


Title 19 (T19) Notes

The **Title19 (T19)** notes feature allows Service Coordinators to make updates on clients in their caseload. T19's are stored in an ongoing chronological order of the client's UCI record while keeping track of which activities are billable or not.

SANDIS7 provides a variety of ways to access a client's T19 notes. The primary way of accessing it is via the Welcome Screen.

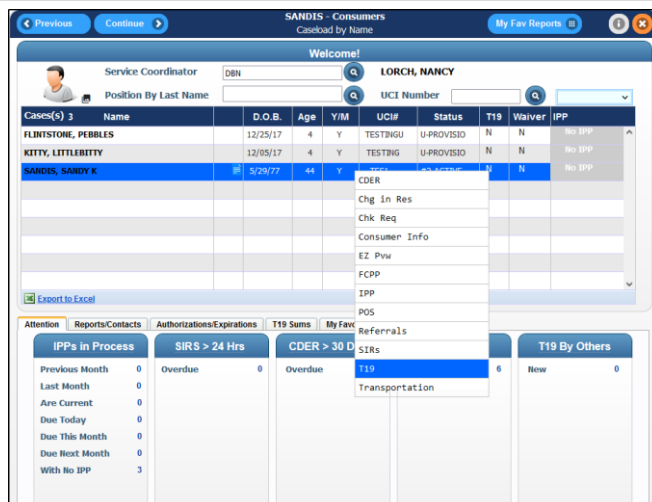
Enter the UCI Number into the On-Call Field, click on the blank drop-down menu next to the  icon and select **T19**.



The screenshot shows the SANDIS7 - Consumers Caseload by Name interface. The 'Welcome!' section displays the Service Coordinator's name (LORCH, NANCY) and the UCI Number (TES1). Below this is a table of cases with columns: Name, D.O.B., Age, Y/M, UCI#, Status, T19, Waiver, and CDER. The table lists three cases: FLINTSTONE, PEBBLES; KITTY, LITTLEBITY; and SANDIS, SANDY K. The 'T19' column for SANDIS, SANDY K is highlighted. To the right of the table is a vertical menu with options: CDER, Chg in Res, Chk Req, Consumer Info, EZ Pwr, FCPP, IPP, POS, Referrals, SIRS, T19, and Transportation. The 'T19' option is selected.


Cases(s)	Name	D.O.B.	Age	Y/M	UCI#	Status	T19	Waiver	CDER
3	FLINTSTONE, PEBBLES	12/25/17	4	Y	TESTING	U-PROVISIO	N	N	Chg in Res
	KITTY, LITTLEBITY	12/05/17	4	Y	TESTING	U-PROVISIO	N	N	Chk Req
	SANDIS, SANDY K	5/29/77	44	Y	TEST	#3-ACTIVE	N	N	Consumer Info

Find the client within the caseload on the Welcome Screen, select the record and right-click it to reveal a pop-up menu. Select **T19** from the list.

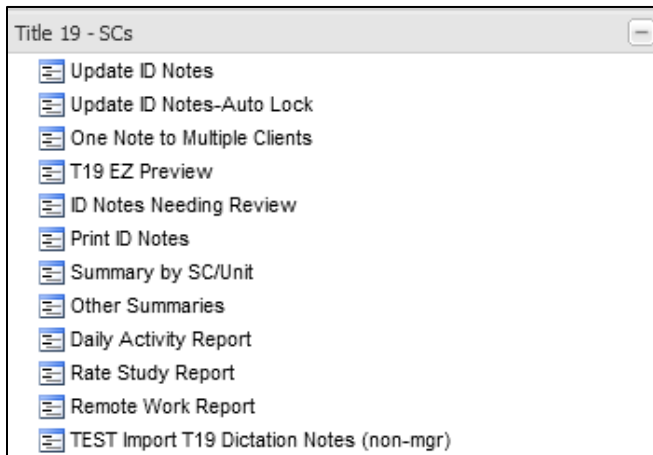


The screenshot shows the SANDIS7 - Consumers Caseload by Name interface. The 'Welcome!' section displays the Service Coordinator's name (LORCH, NANCY) and the UCI Number (TES1). Below this is a table of cases with columns: Name, D.O.B., Age, Y/M, UCI#, Status, T19, Waiver, and IPP. The table lists three cases: FLINTSTONE, PEBBLES; KITTY, LITTLEBITY; and SANDIS, SANDY K. The 'T19' column for SANDIS, SANDY K is highlighted. To the right of the table is a vertical menu with options: CDER, Chg in Res, Chk Req, Consumer Info, EZ Pwr, FCPP, IPP, POS, Referrals, SIRS, T19, and Transportation. The 'T19' option is selected.


