

# Tracking

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How to monitor a patient's location within  
NCMUST

## What is Applicant Tracking

The MUST application has a tracking mechanism designed to monitor a patient's location and due date information to assure timely assessments.

**NOTE:** Currently Applicant Tracking is set to only track those recipients that have PASRR Level II authorizations – or those applicants that have been determined to have MI, MR or related conditions. So, not all applicants that have USP # will be located within this tool – only those with PASRR Level II assignments. In the future, this application may be expanded to include a broader base of applicants.

The permanent medical record transfers with the patient in the case of:

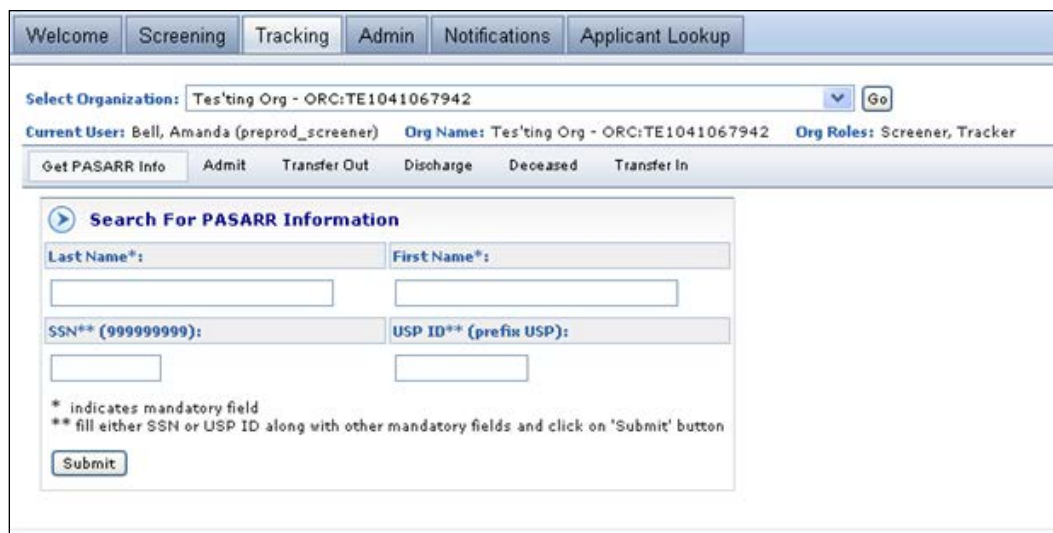
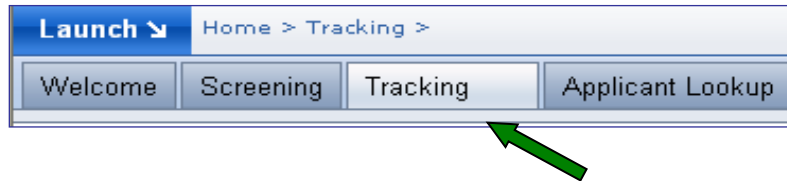
- **Transfers** to another Medicaid-certified facility
- **Relocation** to another facility which is not a Medicaid certified NF or moves to a lower level of care
- **Resident is deceased**
- **Being discharged** from the nursing facility. Discharge means that the resident has either been placed in a less restrictive setting than the nursing facility or the resident no longer resides in a Medicaid-certified nursing facility bed.

# Tracking

To access the Tracking portlet, follow these steps:

1. Access and log in to the MUST application.

Click on the **Tracking** tab.

A screenshot of the Tracking portlet interface. At the top, there is a navigation bar with tabs: 'Welcome', 'Screening', 'Tracking', 'Admin', 'Notifications', and 'Applicant Lookup'. Below the navigation bar, there is a 'Select Organization' dropdown menu set to 'Tes'ting Org - ORC:TE1041067942' with a 'Go' button. Below that, the 'Current User' is 'Bell, Amanda (preprod\_screener)', the 'Org Name' is 'Tes'ting Org - ORC:TE1041067942', and the 'Org Roles' are 'Screener, Tracker'. A row of tabs is visible: 'Get PASARR Info', 'Admit', 'Transfer Out', 'Discharge', 'Deceased', and 'Transfer In'. The 'Get PASARR Info' tab is active. The main content area is titled 'Search For PASARR Information' and contains four input fields: 'Last Name\*', 'First Name\*', 'SSN\*\* (999999999)', and 'USP ID\*\* (prefix USP)'. Below the fields are two asterisks indicating mandatory fields and a 'Submit' button.

