the Patient Survey window will direct you to go to Manage Clinics to set these defaults at the clinic level.

Click on Manage Clinics.

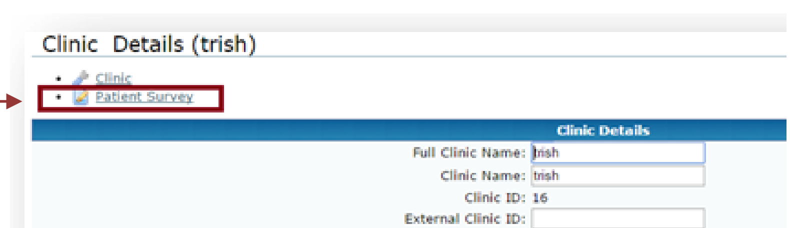


The list of your clinics (sites) will open.
Click on the "Alias" of the clinic site that you want to access.

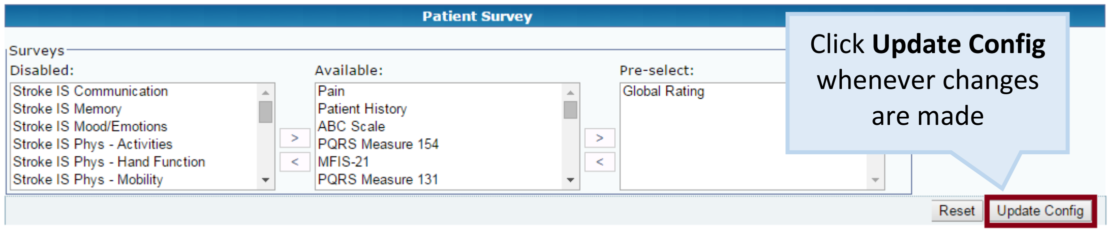


Alias	Contact Name	Contact Phone	Contact E-mail	Practice ID	PTPN ID
kimberly	kimberly	800-482-3686	kimberlyjones@fotoinc.com		
ptpn-pt	John	865-111-1234	johnsutter@fotoinc.com	12345678	54321
trish	trish	800-482-3686	judyholder@fotoinc.com		

This will open the Clinic Detail Screen.
Click on Patient Survey.



The Administrator can now set the optional survey selections for this clinic (site).

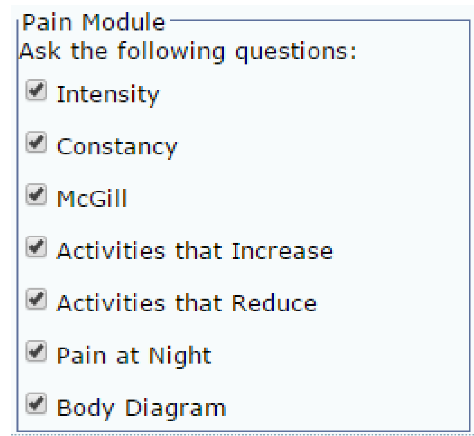


Pain Module

If the Administrator opts to set the Pain Module as Available for selection during the patient set-up process or sets as a Pre-Selected for all patient episodes, the Administrator can select the components of the Pain Module.

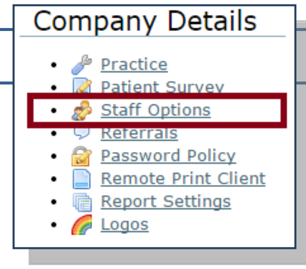
In the bottom portion of the Patient Survey Screen there is a section for selection of the various components of the Pain Module. All pain module components are activated by default. To deselect or deactivate a component, simply click on the checkbox to remove the checkmark. Again, be sure to click on the "Update Config" button to save the default changes.

The components of the Pain Module are outlined in the Optional Survey resource document for your review.



Complete information on all Optional Surveys can be viewed in the "Optional Survey Descriptions" guide which is found under "Instructional Guides" in the FOTO Resource Center.

Staff Option Defaults - Staff Discharge Screen & Care Types



Options are available for the information the Administrator wants to capture in the Staff Discharge screen and selection of the Care Types available for use under Staff Options.

Staff Discharge Default Options

- **<u>Off</u>** – Any option selected as “Off” will not show on the Staff Discharge screen.
- **<u>Avail</u>** – Any option marked “Avail” will show on the Staff Discharge, but will not require the user to complete the fields in order to finish the discharge.
- **<u>Required</u>** – Options marked “Required” will require the user to complete the fields before the discharge can be completed.

Click **Update** when changes have been made.

<u>Description of Staff Discharge selections include:</u>

- **<u>APTA Practice Pattern</u>** – documents the Musculoskeletal, Neuromuscular, Cardiovascular/Pulmonary and Integumentary practice pattern code based on the classification of the patient as a result of the physical therapist’s evaluation history, systems review, and tests and measures.
- **<u>Smart Tracks Code</u>** – If you use this documentation system, this field allows you to enter the unique tracking code for impairment.
- **<u>Global Rating Scale</u>** – Documents the amount of improvement achieved by the patient during the episode valued by the clinician from -7 to +7 (0=baseline status of the patient at the time of the evaluation). *(Note: The patient may also complete the same Global Rating scale if activated in the optional surveys).*
- **<u>Staff Utilization</u>** – Documents the percentage of time the patient was treated by staff during the episode based on role: PT, PTA, OT, OTA, etc.
- **<u>Goals / Results</u>** – Documents the percentage of goals achieved during the episode of care (by clinician report).
- **<u>Exercises, etc.</u>** - Documents the type of procedures, exercises, and modalities (physical agents) that were provided to the patient during the episode of care to track treatment regime.
- **<u>Who Discharged</u>** – Documents who made the decision to discharge the patient from clinical therapeutic care.
- **<u>ICD9 / ICD10</u>** – Allows tracking of specific diagnosis codes tied to the patient’s episode of care, allows for 1 primary diagnosis code and 1 secondary code.

- **Patient Co-pay** - Documents the insurance co-pay based on insurance plan/verification

- **Net Revenue** – Documents the anticipated net revenue for the episode (minus insurance adjustments/ discounts, etc.).

- **Compliance** - Documents the Acceptable or Unacceptable patient compliance with Attendance, Home Program, and Effort.

- **Show Net Revenue** – If checked, the anticipated Net Revenue entered for this episode will surface on the Staff Discharge Report, compared with the average Net Revenue of risk-adjusted episodes nationally who are tracking net revenue.

- **Referral Source Type** - Allows selection of the type of referral source for this episode as an additional dimension such as Neurologist, Orthopedist, General Practice, Podiatrist, etc.

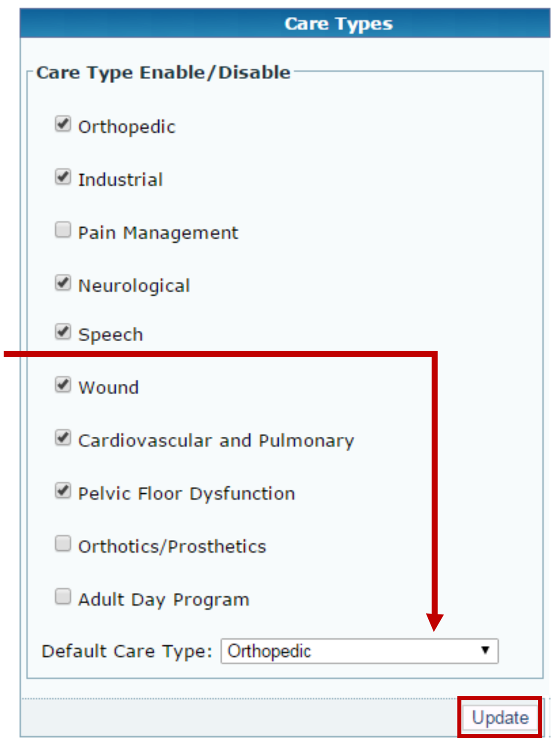
Care Type Default Selections

The Administrator can set the defaults for the available Care Types that can be selected for patient episodes. These defaults can be changed by clicking in the checkbox to add or remove available care types.

Only Care Types that have been activated in this screen will be available for use with patient episodes.

The Administrator can also select the Care Type that will automatically default into the episode set-up screen.

For example, if you practice is primarily an orthopedic practice, setting the Default Care Type to Orthopedic will be beneficial. Even though you have set the Default Care Type in this screen, the other care types that have been activated in this screen will be available during the episode set-up process by clicking on the drop box in this field.



Complete information on Care Types can be viewed in the "Care Type Descriptions" guide which is found under "Instructional Guides" in the FOTO Resource Center.

Referrals Tables (Optional)

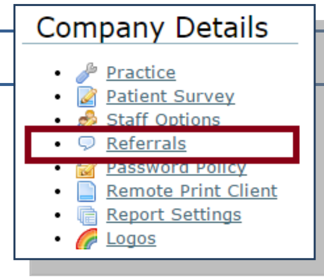


FOTO provides an option of tracking outcome information by tying each patient episode to a physician referral source, employer, insurance company and/or “other” source.

The Referral Tables can be built and managed by the Administrator.

Select type of referral source from the tabs

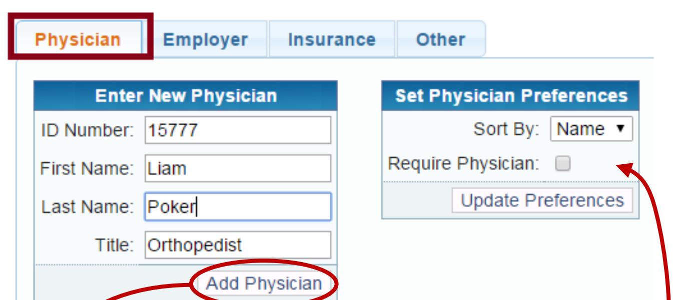
Depending on the referral source table, the fields to be completed will vary:

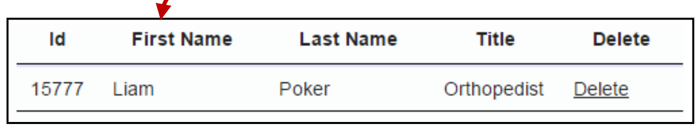
Table Type	Required	Optional
PHYSICIAN	ID Number❶, First Name, Last Name	Title
EMPLOYER	ID Number❶, Name	Miscellaneous
INSURANCE	ID Number❶, Name	Miscellaneous
OTHER❷	ID Number❶, Name	Miscellaneous

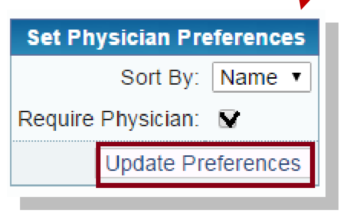
❶ The ID number can be any sequential number of your choice. If you have an existing table built into your billing or electronic medical record, you can use this as the ID Number in FOTO as well. However, this needs to be a **numeric** ID number.

❷ Other Table can be used, for example, to tie episodes to a special program(s) within your organization.

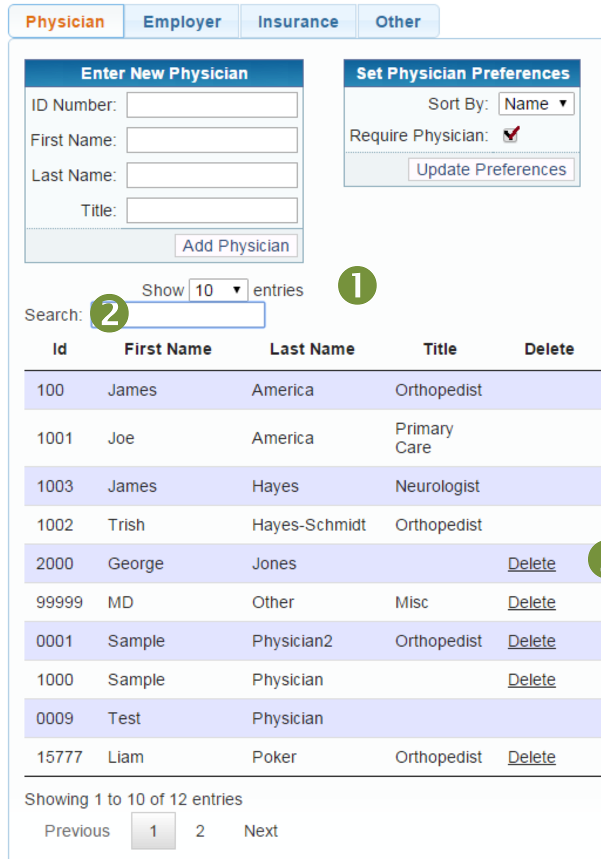
1. Select the Table you want to establish/edit (in our example, we selected the Physician Table).
2. Enter the appropriate information for the referral, then click the “**Add…..**” button (“Add Physician” shown here).
3. Once you select “Add …”, you will see the referral source added to the list below the “Enter” screen.
4. Repeat process to add another referring physician, etc.
5. You can set the Preferences for the Referral Source Table to:
   - Show the drop down menu in Name order or ID number order.
   - Require the referral field completion before Discharge can be completed.
   - When selections made, be sure to UPDATE PREFERENCES.







