



**PATIENT
INQUIRY**

FOTO Patient Inquiry Support Staff Training Guide

Version 021414



**FOCUS ON[®]
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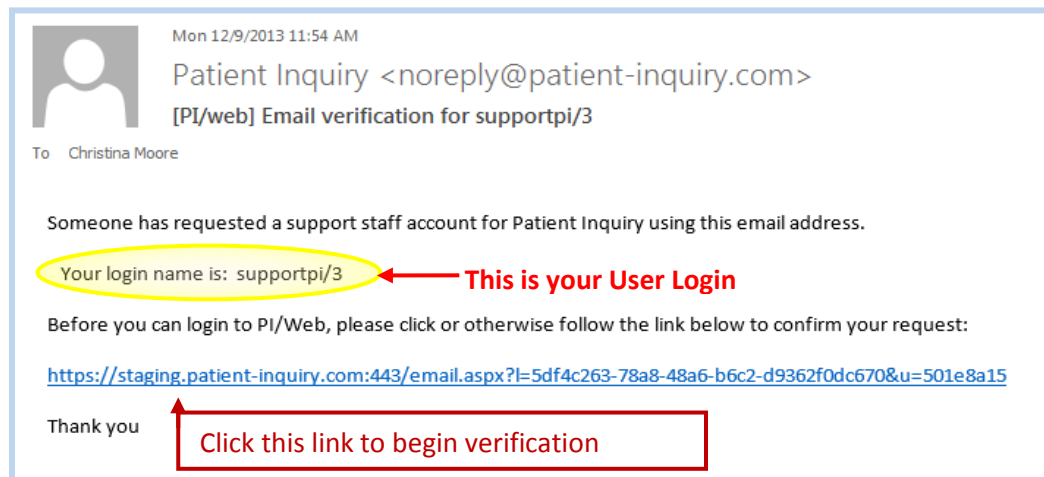
Support Staff User E-Mail Verification & Security Setup Process

When the Patient Inquiry Administrator registers a Support Staff User, an e-mail is generated and immediately sent to the new user. If the e-mail is not received, check any spam or junk mail folders. Also check that e-mails containing links are not being blocked by the organization's IT department. If the e-mail is still not available, notify the person serving as the FOTO Administrator for the Practice or FOTO Support.

From	Subject	Received	Size
noreply@patient-inquiry.com	[PI/web] Email verification for FOTOCO/ssample	Mon 3/23/2009 1:37 PM	5 KB

E-mail is from noreply@patient-inquiry.com

The e-mail contains a link which will allow the Support Staff User to verify their e-mail address and complete the registration process.



This is your User Login

Click this link to begin verification

Clicking the link in the verification e-mail will access the Security Setup screen (below). Enter the desired password (and confirm) and create a security question and answer, then click **Update**.

Security Setup

Please set a security question and answer that you will be asked if you ever need to reset your password. Then enter the password you would like to use with this account.

New Security Question:

New Security Answer:

New Password:

Confirm New Password:

✘ Must meet at least 2 of these rules

- At least one lower case character
- At least one upper case character
- At least one digit
- At least one special character

✘ Must be a minimum length of 4 characters

✔ Must not contain user name

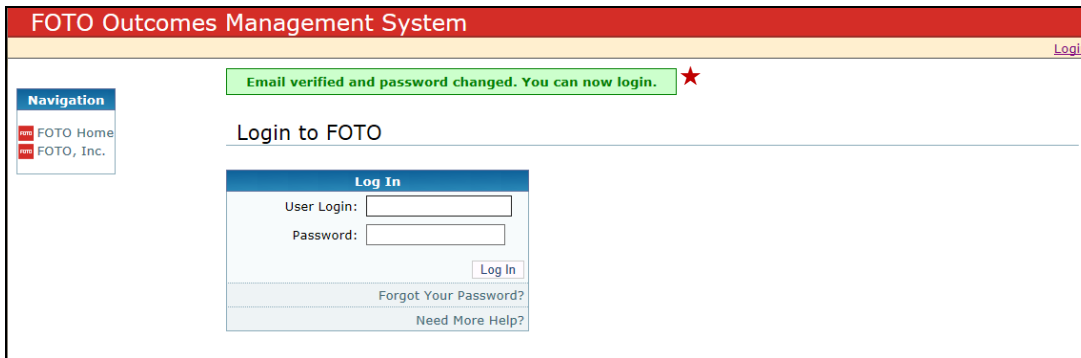
✔ Must not be a commonly used password

Note the following:

- The security question should be something that you would easily remember, but others would not easily know, like your mother's maiden name.
- If you forget your password, the system will ask you the security question and you must supply the answer in order to reset the password.
- The password requirements in red will turn green as the requirements are met when creating the new password.
- If the new password contains the user name, the requirement in green will turn red and will not allow the password to be created.

Once the Security Setup is complete, you will see the below green message indicating that you are ready to login. ★

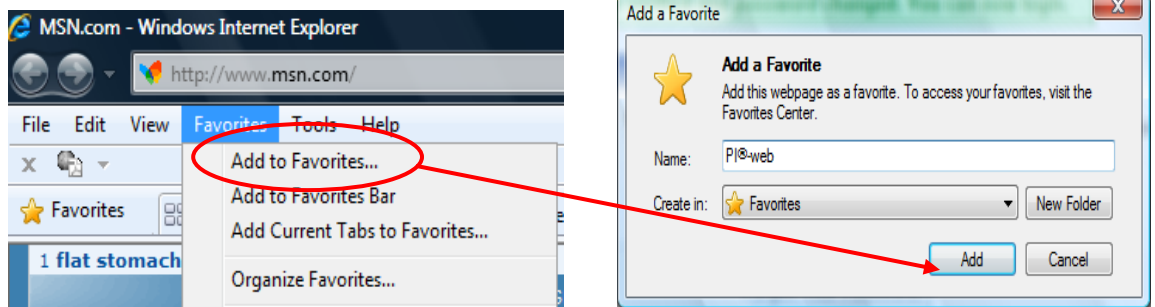
It is advised that you set a bookmark or favorite at this point (before logging into the system).



Bookmarking / Setting Favorite in your Internet Browser

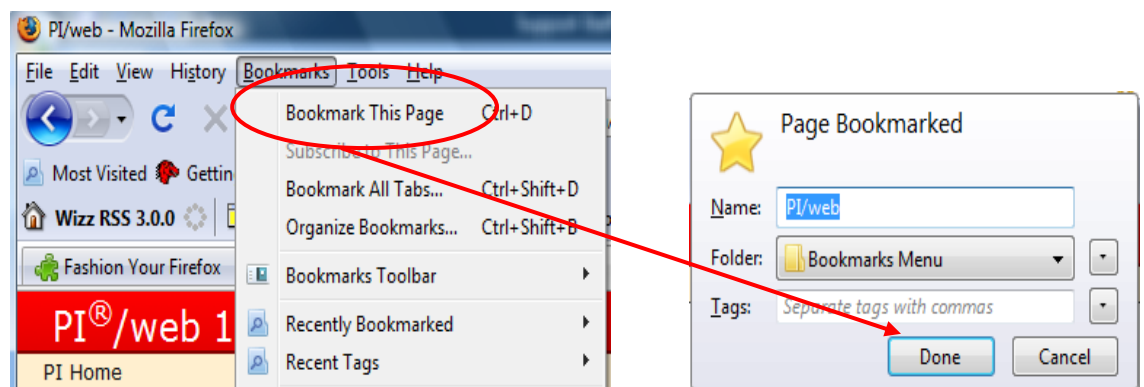
Internet Explorer

Select Favorites > Add to Favorites. (Right-click anywhere on the page if you do not have a toolbar at the top.)



Firefox

Select Bookmarks > Bookmark This Page



Login and Account Settings

Enter your User Login and password, then click **Log In**.



Login to FOTO

Log In

User Login: supportpi/3

Password: ●●●●●●

Log In

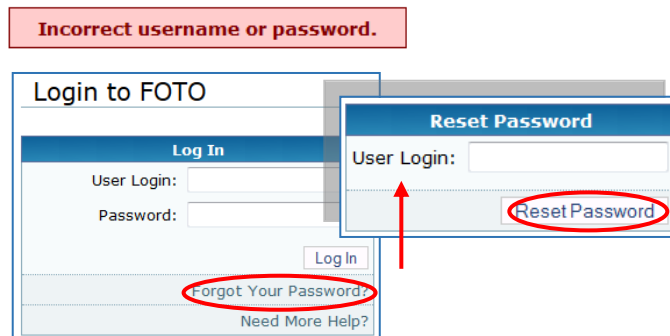
Forgot Your Password?

Need More Help?

Click for Live Support

Password Reset

If you forget your Support Staff User password, click **Forgot Your Password?** from the login screen.



Incorrect username or password.

Login to FOTO

Log In

User Login:

Password:

Log In

Forgot Your Password?

Need More Help?

Reset Password

User Login:

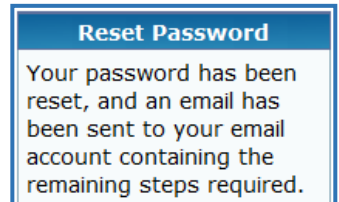
Reset Password

1. Enter your User Login (e.g. FOTOCO/Clinician) in the next screen and click **Reset Password**.

- A Reset Password notification message will appear.

- if nothing happens, the User Login is either incorrect or is the Administrator login.

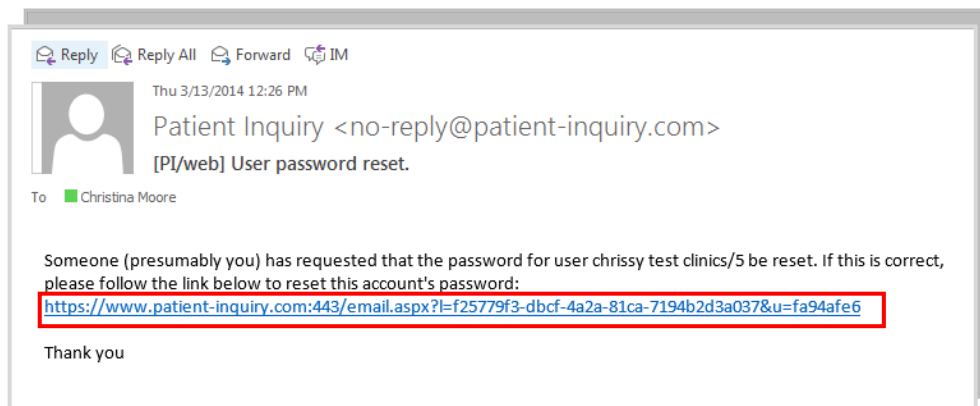
- The **Forgot Your Password?** button will not work for the Administrator login.



Reset Password

Your password has been reset, and an email has been sent to your email account containing the remaining steps required.

2. Click the link from the e-mail sent to the address associated with your User Login.



Reply Reply All Forward IM

Thu 3/13/2014 12:26 PM

Patient Inquiry <no-reply@patient-inquiry.com>
[PI/web] User password reset.

