

Quick Tips Training Booklet





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

CareSuite QuickMAR Pro - [Sales Demo: (165)]

HomePass MedsResidentsAdminMessagingReportsMed DispositionLog offHelp

BERT
BERTHA MAYO



Scheduled

Medication / Treatment

ⓘ ACCOLATE 20 MG TABLET 20MG TAB 8:00 AM

ⓘ ADVAIR 250/50 DISKUS 250-50M DIS 8:00 AM

ⓘ CELEBREX 200 MG CAPSULE 200MG CAP 8:00 AM

ⓘ FUROSEMIDE 20 MG TABLET 20 MG TAB 8:00 AM

ⓘ GABAPENTIN 300 MG CAPSULE 300MG CAP 8:00 AM

Ⓢ LORAZEPAM 1 MG TABLET 1MG TAB 8:00 AM

ⓘ NAMENDA 10 MG TABLET 10MG TAB 8:00 AM

ⓘ OMEPRAZOLE 20 MG CAPSULE DR 20MG CAP 8:00 AM

Exception

Resident refused

-- NONE --

-- NONE --

-- NONE --

-- NONE --

-- NONE --

Withheld per RN

-- NONE --

-- NONE --

From
e-Box

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Add Notes

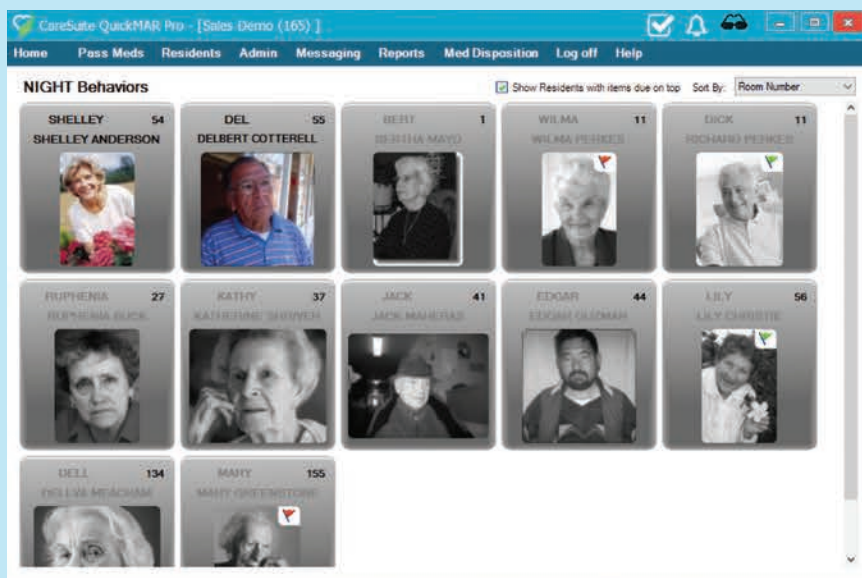
Back

Create Task

Add Chart Note...

Record All

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

The screenshot shows the CareSuite QuickMAR Pro interface for recording behaviors. The resident's name is DELBERT COTTERELL. The interface includes a table for recording behaviors with columns for Behavior, Episodes or Duration, Interventions Used, Outcome, and Side Effects. Two behaviors are listed: HITTING/STRIKING OUT and WANDERING. The table has input fields for episodes/duration and dropdown menus for interventions, outcomes, and side effects. There are also buttons for Back, Create Task, Add Chart Note, and Record All.

Behaviors	Episodes or Duration	Interventions Used	Outcome	Side Effects
HITTING/STRIKING OUT	1	11 - 1 on 1	No change	SELECT
		R - Redirect	Improved	SELECT
WANDERING	1	R - Redirect	Improved	SELECT

Remember

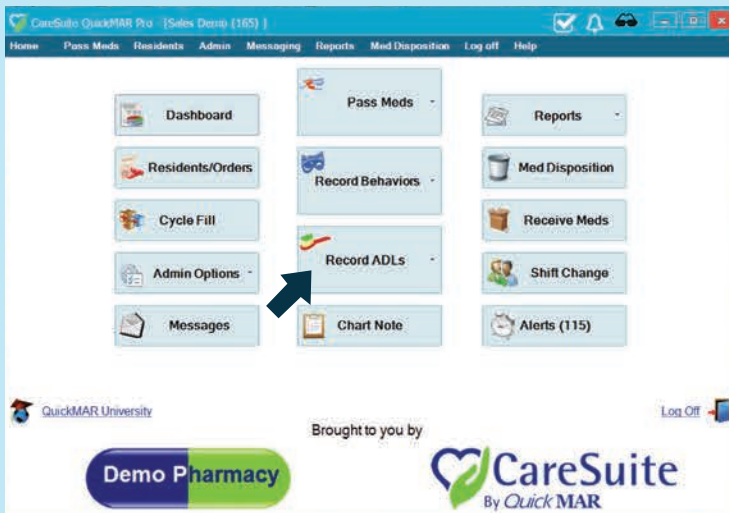
- The "Last" button will show the number of episodes in the last shift
- The "Options" tab will show you a list of recommended interventions
- The "Plan" button will show you a list of recommended interventions and triggers for the behavior
- You can record PRN behaviors as they occur instead of every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

The screenshot shows the CareSuite QuickMAR Pro interface for recording ADLs for resident Wilma Perkes. The interface includes a header with navigation tabs (Home, Pass Meds, Residents, Admin, Messaging, Reports, Med Disposition, Log off, Help) and a sidebar with a resident photo and name. The main area displays a table of scheduled ADLs with columns for Medication / Treatment, Exception, and Vital Results. The table lists six ADLs, each with a corresponding exception dropdown menu and a vital results dropdown menu. The bottom of the screen features buttons for Back, Create Task, Add Chart Note..., and Record All.

Scheduled	Exception	Vital Results
① ASSIST WITH CUTTING UP FOOD 8:00 AM	-- NONE --	- Less
① ASSIST WITH WHEELCHAIR DAY SHIFT	Resident refusal	0 Same
① ASSIST WITH WHEELCHAIR NIGHT SHIFT	-- NONE --	0 Same
① PROMPT AND ASSIST WITH DRESSING 8:00 AM	-- NONE --	0 Same
① PROVIDE STAND-BY ASSISTANCE WITH BATHING 8:00 AM	-- NONE --	0 Same
① REMIND AND CUE FOR PROPER GROOMING 8:00 AM	-- NONE --	= More

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:

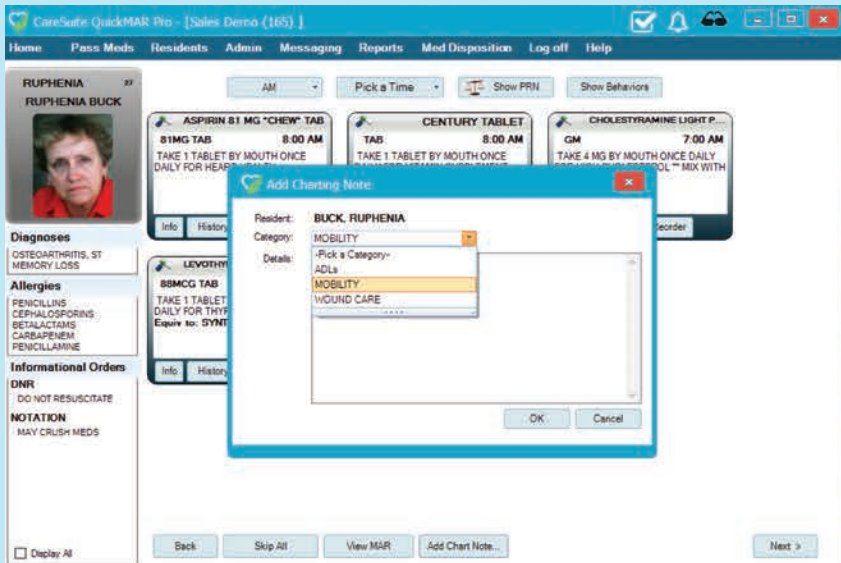
To Enable Charting Notes:

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

The screenshot displays the CareSuite QuickMAR Pro interface for a patient named RUPHENIA BUCK. The interface includes a top menu bar with options like Home, Pass Mods, Residents, Admin, Messaging, Reports, Med Disposition, Log off, and Help. On the left, there is a patient profile section with a photo and a list of diagnoses (OSTEOARTHRITIS, ST, MEMORY LOSS), allergies (PENICILLINS, CEFALOSPORINS, BETA-LACTAMS, CARBAPENEM, PENICILLAMINE), and informational orders (DNR, DO NOT RESUSCITATE, NOTATION, MAY CRUSH MEDS). The main area shows a list of medications with their dosages and frequencies, each in a separate box with 'Info', 'History', and 'Reorder' buttons. The medications listed are: ASPIRIN 81 MG "CHEW" TAB (81MG TAB, 8:00 AM), CENTURY TABLET (TAB, 8:00 AM), CHOLESTYRAMINE LIGHT P... (CM, 7:00 AM), LEVOTHYROXINE 88 MCG TA... (88MCG TAB, 8:00 AM), and PLAVIX 75 MG TABLET (75MG TAB, 8:00 AM). At the bottom, there are buttons for 'Back', 'Skip All', 'View MAR', 'Add Chart Note', and 'Next >'. A large blue arrow points to the 'Add Chart Note' button.



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

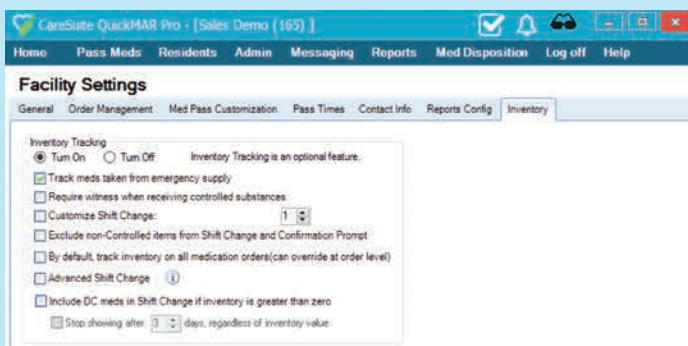
- System is less forgiving than reconciling on paper
- Requires full commitment otherwise the inventory count won't match
- Change is no faster than paper

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

The screenshot shows a software interface for a resident assessment. At the top, there's a navigation bar with tabs for RESIDENTS, CARE, OFFICE, and REPORTS. The main header identifies the resident as PERRELL SHIPLEY and the assessment type as Standard Assessment. A sidebar on the left lists various assessment categories with checkboxes, such as Medical Condition, Medications, Eating/Meals, Sleep Pattern/Night Needs, Bathing, Dressing Assistance, Grooming Assistance, Mobility, Toileting, Self-Care Tasks, Behavioral/Cognitive, Vision/Hearing/Memory, Evaluation and Safety, Activities, Support Services, and Other Services. The 'Total Points' are shown as 12. The main content area displays the resident's personal information (Date of Birth: 21 May 1911, Gender: Male, Room: 9, Physician:), allergies (PAROXETINE, PENICILLINS, QUINOLONES, CODEINE), and a list of medical conditions. A 'Medical History' section contains a grid of checkboxes for various conditions, with 'Edema/Swelling' and 'Hip Problems' checked. A 'Details' section at the bottom prompts the user to provide more details for the checked items.

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

Whispering Pines

Search Resident

ANDERSON, JERRY
ANDERSON, SHELLEY
BISCHOFF, SHELLEY
BITHELL, LEANNE
BLAND, RALPH
BUCK, RUPHENA
BURKE, HAROLD
CAPP, SYBLE
CHRISTENSEN, JAMES
CHRISTIE, LILY
COTTERELL, DELBERT
GREENSTONE, MARY
GUZMAN, EDGAR
MAHERAS, JACK
MAYO, BERTHA
MEACHAM, DELVA
MEACHAM, DELVA
MICKELSEN, EUNICE

FERRELL SHIPLEY

PREVIEWS FACE SHEET CARE PLAN ASSESSMENTS HISTORY

Resident Care Plan

All Assessments

Print Care Plan

Service	Role	Frequency	People	Duration	Points	Effective
Appointments - Assist with appointments	Facility	Weekly	1	5	0	12/14/2016
Minimal Provide assistance making and keeping appointments						
Healthcare Services - Healthcare-Minimal Provide assistance securing and managing healthcare services	Facility	Monthly	1	5	0	12/14/2016
IADLs - Activities Facility will offer a regular set of activities that will be available to the resident. Facility will develop and follow a personalized activity plan for the resident.	Facility	None	1	0	0	12/14/2016

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

The screenshot displays the Whispering Pines Billing Module interface. At the top, there's a navigation bar with tabs for RESIDENTS, CARE, OFFICE, and REPORTS. The main content area is divided into a left sidebar with a list of residents and a main panel for the selected resident, Christie Lily. The resident's profile includes a photo, name, and room number (56). Below this, there's a 'Billing Contact' section with details for Max Christie, including address and phone number. To the right, a 'Payment Method' dropdown is visible, along with a summary of the 'Dues Rate' (\$3,200.00) and 'Overdue' amount (\$3,200.00). At the bottom, an 'Invoice/Payment History' table shows recent transactions.

Date	Amount	Details
12/19/2016	(\$3,200.00)	Payment: Credit Adjustment (one-time)
11/23/2016	\$3,200.00	Invoice: #124
11/04/2016	(\$145.00)	Payment: Payment
11/04/2016	(\$3,200.00)	Payment: Payment

To Get Started

First navigate 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 of 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

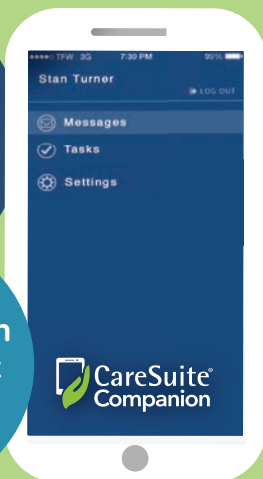
The screenshot shows the 'Resident Billing' section for a resident named Christie Lily. The interface includes a sidebar with a list of residents, a main area with tabs for 'Patient Statements', 'Rates', and 'Statements'. The 'Rates' tab is active, showing a table of recurring charges for the resident. The table has columns for Date, Transaction, Info, Comment, and Amount. The charges include Payments, Late Fee, Care Services, and Room Charges.

Date	Transaction	Info	Comment	Amount
10/10/2016	Payments	Check or Transaction FID		(\$1,000.00)
10/10/2016	Room Charge	Room Charge (10% of unpaid balance)		\$100.00
10/10/2016	Late Fee	Late Fee (10% of unpaid balance)		\$100.00
10/10/2016	Care Services	Care Services for previous month		\$1,000.00
10/10/2016	Room Charges	Room Charges for previous month		\$1,000.00

Introducing CareSuite Companion By QuickMAR®

**NEW
MOBILE
APP!**

Now
included with
CareSuite at
**NO EXTRA
CHARGE**



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

**CareSuite® is continuously
improving new features.**

For more information visit www.quickmar.com

Email: sales@quickmar.com

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