The Administrator can add to this tables at any time.



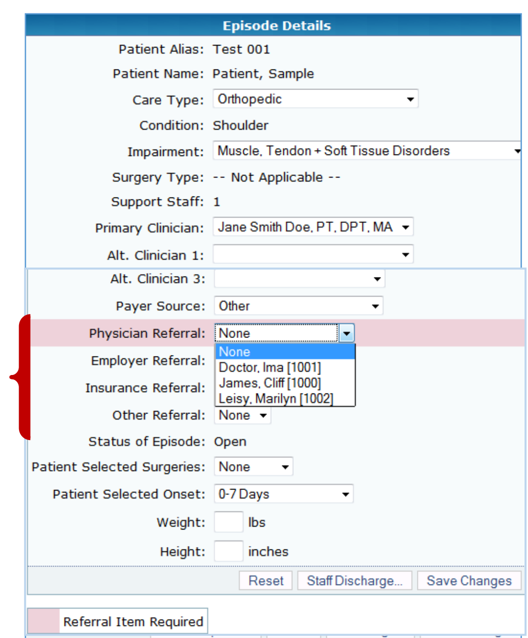
Id	First Name	Last Name	Title	Delete
100	James	America	Orthopedist	
1001	Joe	America	Primary Care	
1003	James	Hayes	Neurologist	
1002	Trish	Hayes-Schmidt	Orthopedist	
2000	George	Jones		Delete
99999	MD	Other	Misc	Delete
0001	Sample	Physician2	Orthopedist	Delete
1000	Sample	Physician		Delete
0009	Test	Physician		
15777	Liam	Poker	Orthopedist	Delete

1. You can select the # of entries to be shown in the table from 10-100.
2. This table list can be searched by typing the name or ID in the Search field, which will surface only that specific referral source in the table.
3. You can "delete" a referral table entry from the list <u>ONLY</u> if the entry has not been selected or tied to a patient episode. <u>*Once it is tied to an episode, if revision is needed, please contact your FOTO Provider Representative*</u>.

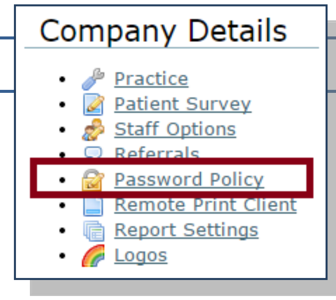
The created referrals will be available for selection in the <u>Patient Episode Details</u> screen.

If the referral is set as <u>required</u>, the field will be highlighted pink and this field **<u>MUST BE COMPLETED</u>** before the episode can be discharged in FOTO.

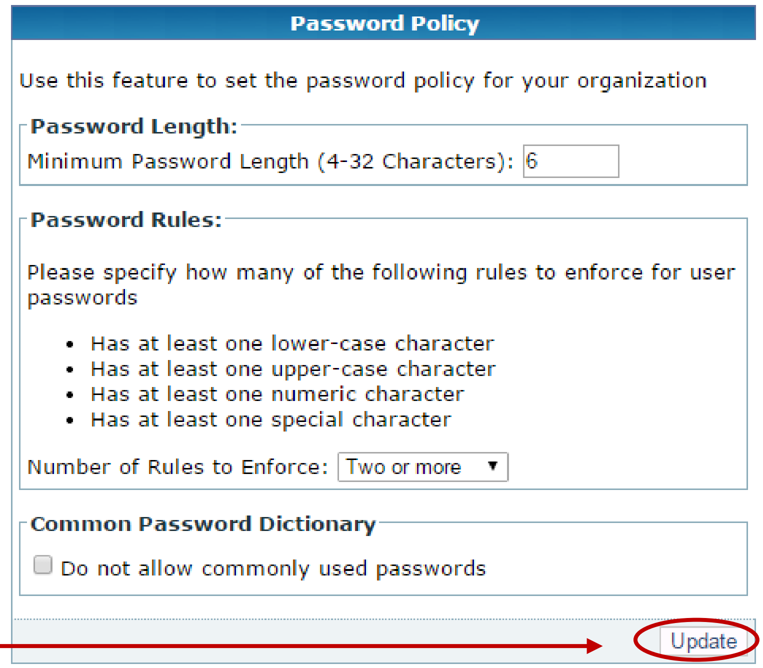
All Referral information is tied to the episodes in the Episode Detail Screen. In our example, only the Physician table was set as required If the Employer, Insurance Co, or Other Referral table had been selected as required, these fields would be highlighted on the Episode Detail screen as well.



Password Default Policy



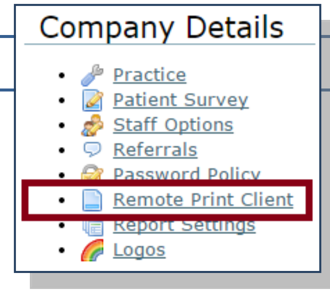
Password Policy allows the Administrator to set the complexity level for all users passwords based on the security level required by the organization.



- **<u>Password Length</u>** – Minimum password length can be set to as few of 4 characters or as many as 32 characters with the base default set at 6. Type the number of characters desired in the Minimum Password Length field.
- **<u>Password Rules</u>** – Set the number of rules which must be met when creating passwords. The lowest level, which is also the base default, is two or more. The highest level is all four. Choose the selection from the drop down menu.
- **<u>Common Password Dictionary</u>** – Commonly used passwords which can be easily guessed, such as abc123, will not be allowed when the box is checked to NOT allow commonly used passwords.

Click **Update** to save any changes.

Remote Print Client



The Remote Print Client (also referred to frequently as **Auto Print**) is a feature that sends your Patient Specific Reports (Intakes, Status Assessments and Discharges) directly to your default printer, alleviating the need for your staff to manually access and send the reports to your printer for view by the clinicians and inclusion in the medical record.

The Remote Print Client can also be set to automatically save your reports in a PDF format to a file of your designation (frequently referred to as **Auto Save**). This is a feature that is utilized frequently by subscribers who want an easy way to move the reports into the electronic medical record.

If you click on the Remote Print Client, you will see a message regarding enabling of this feature.

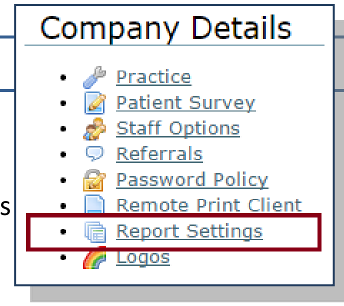
Once enabled, do not change the password unless instructed to do so by FOTO Support.

Please note that this application should be installed on <u>only one desktop computer per site.</u>

For installation or support, please contact FOTO Support Services at:

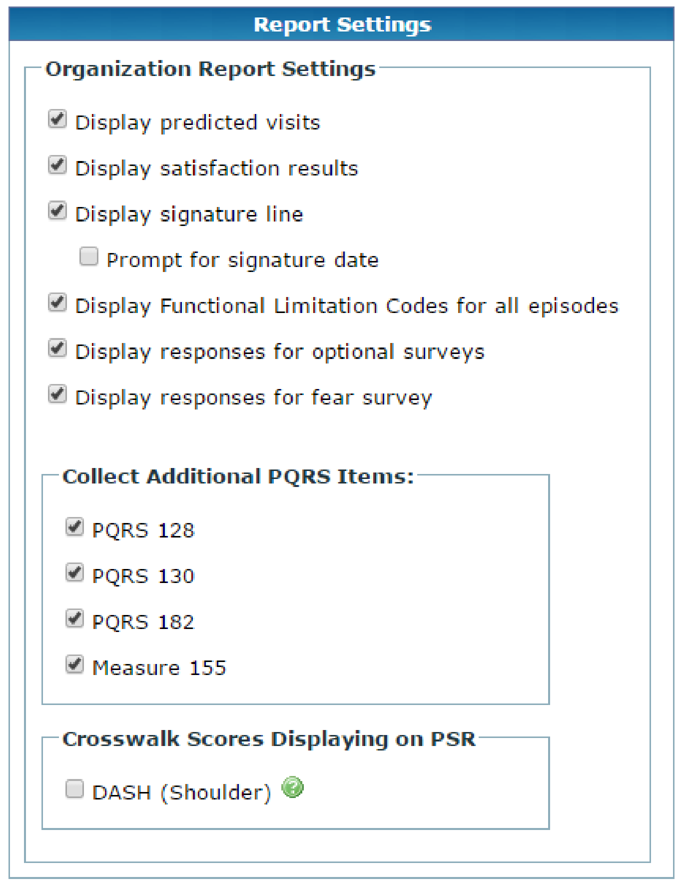
- 800-482-3686 and select the option for Technical Support
- support@fotoinc.com

Report Setting – Defaults for PSFRs



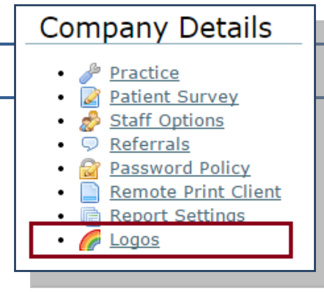
The Administrator can select the features that surface (or print) on the Patient Specific Functional Reports (Intakes & Status). Select options for Patient Specific Reports ☑ to activate or clicking on the checkbox to remove.

- **Display predicted visits** – will print the predicted visits for the episode
- **Display satisfaction results –** will print the patient responses and resulting satisfaction score on the report
- **Display signature line** – displays a signature line for the clinician signature
- **Prompt for signature date** – if the signature line is displayed, activating this box will also insert an area for the date the report was signed



- **Display Functional Limitation Codes for all episodes –** if selected, Functional Limitation (FLR) G-codes will display for all episodes regardless of Payer Source. If not selected, they will only show for Medicare B and Medicare C patients.
- **Display responses for optional surveys –** Optional Survey scores will always appear on the reports. However, the patient's responses to the individual questions is not automatically displayed in addition to the score unless this feature is activated.
- **Display responses for fear survey –** displays Physical Fear FABQ / Work Fear survey questions and patient responses on reports.
- **Collect Additional PQRS Items** - Select one or more of these additional PQRS measures to be captured. These will NOT be included on all patient episodes – only the patient episodes with Medicare as the Pay Source and the patient is age appropriate. If not capturing and reporting PQRS measures, deactivate these fields to remove references to these measures on the reports and staff discharge.
- **Crosswalk Scores Displaying on PSR** - A mathematical **Crosswalk from the FOTO FS score to other Legacy tools** can be included in the PSFRs (Patient Specific Functional Reports – Intake & Status). The benefit is that the legacy tool does not need to be administered to produce this crosswalk score. The Crosswalk is turned off as a default in the Administrative settings. However, if you want the crosswalk scores, this can be activated by clicking in the checkmark box for the legacy tool(s) in this screen

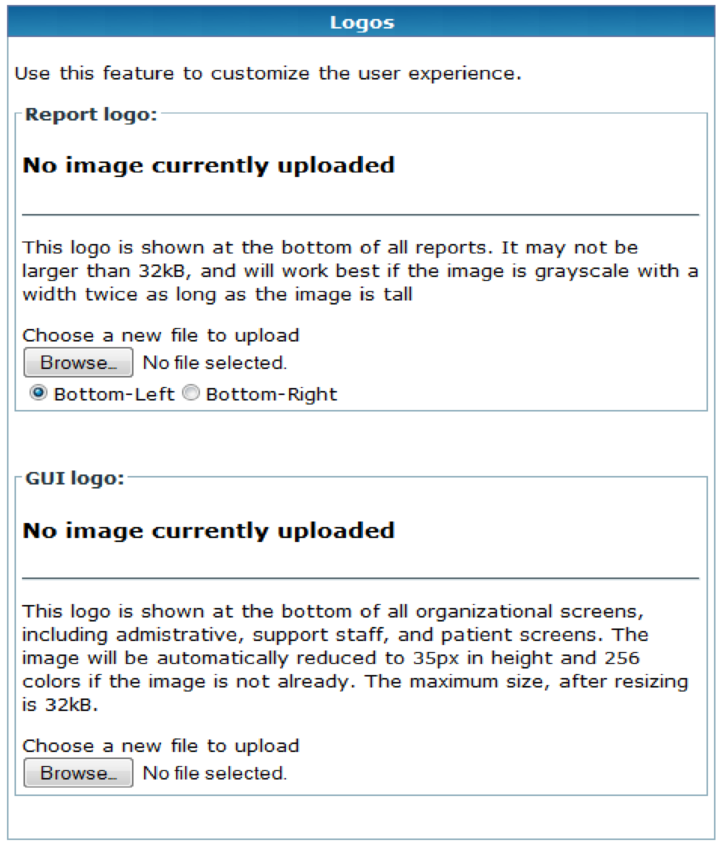
Logos



This area is used to upload Logos to customize the appearance of your FOTO Web-based screens and/or the patient specific reports.