To: Christina Moore

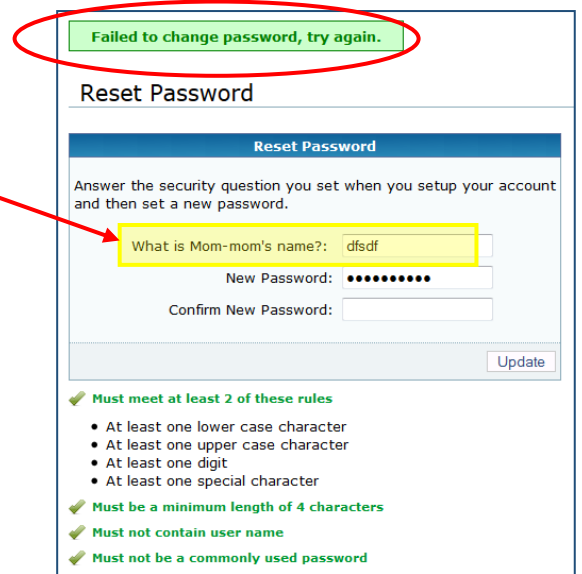
Someone (presumably you) has requested that the password for user chrissy test clinics/5 be reset. If this is correct, please follow the link below to reset this account's password:

<https://www.patient-inquiry.com:443/email.aspx?f=25779f3-dbcf-4a2a-81ca-7194b2d3a037&u=fa94afe6>

Thank you

3. You must answer your security question in order to change your password.
4. Enter and confirm the new password
5. Click **Update**

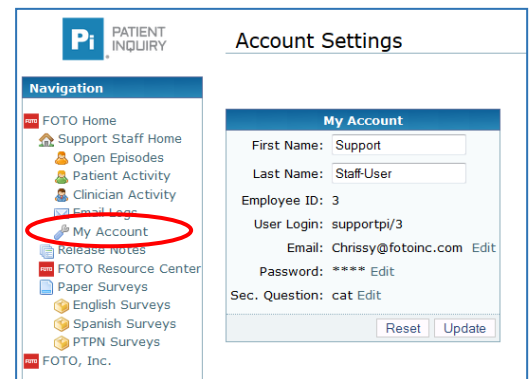
- If all requirements at the bottom turn green, but you still receive a message to try again, your security answer is incorrect.
- If you cannot remember the answer, the FOTO Administrator for your clinic can change your password for you or you can contact FOTO Support.



Support Staff User Account

Once you log into FOTO, you can change your Staff User account settings by clicking **My Account** in the Navigation menu.

- Changes to the First and Last Name can be made from this screen and saved by clicking **Update**.
- Changes to e-mail address, password, or security question/answer can be made by clicking on the word **Edit** to the right of the respective field.



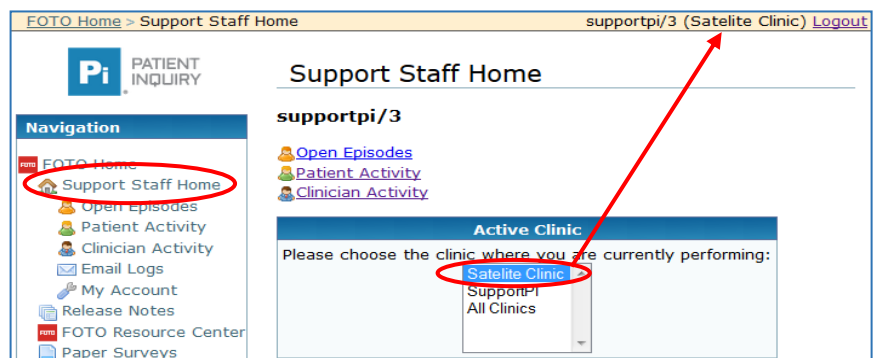
Selecting a Clinic

If the organization contains more than one clinic, the user must select the clinic at which they are currently working. Once a clinic is chosen, it will show next to the user login name in the upper right corner.

Support Staff Home

If you work at more than one clinic within the organization, you can switch clinics by clicking on **Support Staff Home** in the Navigation Menu.

Note that only patients belonging to the clinic you have selected will be available. If you need to view all patients in the organization, select "All Clinics".



The Navigation Menu

Navigation

- FOTO Home
- Support Staff Home
- Open Episodes
- Patient Activity
- Clinician Activity
- Email Logs
- My Account
- Release Notes
- FOTO Resource Center
- Paper Surveys
 - English Surveys
 - Spanish Surveys
 - PTPN Surveys
- FOTO, Inc.

The Navigation Menu on the left side of the screen provides immediate access to most all of the screens needed to manage patients and episodes.

FOTO

The red FOTO links provide valuable information on FOTO, the Outcomes Measurement System, using the system, and much more. It should be noted that these links will take you out of the system and you will need to log back in to manage patient episodes.

Release Notes

Release Notes will show the last time updates were made to the system and what changes were made.

Navigating Patient Screens

When managing a patient in FOTO, there are 3 main screens from which most activities are performed:

1. **Patient Activity** – Manage patient list, add or find a patient, click **Details...** to open Patient Details screen
2. **Patient Details** – Manage patient information, select an episode from the list by clicking the condition
3. **Episode Details** – View and manage details for the selected episode; manage surveys, view/print reports

Patient Activity

[Add Patient](#)

Show **Episode State**

- Setup only
- Intake only, need status
- Closed but no FS Change Score
- Need Staff Discharge
- Complete Episodes
- Non-Participation (NPA) reason specified
- No Episodes

Search:

	Id	Patient	Email	Setup Only	Intake Only
Details...	TestWoman	Woman, That		0	1
Details...	TestGuy	Guy, This		0	1
Details...	TEST10001	Patient, Sample	SamplePatient@gmail.com	1	0

1

Patient Details

- [Patient Details](#)
- [Episodes](#)
- [Add Episode](#)
- [Audit Report](#)

Patient Details

First Name:

Last Name:

Patient ID:

Default Clinic:

Date of Birth:

Gender: Male Female

Language:

Email:

Edit the first and last name for this patient.
Edit name fields if you misspelled or typed the wrong first or last name for this patient originally.

Episodes

Condition	Clinic	Clinician	Created	Intake	Status	Staff Discharge	NPA
Knee	SupportPI	555555	12/16/2013 4:51:25 PM	Complete	Complete(1) Add Survey	<input type="button" value="Staff DC"/>	<input type="button" value="NPA"/>
Shoulder	SupportPI	SClinician	10/2/2013 4:31:26 PM	Pending		<input type="button" value="Staff DC"/>	<input type="button" value="NPA"/>

2

Episode Details for Patient, Sample [TEST10001] - Shoulder

- [Episode Details](#)
- [Audit Report](#)

Activity

Date Created	Activity	Activity Status	Status Date	Measure	Visit	Report
10/2/2013	Intake Survey	Created	10/2/2013		1	

Surveys

Survey	Type	Date Assigned	Date Started	Time Elapsed
Shoulder	Intake	10/2/2013		
Demographics	Intake	10/2/2013		
Fear	Intake	10/2/2013		

Episode Details

Patient Alias: TEST10001

Patient Name: Patient, Sample

Clinic:

Care Type:

Condition:

Impairment:

3

FOTO Outcomes Management System

FOTO Home > Support Staff Home > Manage Patients > Patient Details > Episode Details Sutterco2PI/foto (Sutterco2PI) Logout

Pi PATIENT INQUIRY **Episode Details**

Use the toolbar at the top to easily navigate back from the Episode Details screen to the Patient Details screen or to Logout of the system.

Patient Activity Screen

This screen defaults to show all patients for the selected clinic (if more than one clinic per organization).

Patient Activity

Add Patient ← Add Patients from this screen.

Show **Episode State**

- Setup only
- Intake only, need status
- Closed but no FS Change Score
- Need Staff Discharge
- Complete Episodes
- Non-Participation (NPA) reason specified
- No Episodes

Update Episode State Filters

Search:

	Id	Patient	Email	Setup Only	Intake Only	No Score	Need DC	Complete	NPA	Episode Count
Details...	10000	Doe, John	Chrissy@fotoinc.com	0	1	0	0	2	0	3
Details...	10001	Patient, Sample		1	0	0	0	0	0	1
Details...	11111	Mouse, Mickey	Mainmouse@disney.com	0	0	0	0	0	1	1
Details...	34534	Duck, Daisy	Donaldsgirl@disney.com	0	0	0	1	0	0	1
Details...	Fbranigan	Branigan, Flash		0	1	0	0	0	0	1
Details...	Meow2	Kitty, Hello	hellokitty@meow.com	1	0	0	0	0	0	1
Details...	MrMonopoly	Pennybags, Uncle	donotpasgo@100dollars.net	0	1	0	0	0	0	1
Details...	MrSith	Skywalker, A.	skywalker@theff							
Details...	TestGuy	Guy, This								
Details...	TestWoman	Woman, That								

Showing 1 to 10 of 10 entries Show 100 entries
◀ Previous Next ▶

- To select a patient, click the **Details...** button to open the Patient Details screen.
- To show more than 10 Patients, change the selection in the drop down menu at the bottom. The change will be reflected in the “Showing” message to the left.
- Click **Next** to go to the next page if needed.
- The **Search** field can be used to search the patient list by Patient ID, name or email.
- The screen will hold any selected filters or searches until changed or the user logs out.

	Id	Patient	Email
Details...	10000	Doe, John	Chrissy@fotoinc.com
Details...	10001	Patient, Sample	SamplePatient@gmail.com
Details...	11111	Mouse, Mickey	Mainmouse@disney.com
Details...	34534	Duck, Daisy	Donaldsgirl@disney.com
Details...	Fbranigan	Branigan, Flash	

No Episodes

Update Episode State Filters

Search:

Id ▲

Details... 10000

Creating Test Patients

Creating a test patient is an excellent way to learn and practice using the FOTO Patient Inquiry application.

- Click **Add Patient** from the Patient Activity screen
- Test patients can have any first and last name you want, however, **the word “test” must be in the Patient ID** to ensure the results are not included in the clinic reports.
- Test patients can be deleted by the clinic FOTO administrator **as long as the word “test” is in the Patient ID.**
- Enter your e-mail address for the test patient to practice using the e-mail survey option

Patient Details Screen

Patient Details

Patient information may be edited in the Patient Details box. Click **Update** to save any changes made. The fields will be explained in greater detail under section **Patient / Episode Set Up**.

- **Default Clinic** - the default clinic will be the clinic the user was logged in under when the patient was created.
 - To change this clinic, simply select the needed clinic from the drop down and click **Update**
 - If the needed clinic is not available for selection in the drop down, it means that there is already a patient under the needed clinic with the same Patient ID.

Note: To create a Test Patient, be certain the word "Test" is in the Patient ID as shown here. This will keep the episodes created out of your reports.

If changes are made to this screen, be certain to click **Update** to save.

First Name: Sample
Last Name: Patient
Patient ID: TEST10001
Default Clinic: SupportPI
Date of Birth: 01/01/1935
Gender: Male Female
Language: English
Email: SamplePatient@gmail

Reset Update

Episodes						Instruction Guide	
Condition	Clinic	Clinician	Created	Intake	Status	Staff Discharge	NPA
Shoulder	SupportPI	SClinician	10/2/2013 4:31:26 PM	Pending		Staff DC	NPA

Start a New Episode

Episodes

The Episodes box lists all episodes associated with the patient.

