Quick Tips Training Booklet

CareSuite®
By QuickMAR®

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By QuickMAR®

QuickMAR has a number of training resources available ensuring your facility is taking advantage of all CareSuite has to offer.

Train as often as you wish at **www.quickmar.com/training**

- Over 40 training videos available 24/7
- Sign up for refresher trainings available for caregivers, supervisors and administrators

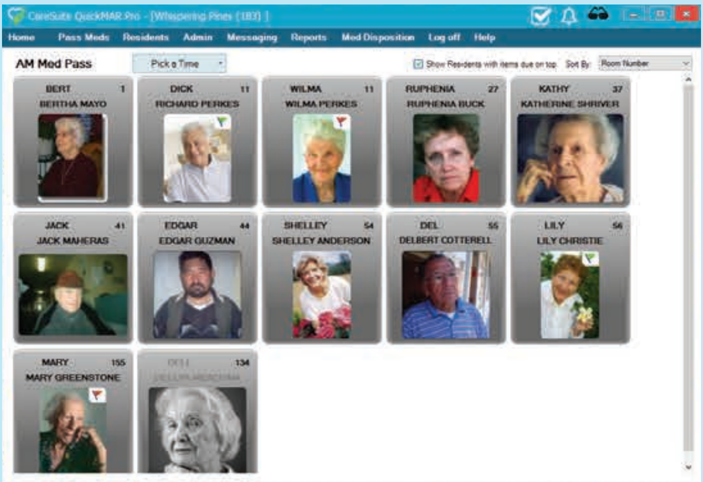
There is also a Help Tab located in the top menu bar within CareSuite. Here you will find detailed instructions for each module and how to complete tasks within CareSuite. You can also launch support session, contact QuickMAR and receive online support.

Phone: 888-340-9866 ext. 2
Email: support@quickmar.com
Live Chat: quickmar.com/support

eMAR:

How to Pass Meds

1. Click on the "Pass Meds" button on the CareSuite by QuickMAR home screen
2. Select a time range and a list of residents will appear, residents with orders to record are shown in color
3. Select the resident you want to administer orders to from the list, select the orders by scanning a bar code or clicking on them
4. Click "Next"
5. Double check the orders, and click the sunglasses icon to hide your screen (if walking away from the computer)
    a. After administering the orders, come back to the computer and click on the CareSuite by QuickMAR square on your desktop, CareSuite by QuickMAR will "unhide"
6. Record exceptions, if any, and click "Record All"
7. After double checking your name and the name of the resident, confirm the med pass by clicking "OK"



Tips About the Med Pick List

- Resident photo ensures you give the meds to the right resident
- The informational orders section shows non-drug orders such as diet or resuscitation status
- Controlled substances are highlighted in red
- Generic or brand name equivalent, if known, will display in the med box
- Colorful tabs will appear throughout the med pass to make you aware of certain conditions or situations such as recently added order, expiring, currently suspended and more

Adding a Note on the Confirmation Screen

1. From the confirmation screen, click on the add note icon
2. Type in the note
3. Click "OK"

The note is now added and will appear on the MAR, it is just like adding a note on a paper MAR, the icon changes to show a note, you can hover over the icon to see the note and click the icon to remove it, add a note to multiple items by clicking on the "Add Notes" button at the top

Giving PRN Medications

1. Start the med pass as normal by clicking the "Pass Meds" button on the CareSuite by QuickMAR home screen
2. Select the PRN med pass
    a. Or, if you go to a routine med pass time range, click on the "Show PRN" button in the resident's med pick list
3. Select the PRN you would like to give and click the "Next" button
4. At the confirmation screen, fill in the dosage and purpose fields and set a follow-up time
5. Click on the "Record All" button and confirm by clicking the "OK" button

Recording PRN Tips

- The PRN box will show when it was last given and instructions, click the history button for more information
- Hover over the information icon on the confirmation screen to read the instructions
- The default follow-up time is 1 hour but is customizable
- The PRN follow up will show in the resident's med pick list at the designated follow-up time