Cases(s)	Name	D.O.B.	Age	Y/M	UCI#	Status	T19	Waiver	IPP
3	FLINTSTONE, PEBBLES	12/25/17	4	Y	TESTING	U-PROVISIO	N	N	No IPP
	KITTY, LITTLEBITY	12/05/17	4	Y	TESTING	U-PROVISIO	N	N	No IPP
	SANDIS, SANDY K	5/29/77	44	Y	TEST	#3-ACTIVE	N	N	No IPP

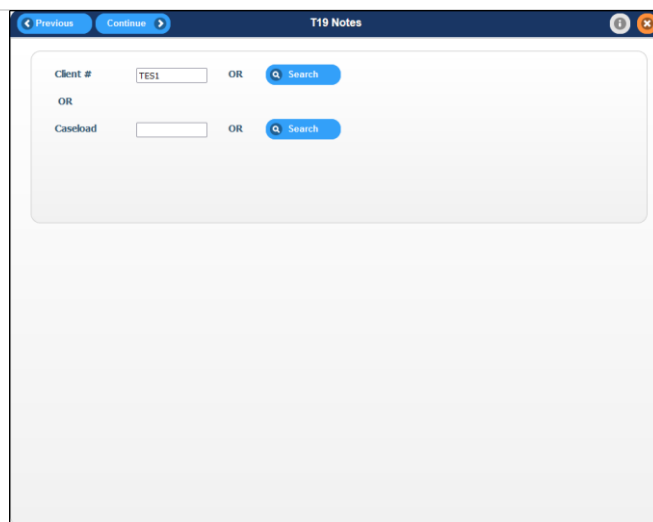
The T19 menu can also be found in the atrium menu under the category **Title 19 – SCs**. Click on the  icon and select Update ID notes.

This menu may be spelled differently depending on the profile and access.



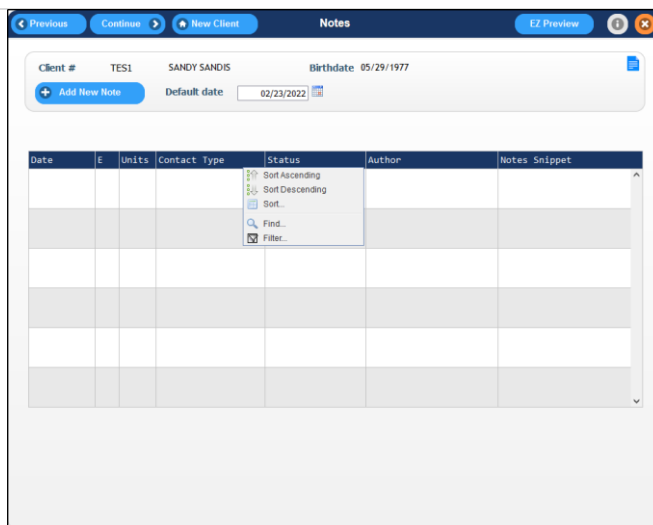
If prompted, enter a client's **UCI#** or enter a 3-character caseload ID to enter a workflow and enter notes for all clients within the caseload.

A  button is available to complete a manual search.



Once at the T19 screen, if any notes are present, they will be listed chronologically by default.

A **Sort**, **Filter** and **Find** feature is available by right-clicking on a header within the dark blue Navigation bar.



Headers Explanation

Date: The date of the T19 event

E: Eligibility for billing the T19 (Y/N)

Units: Time spent performing this event (15 min=1 unit)

Contact Type: Type of contact made (Collateral, Documentation, Face to Face, Discharge Planning or Telephone)

Date	E	Units	Contact Type	Status	Author	Notes Snippet

Status: The current status of the T19 note (New, Submitted, etc...)

Author: The creator of the T19 note

Notes Snippet: A small snippet of the contents of the T19 note.