Episodes						Instruction Guide	
Condition	Clinic	Clinician	Created	Intake	Status	Staff Discharge	NPA
Knee	SupportPI	555555	12/16/2013 4:51:25 PM	Complete	Complete(1) Add Survey	Staff DC	NPA
Shoulder	SupportPI	SClinician	10/2/2013 4:31:26 PM	Pending		Staff DC	NPA

Start a New Episode

- Clinic, Clinician and date created are shown for each episode.
- The Intake and Status columns show various information about the surveys associated with the episode.
- Status Surveys (if applicable), Staff Discharge and NPAs may be added for the episode by clicking the appropriate buttons.
- Click on the Episode Condition to open the Episode Details screen
- Click **Start a New Episode** to begin a brand new episode of care

Episode Details Screen

The Episode Details Screen shows all information associated with the episode and corresponding surveys. The fields will be explained in greater detail under section **Patient / Episode Set Up**.

Activity Box

- Add, begin, enter and email surveys.
- View or download patient specific reports
- Manage visit number associated with surveys taken

Surveys Box

- Lists surveys added, date started and time taken to complete each portion of the survey
- Download PDFs needed if using paper surveys

Episode Details Box

- Add or change episode details
- Add or remove NPA
- Add, edit or remove Staff Discharge
- Delete episode if no status surveys have been added
- See Step 5 of section **Patient / Episode Set Up** for more detailed information

Episode Details for Patient, Sample [TEST10001] - Shoulder

- Episode Details
- Audit Report

Activity						
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Report
10/2/2013	Intake Survey Created	Created	10/2/2013		1	

Paper Entry Continue Email Survey

Surveys				
Survey	Type	Date Assigned	Date Started	Time Elapsed
Shoulder	Intake	10/2/2013		
Demographics	Intake	10/2/2013		
Fear	Intake	10/2/2013		

Download All PDFs

Episode Details	
Patient Alias:	TEST10001
Patient Name:	Patient, Sample
Clinic:	SupportPI
Care Type:	Orthopedic
Condition:	Shoulder
Impairment:	Muscle, Tendon + Soft Tissue Disorders
Surgery Type:	-- Not Applicable --
Support Staff:	1
Primary Clinician:	Clinician, Sample
Alt. Clinician 1:	
Alt. Clinician 2:	
Alt. Clinician 3:	
Payer Source:	Medicare B
Physician Referral:	None
Employer Referral:	None
Insurance Referral:	None
Other Referral:	None
Status:	Open
Non-Participation (NPA):	Participating [edit]
Physicians Quality Reporting System Non-Participation (NPA):	Participating [edit]
Patient Selected Surgeries:	Not yet selected
Patient Selected Onset:	Not yet selected

Delete Episode Reset Staff Discharge... Save Changes

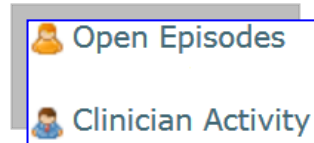
Note: If an episode has been discharged, the discharge will need to first be removed by clicking **Edit/Reopen** before making any changes to the Episode Details box.

(See section **Reopening Discharged Patient Episode**)

Navigating Episode Screens

There are 2 screens from which episodes can easily be viewed and sorted.


- **Open Episodes** – Lists all active/open episodes for the clinic
- **Clinician Activity** – Lists all episodes by clinician



Open Episodes Screen

The Open Episodes screen shows all active episodes that have not been discharged or marked NPA. It also shows patients who have no episodes created.

- Patients with multiple episodes will be listed more than once.



5 Id	3 Patient	5 Clinician	5 Condition	Info	Setup	Intake	Status	Staff Discharge	NPA
10000	Doe, John	SClinician	Shoulder	Intake Complete	09/26/13	01/05/13	Add Survey	Staff DC	NPA
10000	Doe, John	SClinician	Upper Leg	Intake Incomplete	12/09/13			Staff DC	NPA
10001	Patient, Sample	SClinician	Shoulder	Intake Incomplete	10/02/13			Staff DC	NPA
11111	Mouse, Mickey			No Episodes					

Showing 1 to 4 of 4 entries

1 Show 10 entries

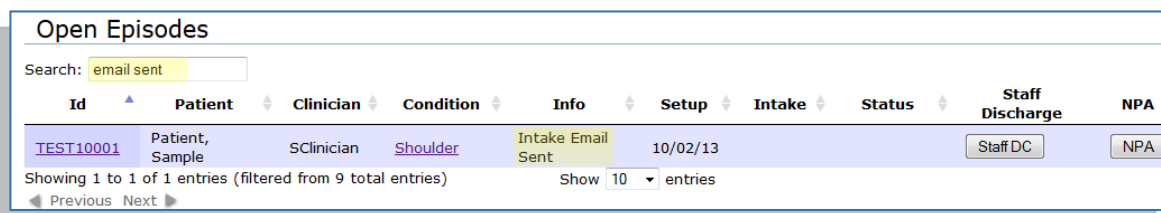
2 Previous Next

1. To show more than 10 Patient Episodes, change the selection in the drop down menu at the bottom. The change will be reflected in the “Showing” message to the left.
2. Click **Next** to go to the next page if needed.
3. The **Search** field can be used to search by Patient ID, name, clinician or key words in the Info column.
4. Surveys, NPAs and Staff Discharges may be added to the episodes.
5. Patient Details and Episode Details may be viewed by clicking on the “ID” and “Condition” respectively.
6. Patient Specific, Staff Discharge and NPA reports may be viewed by clicking on the date listed in the corresponding column.

Note: Reports will open in a separate window. If the browser is set to block all Pop-ups, a message should appear asking to allow Pop-ups from this site. Click “Always Allow” to ensure the reports can be easily viewed. If this message does not appear, the browser may need to be set to allow all Pop-ups.

Monitoring Emailed Surveys

The column labeled “Info” will show if a survey has been emailed to a patient. Enter “email sent” into the search field to see all episodes that have had surveys emailed, but have not yet been completed by the patient.



Id	Patient	Clinician	Condition	Info	Setup	Intake	Status	Staff Discharge	NPA
TEST10001	Patient, Sample	SClinician	Shoulder	Intake Email Sent	10/02/13			Staff DC	NPA

Showing 1 to 1 of 1 entries (filtered from 9 total entries)

Show 10 entries

Previous Next

Clinician Activity Screen

This screen provides patient episode data by clinician.

- If the user is support staff only, all clinicians and their associated patient episodes for the selected clinic (if more than one) may be viewed.
- If the user is also a clinician, only patient episodes assigned to this user will be shown.

Clinician Activity

This Year 1/1/2013 - 12/10/2013

Search:

Click any column header below to sort by that column.

Select	Clinician	Count	Last Intake	Last Status	Last Discharge	Visits	Setup Only	Intake Only	No Score	Needs DC
Select	Clinician, Good [555]	3	05/31/2013	05/31/2013			0	2	0	1
Select	clinician, clinician [clinicians]	8	10/22/2013	10/22/2013			1	6	0	1
Select	Clinician, Great [gclinician]	17	10/22/2013	10/22/2013	10/14/2013	10	2	6	1	4
Select	discipline, test [testdiscipline]	3	10/04/2013	10/04/2013			1	1	0	1
Select	Sutter, John [JohnClinician]	2	08/27/2013		08/27/2013	1	0	1	0	0

Showing 1 to 5 of 5 entries Show 10 entries

Previous Next

Clinician, Great [gclinician] Statistics

Show	Episode State	Count
<input checked="" type="checkbox"/>	Setup only	2
<input checked="" type="checkbox"/>	Intake only, need status	6
<input checked="" type="checkbox"/>	Closed but no FS Change Score	1
<input checked="" type="checkbox"/>	Need Staff Discharge	4
<input checked="" type="checkbox"/>	Complete Episodes	4
<input type="checkbox"/>	Non-Participation (NPA) reason specified	0
	Total	17

Activity Report

7/28/2013 - 8/26/2013

1. Select the desired time frame from the drop down menu.

- The date range will calculate automatically
- All patient episodes created (Setup) within this date range will be included
- Click the column headers to sort clinicians by that column.
- To show more than 10 Clinicians, change the selection in the drop down menu at the top. The change will be reflected in the “Showing” message to the left.
- Click **Next** to go to the next page of Clinicians
- The **Search** field can be used to search for a specific clinician.

2. If you are a clinician, go to step 3. If you are not a clinician, click **Select** by the clinician for which you would like to view patient episodes.

- If you are a clinician, or you have selected a clinician, the associated patient episodes created during the selected time frame will appear at the bottom of the screen. Episodes will only be listed if the clinician is listed as the Primary Clinician for the episode.

Clinician Activity

This Year 1/1/2013 - 12/13/2013

Clinician, Sample [S]Clinician] Statistics

Show	Episode State	Count
<input checked="" type="checkbox"/>	Setup only	1
<input checked="" type="checkbox"/>	Intake only, need status	2
<input checked="" type="checkbox"/>	Closed but no FS Change Score	0
<input checked="" type="checkbox"/>	Need Staff Discharge	1
<input checked="" type="checkbox"/>	Complete Episodes	2
<input checked="" type="checkbox"/>	Non-Participation (NPA) reason specified	1
	Total	7

Search:

Patient ID	Patient	Body Part	Payer Source	Insurance	Site	Start	Intake	Status	Staff Discharge	Discharge Entered	Visits	Days Between Status & DC	NPA
10000	Doe, John	Hip	Medicare B	None	SupportPI	09/26/2013	01/01/2013	02/02/2013	02/02/2013	09/27/2013	5	0	
10000	Doe, John	Upper Leg	Medicare A	None	SupportPI	12/09/2013	12/01/2013	12/02/2013	12/13/2013	12/13/2013	10	11	
10000	Doe, John	Shoulder	Medicare B	None	SupportPI	09/26/2013	01/05/2013	Add Survey	Staff DC				Add NPA
Fbranigan	Branigan, Flash	Foot	Litigation		SupportPI	12/13/2013	12/13/2013	Add Survey	Staff DC				Add NPA
34534	Duck, Daisy	Shoulder	Medicare B		SupportPI	12/09/2013	12/13/2013	12/13/2013	Add Survey	Staff DC			Add NPA
11111	Mouse, Mickey	Hip	Medicare A		SupportPI	12/09/2013	12/03/2013	12/13/2013					12/13/2013
10001	Patient, Sample	Shoulder	Medicare B		SupportPI	10/02/2013			Staff DC				Add NPA

Showing 1 to 7 of 7 entries Show 10 entries [Export](#)

This episode list functions similarly to the list on the Open Episodes screen:

- To show more than 10 Patient Episodes, change the selection in the drop down menu at the bottom. The change will be reflected in the “Showing” message to the left.
- Click **Next** to go to the next page if needed.
- The **Search** field can be used to search by any keyword, number, or date.
 - If searching for a specific patient episode, be certain that the episode was created during the selected time frame (date range).
- Click **Export** to drop the data into an Excel spreadsheet. This will be data only; the formatting will not transfer.
- From this screen, surveys, NPAs and Staff Discharges may be added to the episodes.
- The Patient Details and Episode Details may be viewed by clicking on the “PatientID” and “Condition” respectively.
- Patient Specific, Staff Discharge and NPA reports may be viewed by clicking on the date listed in the corresponding column.

Note: The reports will open in a separate window. Pop-up blockers may need to be disabled.