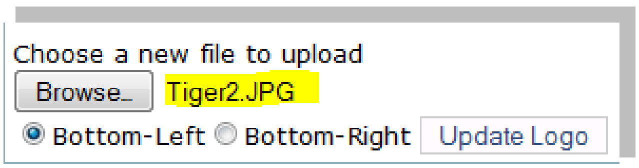
- One section is for uploading a Logo to your Patient Specific Reports
- One section is for uploading a Logo to appear on the Web System Screen

Acceptable formats are **GIF, JPG, or PDF**

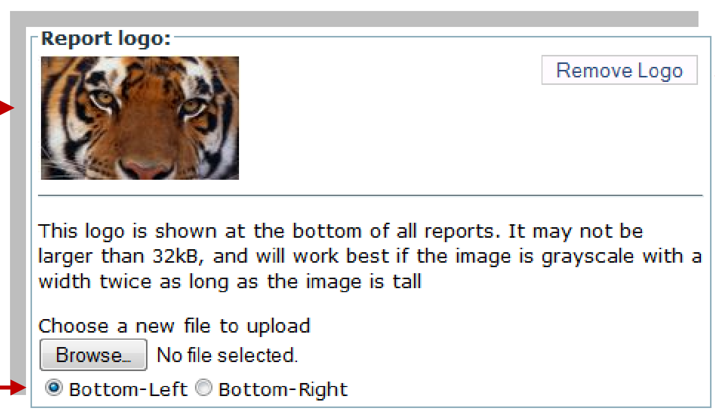


To upload logos in either section:

1. Click the **Browse…** button to select the logo file from your computer.



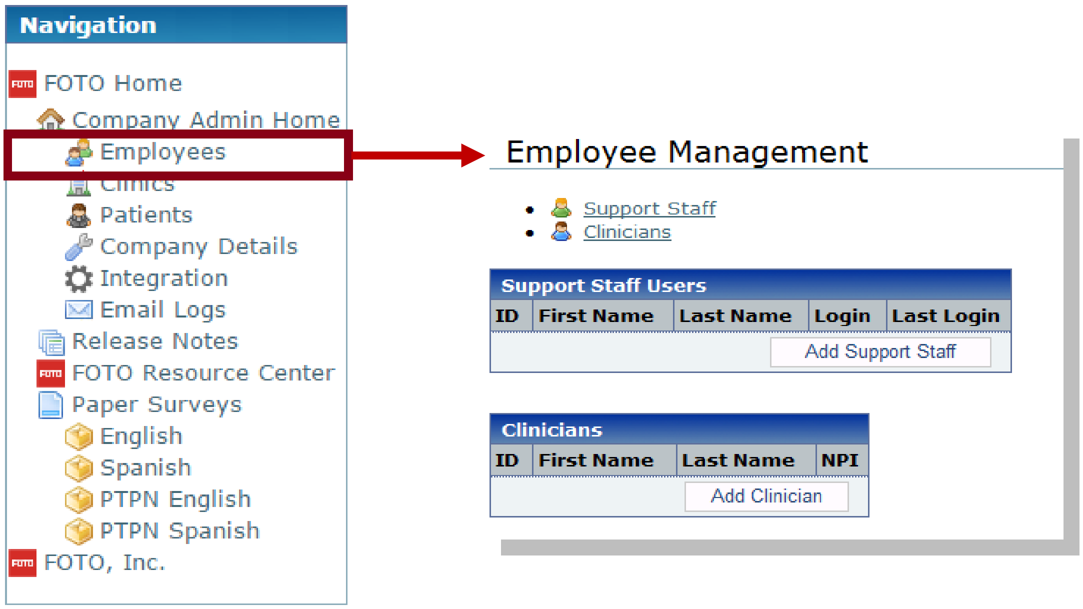
2. Once a file is selected, click **Update Logo**



3. The logo will show in the box if it is successfully uploaded.
4. Select the location of the Logo in the Patient Specific Reports
5. To remove, click **Remove Logo**

EMPLOYEES – Registration & Mgt.

The following tasks are managed from the Employee Link:



Employees may be registered as:

- **Support Staff Users** – Staff Members set up in the Support Staff Users table have login rights and are able to manage patients and episodes.

- **Clinicians** – Clinicians are set up in the clinician table so they may be selected as the primary clinician for patient episodes.

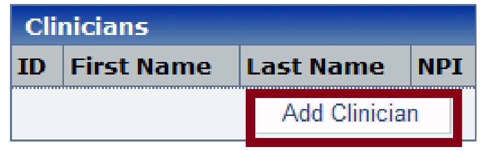
  - ***Special Note***: Clinicians set up in the Clinician Table **ONLY** will not have login rights to the FOTO program and will not have access to manage patients and episodes. When registering a Clinician, there is an option to also register as them as a Support Staff User so they have login rights to access patient data.

To register your employees:

1. Select **Employees** from the Navigation Menu
2. Click either **Add Support Staff** or **Add Clinician**.

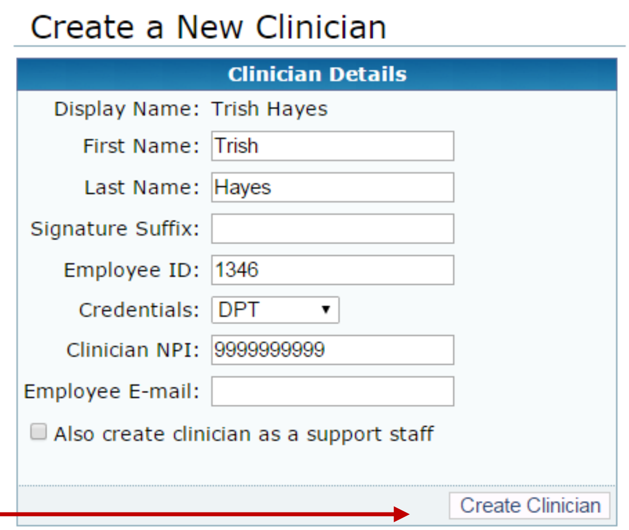
Clinician Registration

Register Staff Member as CLINICIAN ONLY:

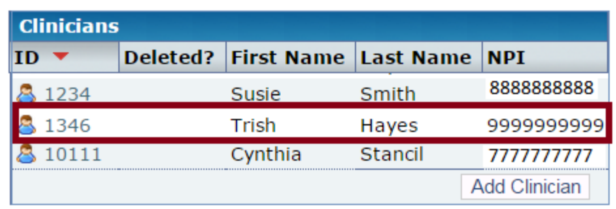


1. Click **Add Clinician**
2. Fill in the appropriate registration information and click **Create Clinician** when finished.
   - **First & Last Name**
   - **Signature Suffix** – Jr., Sr., III
   - **Employee ID** – can be whatever the clinic chooses. Keep in mind that this is the ID that will identify the Clinician on the Quarterly Profile Reports. Can be numeric or alpha ID (ie: initials).
   - **Credentials** – Using the drop down menu, select the professional credentials for the staff member (ie: PT, DPT, MPT, etc.)
   - **Clinician NPI** – Enter clinician's NPI # (Required if participating in the FOTO PQRS Data Registry)
   - **Employee E-mail** – Optional unless also creating as Support Staff User.

   Click on Create Clinician.

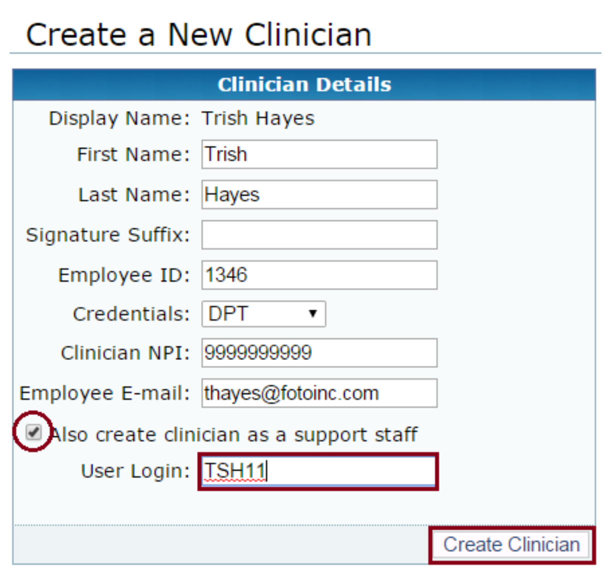


Once Create Clinician is clicked, the clinician will show in the Clinician table and the therapist will appear in the drop down menu for selection as the primary clinician in patient episodes.



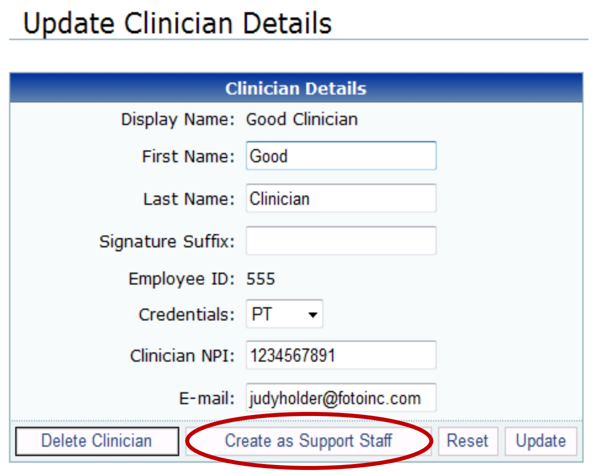
Register Staff Member as a CLINICIAN & SUPPORT STAFF User:

1. Click **Add Clinician** and enter appropriate information following the above instructions.
2. Before clicking the Create Clinician button, select the box beside "**Also create clinician as support staff**."
   - A User Login field will appear, pre-populated with the employee ID or another identifier. This will be used as their unique Support Staff Login.
   - The User Login may be edited if needed.
   - A valid e-mail address is required.
3. Click **Create Clinician** when finished.
   - The clinician will be added to the Clinician List

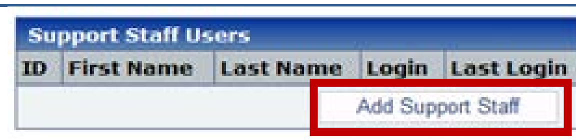


- The Verification Email will be sent to the staff member to set their Support Login password and security question/answer.

Note: A previously registered CLINICIAN ONLY may be added as a Support Staff User by selecting the clinician from the employee list and clicking ***Create as Support Staff***, which will generate a Support User Verification email to the staff member to set password and security question/ answer.