The Tracking submenu displays. This screen is set to default to **Get PASRR Info** information. Other request tabs available are **Admit**, **Transfer Out**, **Discharge**, **Deceased** and **Transfer In**. The functioning of each tab will be discussed below.

## Request PASRR Information

This tab is useful for a user desiring PASRR information on an applicant. Remember, only applicants who have been screened and assigned a PASRR number, will be in this database. To Request PASRR Information, follow these steps:

1. Enter valid last name

Enter valid first name

Enter valid SSN

Click submit

PASRR information and PASRR history for the applicant is displayed

Get PASARR Info	Admit	Transfer Out	Discharge	Deceased	Transfer In
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<b>PASARR Information For (Duck, Donald )</b>						
<b>Last Name:</b>	<b>First Name:</b>	<b>Middle Name:</b>	<b>Date Of Birth</b>	<b>Gender:</b>	<b>SSN (999999999):</b>	
Duck	Donald		01/02/1860	Male	120000090	
<input type="button" value="LookUp another PASARR"/>			<input type="button" value="Print"/>			

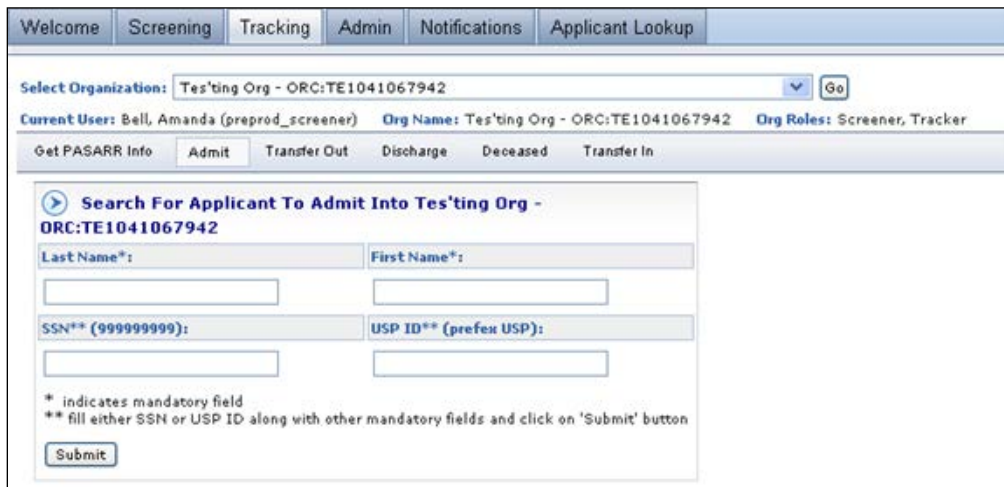
  

<b>PASARR History</b>						
<b>PASARR #</b>	<b>Start Date</b>	<b>End Date</b>	<b>Level II Diag. Type</b>	<b>Went To Level II</b>	<b>isCategorical B</b>	<b>DMH Certification</b>
2008000460A	2008-09-05			false	false	