Date	E	Units	Contact Type	Status	Author	Notes Snippet

To begin, click on [+ Add New Note](#). A new entry with an empty note will be displayed. Fill in the **Contact Date**, **Units**, **Contact Type** and select a **Template** (*this feature is not available at all Regional Centers.*)

Previous Save Save/Continue Note Details

Client # TES1 SANDY SANDIS Reviewed by on

Contact Date 02/23/2022 Recorded by on 02/23/2022

Units 1

Contact Type

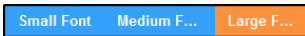
Template

Spell Check

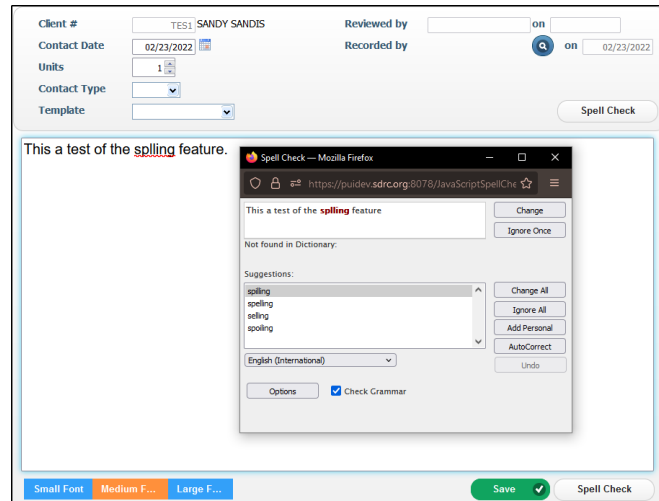
Small Font Medium F... Large F...

Save Spell Check

The T19 screen has a feature to increase or decrease the font size of your notes.



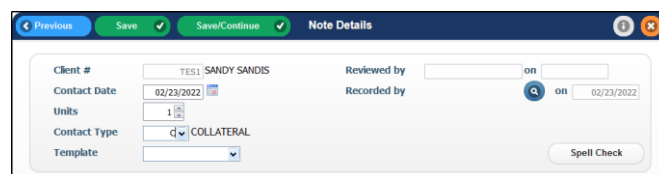
This does not affect how the notes are saved and is only used for readability.



A Spell Check button is located on the top and bottom of the screen for convenience.

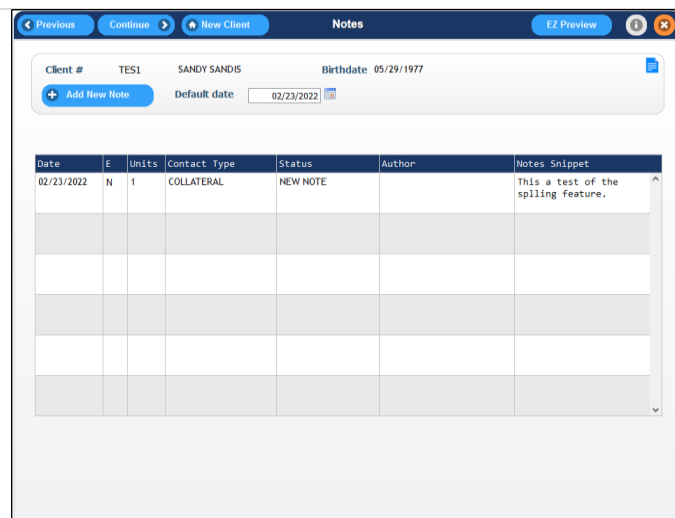
Clicking on Save/Continue will save the information without exiting the screen.

When ready, click on the Save button to save the entered information and proceed to the **T19 History** screen.



The T19 Notes History screen will now display the newly create note with the status **New Note** and will also display the units, date of the event, author of the note, and if the T19 note is eligible for billing.

An email can also be automatically generated and sent to a supervisor.



Right-click a record and select **Change** to return to the T19 note interface and make additional changes. This process is the same as adding a new note and the same steps can be followed.

*Notes can be edited as long as they are in **New Note** status.*

The screenshot shows the 'Notes' interface for Client # TES1, SANDY SANDIS, Birthdate 05/29/1977. A table lists notes with columns: Date, E, Units, Contact Type, Status, Author, and Notes Snippet. The first row is highlighted in blue and has a right-click context menu open with options: Copy, Change, Delete, View, and Print. The 'Status' column for this row is 'NEW NOTE'.

Date	E	Units	Contact Type	Status	Author	Notes Snippet
02/23/2022	N	1	COLLATERAL	NEW NOTE		This is a test of the spilling feature.

To delete a note, right-click a record and select **Delete**. The note will load along with all the contacts. Select **Confirm Delete** to authorize the deletion.