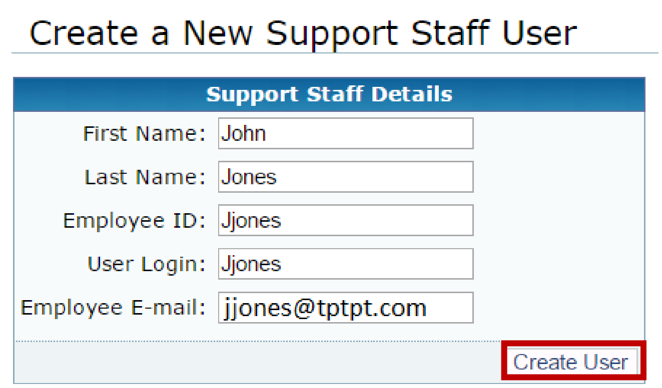
Support Staff Registration



Register a Staff Member as Support Staff

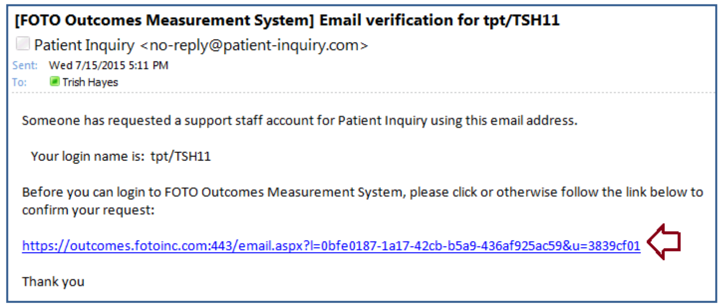
Definition: Staff Members in your organization that should have login rights to access the Patient Outcome information from the FOTO system.

1. Click **Add Support Staff** in the Support Staff User Window
2. Fill in the appropriate registration information
   - **First & Last Name of Employee**
   - **Employee ID** – can be whatever the clinic chooses.
   - **User Login** – what is entered here will be added to the admin login to create the support staff user login. Example – the admin login is ABCPT. Enter 123 here for the user login. The support staff login will be ABCPT/123. By using initials of Jjones, the employees login will be ABCPT/Jjones, etc.
   - **Employee E-mail** – must be entered correctly for the employee to receive the verification e-mail.



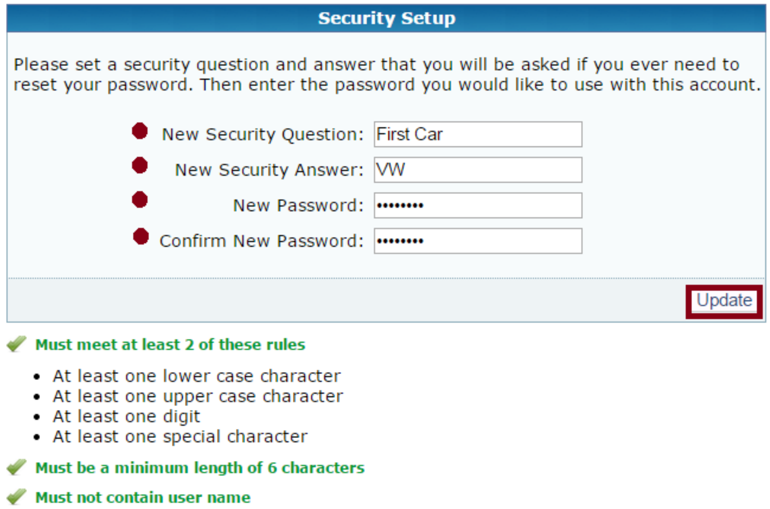
When finished, click on CREATE USER.

Support Registration Login Verification



Once a Support Staff User is registered, a verification e-mail is sent to the registered e-mail address.

The Support Staff User must click on the link within the e-mail to verify that the e-mail address is correct and to create a password, security question and answer**.**



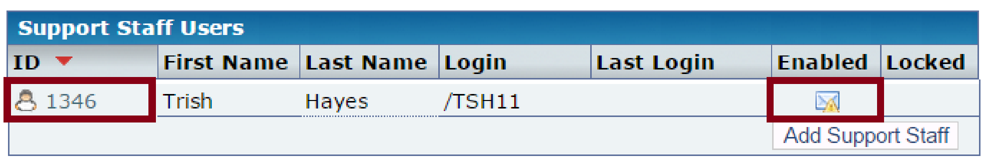
Staff Member enters:

- **<u>Security Question</u>** – this can be any question they would like: mother's maiden name, State, pet's name, etc.
- **<u>Security Answer</u>** – the response/answer to the question they have selected.
- **<u>Password</u>** – the password they will use to log in to the FOTO program (Must follow password policy established by Administrator).
- **<u>Confirm Password</u>** – retype the same password.

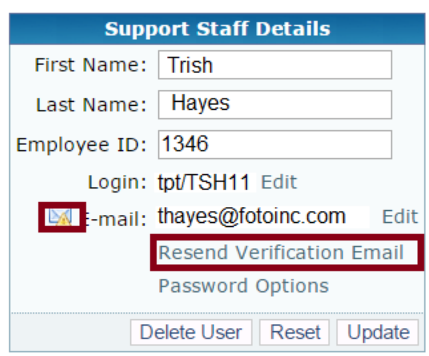
When done, they will click the UPDATE button.

<u>A Support Staff User **CANNOT** log in to Outcomes Manager until the verification is complete.</u> **<u>The link in the E-mail EXPIRES AFTER 5 DAYS</u>** and must be regenerated by the Administrator if it is not completed within that time frame.

Resending the Verification E-mail



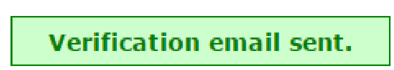
If a Support Staff User does not complete the verification process within the initial 5 day window, the Administrator may resend the verification e-mail. The un-verified Support Staff User will have an envelope in the Enabled box to indicate the email has not yet been accessed and the icon in the ID field will show a "clear" icon which indicates that the user has not verified their account.



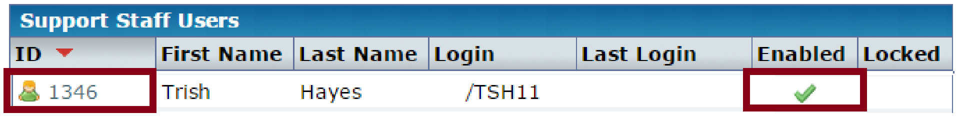
To resend the verification email, the Administrator:

1. Clicks on the user ID to access Support Staff Details /or/ click on the envelope icon (as shown above).
2. Click on the envelope with the yellow caution triangle or on the words "Resend Verification Email" to resend the activation link.
   - The staff member will again have 5 days to complete the verification process.

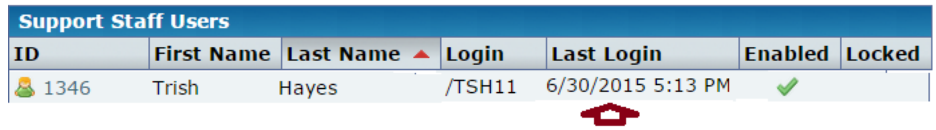
A notice will appear that indicates that the verification e-mail was sent.



The Administrator can always check on the status of the Verification. Once the staff member has completed the verification, the icons will change in the Support Staff User table to show a Green icon in the ID field as well as a green Checkmark in the Enabled column to show that the support login has been verified.



The Administrator can also monitor the last login date of the staff member into the system in this screen.

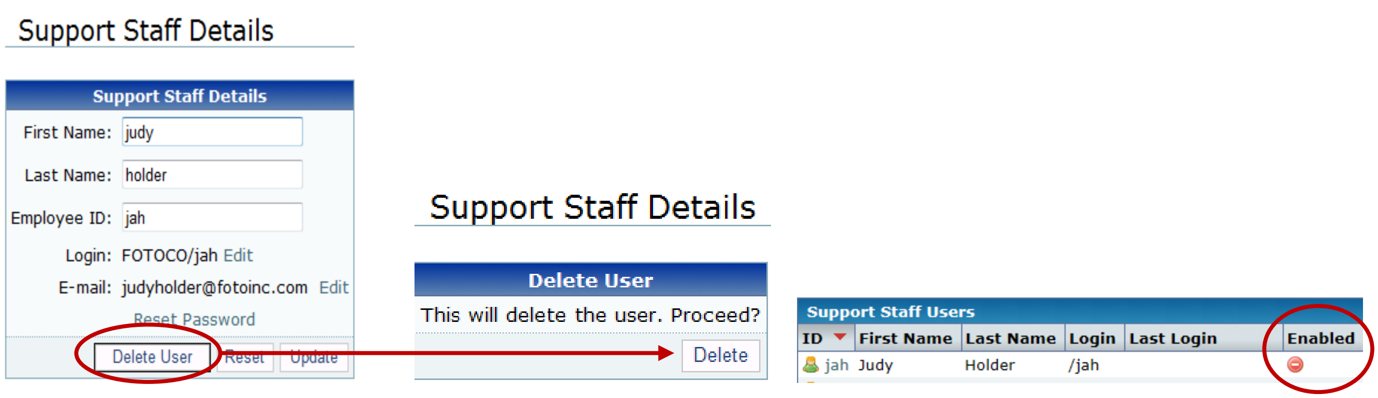


Deleting Employees

Support Staff Users

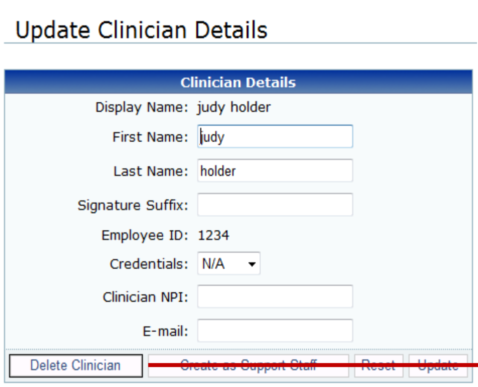
To Delete / Disable Login for a Support Staff User, select the Support Staff User ID and then select ***Delete User***. When asked if you would like to proceed, select ***Delete***. The user will show as deleted with the following symbol .

Note that the login will be disabled 4 hours after being marked as deleted, at which time, the user will also show as unverified. This will hopefully allow enough time for an unintentional deletion to be reversed without having to go through the verification process again.

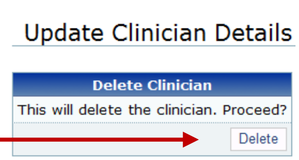


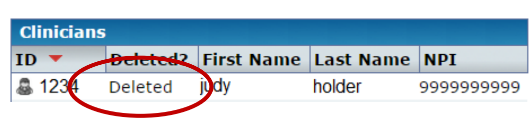
Clinicians

To delete a Clinician from the Clinician table, select the Clinician ID from the list and select ***Delete Clinician***. Then confirm by selecting **Delete** again. Note that the clinician will show as deleted in the list and can no longer be selected when creating episodes.



> Note: It is important to delete any clinicians who no longer work for you to prevent their names from being accidentally selected as the primary clinician for new patient episodes.



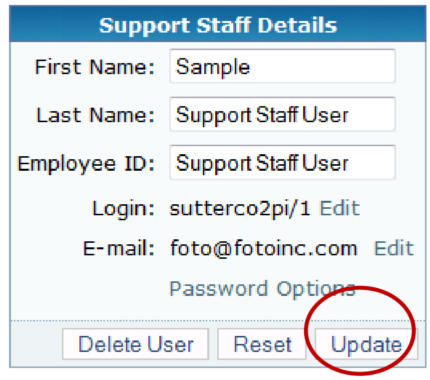


SPECIAL NOTE RELATED TO DELETIONS OF CLINICIANS:

If your **Clinician has been set up with a Support User Login**, you must complete **both steps above** to remove them from the Clinician Table and deactivate their login rights.

Editing Employee Information

The Support Staff First & Last Name, Employee ID, Login, and E-Mail Address may be edited by selecting the Support Staff User ID from the Employee list.



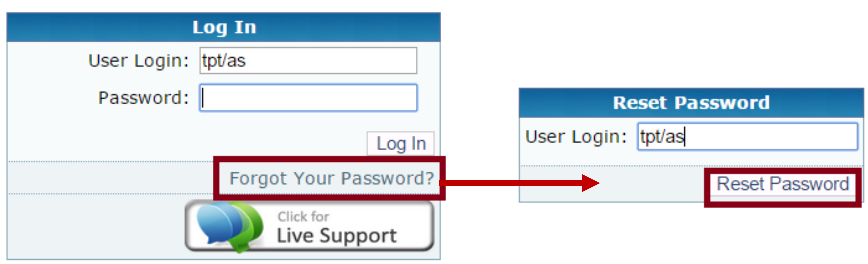
- First/Last Name and ID can be edited in the field, then click **Update** to save changes.
- Note that Employee ID cannot be edited once set-up is completed.
- Login can be changed by selecting **Edit**
- E-mail can be changed by selecting **Edit**.
- Click the words **Password Options** to access the password reset screen for the user.
- Be sure to select UPDATE once revisions are completed.