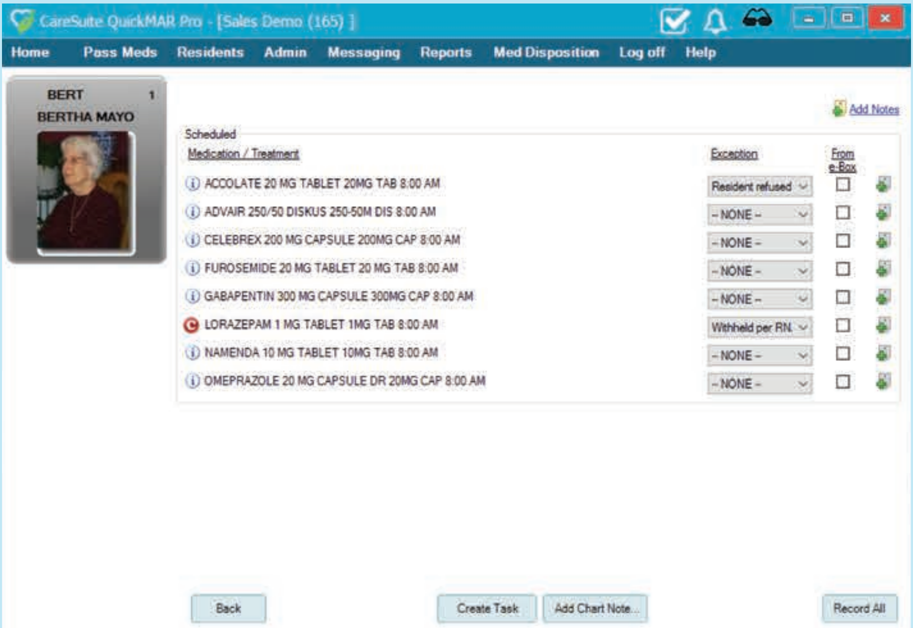
Recording Exceptions

There are three places to record an exception:

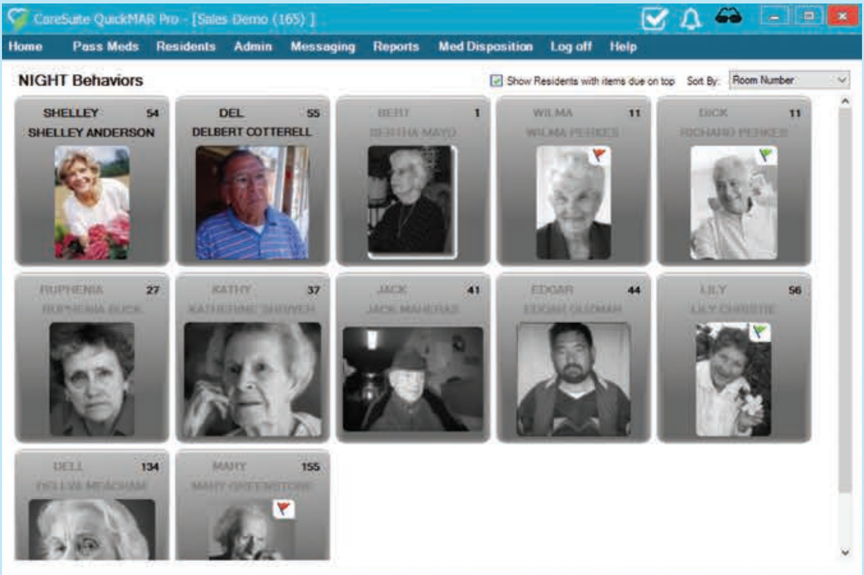
1. At the confirmation screen during the med pass
    a. User has already selected the med in QuickMAR, while assisting, resident refuses one or more of the meds
    b. In the exceptions column, find the appropriate exception, finish the med pass
2. When selecting the meds from the pick list
    a. Select only those you will be giving
    b. After clicking "Next," indicate the exception for those not picked, a warning dialogue box appears indicating that some of the meds were not selected, select the reason for the exception and click continue
3. Using the "Skip All" button
    a. Resident is out of the facility and won't be taken all of the meds
    b. Select a resident, on the med pick list screen, click the "Skip All" button found at the bottom of the med pick list, dialogue box appears, select, select your reason and click "OK", this exception is recorded for all medications"

Recording Exception Tips

- You are limited to exceptions from the drop-down menu
- "Skip All" button affects only the meds in the current med pass
- Don't record an exception until you are sure it is an exception



Behavior Tracking:

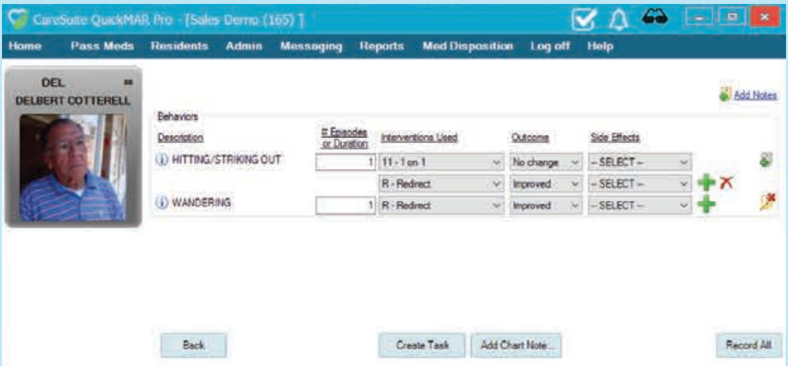


To Enable Behavior Tracking:

1. From the top menu bar, click on "Admin" and then "Settings" and finally "CareSuite Modules"
2. Click on the "Behavior Management" tab and select "Enable Behavior Management"
3. Configure your shifts and click "Save"
4. Add Categories
    a. To add categories, click on "Admin," found in the top menu bar, then navigate to "Settings" and then "Drop-down Menus"
    b. Click on the "Interventions" tab
    c. Click "New" to make a new category
    d. Type in the name of the category and click "Save"
    e. Complete the same steps in the "Side Effects" tab

To Record Behaviors:

1. Click on the "Record Behaviors" button on the CareSuite by QuickMAR home screen
2. Select a time range and a list of residents will appear, residents with behaviors to record are shown in color
3. Select the resident you want to record behaviors for from the list, select the behaviors you want to record
4. Click "Next"
5. At the confirmation screen, record the number of episodes, duration, interventions, outcomes and side effects
    - a. Episodes – enter a number, or C for continuous
    - b. Interventions
        - i. Interventions are listed in preferred order
        - ii. You can enter a custom intervention
        - iii. Add more interventions by clicking the green + sign
6. When you are finished, click the "Record All" button
7. Click "OK" at the final confirmation screen



Remember

- The "Last" button will show the number of episodes in the last shift
- The "Options" tab will show you a list of recommended interventions
- The "Plan" button will show you a list of recommended interventions and triggers for the behavior
- You can record PRN behaviors as they occur instead of every shift

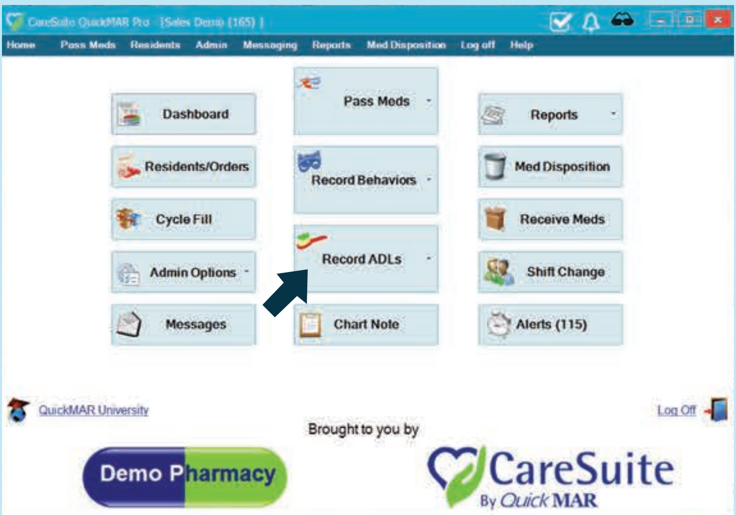
ADL Tracking:

There are only a few differences between passing meds and recording ADLs

To Enable ADL Tracking

1. From the top menu bar, click on "Admin" and then "Settings" and finally "CareSuite Modules"
2. Click on the "ADLs" tab and select "Enable QuickCare ADL Tracking"
3. Configure your settings and click "Save"
4. Add Categories

    a. To add categories, click on "Admin," found in the top menu bar, then navigate to "Settings" and then "Drop-down Menus"
    b. Click on the "ADL Services" tab
    c. Click "New" to make a new category
    d. Type in the name of the category and click "Save"



