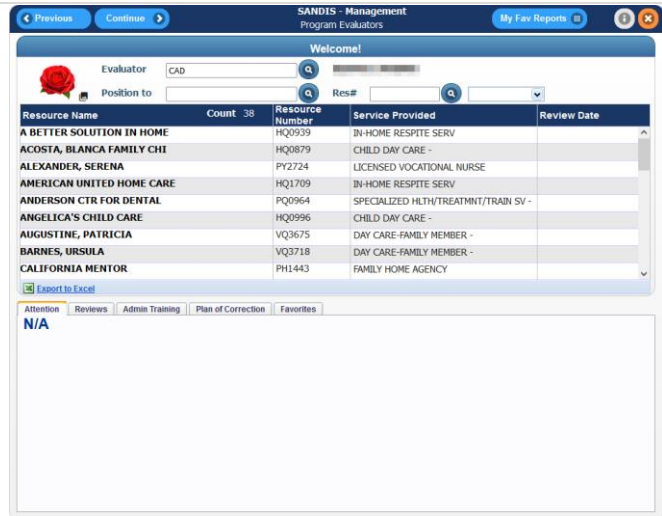


QA Welcome Screen

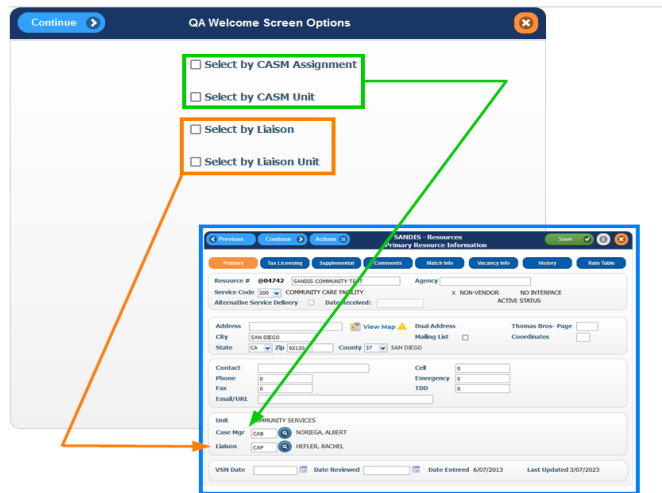
The QA Welcome Screen provides a quick glance view of Resource records for staff and items that require attention.


The QA Welcome Screen defaults to display the Resource Name, Resource Number, Service Provided and Review Date for the resources assigned to the Evaluator.

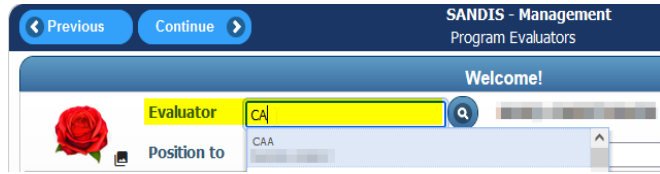



The QA Welcome Screen can also be changed to display Resources assigned to a particular Case Manager or Liaison based on the information stored in the Resource Record.

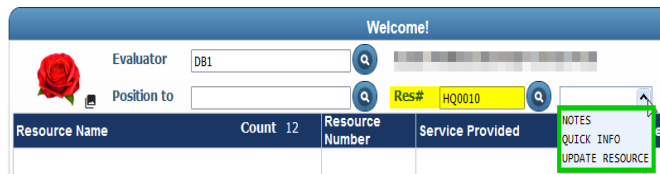
- QA Welcome Screen by CASM
- QA Welcome Screen by Evaluator



The QA Welcome Screen for other profiles can be accessed by working with the **Evaluator** field, either by clicking the  to search for the desired profile or by entering it manually.



Resources can be worked with directly by entering the Resource Number in the **Res#** field (either manually or by clicking  to search by Resource Name) then selecting the desired option from the adjacent drop-down menu.



Right-clicking on a Resource entry displays the available options:

- Notes
- Quick Info
- Update Resource

Resource Name	Count 12	Resource Number	Service Provided
AACRES, LLC		PY0641	START UP FUNDING
APPLIED BEHAVIORAL ALTERN			BEHAVIOR ANALYST
BRILLIANT CORNERS			START UP FUNDING
EASTER SEALS CIP			START UP FUNDING
FLORA CROW			START UP FUNDING

Notes

Selecting **Notes** will display the Resource Notes History screen where Notes can be recorded and reviewed.