"Forgot Password" Reset

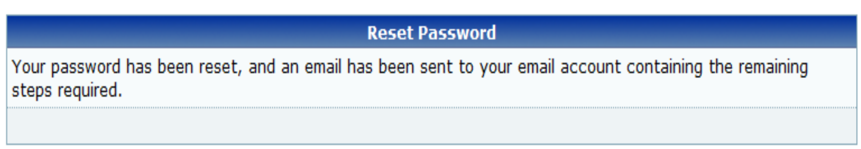
Support Staff Member Password Reset – Staff Reset

IF THE SUPPORT STAFF USER REMEMBERS THE RESPONSE TO THE SECURITY QUESTION (set up during verification), the "**Forgot Your Password?"** button can be used to reset the password.

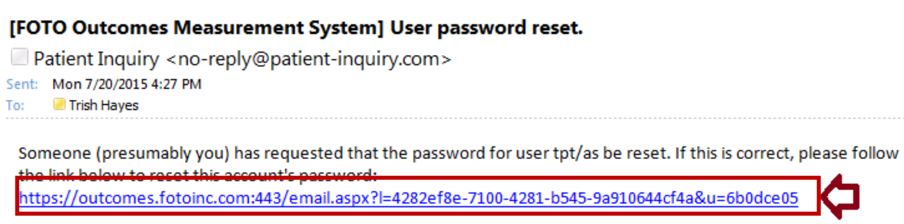
1. Select **Forgot Your Password?**
2. Input User Login and click **Reset Password**



3. If the reset is successful, the message will appear. If this message does not appear and nothing happens, there is an error in the User Login.

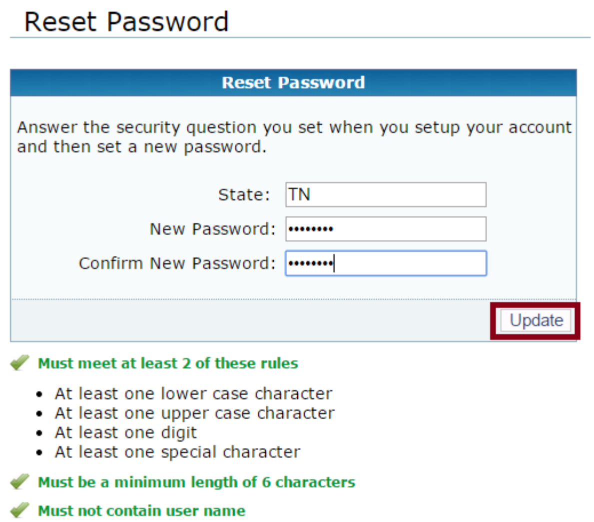


4. An e-mail is sent from **noreply@patient-inquiry.com**. Open the e-mail and click on the link.

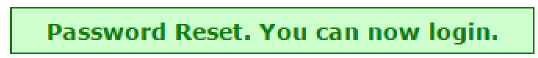


5. Input the security response and a new password (and confirm) and click **Update**.

   - The password requirements in red will turn green as the requirements are met.
   - If the new password contains the user name, the requirement in green will turn red and will not allow the password to be created.



A message will surface to notify you if the password reset is sucessful.



The "**Forgot Your Password?"** button will NOT reset the administrator password. If the administrator forgets the administrative password, please contact your FOTO Provider Representative or:

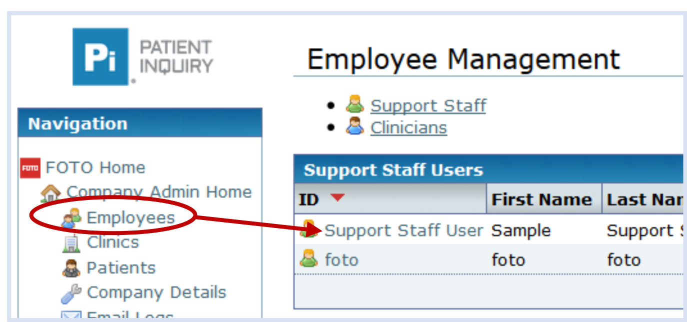
<u>FOTO Support Services</u> 800-482-3686 ext. 234 support@fotoinc.com

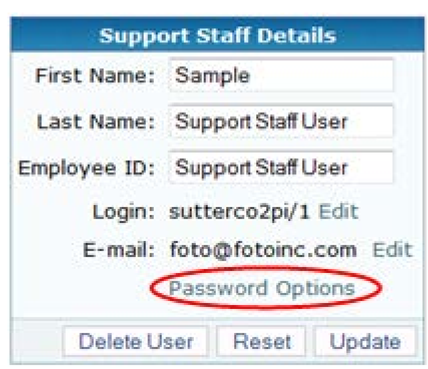
Support Staff Member Password Reset – Administrator Reset

<u>IF THE SUPPORT STAFF USER DOES NOT KNOW EITHER THE SECURITY QUESTION RESPONSE OR THE CURRENT PASSWORD</u>, the Outcomes Manager Administrator can reset the Password.

Changing the Password for the User

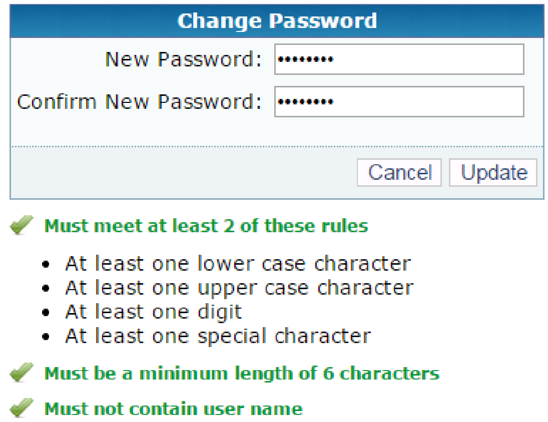
1. Login as Outcomes Manager Administrator
2. Select **Employees** from the Navigation Menu
3. Click on the Support Staff User ID for the employee whose password needs to be reset.





4. Click the words **Password Options** from the Support Staff Details screen.

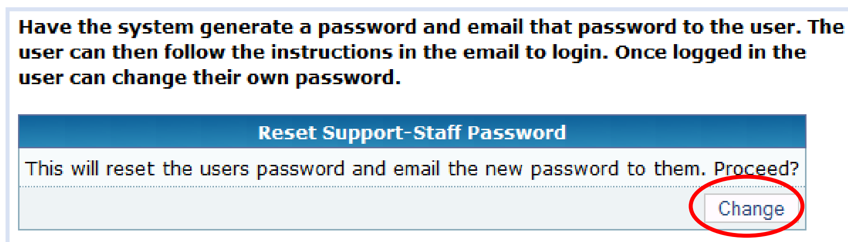
5. **To change the password for the user**, enter a new password and confirm, then click **Update**.



- The password requirements in red will turn green as the requirements are met.
- If the new password contains the user name, the requirement in green will turn red and will not allow the password to be created.
- Cick on UPDATE.
- **The Administrator Must Share the New Password set with the User**.
- A confirmation that the password change succeeded and an email was sent to notify the user will appear.

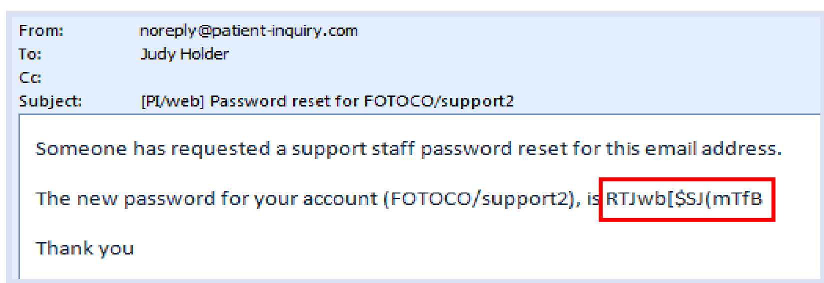
/OR /

6. **To send the user a computer generated password by e-mail,** follow the previous process items 1 through 3. Then click the **Change** button under "Reset Support Staff Password".

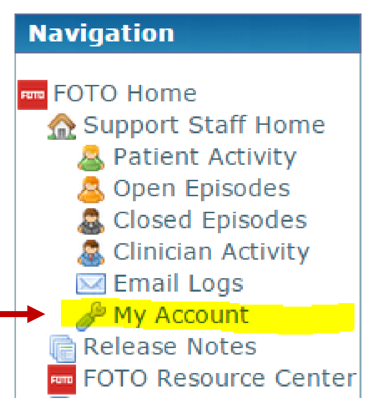


- A confirmation that an email was sent to the support staff user will appear.

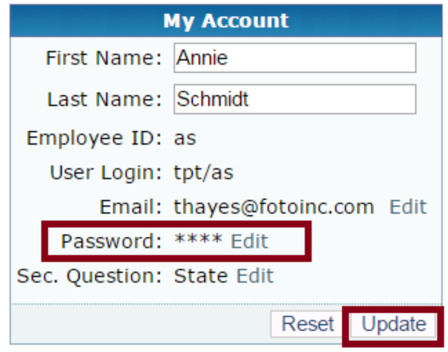
- The Staff Member will receive an email with a system generated password.



- Using their User Name and the computer generated password in the email, the staff member will login to the system .
- Once logged in the Support Staff member can go to "My Account" from the Navigation bar, which will open the My Account window to reset/edit their password.

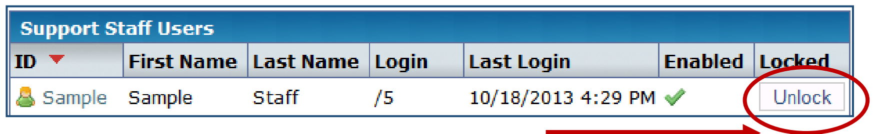


- Select **Edit** to change Password (or Security Question and Answer)
- Click Update when finished to reset the password.



Locked Accounts

<u>If the Support Staff User has entered an incorrect password 5 or more times</u>, their account will be locked as a security measure. As the Administrator, you can Unlock the login by accessing the Support Staff Table and clicking the "Unlock" button.



<u>Locked or Forgotten</u> Administrator logins must be reset by contacting:

FOTO Provider Relations Representative
/or/
FOTO Support Services
800-482-3686
support@fotoinc.com

Administrator Password Reset

See <u>Company Detail</u> section entitled <u>*Practice Information & Administrative Password*</u> to change the Administrator password from within the system.

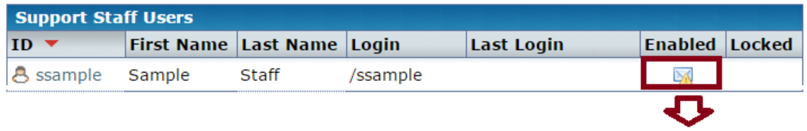
- Note the "**Forgot Your Password?"** button will NOT reset the administrator password: contact your FOTO Provider Representative or FOTO's Support Services to reset.
- The admin login information will only be given by FOTO to the person listed as the administrator or "Contact" for the Practice.

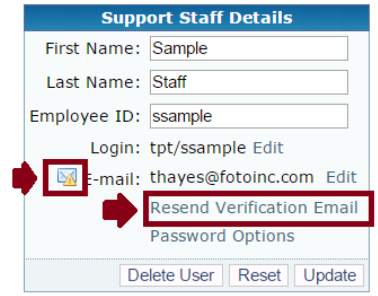
Password Reset Trouble-shooting

The Support Staff Login must be verified for either password reset option to work.