Patient / Episode Set Up

Adding a Patient

1. Select **Patient Activity** from the Navigation Menu.
2. Click **Add Patient**
3. Enter information for the patient and click **Create**.
 - Some surveys are based on age so be certain the birthdate entered is correct.
 - **E-Mail** is an optional field, however, patient surveys cannot be sent by e-mail if left blank.
 - **External ID** will populate if a patient is pulled from one of the EMR systems that integrates with Patient Inquiry. Manual entry is not recommended, see **Addendum A – EMR Integration**.
 - To create a patient without creating an episode, uncheck the box next to **Continue creating patient episode**.

A screenshot of the 'Sign Up New Patient' form. The form contains fields for First Name, Last Name, Patient ID, Gender (Male/Female), Language (English), Date of Birth (MM/DD/YYYY), E-mail, and External ID. There is a checkbox for 'Continue creating patient episode' which is checked. The 'Create' button at the bottom right is circled in red.

Creating an Episode

4. Input appropriate information for the episode and click **Create Episode**.

- **Clinic** – Ensure the correct clinic is selected
- **Clinician** – if the correct clinician is not listed, notify the clinic FOTO Administrator to add this person.
- **Care Type, Body Part, Impairment** - determine the type of survey that will be created for the patient.
- **Surgery Type** - only required if the impairment is post-surgical.
- **Payer Source** is the TYPE of insurance plan the patient is presenting for payment of care (not the specific insurance).
- **For Visit** – Defaults to “1” to indicate the first visit, but can be changed if the Intake Survey will be taken on a subsequent visit.

A screenshot of the 'Create a New Episode' form. The 'Episode Details' section includes dropdown menus for Clinic (My PT Clinic), Clinician, Care Type, Body Part, Impairment, Surgery Type (Not Applicable), Payer Source, and For Visit (1). Below this is the 'Optional Surveys' section, which has two columns: 'Available' and 'Required'. The 'Available' column lists Pain, Patient History, ABC Scale, MFIS-21, PSFS, and Pain Disability Index. The 'Required' column lists Global Rating, PQRS Measure 154, and PQRS Measure 131. A 'Create Episode' button is at the bottom right.

Optional Surveys

Must be selected here and cannot be added later.

- To select, move the survey from “Available:” to “Required:” using the “>” button.
- To remove or change optional surveys after episode creation, delete the episode and start over.
- For more information about each of the optional surveys, click on **FOTO Resource Center** in the Navigation menu – DO NOT LOGIN. Select **Instructional Guides** from the menu to the left of the Login screen. Under the heading *Support Materials*, click on **Optional Survey Descriptions**.

Adding / Changing Episode Details

5. Once the episode is created, the Episode Details screen will appear. Information may be edited or added in the Episode Details box if needed. Be certain to click **Save Changes** when finished.

- **Clinic** – to change the clinic for the episode, select it from the drop down menu. This will remove the episode from the current clinic’s episode screens. If the needed clinic is not available, a patient with the same Patient ID already exists at that clinic. Contact FOTO to merge duplicate patients.
- **Care Type, Impairment** – If the Care Type is incorrect, it is best to delete the episode and start over since the survey initially created will not change.
- **Surgery Type** – must be selected if impairment is post-surgical.
- **Primary Clinician** – This is the clinician that will show for the episode and on the reports.
- **Alt. Clinician** – up to 3 additional clinicians may be added, however, only the primary clinician will show on the reports.
- **Payer Source** – This field will affect certain surveys and can be changed here if needed. *PQRS Measure surveys must have Medicare B selected.*
- **Referrals** – If needed, the drop down lists for these referrals must be set up by the Patient Inquiry administrator.
- **Non-Participation (NPA)** - used to document non-inclusion in the Patient Inquiry process. (See section **Non-Participation Audit**)
- **Surgeries, Onset, Weight, and Height** - will be populated by the patient once they answer these questions in the intake survey. If answered incorrectly, enter or select correct answer from the drop down menu.

Episode Details

Patient ID: TEST10001
Patient Name: Patient, Sample
Clinic: SupportPI
Care Type: Orthopedic
Condition: Shoulder
Impairment: Muscle, Tendon + Soft Tissue Disorders
Surgery Type: -- Not Applicable --
Support Staff: 1
Primary Clinician: Clinician, Sample
Alt. Clinician 1:
Alt. Clinician 2:
Alt. Clinician 3:
Payer Source: Medicare B
Physician Referral: None
Employer Referral: None
Insurance Referral: None
Other Referral: None
Status: Open
Non-Participation (NPA): Participating [edit]
Physicians Quality Reporting System Participating [edit]
Non-Participation (NPA):
Patient Selected Surgeries: Not yet asked
Patient Selected Onset: Not yet asked
Weight: Not yet asked
Height: Not yet asked

Delete Episode Reset Staff Discharge... **Save Changes**

6. Click **Save Changes** when finished.

Patient Selected Surgeries: 1
Patient Selected Onset: 8-14 Days
Weight: 195 lbs
Height: 68 inches

Reset Staff Discharge... **Save Changes**

Deleting an Episode

Click **Delete Episode** from the Episode Details screen.

- Episodes may be deleted as long as they only contain an intake survey.
- Once a status survey is added, the **Delete Episode** button will no longer be available.

Height: Not yet a
Delete Episode Res

Surveys

Intake Surveys

Once the patient and the episode are created, the intake survey will be available for the patient to complete. The intake survey is automatically created when the episode is created.

Activity							
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Report	
						Open	Save
9/26/2013	Intake Survey	Created	9/26/2013		1		
						Paper Entry	Continue
							Email Survey

3 1 2

Surveys				
Survey	Type	Date Assigned	Date Started	Time Elapsed
Hip	Intake	9/26/2013		
Demographics	Intake	9/26/2013		
Fear	Intake	9/26/2013		
Download All PDFs				

If no optional surveys are selected, only the basic surveys will be created:

- Body part, general or med/neuro
- Demographics
- Fear

Electronic Intake Survey (Email or In Clinic)

Survey data can be gathered electronically, where the patient responds to survey questions directly on the computer screen. This can be done in the clinic, or the survey can be emailed to the patient to be completed on their own computer or tablet. (See section *Electronic Patient Data Collection*)

- Click **Continue** 1 to immediately begin the intake survey in the clinic, or
- Click **Email Survey** 2 to send an email to the patient containing a secure link to the survey.
 - A verification notice will appear at the top of the screen indicating that the email was sent.

Email sent to [REDACTED]

Paper Intake Survey

The patient can take the survey on paper, however, their responses will need to be entered into Patient Inquiry by a practice staff member.

- Click **Paper Entry** 3 to enter the patient's responses once they have completed the paper survey (See section *Paper Patient Data Collection*)

Deleting an Intake Survey

The intake can only be removed by deleting the episode as long as a status survey has not yet been added, however, completing the NPA for the episode will also remove the episode from the open episodes list and the clinic reports.

Completed Intake Survey

Regardless of how the intake survey has been completed, the start date will show for each section of the survey under "Date Started."

Surveys				
Survey	Type	Date Assigned	Date Started	Time Elapsed
Shoulder	Intake	7/16/2013	7/16/2013 11:37 AM	0m
Demographics	Intake	7/16/2013	7/16/2013 11:37 AM	1m
Fear	Intake	7/16/2013	7/16/2013 11:38 AM	0m

Date Started	Time Elapsed
9/27/2013 10:26 AM	Incomplete

[Download All PDFs](#)

- If the Time Elapsed shows as "Incomplete" or "Expired," the patient may have exited the survey before finishing.
 - Click **Continue** from the Activity box to allow the patient to finish the intake survey in the clinic or click **Email Survey** to resend the link to the patient.

Once completed, a Functional Intake Summary report will be generated and can be viewed or downloaded by clicking the icons under **Open** or **Save** respectively in the "Activity" box.

Activity						
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Report
9/25/2013	Functional Intake Summary	Completed	9/27/2013	35.1600	1	

[Add Survey](#)

To print, open the report, then click the print icon. (See section *Printing Patient Specific Survey Reports*)

Back [Download](#) Note: closing this window may exit PI/web, use Back.

Page: 1 of 2 Automatic Zoom

Test Clinics
INTAKE FUNCTIONAL STATUS SUMMARY

Patient: TEST SURVEY, TEST SURVEY	Risk-Adjustment Criteria	
ID#: test survey lin	Care Type: Orthopedic	Gender: Female
Date of Birth: 10/10/1938	Body Part: Knee	Comorbidities: None
Initial DOS: 6/19/2013	Severity: Very Severe (Intake FS: 1)	Payer: Medicare B
Body Part: Knee	Age: 75	Fear Avoidance: Low
Impairment: Post-surgical procedures: Musc...	Acuity: 0 - 7 days	Surgery Status: None
Surgery Type: Not Specified		

Functional Status Measures:	Patient's	FOTO*
Physical FS Primary Measure	1	41

Rehabilitation Resource Predictor
 FOTO Patients with similar risk adjusted parameters (Care type, Body Part/Impairment, Severity, Age, Acuity, Gender, Surgery, Fear, Payer Source, and Co-morbidities) have utilized rehabilitation resource and experienced the following results:
FOTO Mean data
Change Score: Physical FS Primary Measure

Status Surveys

When the patient is ready to complete another survey, a status survey will need to be added.

Note: A Patient Status should be completed at minimum on the patient's last date of service (or as close as possible), but may be completed as often as desired during care.

***** The last status survey will be the discharge survey. *****

Add Survey

A Status Survey is added the same way during care and on the last (discharge) visit. Add Survey buttons can be found on the Open Episodes, Clinician Activity, Patient Details and Episode Details screens

- Patient Details screen

Episodes					Instruction Guide	
Condition	Created	Intake	Status	Discharge	NPA	
Shoulder	7/16/2013 12:38:52 PM	Complete	Add Survey	Discharge	NPA	

- Episode Details screen

Activity						
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Report
9/25/2013	Functional Intake Summary	Completed	9/27/2013	35.1600	1	Add Survey

If the add survey button is not available on any of these screens, the previous survey may not have been completed. Check the Activity Status for the survey in the Activity box on the Episode Details screen.

Any **Add Survey** button will bring up the Create Survey screen.

1. Enter the visit number for the status survey
2. Select one of the following and click **Create**:
 - **Login as <Patient ID> now.** – The survey will begin immediately. (Test 001 in the example to the right is the Patient ID and will differ for each patient.)
 - **Paper Survey Entry** – This will allow a staff member to enter patient responses from a completed paper survey.
 - **Return to Patient Details** – returns to the Episode Details screen.
 - **Email Survey** – Immediately emails the survey link to the patient.

Create Survey

This survey associated with visit number:

Choose how or whether to start the survey.

Login as Test 001 now.

Paper Survey Entry

Start Method: Return to Patient Details

Email Survey

Adding a New Episode

If a patient returns for another episode of care or requires treatment for more than one condition at the same time, a new episode can be added as follows:

1. Click **Start a New Episode** from the Patient Details screen in the "Episodes" box.
2. Create the episode as previously shown (see section *Creating an Episode*).

Episodes					Instruction Guide	
Condition	Created	Intake	Status	Discharge	NPA	
Shoulder	7/16/2013 12:38:52 PM	Complete	Add Survey	Discharge	NPA	

Start a New Episode

Complete Outcome Episode

Surveys Required

A complete outcome episode requires at least the following: ❶ Patient Intake Survey, ❷ Patient Status (Discharge) Survey, and ❸ Staff Discharge.

Note: PQRS surveys are only required if you are collecting CMS PQRS Measures using the FOTO software.