Deleted T19 notes cannot be recovered.

The screenshot shows the 'Note Details' interface for Client # TES1, SANDY SANDIS. It displays fields for Contact Date (02/23/2022), Units (1), Contact Type (C), and Template. A 'Confirm Delete' button is visible. Below the fields, the note snippet 'This is a test of the spilling feature.' is shown.

Notes can also be copied from an existing note.

Right-click a record and select **Copy**. The newly created note will display and all the contents and information on the copied note will be present in the new note **except** the Contact Date.

The screenshot shows the 'Notes' interface for Client # TEST, SANDY SANDIS, Birthdate 02/04/2019. A table lists notes with columns: Date, E, Units, Contact Type, Status, Author, and Notes Snippet. The first row is highlighted in blue and has a right-click context menu open with options: Copy, Change, Delete, View, and Print. The 'Status' column for this row is 'NEW NOTE'.

Date	E	Units	Contact Type	Status	Author	Notes Snippet
01/20/2022	N	1	F.F CONTACT	NEW NOTE	RIVAS, ADRIANA	ANNUAL REVIEW MEETING REPORT-Date of Meeting: 01/13/2022-04
07/22/2021	N	1		EW NOTE	LORCH, NANCY	this is a note I wrote in the sandis viewer.
06/14/2021	N	0		EW NOTE	MARQUEZ, ALEXIA	Nothing here.
06/10/2021	N	0		EW NOTE	ZURITA, LUZ	Nothing here.
05/04/2021	N	1	TELEPHONE	REVIEWED	BURGO, PAMELA	Nothing here.
03/30/2021	Y	1	DOCUMENTATION	REVIEWED	MENDEZ, MAURA	Nothing here.

To work with a note in View-Only mode, right-click the record and select View. The fields and text will be grayed out and unable to be edited while in View Only mode.

The 'Note Details' window displays the following information:

- Client #:** TEST SANDY SANDIS
- Contact Date:** 01/20/2022
- Units:** 1
- Contact Type:** F-F CONTACT
- Template:** (dropdown menu)
- Reviewed by:** (empty field)
- Recorded by:** RVAS, ADRIANA
- on:** 01/20/2022 at 14:34
- Spell Check:** (button)

ANNUAL REVIEW MEETING REPORT

Date of Meeting: 01/13/2022
Date of Report: 01/13/2022

An annual review meeting was held on the above date via teleconference call. The following numbers of the planning team attended the meeting: Garrett Nelson, the client; Kathy Nelson, the client's mother; and Allen Nelson, the client's father. Purpose of meeting was to review IPP objectives and to assess the client's current status and needs.

Taking Care of Oneself and One's Home: Kathy stated that Garrett continues to have issues with toileting. She described how he will defecate, and miss the toilet and as a result, it will go onto the floor. He will then need a shower and requires thorough cleaning, which also puts a strain on both of his parents. In addition, Garrett requires assistance with wiping after a bowel movement. Please see the Outcomes section for additional details.

Social and Community Involvement: Since the COVID-19 pandemic began, Garrett has been at home with his parents, and has not received any services, either remotely, or live, from his previous day program at CIS. SC discussed with Kathy other possible agencies that might be

T19 notes can be printed or emailed by right-clicking the record and selecting **Print**. A copy of the note will be displayed on the screen. Confirm that the note is correct and ready to be printed by selecting **Continue** or **X**.

The 'Display Spooled File' window shows a preview of the report with the following details:

- Control:** (input field)
- Search:** (input field)
- File:** QPQUPR FIL
- Page:** 1 of 8
- Consumer I.D. Notes:** (input field)
- Date:** 01/20/2022
- Units:** 01
- Contact:** F-F CONTACT
- Flg:** N
- Qual:** N

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Social and Community Involvement: Since the COVID-19 pandemic began,

Overprinting not displayed.

A prompt will display asking to Print or Email the report. Choose the selected option and press **Continue**. The report will then be printed or emailed.

The 'Print/E-Mail Option' dialog box asks: "Would you like to Print or Email the report?"

Selection Criteria: ☐ PRINT REPORT?


Clicking on **X** will exit the window without performing any action.