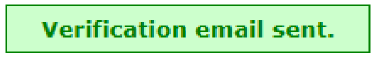
- On the employee list, an un-verified Support Staff User has the following symbols:
  in ID# column and in Enabled column.
- A verified Support Staff User has the following symbols:
  in ID# column and in Enabled column.
- Be certain the employee is not also marked deleted:

- To regenerate the Support Staff Verification e-mail select the Support Staff ID, click the icon next to the word Email or click on the words: Resend Verification Email





- A verification will be received



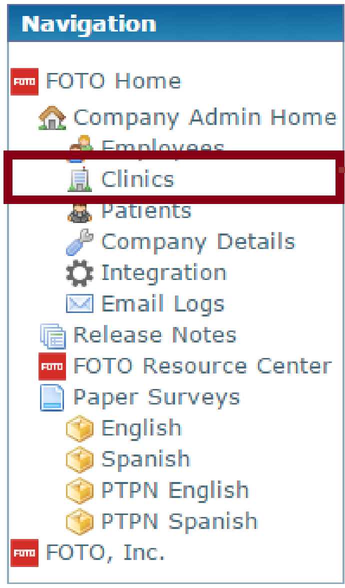
If the e-mails generated are not received by the user:

- Make sure the e-mail address is correct
- Check any spam or junk mail folders
- Contact your IT department (if applicable) to ensure the e-mails are not being blocked by spam filters.

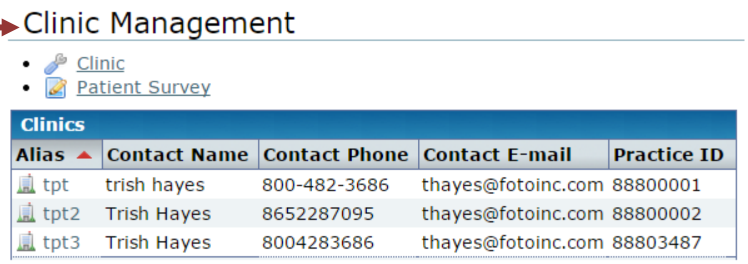
CLINICS (Clinic Management)

FOCUS ON® THERAPEUTIC OUTCOMES INC

From Clinics in the Navigation Bar the Administrator can:



- Edit clinic identifying details (address, contact, etc.)
- Manage Patient Surveys at the clinic level
- Manage the email message defaults for email survey distribution



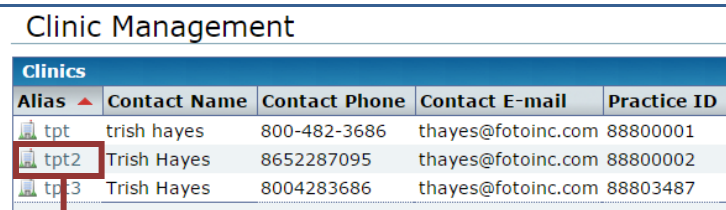
Alias	Contact Name	Contact Phone	Contact E-mail	Practice ID
tpt	trish hayes	800-482-3686	thayes@fotoinc.com	88800001
tpt2	Trish Hayes	8652287095	thayes@fotoinc.com	88800002
tpt3	Trish Hayes	8004283686	thayes@fotoinc.com	88803487

Whether you are a single site practice or a multi-site organization, you can manage your clinic defaults from this screen.

Editing Clinic Details

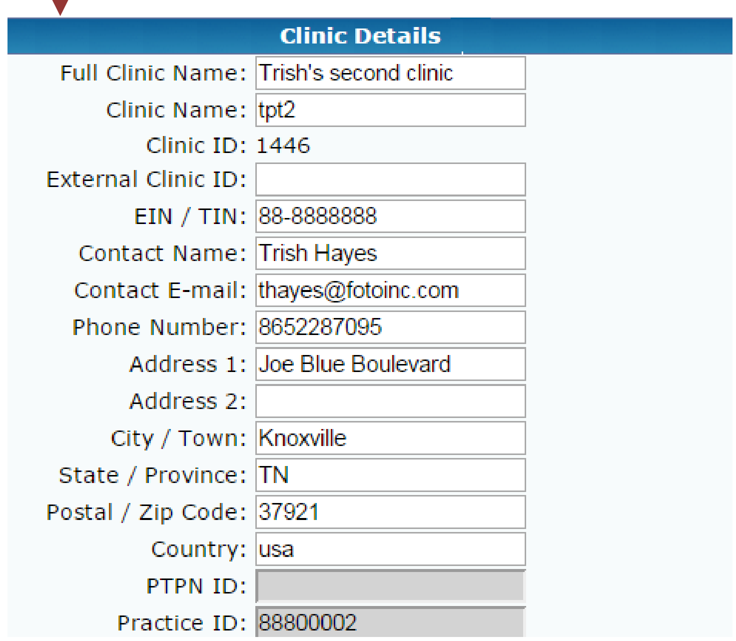
Select **Clinics** from Navigation Menu

Select the Clinic Alias to open the Clinic Details screen for the desired clinic.



Alias	Contact Name	Contact Phone	Contact E-mail	Practice ID
tpt	trish hayes	800-482-3686	thayes@fotoinc.com	88800001
tpt2	Trish Hayes	8652287095	thayes@fotoinc.com	88800002
tpt3	Trish Hayes	8004283686	thayes@fotoinc.com	88803487

The Clinic Details can be edited as appropriate by the Administrator.



Note: Clinic ID, PTPN ID# and Practice ID# cannot be edited.

Managing /Editing Email Messages for Survey Completion

Outcomes Manager has a feature that facilitates your ability to email patients to request they complete the Intake Survey and/or Status Survey outside of the clinic on the internet. Using this feature allows the patient to complete the survey prior to entering the clinic, saving time while still providing the clinician with the pertinent functional data for the evaluation or follow-up visit. If the auto print feature is installed, the survey will print automatically when completed, but can be manually printed as well.

FOTO has set up the email message, link, and instructions. However, as the Administrator, you do have an option of revising the email message as appropriate for your practice.

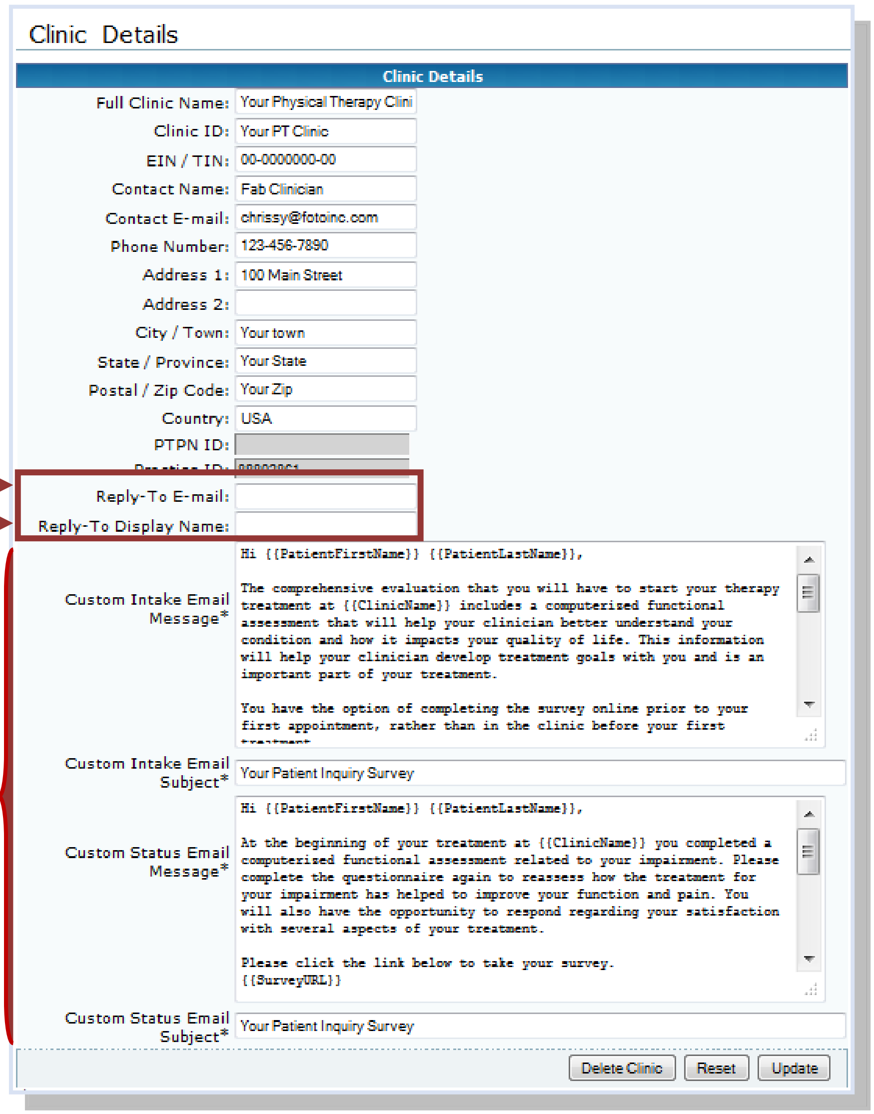
By default, emails will show as being sent from “Patient Inquiry”. To have them show as being sent from your clinic, be sure to fill in both the “Reply-To” fields.

- Add your practice/org’s email address here
- Enter the Display Name (Practice/Org Name)

The default email messages shown to the right are further explained in the next section.

It is important to note that these messages are completely customizable.

- To make changes to these messages, see section, *To Revise the Email Message* below.



Default Email Message for Patient Intake Assessments (can be revised):

Hi <First Name Last Name>,

The comprehensive evaluation that you will have to start your therapy treatment at <full clinic name> includes a computerized functional assessment that will help your clinician better understand your condition and how it impacts your quality of life. This information will help your clinician develop treatment goals with you and is an important part of your treatment.

You have the option of completing the survey online prior to your first appointment, rather than in the clinic before your first treatment. The survey should not take longer than 5 – 7 minutes.

To begin the survey, please click the link below.
LINK

The information you share is confidential, a part of your medical record, and is subject to all protected health care information regulations.

Thank You!

Default Email Message for Patient Status Assessments (can be revised):

Hi <First Name Last Name>,

At the beginning of your treatment at <full clinic name> you completed a computerized functional assessment related to your impairment. Please complete the questionnaire again to reassess how the treatment for your impairment has helped to improve your function and pain. You will also have the opportunity to respond regarding your satisfaction with several aspects of your treatment.

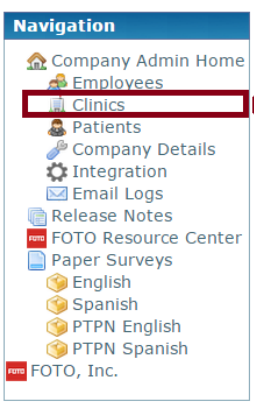
To begin the survey, please click the link below.
LINK

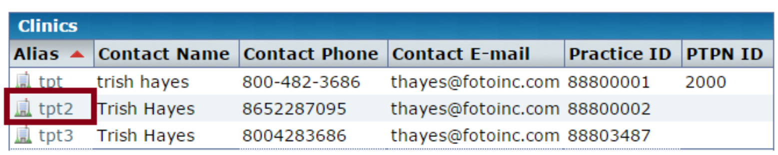
The information you share is confidential, a part of your medical record, and is subject to all protected health care information regulations.

Thank you!

To Revise the Email Message

- Select **CLINICS** in the Navigation Menu.
- Select the Clinic Alias for the clinic email that you want to edit.
- The clinic detail screen will open for the clinic you selected.