❶ Patient Intake Survey

- Patient completes Intake Survey on arrival to the office or by e-mail before the initial evaluation

❷ Patient Status(Discharge) Survey

- Patient completes at least one Status Survey on the last date of service (or as close to the last date of service as possible).
- Status Surveys may be collected as many times as desired to assist in the clinical management of the patient's episode – for example perhaps every 6th visit, etc.
- If multiple Status Surveys are collected, it is still important to obtain the final Status Survey from the Patient on their last date of service or as close to the last date of service as possible.

❸ Staff Discharge

- The Staff Discharge form is produced to assist support staff in collecting the information necessary to populate the staff discharge to close the FOTO episode of care. This is NOT completed by the patient.
- The Staff Discharge includes episode detail information from the clinic such as the date of the last date of service, number of visits the patient received during the episode, insurance and other referral code information, who discharged the patient, the global rating of the clinician, modalities/exercises/procedures provided during the episode treatment.

PQRS Measures *(If selected. Only appropriate for Medicare B)*

If these surveys are selected but not added for the patient, check the patient's birthdate and payer source.

- Measure 131 Pain Assessment prior to Initiation of Therapy (If patient is Medicare B and 18+ years of age)
- Measure 154 Fall Risk Assessment (if patient is Medicare B and 65 or more years). Includes:
 - Fall Risk Assessment
 - Fall Risk environmental factors
 - If patient reports 1 fall with injury or 2 or more falls without injury in the last 12 months:
 - Abbreviated ABC Scale should also be completed and will automatically be included if the survey is taken electronically
 - Tinetti Assessment will print out with Functional Intake Summary
 - Fall Prevention educational handout will print out with Functional Intake Summary

Electronic Patient Data Collection

In Clinic



To allow a patient to take a survey in the clinic, assuming the patient, episode and survey have already been created:

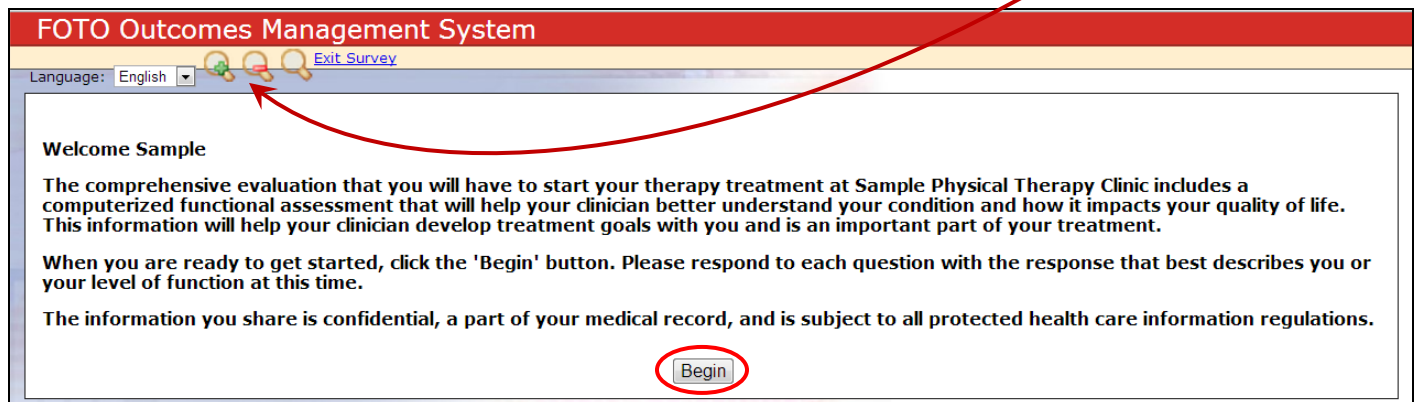
- Click **Continue** from the Activity box on the Episode Details screen.

Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
9/26/2013	Intake Survey	Created	9/26/2013		1			
						Paper Entry	Continue	Email Survey

The Patient Survey Instruction Page will appear on screen and the survey will start when the patient selects **Begin**. The patient should select the best response for each question.

The [Exit Survey](#) button allows the patient to exit the survey if needed. The survey can be restarted at the leave off point by clicking **Continue** again.

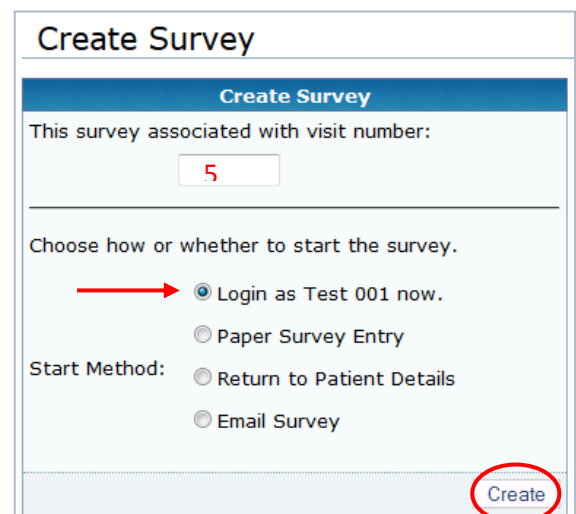
If the patient has difficulty seeing the words on screen, the size can be adjusted by clicking the  icons at the top of the screen. The  icon will reset the size to 100%.



If a survey has not yet been created, click **Add Survey** from the Activity box on the Episode Details screen.

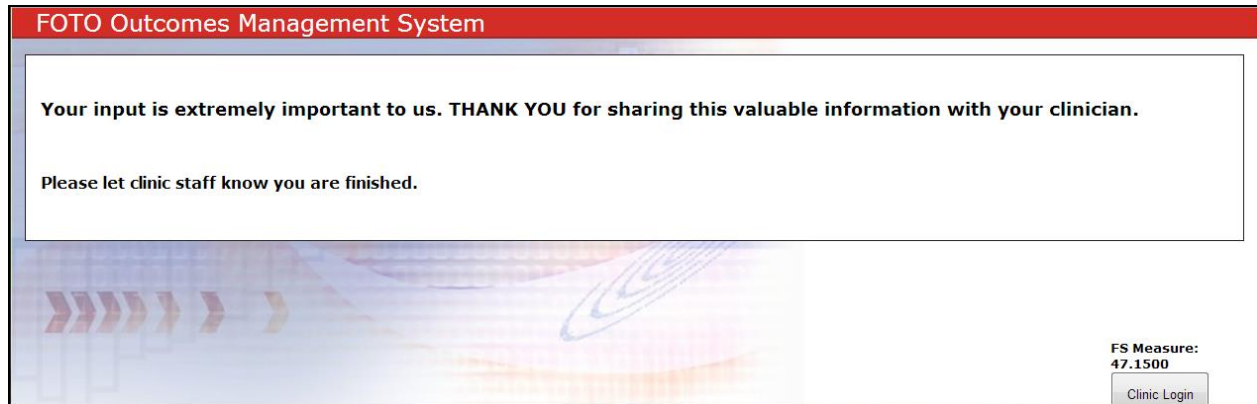
Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
9/25/2013	Functional Intake Summary	Completed	9/27/2013	35.1600	1			
						Add Survey		

- Enter the visit number
- Select **Login as <Patient ID> now**
- Click **Create**.
 - The Patient Survey Instruction Page will appear on screen just as above.



Note: The surveys administered use Computer Adaptive Testing to select questions that are appropriate for the patient's impairment and functional level. For more information on Computer Adaptive Testing, go to <http://www.fotoinc.com/research.htm>.

Once the survey has been completed, the patient will see the following screen:



At this point, the patient should inform the staff that the survey has been completed. The staff can then click the Clinic Login button in the bottom right corner to get back to the login screen.

Email

Emailing a survey to a patient is similarly performed as above. Assuming the patient, episode and survey have already been created:

- Click **Email Survey** from the Activity box on the Episode Details screen.

Activity							Report		
Date Created	Activity	Activity Status	Status Date	Measure	Visit		Open	Save	
9/26/2013	Intake Survey	Created	9/26/2013		1				
							Paper Entry	Continue	Email Survey

If a survey has not yet been created, click **Add Survey** from the Activity box on the Episode Details screen.

1. Enter the visit number
2. Select **Email Survey**
3. Click **Create**.
 - A verification notice will appear at the top of the screen indicating that the email was sent.

Email sent to [redacted]

Activity							Report		
Date Created	Activity	Activity Status	Status Date	Measure	Visit		Open	Save	
9/25/2013	Functional Intake Summary	Completed	9/27/2013	35.1600	1				
									Add Survey

Create Survey

This survey associated with visit number:

Choose how or whether to start the survey.

Login as Test 001 now.

Paper Survey Entry

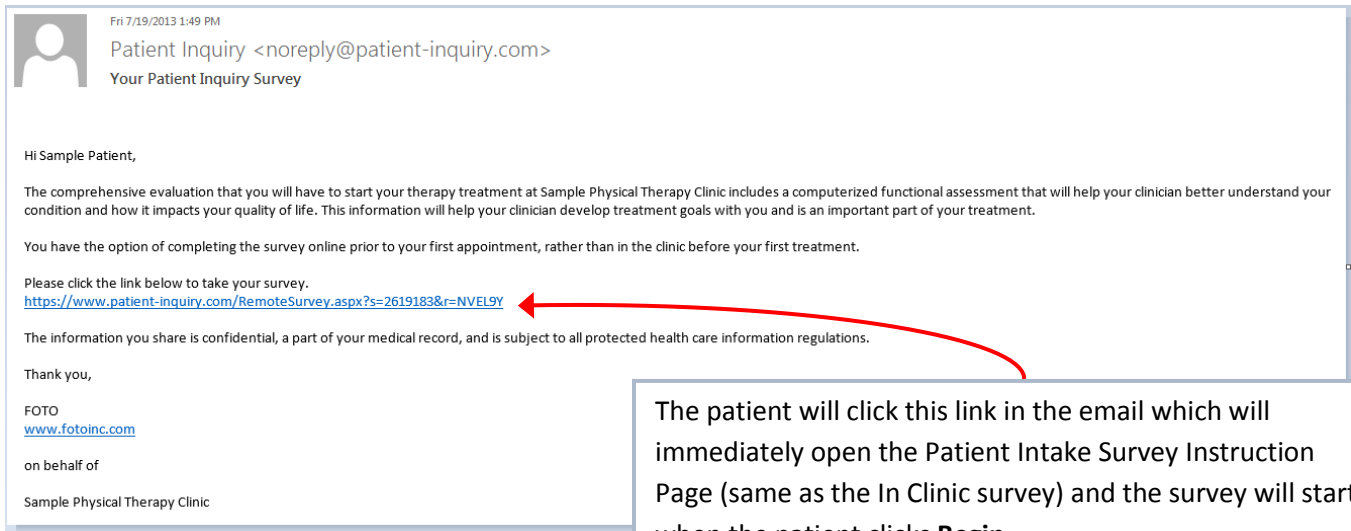
Start Method: Return to Patient Details

Email Survey

Create

Monitor emailed surveys using the Open Episodes screen by entering "email sent" in the search field. (See section **Open Episodes Screen**)

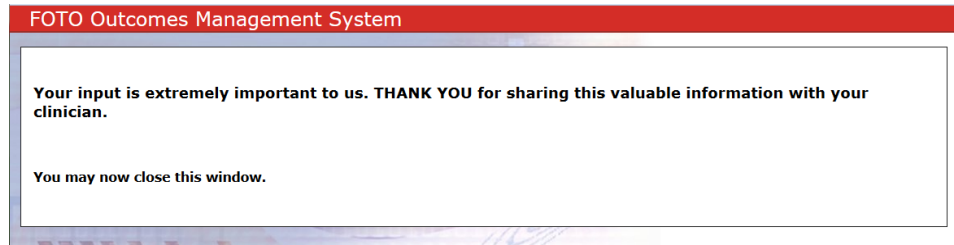
The patient will receive an email from noreply@patient-inquiry.com containing a link to the survey similar to the one below:



The patient will click this link in the email which will immediately open the Patient Intake Survey Instruction Page (same as the In Clinic survey) and the survey will start when the patient clicks **Begin**.