To Record ADLs

1. Click on the "Record ADLs" button on the CareSuite by QuickMAR home screen

2. Select a time and a list of residents will appear, residents with ADLs to record are shown in color

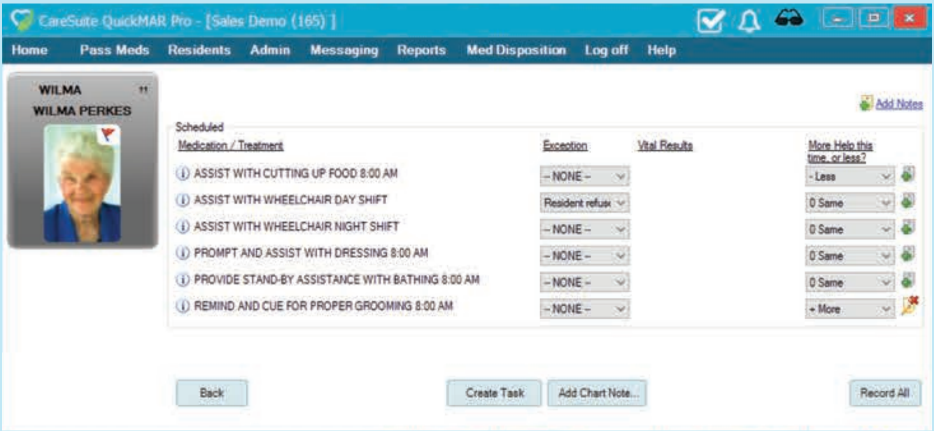
3. Select the resident you want to record ADLs for from the list, select the ADLs you want to record

4. Click "Next"

5. At the confirmation screen record exceptions, enter vitals and provide feedback

6. When you are finished, click the "Record All" button

7. Click "OK" at the final confirmation screen



Remember

- If you have questions about an ADL, click the "Info" button
- ADLs will show up as alerts if not recorded
- If you have a separate ADL "cart", select the right cart
- Recording ADLs is similar to recording other order types
- More/Less field
- PRNs do not require a reason or follow up

Charting Notes:

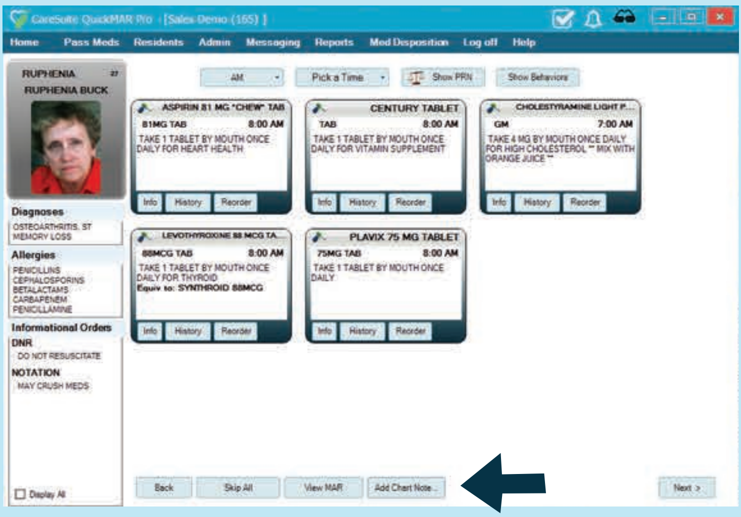
To Enable Charting Notes:

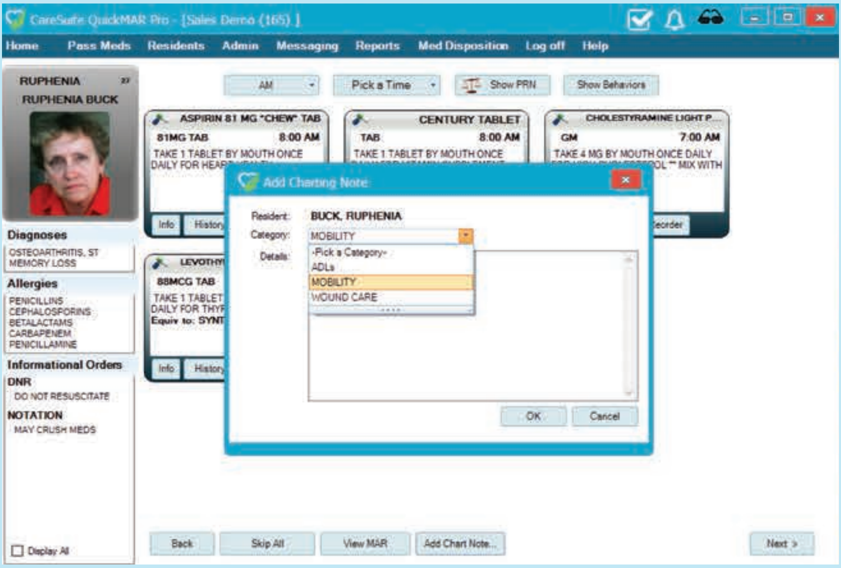
1. From the top menu bar, click on "Admin" and then "Settings" and finally "CareSuite Modules"
2. Click on the "Charting Notes" tab and select "Enable Quick Chart Charting Module"
3. Click "Save"
4. Add Categories

   a. To add categories, click on "Admin," found in the top menu bar, then navigate to "Settings" and then "Drop-down Menus"
   b. Click on the "Notes" tab
   c. Click "New" to make a new category
   d. Type in the name of the category and click "Save"

To Record a Note

1. Within any med pass, click on "Add Chart Note"
2. Pick a category and type in your note
3. Click "Okay", the note is now saved with your name and a time stamp





3 Places to Add Charting Notes

1. On the home screen
2. Within a med pass
3. The order screen

Remember

- On the order screen, you can sort notes by time period, print notes and edit notes

Inventory Control:

First Question: Should I use this feature or not?

Advantages of Using Inventory Control

- Less paperwork
- Systems tracks the inventory
- Better and faster delivery tracking
- Inventory count is offered every time you pass a med
- Easier and better reporting

Disadvantages of Using Inventory Control

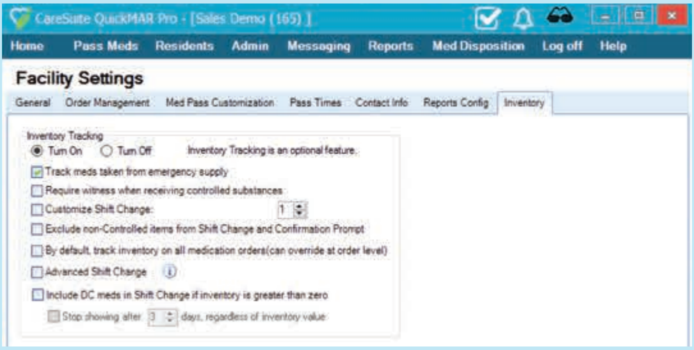
- System is less forgiving than reconciling on paper
- Requires full commitment otherwise the inventory count won’t match
- Change is no faster than paper

To Make Inventory Control Work You Must Faithfully Do the Following

- Check in all controlled drugs upon delivery
- At order screen, ensure the dosage field has the correct value
- When giving a PRN, ensure you enter the correct number of pills
- During med pass, pay attention to the resulting quantity
- Adjust all exceptions to indicate how they each effect inventory
- Use shift change feature faithfully
- Use med disposal screen promptly

How to Enable or Disable Inventory Tracking

1. From the top menu bar, click on “Admin” and then “Settings” and finally “Facility Preferences”
2. In the Turn On/Off Inventory Tracking Section, choose the desired setting - On or Off
3. Click “Save”
4. Complete an initial “Receive Meds” for everything you want to track
    a. Select the “Receive Meds” button on the home screen
    b. Indicate the source for the delivery
    c. Add each of the medications to the list of received meds by scanning the bar code on the package or pick the meds from a list and enter how many you are receiving
5. Track Inventory for each order you want to track
    a. Click on the “Residents/Orders” button on the home screen
    b. Select the resident you want to track an order for and then select the order
    c. Click on the “Advanced” tab at the bottom and check the “Track Inventory” box
    d. Click “Save”



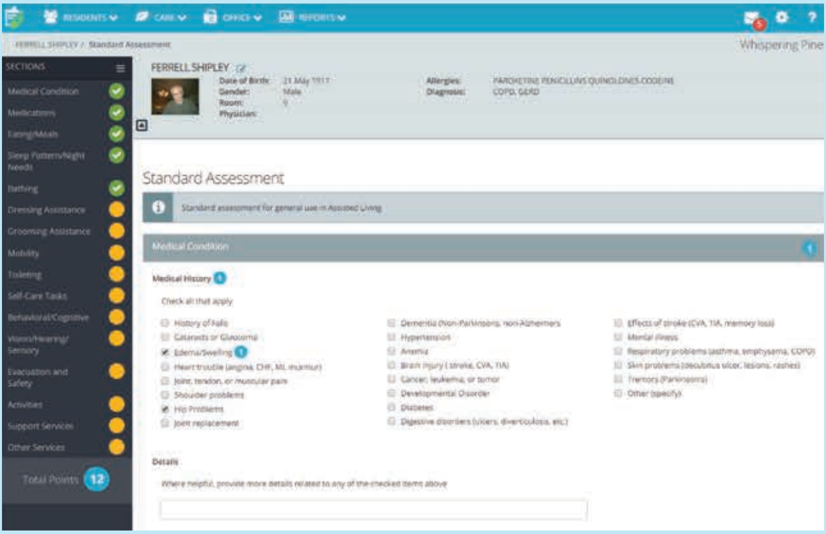
Remember

- Must have “Track Inventory” box checked for each item and make sure the dosage box is accurate
- QuickMAR won’t let you pass drugs if the inventory is at 0, check meds in by using the “Receive Meds” button on dashboard
- No surprises at the end of the shift because you are reconciling when you are giving meds

Assessments/ Care Plans:

Types of Care Plans

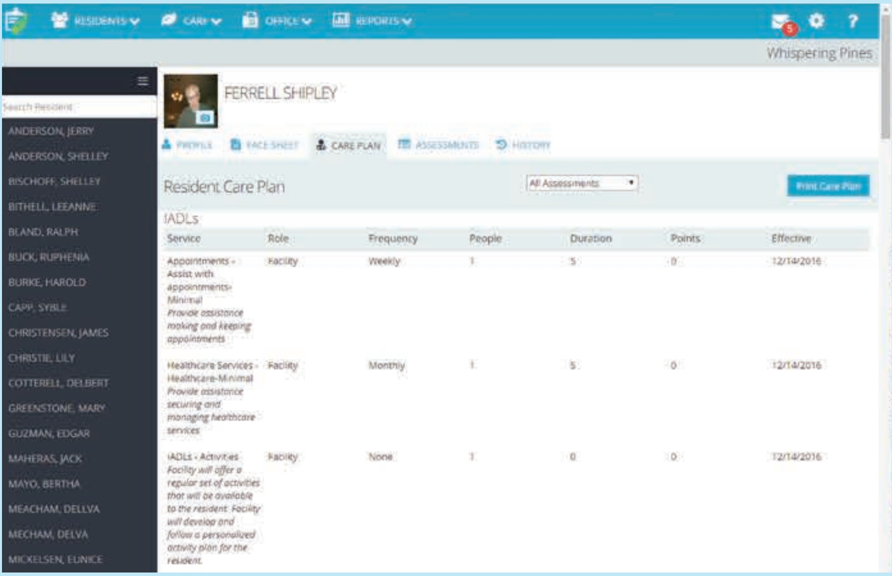
- Standard
- Temporary Assessment
- Fall Assessment
- Self-Admin of Meds
- Others



How to Make an Assessment/Care Plan

1. From the list of residents, select the resident you would like to create an assessment for
2. Click on the "Assessments" tab
3. Click on the "Create Assessment" button
4. Use the drop-down menu to choose the type of assessment you want to create, once you have made your selection, click the "Create Assessment" button

5. Complete each section, as you complete each section, click the "Mark Complete" button
6. Once all of the sections are complete, click on the "Next" button
7. On the Care Plan page, you can edit any care items by clicking on the "Edit" icon
8. After reviewing the care plan, click the "Complete Assessment" button
9. Click on the "Care Plan" tab to view the care items created in the assessment