## Admit New Applicant

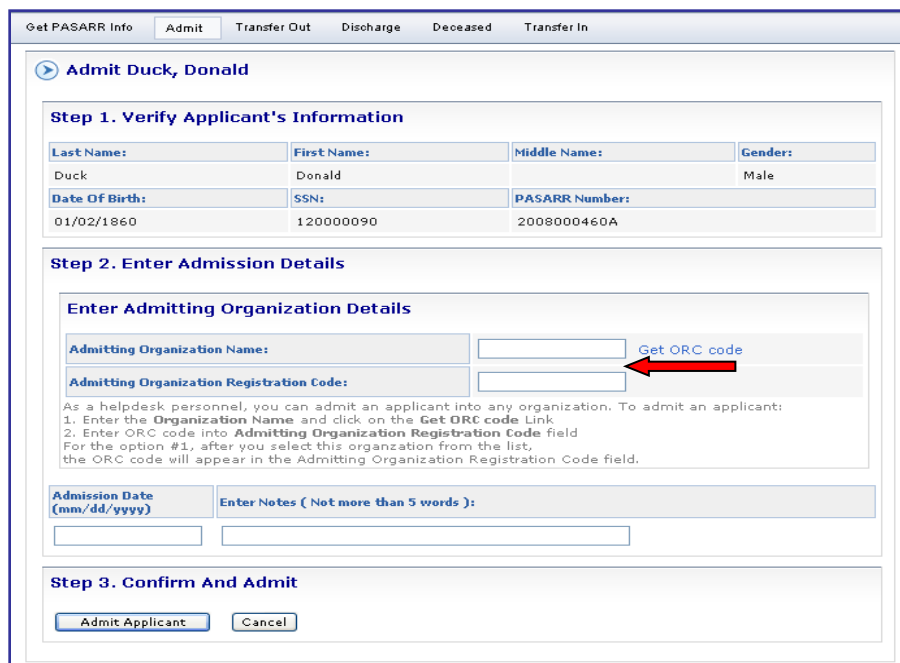
After an applicant has been screened and assigned a PASRR number, the applicant is ready to be admitted into a facility that can provide the needed services to the applicant. For a facility to receive this applicant, the applicant must be admitted through the Tracking portlet. To admit an applicant:

1. Access and log in to the MUST application.
2. Click on the **Tracking** tab.
3. Click on the **Admit** sub-tab to access the following:



The screenshot shows the MUST application interface. At the top, there are navigation tabs: Welcome, Screening, Tracking, Admin, Notifications, and Applicant Lookup. Below the tabs, there is a 'Select Organization' dropdown menu set to 'Tes'ting Org - ORC:TE1041067942' and a 'Go' button. The current user is identified as 'Bell, Amanda (preprod\_screener)' with roles 'Screener, Tracker'. Below this, there are buttons for 'Get PASARR Info', 'Admit', 'Transfer Out', 'Discharge', 'Deceased', and 'Transfer In'. The main content area is titled 'Search For Applicant To Admit Into Tes'ting Org - ORC:TE1041067942'. It contains a form with the following fields: 'Last Name\*' (mandatory), 'First Name\*' (mandatory), 'SSN\*\* (999999999)', and 'USP ID\*\* (prefex USP)'. A legend indicates that '\*' denotes a mandatory field and '\*\*' indicates that either SSN or USP ID must be filled along with other mandatory fields. A 'Submit' button is located at the bottom of the form.

4. Enter valid last name
5. Enter valid first name
6. Enter valid SSN
7. Click **Submit** (applicant information is displayed)

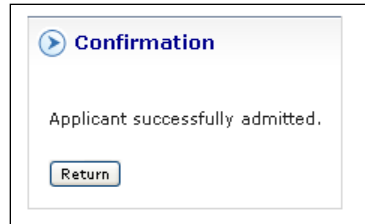


The screenshot shows the MUST application interface for admitting an applicant. The top navigation tabs are the same as in the previous screenshot. The main content area is titled 'Admit Duck, Donald'. It is divided into three steps:

- Step 1. Verify Applicant's Information:** A table displays the applicant's information:

Last Name:	First Name:	Middle Name:	Gender:
Duck	Donald		Male
Date Of Birth:	SSN:	PASARR Number:	
01/02/1860	120000090	2008000460A	
- Step 2. Enter Admission Details:** This step includes a section for 'Enter Admitting Organization Details' with fields for 'Admitting Organization Name' and 'Admitting Organization Registration Code'. A 'Get ORC code' link is present next to the organization name field, with a red arrow pointing to it. Below this, there is a text box with instructions: 'As a helpdesk personnel, you can admit an applicant into any organization. To admit an applicant: 1. Enter the Organization Name and click on the Get ORC code Link. 2. Enter ORC code into Admitting Organization Registration Code field. For the option #1, after you select this organization from the list, the ORC code will appear in the Admitting Organization Registration Code field.' Below the instructions are fields for 'Admission Date (mm/dd/yyyy)' and 'Enter Notes ( Not more than 5 words )'.
- Step 3. Confirm And Admit:** This step contains two buttons: 'Admit Applicant' and 'Cancel'.

8. Enter the ORC of the Admitting organization **or** enter the organization name and click **Get ORC Code** to search for the ORC
9. Enter applicant admission date (admission date cannot be more than 60 days from the current date)
10. Enter notes (optional: may be used to help identify new patient)
11. Click **Admit Applicant** and a confirmation will populate showing applicant was successfully admitted.



If errors in demographics are noted after 30 days, contact the Helpdesk to make the needed corrections

## Transfer Out

If for any reason, a PASRR applicant in your facility needs to be transferred to another facility, this may be accomplished through the application, as long as the applicant was admitted into your facility through the tracking portlet. Once you transfer the applicant from your facility, that applicant is available to be transferred into another facility. To transfer an applicant from your facility:

1. Access and log in to the MUST application.
2. Click on the **Tracking** tab.
3. Click on the **Transfer Out** sub-tab. Applicants who are currently admitted into your facility will display.



The screenshot shows a web application interface with a navigation bar at the top containing buttons for 'Get PASARR Info', 'Admit', 'Transfer Out', 'Discharge', 'Deceased', and 'Transfer In'. The 'Transfer Out' button is selected. Below the navigation bar, there is a section titled 'Transfer Out Of EDS ORC:ED1041067487'. Underneath this title is a table with the following columns: 'USP ID', 'Last Name', 'First Name', 'Date of Birth', 'Gender', and 'Action'. The table contains one row of data: 'USP902', 'Duck', 'Donald', '01/02/1860', 'Male', and a 'Transfer Out' button.

USP ID	Last Name	First Name	Date of Birth	Gender	Action
USP902	Duck	Donald	01/02/1860	Male	Transfer Out

4. To select the applicant to be transferred out, click the **Transfer Out** button beside their name
5. The applicant's information is displayed. Verify the information is correct (see below)

Get PASARR Info	Admit	Transfer Out	Discharge
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**Transfer Out (Duck, Donald )**

**Step 1. Verify Applicants Information**

Last Name:	First Name:	Middle Name:
Duck	Donald	
Gender:	Date Of Birth:	SSN:
Male	01/02/1860	120000090
PASARR number :	Organization ID:	Recipient ID:
2008000460A	1041067487	902

**Step 2. Enter the Organization Registration Code**

ORC:

**Step 3. Verify and Continue**

6. Enter a valid ORC to where the applicant is being transferred (communication between the current ORC and the new ORC is required, the transfer to ORC will receive this applicant in their organization)

Get PASARR Info	Admit	Transfer Out	Discharge	Deceased	Transfer In
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**Transfer Out (Duck, Donald )**

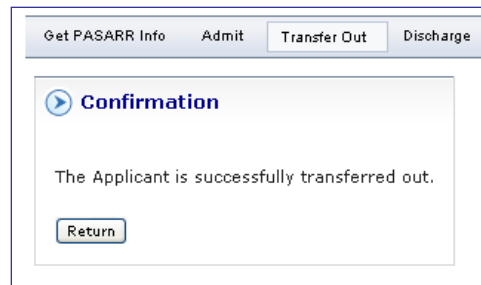
**Step 4. Verify Organization**

Transfer to Organization:	Transfer to Organization ID:	Options:
Alpha Org	1041067488	<input type="button" value="Change Organization"/>
Transfer to Contact:	Transfer Area code:	Transfer Out Date (mm/dd/yyyy):
<b>John Doe</b> ▼	Hospital/General ▼	<input type="text"/>
Enter Notes ( Not more than 5 words ) :		
<input type="text"/>		

**Step 5. Verify And Continue**



7. Click **continue**
8. New ORC information is displayed with the administrator name as contact person
9. Enter valid transfer out date (this date cannot be prior to the applicant's admission date. Enter notes (optional)
10. Click **Transfer Out**
11. Successful transfer notice is displayed



## Transfer In

Once an applicant has been successfully transferred out by the previous facility, the receiving facility must transfer the applicant into their facility. To admit an applicant into a new facility:

1. Access and log in to the MUST application.
2. Click on the **Tracking** tab.
3. Click on the **Transfer In** sub-tab. Applicants currently transferred out from another organization (with your ORC) will appear on your list of applicants associated with your org
4. To select the applicant to be transferred in, click the **Transfer In** button beside their name

USP ID	Last Name	First Name	Date of Birth	Gender	Action
USP902	Duck	Donald	01/02/1860	Male	<input type="button" value="Transfer In"/>
USP708	Thirty	Day	04/30/1951	Male	<input type="button" value="Transfer In"/>

5. The applicant's information is displayed. Verify the information is correct

**Transfer In (Duck, Donald)**

**Step 1. Verify Applicants Information**

Last Name:	First Name:	Middle Name:
Duck	Donald	
Gender:	Date Of Birth:	SSN:
Male	01/02/1860	120000090
PASARR number :	Organization ID:	Recipient ID:
2008000460A	1041067488	902

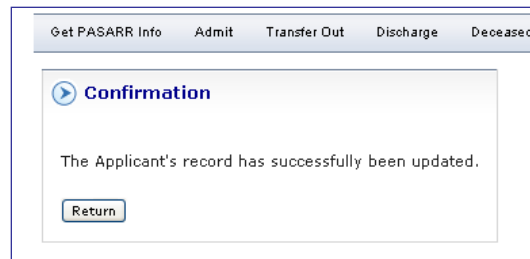
**Step 2. Enter Transfer Information**

Transfer In Date (mm/dd/yyyy):	Notes ( Not more than 5 words ) :
<input type="text"/>	<input type="text"/>

**Step 3. Verify And Continue**

6. Enter the transfer in date (date cannot be prior to the previous org transfer out date). Enter notes (optional: may be used to help identify new patient)
7. Click on the **Transfer In** button

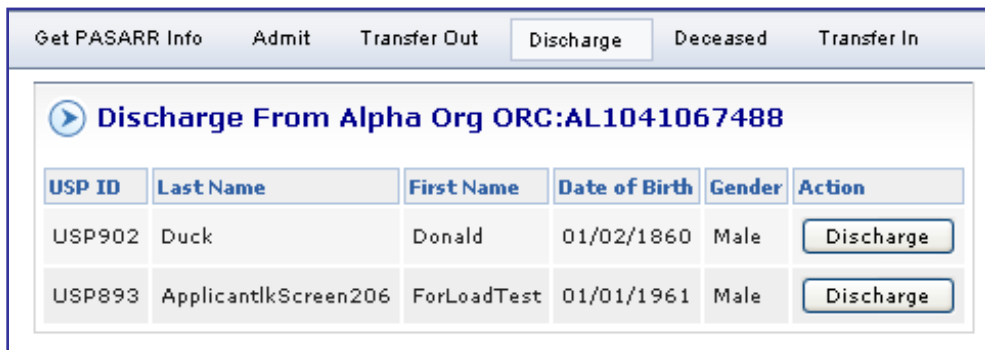
Successful update message is displayed



## Discharge Applicant

An applicant that will be discharged to home or to a lower level of care facility will need to be discharged from your facility. To discharge an applicant:

1. Access and log in to the MUST application.
2. Click on the **Tracking** tab.
3. Click on the **Discharge** sub-tab. Applicants who are currently admitted into your facility will display.



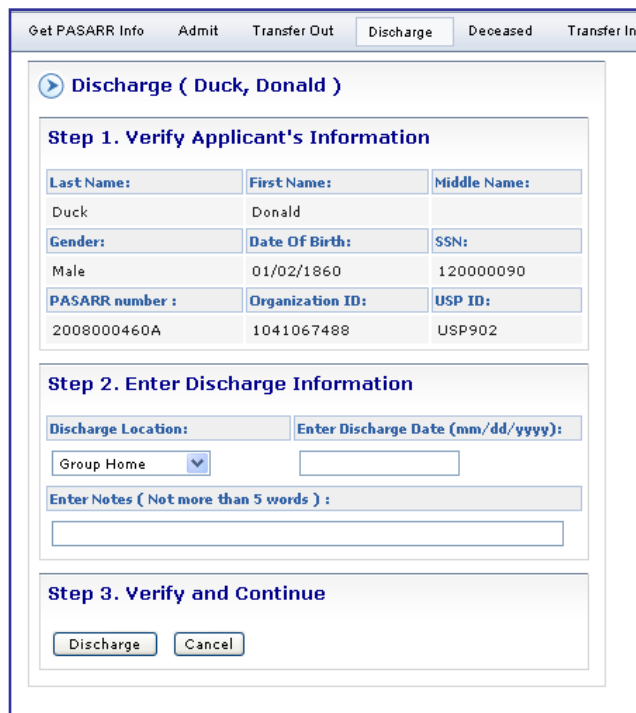
Get PASARR Info   Admit   Transfer Out   **Discharge**   Deceased   Transfer In

▶ **Discharge From Alpha Org ORC:AL1041067488**

USP ID	Last Name	First Name	Date of Birth	Gender	Action
USP902	Duck	Donald	01/02/1860	Male	<input type="button" value="Discharge"/>
USP893	ApplicantkScreen206	ForLoadTest	01/01/1961	Male	<input type="button" value="Discharge"/>

To select the applicant to be discharged, click the **Discharge** button beside their name.

The applicant's information is displayed. Verify the information is correct



Get PASARR Info   Admit   Transfer Out   **Discharge**   Deceased   Transfer In

▶ **Discharge ( Duck, Donald )**

**Step 1. Verify Applicant's Information**

Last Name:	First Name:	Middle Name:
Duck	Donald	
Gender:	Date Of Birth:	SSN:
Male	01/02/1860	12000090
PASARR number :	Organization ID:	USP ID:
2008000460A	1041067488	USP902

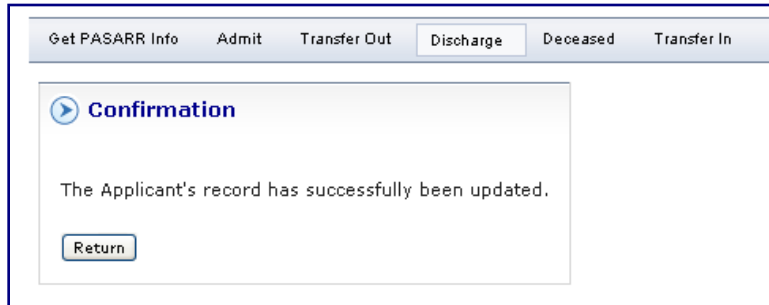
**Step 2. Enter Discharge Information**

Discharge Location:    Enter Discharge Date (mm/dd/yyyy):

Enter Notes ( Not more than 5 words ) :

**Step 3. Verify and Continue**

4. Select the discharge location from the drop-down box. Enter valid discharge date (cannot be prior to the admission date). Enter notes (optional).
5. Click on the **Discharge** button.



Successful discharge notice is displayed.

## Deceased applicant

Once a patient expires, they should be reported as deceased in the tracking portlet. To report a deceased applicant:

1. Access and log in to the MUST application.
2. Click on the **Tracking** tab
3. Click on the **Deceased** sub-tab. *Applicants who are currently admitted into your facility will display*
4. To select the applicant to report deceased, click the Report Deceased button beside their name

Get PASARR Info Admit Transfer Out Discharge **Deceased** Transfer In

▶ **Report Deceased From EDS ORC:ED1041067487**

USP ID	Last Name	First Name	Date of Birth	Gender	Action
USP519	Cro	Ja	04/14/1915	Male	<b>Report Deceased</b>

The applicant's information is displayed. Verify the information is correct

Get PASARR Info Admit Transfer Out Discharge **Deceased** Transfer In

▶ **Report ( Cro, Ja S ) as deceased**

**Step 1. Verify Applicant's Information**

Last Name:	First Name:	Middle Name:
Cro	Ja	S
Gender:	Date Of Birth:	SSN:
Male	04/14/1915	222552222
PASARR number :	Organization ID:	USP ID:
2008000196E	1041067487	USP519

**Step 2. Enter Deceased Information**

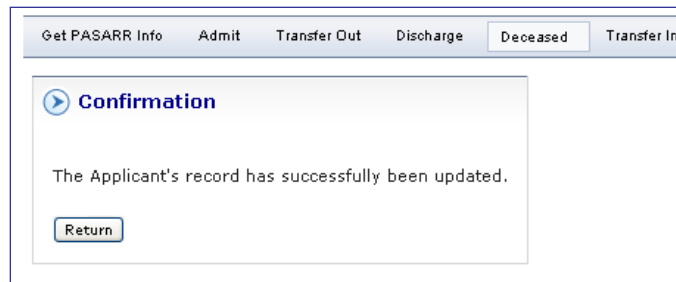
Deceased Date (mm/dd/yyyy):  Enter Notes ( Not more than 5 words ) :

**Step 2. Verify and Continue**

**Report Deceased** **Cancel**

Enter date of death (cannot be prior to the admission date). Enter notes (optional)

5. Click on the **Report Deceased** button.



Successful update message is displayed