Note: The email message for a Status Survey will differ from the email message for the Intake Survey.

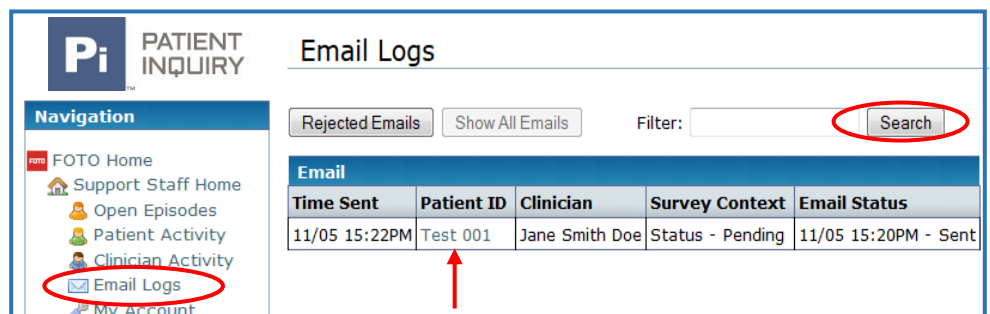
Once the patient completes the survey, a screen will appear instructing the patient to close the window.



Email Logs

Click **Email Logs** from the Navigation menu to view all emails or just the rejected emails sent from your organization's FOTO account. If an email is rejected, click the Patient ID to view the Patient Details and check that the email address listed for the patient is correct.

- Enter the Patient ID in the filter to search for all emails sent to that patient.



Paper Patient Data Collection

Paper Survey Forms

To print the paper surveys to be completed by the patient, click on the **Download all PDFs** button from the Episode Details screen to download the PDFs to the computer, then select the appropriate forms needed to print. If your clinic is a PTPN member, the surveys downloaded will be specific for PTPN.

Episode Details for Doe, John [10000] - Shoulder

- [Episode Details](#)
- [Audit Report](#)

Activity							
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Report	
						Open	Save
9/26/2013	Functional Intake Summary	Completed	1/5/2013	49.6200	1		
9/26/2013	Functional Status Summary	Completed	2/1/2013	49.6200	5		

[Add Survey](#)

Surveys				
Survey	Type	Date Assigned	Date Started	Time Elapsed
Shoulder	Intake	9/26/2013	1/5/2013 12:00 AM	0m
Demographics	Intake	9/26/2013	1/5/2013 12:00 AM	0m
Fear	Intake	9/26/2013	1/5/2013 12:00 AM	0m
Shoulder	Status	9/26/2013	2/1/2013 12:00 AM	0m
Satisfaction	Status	9/26/2013	2/1/2013 12:00 AM	0m
Fear	Status	9/26/2013	2/1/2013 12:00 AM	0m

[Download All PDFs](#)

Forms that will download include:

- **Body part, general or med/neuro Intake Survey**
– Print this form if it is the first survey the patient needs to complete for the episode.
- **Body part, general or med/neuro Status Survey**
– Print this form if the patient has already completed the intake survey.
 - If the clinic is a PTPN member, the status survey will contain the Global Rating question.
- **PQRS 131 and 154 – (Medicare B Only)**
- **Abbreviated ABC** – Print if selected as an optional survey.

Downloading Paper Surveys

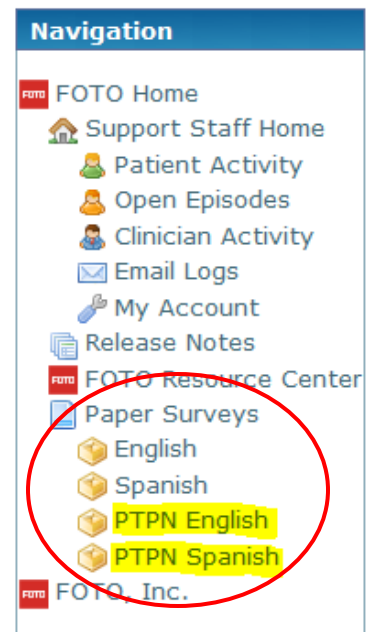
Paper survey forms can be downloaded from the Support Staff Home Navigation Menu. It is a good idea to have these forms downloaded onto the computer as backup in case the website or the clinic internet is down for any reason.

PTPN Members

Be certain to select surveys from the PTPN folders. The PTPN status surveys will contain the Global Rating question which is not included in the English only folder.

Also Included in the PTPN Folder:

- **Staff Discharge PTPN** - This form is produced to assist support staff in collecting the information necessary to populate the staff discharge to close the FOTO episode of care. **This is NOT completed by the patient.**
- **ABC Scale Full Version** – Contains 16 questions (as opposed to 6 in the Abbreviated ABC Scale) regarding the patient's confidence that they will not lose their balance or become unsteady in the course of daily activities.



Entering Data from Patient Paper Survey Forms

When the patient has completed the paper Survey Form, a staff member must enter the patient's responses into Patient Inquiry.

- If a survey has already been added, click **PAPER ENTRY** in the Activity box of the Episode Details screen.

Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
9/26/2013	Functional Intake Summary	Completed	1/1/2013	4.4100	1			
9/27/2013	Status Survey	Created	9/27/2013		?			

- If a survey has not yet been added, click **Add Survey**. Enter the visit number, then select **Paper Survey Entry** and click **Create**

(See section **Add Survey**)

Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
9/26/2013	Functional Intake Summary	Completed	1/1/2013	4.4100	1			

Create Survey

This survey associated with visit number:

Choose how or whether to start the survey.

Login as Test 001 now.
 Paper Survey Entry
 Return to Patient Details
 Email Survey

Start Method:

The Data Entry screen will appear and follows the format of the paper survey form that the patient completed.

- Enter patient's responses from the paper survey form by clicking on the radial (○) buttons for the appropriate response.

Data Entry												
General Information												
Survey Date	08/23/2013											
Question	I can't do this	Much difficulty	Some difficulty	Little difficulty	No difficulty							
Combing or brushing your hair using your affected arm?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Place a can of soup (1 lb) on a shelf at shoulder height?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Pick up and drink out of a full water glass?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Reach a shelf that is at shoulder height?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Reach an overhead shelf?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Pushing yourself out of a chair using both arms?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Reaching across to the middle of the table with your affected arm to get a salt shaker while sitting?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Getting a scarf or necktie over your head and around your neck, using both hands?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Putting on deodorant under the arm opposite your affected shoulder?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Pulling a chair out from a table using your affected arm?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>							
Question	10 Pain as bad as it can be	9	8	7	6	5	4	3	2	1	0 No Pain	
Rate the level of pain you have had in the past 24 hours												
Question											Somewhat Agree	Completely Agree
I should not do physical activities my pain worse											<input type="radio"/>	<input type="radio"/>
											<input type="button" value="Submit"/>	

Survey Date is the Date the patient completed the survey
NOT the date the survey was entered into the system

- Click **Submit** when the data entry has been completed. A verification will show at the top of the Episode Details screen:

Successfully submitted paper survey results.

Paper Entry with Optional Surveys

Optional surveys must be completed electronically with the exception of PQRS Measure 154, 131, and the Abbreviated ABC Scale. If the patient completes a paper survey, any other optional surveys selected for the episode must either be completed electronically or removed from the episode.

In the example to the right, a patient's Knee episode contains the following optional surveys:

- Pain Module
- PQRS Measure 131
- PDI 7
- Oswestry
- Abbreviated ABC Scale

1. To enter the patient's responses from the paper survey, click the **Paper Entry** button from the Activity box.

- The following message will show at the top of the Data Entry screen:

The following optional survey(s) associated for this episode are not available as paper surveys:

- Pain Module
- PDI 7
- Oswestry

You can still do the paper survey, but you will need to either complete the optional survey(s) electronically or you can elect to remove the unfinished optional survey(s) when you add the next status update. [Back to Episode Details](#)

2. Enter the patient responses and click **Submit**.

3. The Episode Details screen will reappear. At this point either:

- Click the **Continue** button to allow the patient to take the optional surveys electronically, or
- Remove the optional surveys by clicking the **Discard Survey** button for each survey.

Once the optional surveys are either completed or removed, the **Add Survey** button will be available to add a Status when needed.

Episode Details for Patient, Fine [test08] - Knee

- [Episode Details](#)
- [Audit Report](#)

Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
11/7/2013	Intake Survey	Created	11/7/2013			1		

[Paper Entry](#) [Continue](#) [Email Survey](#)

Surveys				
Survey	Type	Date Assigned	Date Started	Time Elapsed
Demographics	Intake	11/7/2013		
Fear	Intake	11/7/2013		
Knee	Intake	11/7/2013		
Pain Module	Intake	11/7/2013		
PQRS Measure 131	Intake	11/7/2013		
PDI 7	Intake	11/7/2013		
Oswestry	Intake	11/7/2013		
Abbreviated ABC Scale	Intake	11/7/2013		

[Download All PDFs](#)

Successfully submitted paper survey results.

Episode Details for Patient, Fine [test08] - Knee

- [Episode Details](#)
- [Audit Report](#)

Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
11/7/2013	Functional Intake Summary	Completed	11/1/2013	2.7700	1			

[Continue](#) [Email Survey](#)

Surveys				
Survey	Type	Date Assigned	Date Started	Time Elapsed
Pain Module	Intake	11/7/2013		
PDI 7	Intake	11/7/2013		
Oswestry	Intake	11/7/2013		
Demographics	Intake	11/7/2013	11/1/2013 12:00 AM	0m
Fear	Intake	11/7/2013	11/1/2013 12:00 AM	0m
			11/7/2013 11/1/2013 12:00 AM	0m
			11/7/2013 11/1/2013 12:00 AM	0m
			11/7/2013 11/1/2013 12:00 AM	0m

[Discard Survey](#)
[Discard Survey](#)
[Discard Survey](#)

[Download All PDFs](#)

Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
11/7/2013	Functional Intake Summary	Completed	11/1/2013	2.7700	1			

[Add Survey](#)

Surveys				
Survey	Type	Date Assigned	Date Started	Time Elapsed
Demographics	Intake	11/7/2013	11/1/2013 12:00 AM	0m
Fear	Intake	11/7/2013	11/1/2013 12:00 AM	0m
Knee	Intake	11/7/2013	11/1/2013 12:00 AM	0m
Abbreviated ABC Scale	Intake	11/7/2013	11/1/2013 12:00 AM	0m
PQRS Measure 131	Intake	11/7/2013	11/1/2013 12:00 AM	0m

[Download All PDFs](#)

Staff Discharge

The Staff Discharge is completed the same way (as described below) for both electronic and paper data collection options. If the clinician completes the paper discharge form, a staff member will still need to enter the data in this manner.