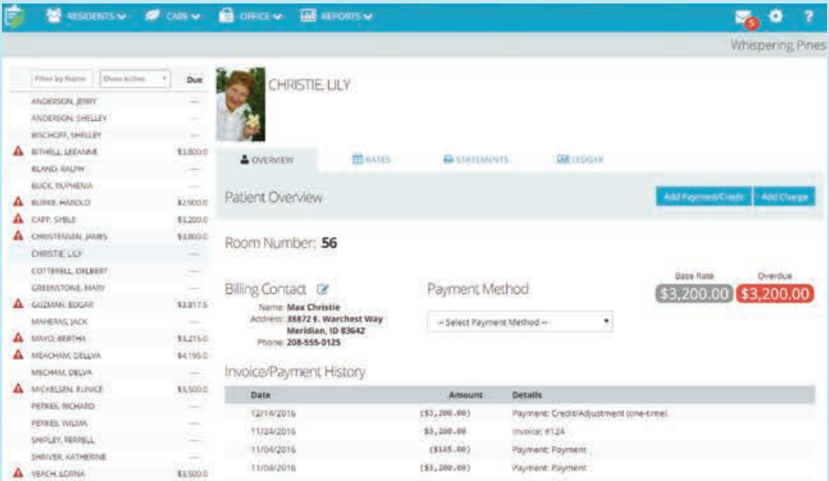
Tips

- You cannot mark a section complete until all required questions have been answered
- Use the column on the left to quickly navigate to any section
- Total points will be shown in the left column
- Some items create a care item such as bathing
- Customize care items by clicking on the edit icon
- Customize points by clicking on the point bubble

Billing:

The Billing Module Allows You To

- Track all charges associated with a resident
- Recurring monthly charges
- Ad hoc charges
- Produce an invoice for the upcoming billing period
- Receive payments from your residents



To Get Started

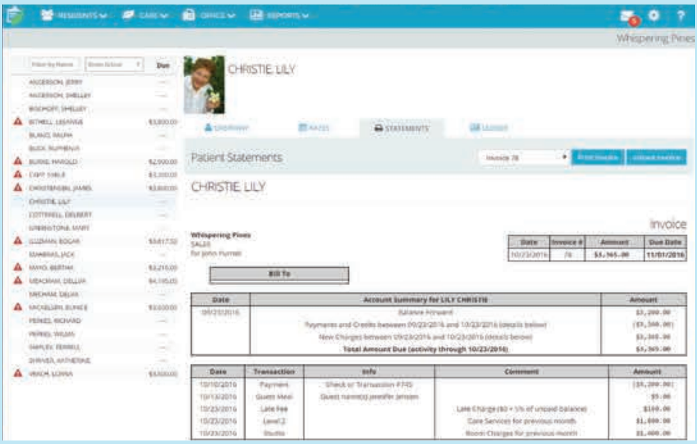
First nagivate to the billing settings by clicking on the "Settings and Profile" icon in the upper right and select "Settings," in the left column click on "Billing"

1. Create your most common billing items (ex: guest meals, transportation fees)
    a. Click on the "Transaction Categories" tab
    b. Use the "Create Category" button to create a new billing item or click on the title of an existing item to edit

2. Set up your recurring billing information (ex: room rates, level of care)
    a. Click on the “Transaction Categories” tab
    b. Use the “Create Category” button to create a new room rate or level or care or click on the title of an existing item to edit
3. Set up your late fee preferences
    a. Click on the “Settings” tab
    b. Fill in the form and click “Save Changes”
4. Enter your billing address and a logo (optional)
    a. Click on the “Profile” tab
    b. Upload a logo and click the “Edit” icon to add contact information
5. Assign every resident their billing rates and effective dates
    a. This task is not completed in the “Settings” section
    b. Click on the “Residents” tab in the top bar and select “Resident Billing”
    c. Select a resident and click on the “Rates” tab
    d. Assign a value to the “Care Services” and “Room Charges” drop-downs
    e. Set up other recurring charges using the “Schedule New” drop-down, add as many recurring charges as needed

Preparing for Billing Each Month:

Make sure to process all payments from last month, and add all additional charges or credits that occurred since the last billing date, then, generate all the invoices for the upcoming month



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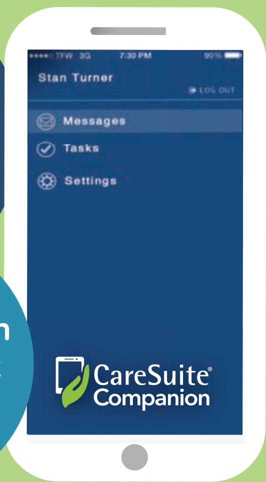

- Notifications
- Messaging
- Monitor Med Pass
- Tasks
- Available for iOS and Android

CareSuite® is continuously improving new features.

For more information visit www.quickmar.com
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