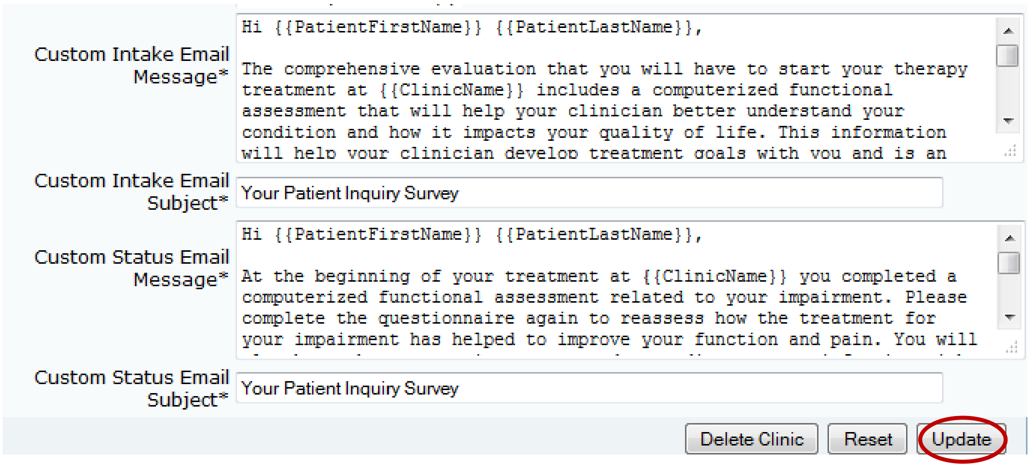


Clinics

Alias	Contact Name	Contact Phone	Contact E-mail	Practice ID	PTPN ID
tpt	trish hayes	800-482-3686	thayes@fotoinc.com	88800001	2000
tpt2	Trish Hayes	8652287095	thayes@fotoinc.com	88800002	
tpt3	Trish Hayes	8004283686	thayes@fotoinc.com	88803487	

If you have more than one clinic, you will need to edit the e-mail messages for each site/clinic individually. However, once you have edited the email for one site, you can copy and paste to the other site message window.

<u>Custom Email Subject Line</u>:
You can change/edit the Subject Line for the Intake Email and/or the Status Email.



Simply click in the field and revise the subject line. Be sure that the subject lines for both the intake and the status are no longer than 70 characters long.

<u>Custom Email Message:</u>
You can edit the email message with your own message and alter the default message. You can use the following merge specific values in your email message.

{{PatientFirstName}} = Patient First Name
{{PatientLastName}} = Patient Last Name
{{ClinicName}} = Clinic Name
{{SurveyURL}} = Will insert only the survey URL (no instructions)

Be sure to include the {{SurveyURL}} link in the email as this is the link for the patient to access their Intake or Status Assessment.

<u>Click **Update** when finished</u>.

If you have multiple clinics/sites in your organization, once you have edited one site, you can copy the text from one site and paste it in the second site email screen, etc.

Distributing Patient Surveys by Email

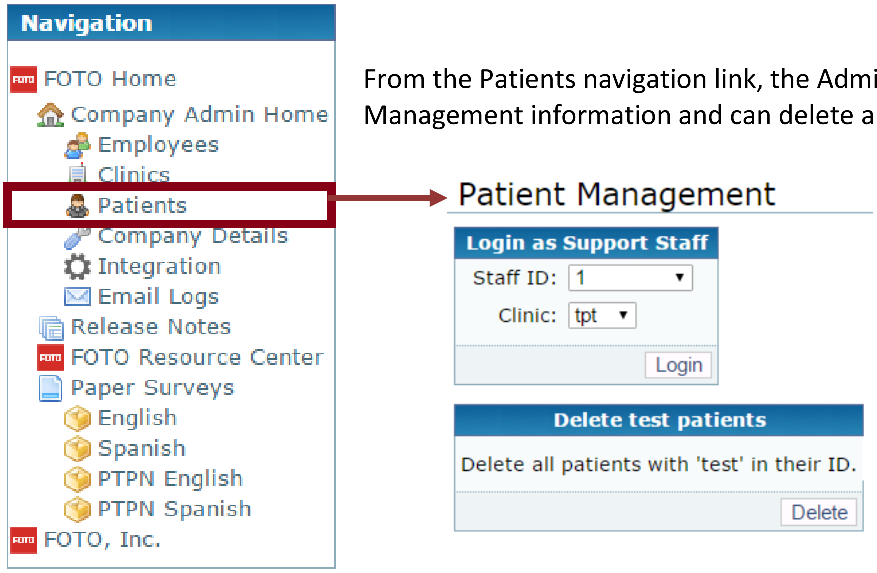
To send survey emails to patients, please refer to the Support Staff Training Guide.

Managing Patient Survey Defaults at the Clinic Level

Refer to Administrative Section for Company Details, Patient Survey, Patient Survey Default Settings, #3.

PATIENTS (Patient Management)

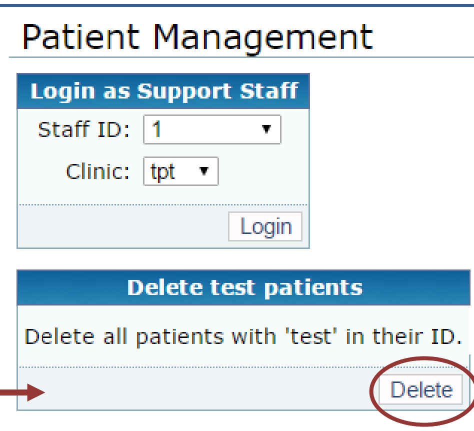
From the Patients navigation link, the Administrator can login to access Patient Management information and can delete all "test" patients from their database.



Deleting Test Patients

Sample patients entered in the system may be deleted by the administrator as long as the Patient ID includes the word ***"TEST."*** For example: test44559

- Select **Patients** from the Navigation Menu
- Do not login as Support Staff.
- Click **Delete** for: ***Delete all patients with 'test' in their ID***.



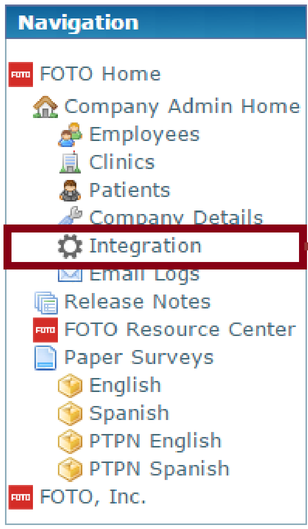
Entering Patient Management Screens

To enter the Patient Management screen, the administrator must login as a support staff user.

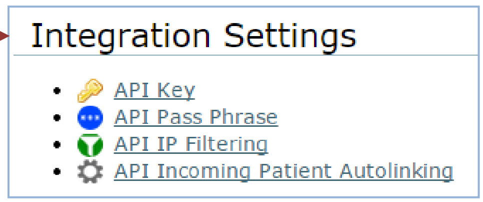
- Select **Patients** from the Navigation Menu
- Select the appropriate Staff ID and Clinic from the drop down menu
- Click **Login**
- ***Please proceed to the Support Staff Training Guide for Managing Patients and Surveys***

To return to the admin portion of the system, the administrator will be required to log off as a support staff user and login again as the administrator.

EMR INTEGRATION: API



The API Key allows FOTO to integrate with an Electronic Medical Record (EMR) software. FOTO partners with several EMR software companies and is always open to partnering with others. To view the current list of EMR Integration Partners go to http://www.fotoinc.com/partners-programs/partners.



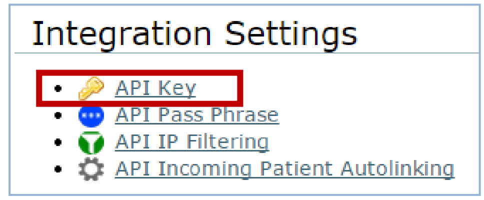
The two types of integration are:

- **Basic Integration** - Provides a one way transfer of patient demographic information from the vendor into FOTO.
  - Saves keystrokes, staff setup time, and keeps key fields between the systems in synch.
- **Plus Integration** – Provides a two way transfer of patient information between the EMR vendor and FOTO.
  - Each plus level integration is unique depending on how the vendor creates the interface.
  - Typical features include:
    - Pushing the patient demographic information from the vendor into FOTO
    - Pulling the Patient Specific Reports from FOTO into the patient record
    - Pushing the visit and discharge information into FOTO to automatically complete the discharge.
    - FOTO also allows the vendor to pull patient episode information including survey/assessment scores, g-codes, predicted change and predicted visits.

In order for FOTO and the EMR vendor to "communicate", an API key is needed to initiate the process with your organization's FOTO program.

Your EMR vendor will request an API key and may also require that the Administrator set up some additional API parameters to meet /enhance security/vendor requirements. The API key is the FIRST STEP. Your vendor will guide you to the requirements for the other integration settings as follows.

API Key

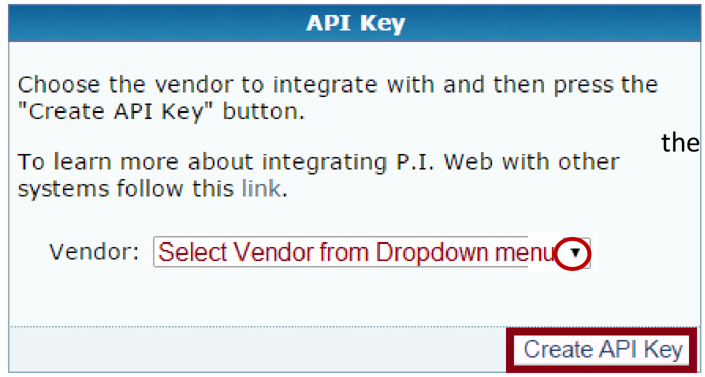


The API Key allows FOTO to integrate with an Electronic Medical Record (EMR) software.

1. Select a vendor from the drop down menu.

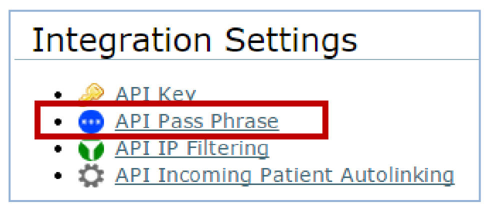
   If the needed vendor is not listed, then it does not currently integrate with FOTO. Contact FOTO at marketing@fotoinc.com to check the status of integration with the needed EMR vendor.

2. Click **Create API Key** to generate code to provide to vendor.



> **Note:** Some vendors require an API plus (+) integration which must be enabled by your FOTO Provider Representative or FOTO Support.

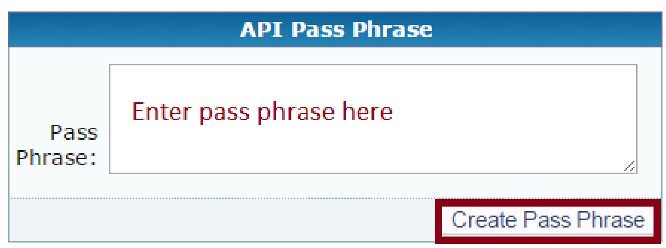
API Pass Phrase



Additional security checks can be added to your API calls by requiring a secret pass phrase with every API call. If so, this pass phrase can be added in this field.

1. Enter the word or phrase in the **Pass Phrase:** text box

2. Click **Create Pass Phrase**

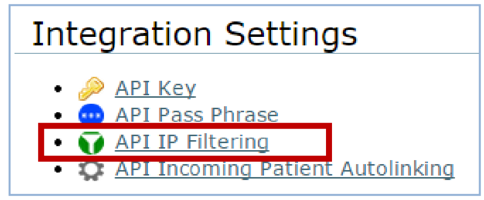


- If a pass phrase is created in FOTO, the EMR must send this pass phrase along with the API key for each and every message it sends to FOTO.

- The creation or editing of the pass phrase in FOTO must be carefully coordinated with the EMR to prevent a disruption in integration.

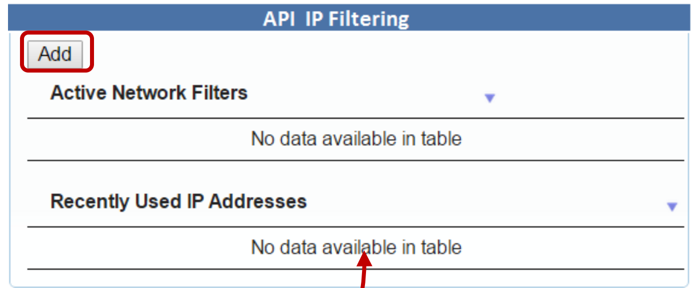
NOTE: Any additions or changes to the pass phrase will take place **IMMEDIATELY**. Make sure you coordinate with your vendor integration partner to add/change the pass phrase to prevent a disruption with the EMR integration.

API IP Filtering

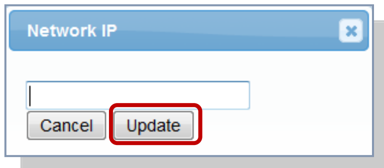


You can add additional security to your API calls by creating a list of network IP addresses for the FOTO API to validate against. Only API calls from the listed IP addresses will be able to access your organization's FOTO account.

You can add, edit or delete IP addresses (and ranges) to accommodate your network setup as needed. To allow all API calls, delete any added IP addresses in the filter list.



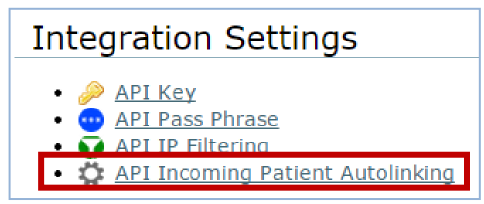
1. Click **Add**
2. Enter the Network IP Address (or range) for your vendor and click **Update**



- Your vendor's IP address(es) may be listed in the **Recently Used…** section if your FOTO account is already receiving data from them.

NOTE: Any additions or changes to this list will take place **IMMEDIATELY**. Make sure you coordinate with your vendor integration partner to add/change the pass phrase to prevent a disruption with the EMR integration.

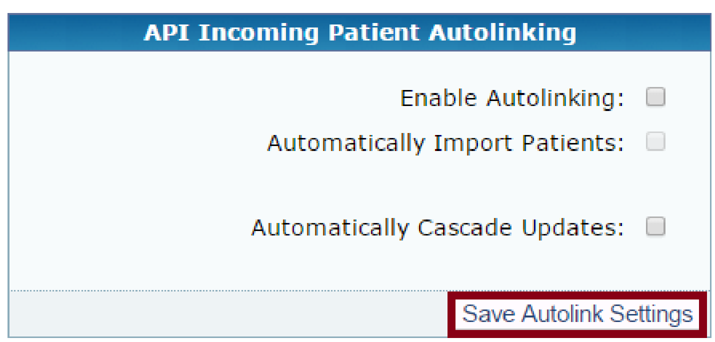
API Incoming Patient Autolinking



Patients being sent to FOTO from the EMR can be automatically linked, created or updated based on selections in this area. *Note: These settings will apply to all clinics within the organization.*

Please read the below and take careful consideration before selecting any of these options for your organization. All changes will take place immediately. If you are unsure as to which options are right for your organization, please contact FOTO to discuss these options with regards to your organization's needs and configuration.

To engage these API autolinks, click on the checkbox to activate.



- **Enable Autolinking** - Patients sent from the EMR will automatically link to the same patient already existing in FOTO.
  - The FOTO Patient ID and the Patient's ID or Medical Record Number (MRN) coming from the EMR must match exactly.
  - The patient must be in FOTO first, before it is sent from the EMR.

- **Automatically Import Patient** – Once Autolinking is selected, you may also enable your API to automaticaly create new patients in FOTO when sending them over from the EMR.
  - This is NOT recommended for hospitals who use their EMRs for more than just physical therapy patients.

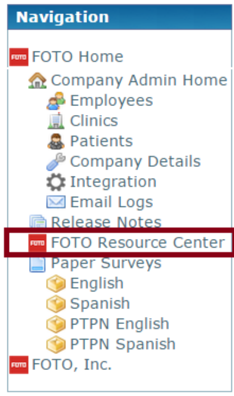
- This is also not currently recommended for organizations with more than one clinic in FOTO as patients will only be added to the first clinic listed for the organization. *(Future updates will allow the selection of the clinic for which the patient will be created.)*

- **Automatically Cascade Updates** – automatically cascades patient updates sent in via the API. This allows patient updates in an integrated EMR to automatically cascade (or update) into FOTO.

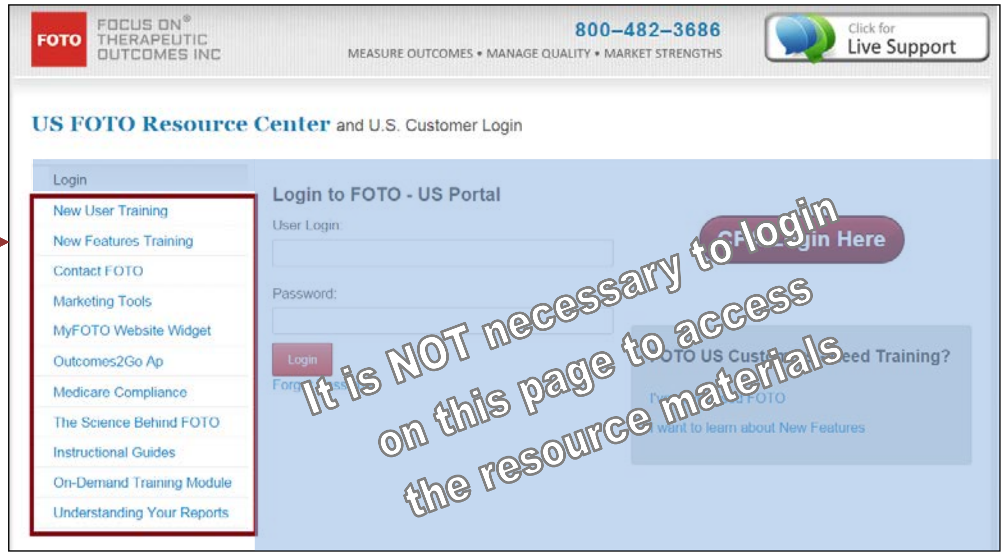
NOTE: Any additions or changes to incoming patient autolinking will take place **IMMEDIATELY**.

FOTO Online Resources/Training

For assistance with any of your Outcomes Manager processes, once logged into the system, click on FOTO Resource Center in the Navigation menu. You will automatically be taken to FOTO's website.



Simply click on a topic to open the related resource materials



- **New User Training** – Sign up for an open live webinar training session with a FOTO representative covering how to use the system from setup to discharge and everything in between.
- **New Features Training** - Sign up for a webinar training session covering new features
- **Contact FOTO** – FOTO contacts, phone numbers and e-mail addresses
- **Marketing Tools** – Contains template letters and press releases that can be used to announce your participation with FOTO and for those who receive the Outcomes Excellence Certificate.
- **Medicare Compliance** – Contains a video on use of the FOTO information for Functional Limitation Reporting

- **The Science Behind FOTO** – Contains articles and published papers
- **Instructional Guides** – Contains Administrator and Support Staff Training PDFs and other resource documents
- **On-Demand Training Module** – Contains videos on how to perform various functions within the application
- **Understanding Your Reports** – Administrator Guides to understanding Report Portal reports & management tools

LIVE SUPPORT CHAT FEATURE

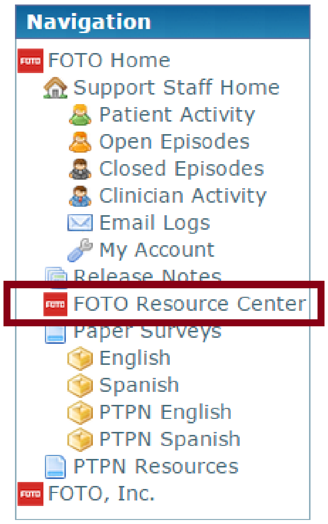
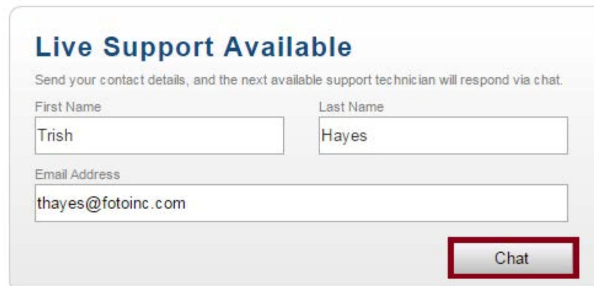


FOTO has implemented a Live Chat Feature with our Technical Support Team. This is a great feature to access to gain immediate access to our Support Service Team.

To gain access to the Live Support Chat feature, simply click on the FOTO Resource Center from your Navigation Bar. In the upper right corner of the screen, you will see the Live Support Button.

Click to open the Chat screen.

Type in your name and email address and click the Chat button.

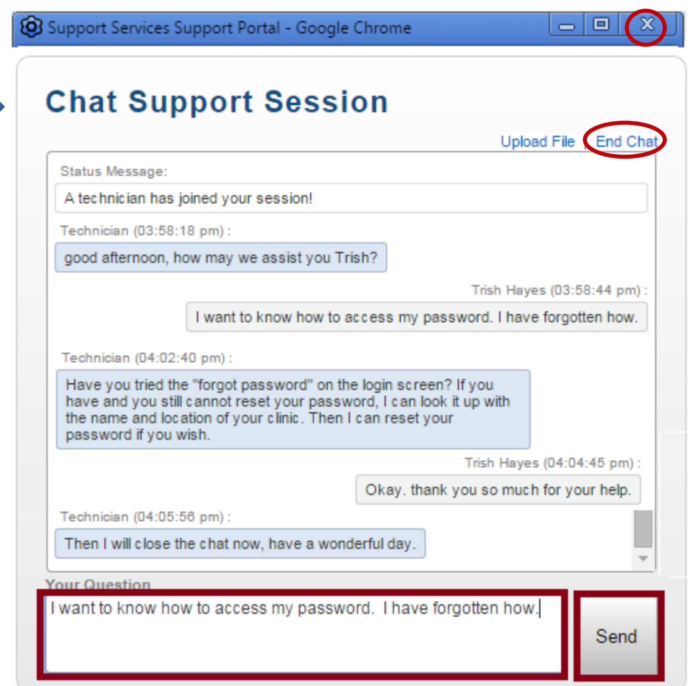


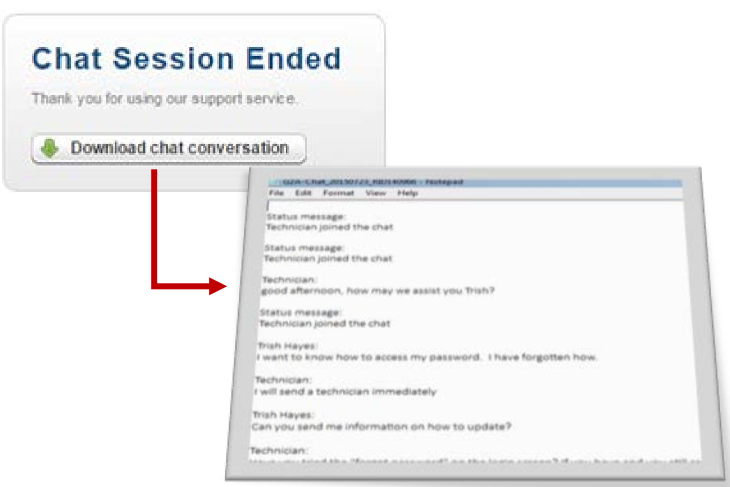
Simply type in your questions and click the send button.

Continue your conversation with Support Services and when done you close the session by:

- Clicking the End Chat button or
- Clicking the ☒ button.

If you select End Chat you will have the option to download the chat conversation for future reference if you like.





You can also contact your FOTO Provider Representative at any time. Please refer to the FOTO Contact List for full details.

FOTO Contact Information

FOCUS ON® THERAPEUTIC OUTCOMES INC

Please contact FOTO Provider staff at any time for assistance, as follows:

	800 • 482 • 3686	Email
Judy Holder **Director of Account Development**	Extension 238	judyholder@fotoinc.com
Provider Relations Staff		
Trish Hayes **Director of Provider Relations**	Extension 223	thayes@fotoinc.com
Cynthia Stancil U.S. Provider Representative	Extension 235	cynthiastancil@fotoinc.com
Kimberly Jones U.S. Provider Representative	Extension 232	kimberlyjones@fotoinc.com
Mimi Einstein U.S. Provider Representative	Extension 227	mimieinstein@fotoinc.com
Nikki Rasumussen, P.T., Cert. MDT Clinical Lead, Provider Relations	Extension 246	nrasmussen@fotoinc.com
Laura Mensch Canadian Provider Representative	Extension 240	lauramensch@fotoinc.com
Technical/Support Services Staff		
Deborah Debord **Director of Support Services**	Extension 234	ddebord@fotoinc.com
John Sutter Support Services Specialist	Extension 221	johnsutter@fotoinc.com
Chrissy Moore Support Services Specialist	Extension 219	chrissy@fotoinc.com
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