Date	Units	Contact Type	Status	Author	Notes Snippet
07/30/2019	N 0	UNANNOUNCED VISIT	REVIEWED		Title 17, unannounced visit. SC looked at P&I, medications,
03/29/2018	N 0	UNANNOUNCED VISIT	REVIEWED		Title 17, unannounced visit. SC looked at P&I, medications,
12/27/2017	N 0	UNANNOUNCED VISIT	REVIEWED		SC traveled to DSC Helix House to review client files, P & I
03/17/2017	0	UNANNOUNCED VISIT	REVIEWED		Title 17, unannounced visit. No issues found. See T-17 check
12/29/2016	0	UNANNOUNCED VISIT	REVIEWED		SC completed an unannounced visit at DSCI- Helix. Medication
12/29/2016	0	UNANNOUNCED VISIT	REVIEWED		SC completed an unannounced visit at DSCI- Helix. Medication
03/15/2016	0	UNANNOUNCED VISIT	REVIEWED		Completed Title 17 monitoring. Checked charts, medications,
12/29/2015	0	UNANNOUNCED VISIT	REVIEWED		SC completed an unannounced visit at DSCI- Helix. Medication
06/04/2015	0	UNANNOUNCED VISIT	REVIEWED		Completed Title 17 monitoring along with SC Terri Guttman. C

Quick Info

Selecting **Quick Info** will display information about the Resource in a VIEW ONLY mode.

Resource: @04742 SANDIS COMMUNITY TEST Type of Facility: _____

Service: COMMUNITY CARE FACILITY Vacancies: M 000, F 000, N-A 000

Address: 1234 SANDIS AVE, SAN DIEGO, CA 92120

Contact: _____
Email: _____
Phone: (858) 576-2847

Next QA Review: _____ Liaison: _____
Next T17 Review: 04/01/2023

Insurance Expires: 01/01/2018
License Effective: 03/06/2020 Expires: _____ Lic.By: BUSINESS LICENSE
Contract Effective: _____ Expires: _____ Lic#: 1234567890

Update Resource

Selecting **Update Resource** will load the Resource record for editing. The accessible fields are determined by current profile's permissions.

SANDIS - Resources Primary Resource Information Save

Primary Tax Licensing Supplemental Comments Match Info Vacancy Info History Rate Table

Resource # @04742 SANDIS COMMUNITY TEST Agency: _____

Service Code: 200 COMMUNITY CARE FACILITY X NON-VENDOR NO INTERFACE
Alternative Se: 505 - Activity Center 357 - Acupuncture Services 700 - Acute Care Hospital ACTIVE STATUS

Address: 1225 - Ada Training 870 - Adaptive Computer Sales/training Dual Address: Thomas Bros- Page
City: SA 605 - Adaptive Skill Train Mailing List: Coordinates:


State: CA Zip: 92120 County: 37 SAN DIEGO

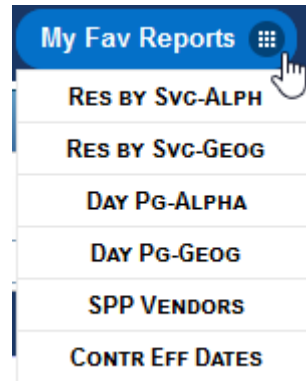
Contact: HELPDESK Cell: 0
Phone: (858) 576-2847 Emergency: 0
Fax: 0 TDD: 0
Email/URL: HELPDESK@SDRC.ORG

Unit: COMMUNITY SERVICES
Case Mgr: CAB NORIEGA, ALBERT
Liaison: CAP HEFLER, RACHEL


VSN Date: _____ Date Reviewed: _____ Date Entered: 6/07/2013 Last Updated: 3/07/2023

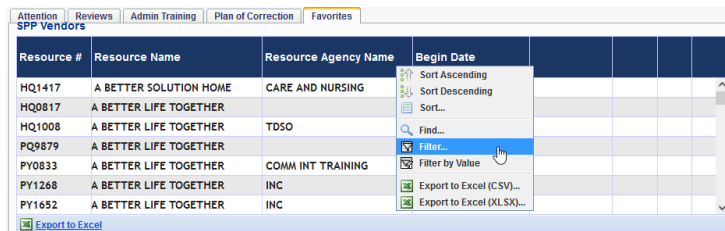
My Fav Reports

Clicking on  lists multiple reports that will display under the **Favorites** tab at the bottom of the Welcome Screen.



Favorites

Selecting any of the reports under My Fav Reports will display under the **Favorites** tab. The Filter and Find features can be used in any of the columns by right-clicking on the header. The Export to Excel feature is available by simply clicking on .



The screenshot shows a software interface with a "Favorites" tab selected. Below the tab is a table with the following data:

Resource #	Resource Name	Resource Agency Name	Begin Date
HQ1417	A BETTER SOLUTION HOME	CARE AND NURSING	
HQ0817	A BETTER LIFE TOGETHER		
HQ1008	A BETTER LIFE TOGETHER	TDSO	
PQ9879	A BETTER LIFE TOGETHER		
PY0833	A BETTER LIFE TOGETHER	COMM INT TRAINING	
PY1268	A BETTER LIFE TOGETHER	INC	
PY1652	A BETTER LIFE TOGETHER	INC	

A context menu is open over the "Begin Date" header, showing options: Sort Ascending, Sort Descending, Sort..., Find..., Filter..., Filter by Value, Export to Excel (CSV)..., and Export to Excel (XL SX)....

Additional reports are available on the Welcome Screen by clicking the corresponding tab:

- **Reviews**
- **Admin Training**
- **Plan of Correction**

Resource #	Resource Name	Service Code	Review Date
HQ0725	APK SERENE KERN	SPECIALIZED RES'L FAC'Y (HABILIT.)	07/23/2010
HQ0725	APK SERENE KERN	SPECIALIZED RES'L FAC'Y (HABILIT.)	03/31/2019

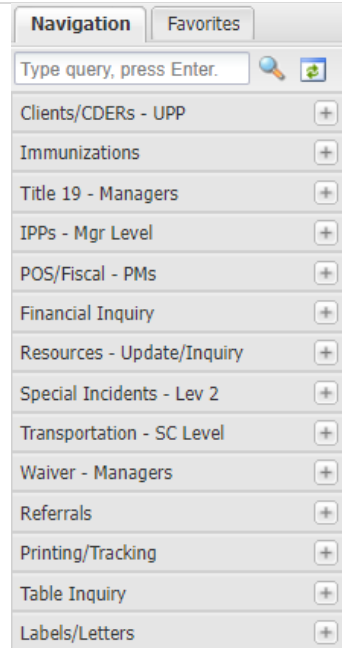
The Filter and Find features can be used in any of the columns of the reports on the Welcome Screen by right-clicking on the navy-blue bar. The Export to Excel feature is available by simply clicking on

[Export to Excel](#)

Resource #	Resource Name	Service Code
@04742	SANDIS COMMUNITY TE	NITY CARE FACIL
@04742	SANDIS COMMUNITY TE	NITY CARE FACIL
@04742	SANDIS COMMUNITY TE	NITY CARE FACIL

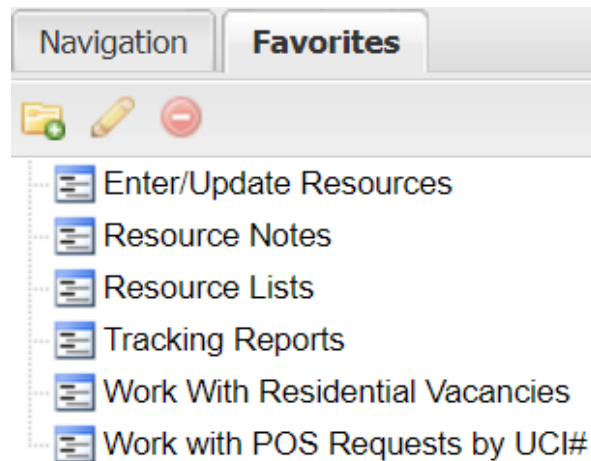
Navigation

Menus under the Navigation provide access to other records and reports.



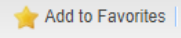
Favorites Tab

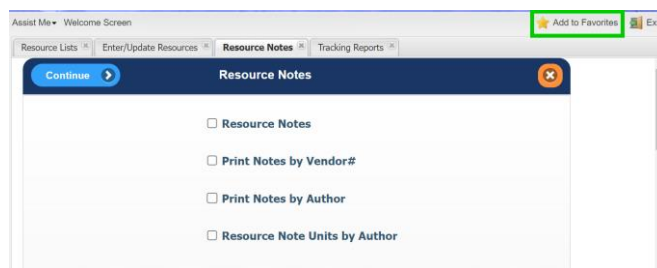
Frequently used menu items can be added to the Favorites tab for quick access.





Adding menu items to Favorites

While the tab for a frequently used screen is displayed, click on

 to add a shortcut to the Favorites tab.



Managing Favorites

Menu items added to the Favorites tab can be renamed by clicking on the  button. Items can also be removed by clicking on the  button.