Title 19 EZ Preview

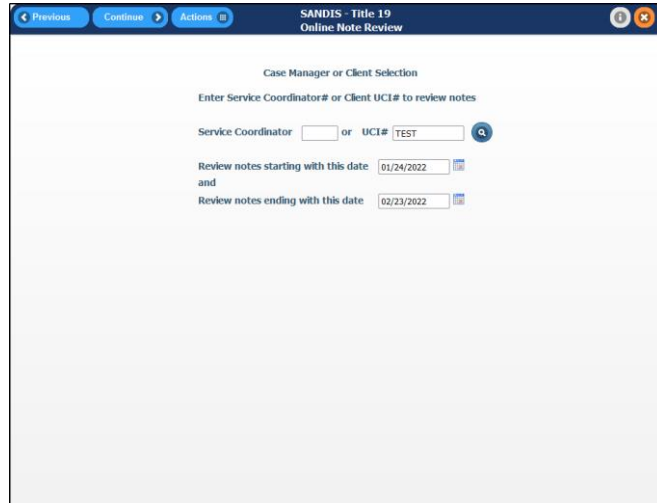
T19 EZ Preview provides a way to review notes for all UCI's within a caseload or for a specific individual only. To access the feature, click on a record within the Welcome Screen caseload view and select **EZ PVW**.



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2	KITTY, LITTEBITY		4	Y	TESTING	U-PROVISED	N	N	No IPP
3	SANDIS, SANDY K		44	Y	TES1	#2-ACTIVE	N	N	No IPP

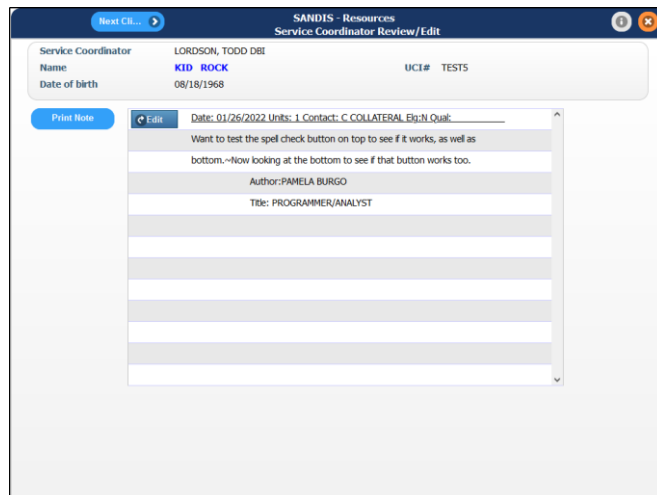
The T19 EZ Preview feature can also be accessed directly from the Navigation menu by Clicking on Title 19- SC group and selecting **T19 EZ Preview**.


Lastly, a **T19 EZ Preview** shortcut can be found in the Primary Consumer Information screen of a client. Click on the  icon.

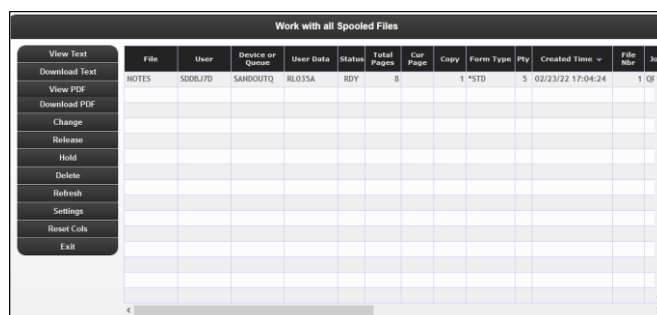
Enter either the Service Coordinator's **Caseload Code** to review all the notes written by that person or use the  button to **Search by Name** to select a UCI and review the notes written for that specific individual. Enter the **Begin** date and **End** date for the T19 notes.





Press  to proceed. All notes that were entered within the specified begin and end dates will be displayed. If searching by caseload, click on  to proceed to the notes of the next UCI within that caseload.

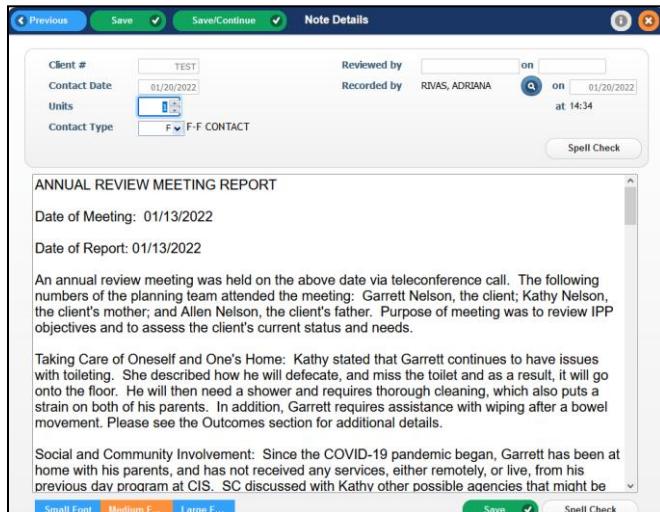


If desired, the T19 note can be printed while in T19 EZ Preview mode. Click on  and the note will be automatically printed to the assigned printer for your profile.



File	User	Device or Queue	User Data	Status	Total Pages	Car Page	Copy	Form Type	Pky	Created Time	File Size	Job
NOTES	SNDLJTD	SANDOUTQ	AL035A	RDY	8	1	STD	3	02/23/22 17:04:24	1 KB	1	1

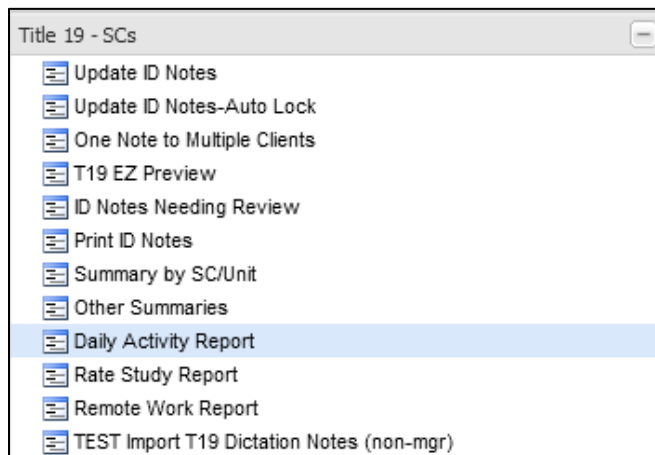
If a note is in NEW status, clicking on the  button will open the note in **Edit** mode. Make any desired changes and press  to save your changes and return back to the T19 EZ Preview workflow.





Daily Activity Report

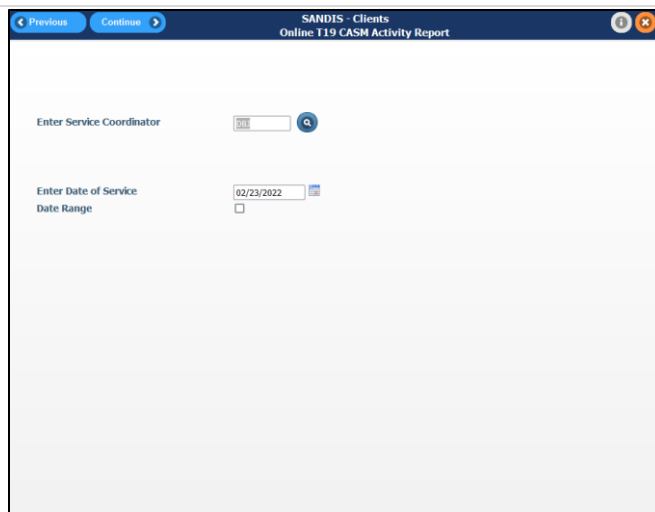
The **Daily Activity Report** provides a way to view all notes created in a day by caseload code.


Use the Navigation menu to find the **Title 19- SCs** category and find **Daily Activity Report**.



Enter the SC code manually or by clicking  to search for the desired profile.

Enter a **Date** manually or by clicking  to select a specific day. An end date can be selected by checking the **“Date Range”** checkbox and entering an end date in the corresponding field.





Press  to proceed and bring up all records matching the specified criteria (the **start** and **end** date as well as the **SC code**.)

[illegible]

There is a **Find**, **Sort**, and **Filter** feature available by right-clicking on a header in the dark blue bar.

To enter a record, click on the UCI# surrounded by a gray box. This will open the note under T19 EZ Preview mode.

VCIF	Client	Contact Date	Recorded Date	Units	Contact Type
YES		12/23/2021	12/23/2021	1	FFF CONTACT

Clicking on  will load the adjacent screen, allowing the previous information to be printed or emailed. Make a selection and click on  to receive the report as selected.

Continue

Print/E-Mail Option

Would you like to Print or Email the report you just viewed

☐ PRINT REPORT?

☐ EMAIL REPORT AS A .PDF?