A Staff Discharge must be completed to close the FOTO episode of care and for patient outcome data to be included in the clinic data set (or quarterly report). Keep in mind that a complete discharged episode includes the Intake Survey, the Status Survey on or near the last date of service and the Staff Discharge.

To enter staff discharge information:

1. Select **Staff Discharge** or **Staff DC** from either the Patient Details, Episode Details, Open Episodes or Clinician Activity screen.

Episodes							Instruction Guide	
Condition	Clinic	Clinician	Created	Intake	Status	Staff Discharge	NPA	
Knee	SupportPI	555555	12/16/2013 4:51:25 PM	Complete	Complete (1) Add Survey	Staff DC	NPA	
Shoulder	SupportPI	SClinician	10/2/2013 4:31:26 PM	Pending		Staff DC	NPA	

Start a New Episode

Episode Details	
Patient Alias:	TEST10001
Patient Name:	Patient, Sample
Clinic:	SupportPI
Care Type:	Orthopedic
Condition:	Shoulder
Impairment:	Muscle, Tendon + Soft Tissue Disorders
Surgery Type:	-- Not Applicable --
Support Staff:	1
Primary Clinician:	Clinician, Sample
Alt. Clinician 1:	
Alt. Clinician 2:	
Alt. Clinician 3:	
Payer Source:	Medicare B
Physician Referral:	None
Employer Referral:	None
Insurance Referral:	None
Other Referral:	None
Status:	Open
Non-Participation (NPA):	Participating [edit]
Physicians Quality Reporting System Non-Participation (NPA):	Participating [edit]
Patient Selected Surgeries:	Not yet selected
Patient Selected Onset:	Not yet selected
<input type="button" value="Delete Episode"/> <input type="button" value="Reset"/> <input type="button" value="Staff Discharge..."/> <input type="button" value="Save Changes"/>	

The Staff Discharge Screen will open.

2. Enter the discharge information as appropriate:

Episode Information	
Patient ID: 10000	Care Type: Orthopedic
Name: Doe, John	Body Part: Shoulder
Clinician: SClinician	Impairment: Wounds and Traumatic Amputation
Initial Visit: 1/5/2013	
Interruption Days Interruption Days: <input type="text"/>	Date of Last Visit Last Visit: 01/05/2013
Patient Visits OT Visits: <input type="text"/> OT Hours: <input type="text"/> PT Visits: 1 PT Hours: <input type="text"/> ST Visits: <input type="text"/> ST Hours: <input type="text"/> RT Visits: <input type="text"/> RT Hours: <input type="text"/> RN Visits: <input type="text"/> RN Hours: <input type="text"/> Other Visits: <input type="text"/> Other Hours: <input type="text"/> Total Visits: 1 Total Hours: <input type="text"/>	QORS - Measure 128 QORS-128 BMI Screening : <input type="text"/> QORS-128 BMI Referral/Education : <input type="text"/> QORS - Measure 130 QORS-130 Current Medication Docs: <input type="text"/>
Clinician Comments Clinician Comments: <input type="text"/>	
<input type="button" value="Save and Suspend"/> <input type="button" value="Discharge"/> <input type="button" value="Cancel"/>	

- **Interruption Days** – an optional field for the number of days (not visits) missed by the patient due to vacation, travel, illness, etc., if any.
- **Date of Last Visit** – Enter the date of the last visit for the patient.
- **Patient Visits** – The number of visits must be entered for the appropriate discipline(s), however, the number of hours are optional.
- **Clinician Comments** – This is a free form text field where the clinician may enter whatever they deem appropriate.
- **QORS Measures 128/130/155/182** – if the patient is Medicare B and any of these measures are applicable, answers must be selected from the drop down menus to complete the discharge.

3. Click **Save and Suspend** to save the data entered and return to the discharge later or click **Discharge** to complete the episode and discharge the patient.

Reopening Discharged Patient Episode

If a patient has been accidentally/prematurely discharged or a field needs to be edited within the Staff Discharge or Episode Details screen, the discharge can be reopened.

1. Click **Edit/Reopen...** from the Episode Details screen to reopen the Patient Discharge.

The image shows two screenshots from a medical software interface. The left screenshot is titled 'Episode Details' and contains various fields for patient information, including Patient Alias, Name, Care Type, Condition, Impairment, Support Staff, Primary Clinician, and Payer Source. At the bottom, there are buttons for 'Reset', 'Update', and 'Edit/Reopen...'. The 'Edit/Reopen...' button is circled in red. The right screenshot is titled 'Patient Discharge' and shows 'Episode Information' including Patient ID, Name, Care Type, Body Part, and Initial Visit. It also has fields for 'Interruption Days' and 'Date of Last Visit'. At the bottom, there are three buttons: 'Cancel', 'Reopen Episode and Clear Responses', and 'Reopen Episode and Save Responses'. The 'Reopen Episode and Save Responses' button is circled in red. A red arrow points from the 'Edit/Reopen...' button in the first screenshot to the 'Reopen Episode and Save Responses' button in the second screenshot.

2. If corrections need to be made either to the discharge or the episode, click **Reopen Episode and Save Responses**.

- A window will appear to make sure the discharge should be suspended.

The screenshot shows a dialog box titled 'Reopen Episode and Save Responses?'. It contains a warning icon and the text: 'This discharge will be suspended. All responses will be saved. Are you sure?'. At the bottom, there are two buttons: 'Continue' and 'Cancel'. The 'Continue' button is circled in red.

3. If the discharge needs to be completely removed, click **Reopen Episode and Clear Responses**

- A window will appear to make sure the discharge should be removed.

The screenshot shows a dialog box titled 'Clear Responses and Reopen Episode?'. It contains a warning icon and the text: 'These responses will be cleared and cannot be recovered. Are you sure?'. At the bottom, there are two buttons: 'Continue' and 'Cancel'. The 'Continue' button is circled in red.

4. Click **Continue**

- The appropriate verification message will appear depending upon which button was selected, and the episode will be reopened.

Successfully re-opened the episode and saved values.

Successfully re-opened the episode and cleared values.

5. Changes can now be made to the episode. To make changes to the discharge, the episode will need to be discharged again.

Note: DO NOT Re-open an older discharged episode if:

- A previously discharged patient returns at a later date for care to the same body part or another body part – create a new episode
- A patient returns for treatment following a surgical intervention (for example) – create a new episode

Non-Participation Audit (NPA)

There are instances when, despite your best efforts, you may be unable to capture an Intake Survey or a Status Survey for a patient's outcome episode. When this occurs, a Non-Participation Audit (NPA) can be completed to document the reason the survey was not obtained.

To access the Non-Participation Audit screen:

1. Click the **NPA** button associated with the Episode (Condition) that was not completed from either the Patient Details, Open Episodes or Clinician Activity screen.

Episodes				Instruction Guide		
Condition	Created	Intake	Status	Discharge	NPA	
Hip	7/19/2013 1:48:09 PM	Complete	Add Survey	Discharge	NPA	
Ankle	7/19/2013 1:26:14 PM	Complete	Complete(1) Add Survey	Discharge	NPA	
Shoulder	7/16/2013 12:38:52 PM	Complete	Pending	Discharge	NPA	
Start a New Episode						

2. This will open the Non-Participation Audit screen

- Notice there are two fields available, however, it is only necessary to select one as appropriate:

- **Reason for not completing intake**

- If the Intake Survey could not be obtained or is deemed inappropriate (e.g. patient referred for an evaluation only – one time visit), select the reason from the Intake drop down list and click **Update**.

- **Reason for not completing Patient status** - If the Intake Survey was completed, but a final Status Survey could not be obtained from the patient, select the appropriate reason from the Status NPA drop down list and click **Update**.

Non-Participation Audit

Reasons	
Reason for not completing intake:	<input type="text"/>
Reason for not completing Patient Status:	<input type="text"/>
Update	

Note: Once the NPA is completed, it is not necessary to complete a Staff Discharge

In the Activity box, the system will generate a Non-participation Report to document the reason either the Intake or Status survey was not obtained.

Activity							
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Report	
						Open	Save
7/19/2013	Functional Intake Summary	Completed	7/22/2013	28.5400	?		
10/17/2013	Non-participation Report	NPA	10/17/2013				
Add Survey							

Test Clinics - Sample Physical Therapy Clinic			
Patient:		Risk-Adjustment Criteria	
ID#	test01	Care Type:	Orthopedic
Date of Birth:	10/10/1935	Body Part:	Hip
Initial DOS:	7/22/2013	Severity:	Severe (Intake FS: 29)
Body Part:	Hip	Age:	78
Impairment:	Muscle, Tendon + Soft Tissue D...	Acuity:	8 - 14 days
Surgery Type:	Not Applicable	Gender:	Female
		Comorbidities:	One
		Payer:	Medicare B
		Fear Avoidance:	Low
		Surgery Status:	1 or more
Reason for not completing Patient Status: Patient self discharged			

Removing the NPA

To remove a NPA from a patient episode:

1. Select the **Details...** button from the Patient Activity screen to open the Patient Details screen.
2. From this screen in the Episodes box, select the episode containing the NPA by clicking on the condition and opening the Episode Details screen.

Episodes						Instruction Guide
Condition	Created	Intake	Status	Discharge	NPA	
Pelvis	7/19/2013 11:51:34 AM	Pending		Discharge	NPA	
Shoulder	7/19/2013 11:45:07 AM	Complete	NPA		8/6/2013	
Pelvis	7/19/2013 11:39:41 AM	Complete	Pending	Discharge	NPA	
Shoulder	7/15/2013 2:29:54 PM	Complete		Add Survey	Discharge	
Pelvis	7/8/2013 1:01:15 PM	Complete		Add Survey	Discharge	
Hip	7/8/2013 12:55:57 PM	Complete		Add Survey	Discharge	
Neck	6/21/2013 10:46:01 AM	Complete	Pending	Discharge		
Neck	6/21/2013 10:40:30 AM	Complete	Complete(2)	Discharge		

3. Click [\[remove\]](#) for Non-Participation (NPA):
4. A confirmation will appear at the top of the screen.

NPA successfully removed

5. The Non-participation Report will be removed from the Activity box.

Episode Details

Patient Alias: test PQRS
Patient Name: test PQRS, test PQRS
Care Type: Orthopedic
Condition: Shoulder
Impairment: (none)
Support Staff: 1
Primary Clinician: Jane Smith Doe, PT, DPT, MA
Alt. Clinician 1:
Alt. Clinician 2:
Alt. Clinician 3:
Payer Source: Medicare B
Physician Referral: None
Employer Referral: None
Insurance Referral: None
Other Referral: None
Status: Open
Non-Participation (NPA): Not participating [edit] **[remove]**
Physicians Quality Reporting System: Participating [edit]
Non-Participation (NPA):
Surgeries: None [Change Surgeries]
Change Onset: 0-7 Days [Change Onset]

Delete Episode Reset Discharge... Update

Deleting Surveys

An Intake can only be removed by deleting the episode as long as a status survey has not yet been added, however, completing the NPA for the episode will also remove the episode from the open episodes list and the clinic reports.

If a Status Survey was added for the wrong patient or otherwise completed incorrectly, it can only be deleted by contacting FOTO.

Printing Patient Specific Survey Reports

Patient Intake and Status Survey information, as well as the Staff Discharge data, are a part of the patient's medical record. The survey reports also provide clinicians with useful information regarding the patient's functional status level, functional improvements and history information pertinent to treatment.

These reports can be accessed and printed manually following completion of the Electronic Patient Intake and Status Survey, as soon as the Paper Patient Intake and Status Survey have been entered into Patient Inquiry, and following completion of the Staff Discharge screen.

To print, these reports:

1. Select the patient and the episode.
 - At the top of the Episode Details screen is a box labeled "Activity."
 - The reports associated with the surveys that have been completed for this patient's episode will be listed.
2. Click on the Open icon
 - The report you selected will open on screen.

Activity							Report	
Date Created	Activity	Activity Status	Status Date	Measure	Visit	Open	Save	
9/26/2013	Functional Intake Summary	Completed	1/1/2013	4.4100	1			
9/27/2013	Functional Status Summary	Completed	2/2/2013	47.2300	5			
9/27/2013	Patient Discharge Summary	Discharged	9/27/2013					

Printing from a Tablet

Reports can usually be viewed on a tablet by clicking the Save icon. Contact the tablet manufacturer for information on printing a PDF from the tablet.

Depending on the type of browser used, to print either:

3. Click on the print icon from the toolbar at the top, or
Move the mouse toward the bottom of the screen and a toolbar will appear.
 - The report will print to the printer set up as your default printer.
 - If these toolbars do not show, check your browser settings
4. When finished, please click on [Back](#) in the upper left corner of the report toolbar.

PI /web Reports

Test Clinics - Sample Physical Therapy Clinic
INTAKE FUNCTIONAL STATUS SUMMARY

Patient: PATIENT, SAMPLE	Risk-Adjustment Criteria	
ID# test01	Care Type: Orthopedic	Gender: Female
Date of Birth: 10/10/1935	Body Part: Ankle	Comorbidities: Two or Three
Initial DOS: 7/19/2013	Severity: Slight (Intake FS: 47)	Payer: Medicare B
Body Part: Ankle	Age: 78	Fear Avoidance: Low
Impairment: Sprains / Strains	Acuity: 0 - 7 days	Surgery Status: 1 or more
Surgery Type: Not Applicable		

Functional Status Measures:	Patient's	FOTO*
Physical FS Primary Measure	47	36

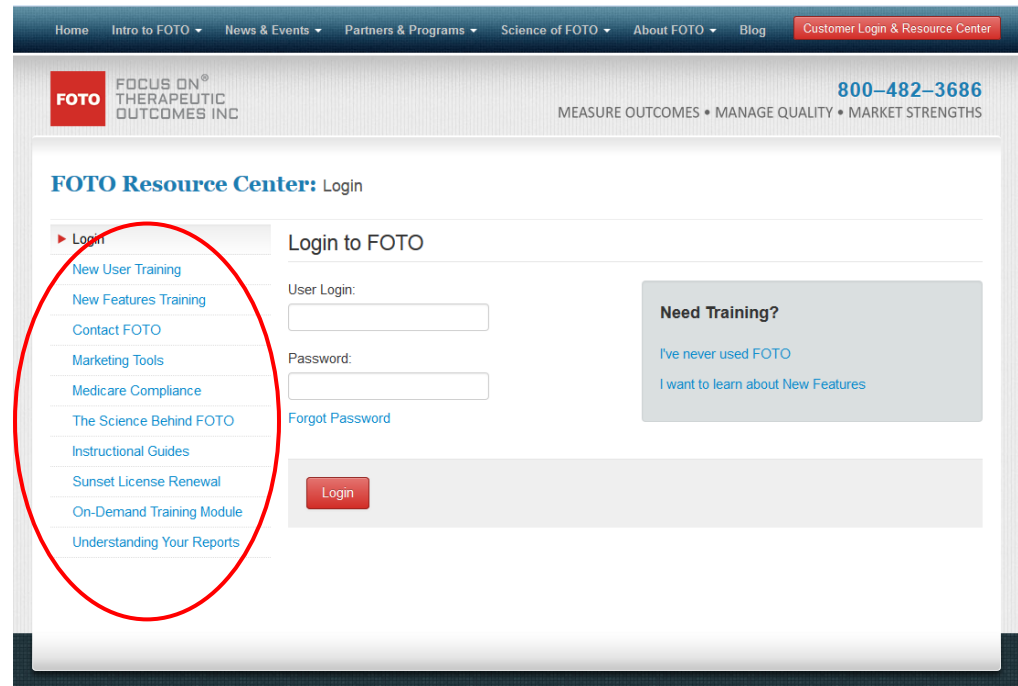
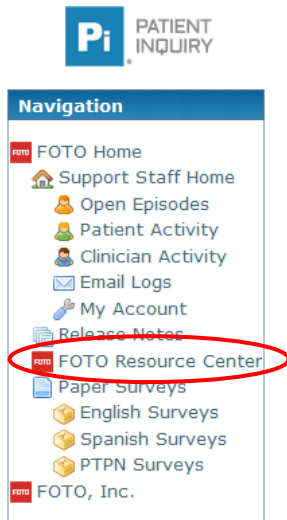
Rehabilitation Resource Predictor
FOTO Patients with similar risk adjusted parameters (Care type, Body Part/Impairment, Severity, Age, Acuity, Gender, Surgery, Fear, Payer Source, and Co-morbidities) have utilized rehabilitation resource and experienced the following results:

FOTO Mean data	Physical FS Primary Measure
Change Score:	17
Physical FS Change	
Statistics:	
Visits per episode	12
Duration of episode	37
Dollars per episode	\$1607

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

YOU DO NOT NEED TO LOGIN.

Simply click on the support topic for which you would like more information.



- **New User Training** – Sign up for a webinar training session with a live 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 with a live FOTO representative 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 Functional Limitation Reporting
- **The Science Behind FOTO** – Contains articles and published papers
- **Instructional Guides** – Contains Administrator and Support Staff Training PDFs and other guides
- **On-Demand Training Module** – Contains videos on how to perform various functions within the application
- **Understanding Your Reports** – Contains guides to understanding your reports


FOTO Provider Assistance Contact Information

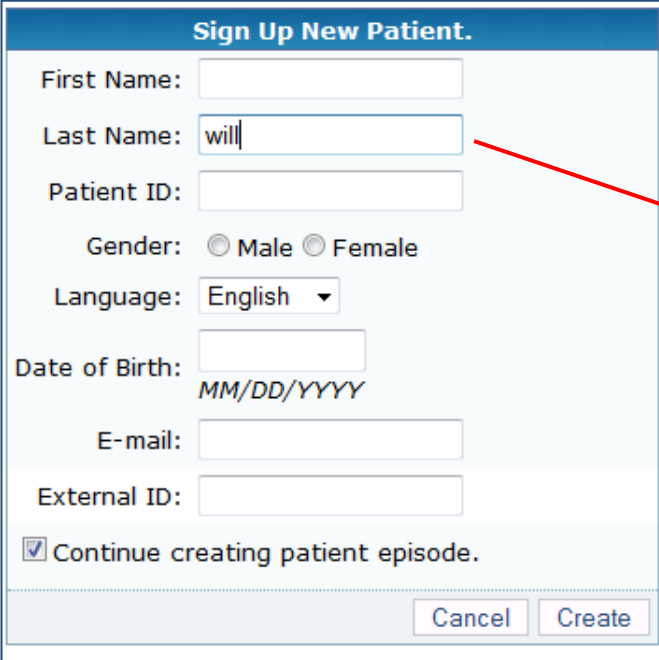
Please contact FOTO staff at any time for assistance, as follows:

	Phone	Email
Judy Holder Director of Account Development	800-482-3686, extension 236	judyholder@fotoinc.com
Trish Hayes Director of Provider Relations	800-482-3686, extension 233	thayes@fotoinc.com
Cynthia Stancil Provider Representative	800-482-3686, extension 235	cynthiastancil@fotoinc.com
Kimberly Jones Provider Representative	800-482-3686, extension 222	kimberlyjones@fotoinc.com
Mimi Einstein Provider Representative	800-482-3686, extension 227	mimieinstein@fotoinc.com
Deborah Debord Director of Support Services	800-482-3686 extension 234	ddebord@fotoinc.com
John Sutter Support Services Specialist	800-482-3686, extension 221	johnsutter@fotoinc.com
Chrissy Moore Support Services Specialist	800-482-3686, extension 219	chrissy@fotoinc.com

Addendum A – EMR Integration

If you have an EMR software that integrates with FOTO, and your FOTO administrator has established the integration connection via the API key, you can begin to add patients into FOTO by pulling them from the EMR.

1. Enter the patient into the EMR first.
2. Begin to add the Patient in FOTO, see section **Patient / Episode Set Up**.
 - Type in the first few letters of the patient’s name.
 - A box will pop up either to the right or bottom of the new patient screen from which to select the needed patient by clicking the  symbol beside the patient’s name.



Sign Up New Patient.

First Name:

Last Name:

Patient ID:

Gender: Male Female

Language:

Date of Birth:

MM/DD/YYYY











E-mail:

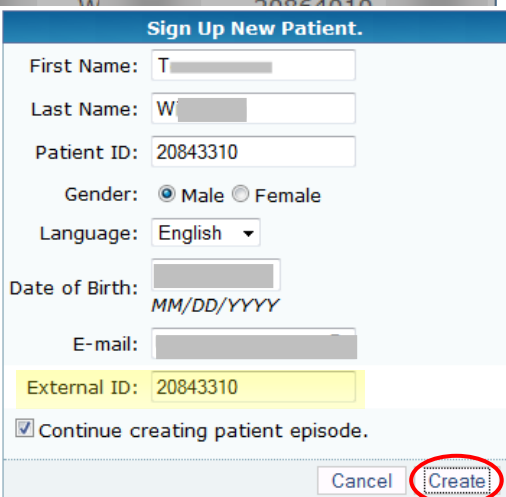
External ID:

Continue creating patient episode.

Type the first and last name for this patient

Type the first and last name for this patient in the ap

Imported Patients in Organization				
Select	First Name	Last Name	Patient ID	Email
	M	W	20840510	
	T	W	20843310	
	M	W	6131760	
	G	W	20770050	
	L	W	2084010	
	D			
	K			
	S			
	M			
	S			



Sign Up New Patient.

First Name:

Last Name:

Patient ID:

Gender: Male Female

Language:

Date of Birth:



MM/DD/YYYY

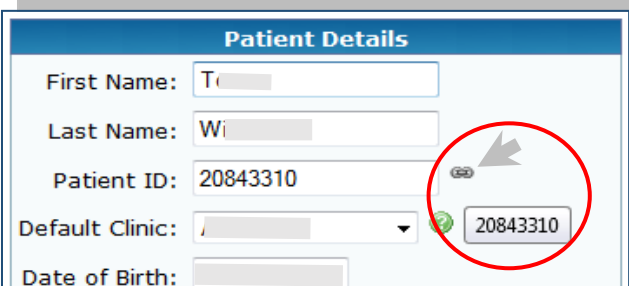
E-mail:

External ID:

Continue creating patient episode.

- Once selected, the patient information will be populated automatically from the EMR.
- The External ID should not be changed once it is pulled over from the EMR.

3. Click **Create** to enter the patient into FOTO.
4. The patient will show as linked to the EMR with the chain symbol  next to the Patient ID.
 - Mouse over the  to view the External ID which will surface below.



Patient Details

First Name:

Last Name:

Patient ID:

Default Clinic:

Date of Birth: