A Guide to System Preferences

System Preferences is a tool used to set a Global Setting for all users in the agency. Users need to be listed as an "Administrator" or be given the System Preferences window in Security.

Found in the Administration Module, System Preferences is a listing of tabs based on certain modules throughout the system. Each one with its own preferences for the agency as a whole.

General

- Back up path
    - Designate where the back up is located for the Gatekeeper database
- Use Caching for all rosters of people
    - This will automatically update any lists generated for any roster after updates are completed.
- Mask Social Security on Reports
    - For security purposes, this function blocks all SSN with exception of the last 4 digits.
- Allow usage of single sign-on
    - Turns on ability to utilize single sign on with Windows – see document for specific instructions.
- Email settings
    - Agency chooses which type of interface with email will be utilized. PSI recommends Insights for your system. This requires a separate utility added to your server, but will result in all emails generating from the PSI server instead of the agency's server.

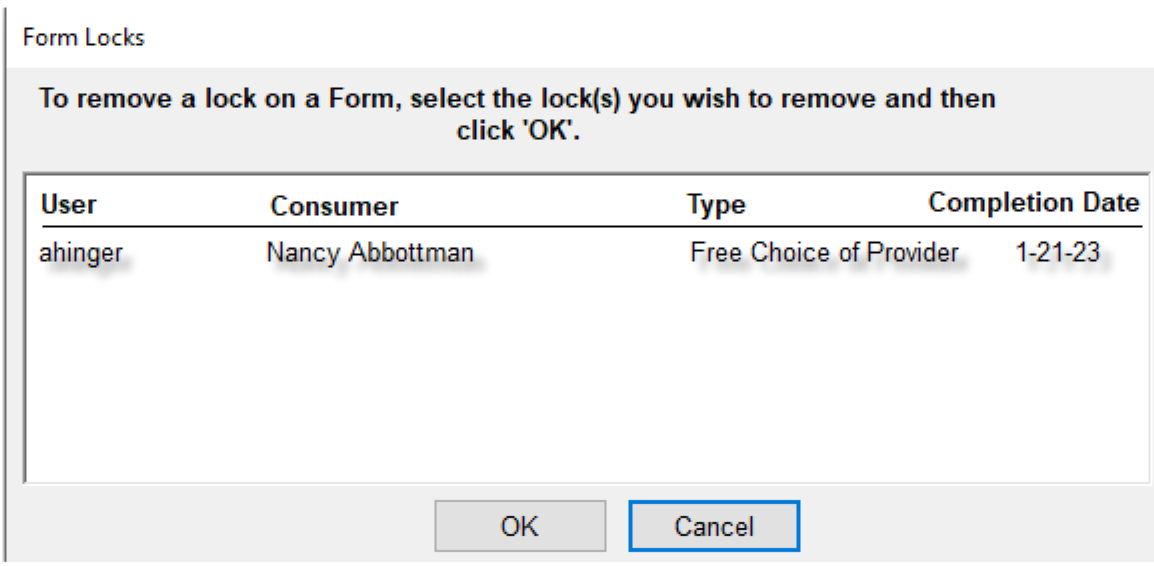
Demographics

- Default Organization
    - Defines which organization the county typically uses. This is not required.
- Q/A Period
    - Used for the Q/A window and tells the system how long is a typical period for the agency.
- Waiting Lists
    - No longer used in the system
- Auto copy Location Address to Consumer Address
    - This is a custom setting and not required
- Auto copy Location's License#
    - Used when creating a residential facility in Edit Locations
- Allow Duplicate Local IDs
    - Customized setting
- Use Standardized Addressing

- This sets the standard when creating an envelope in the system
- Use Custom Insert Wizard
    - This is a customized setting for a customer and should not be used
- Edit Funding Source Note as Drop down/Free form
    - This setting allows for customers to choose the note type for funding source.

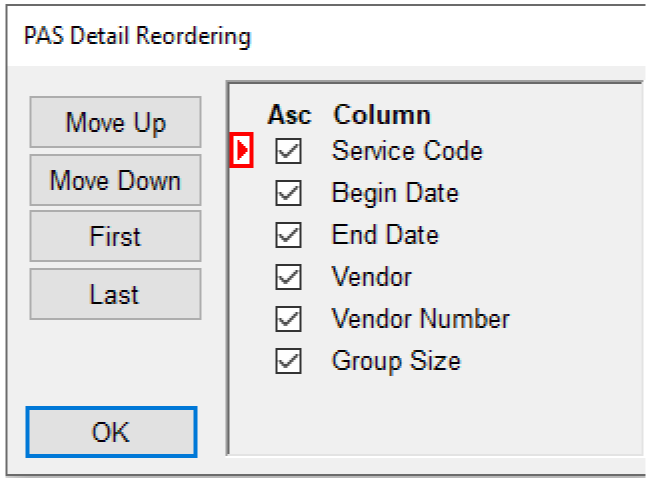
Forms

- Form Template Path
    - Sets path where all form templates may be found. Required when using forms.
    - View Form Locks
        - This allows user to determine who has the forms open at any given time.

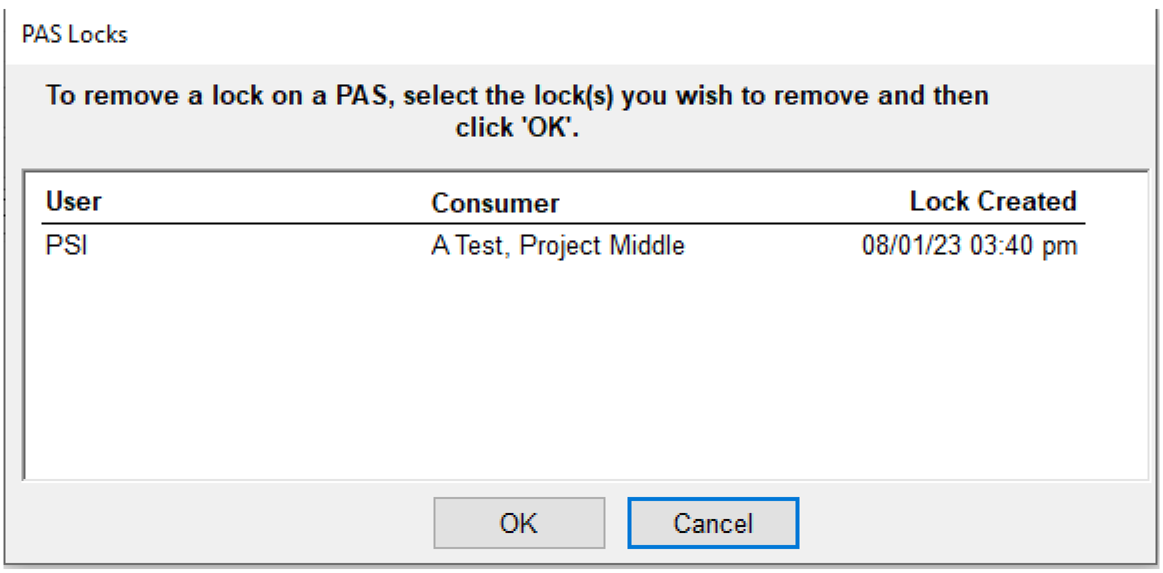


Authorizations

- PAS XML File Path
    - Lists the path where PAS XML resides
- Set PAS Detail Sort
    - Lists detailed items that may be re-ordered

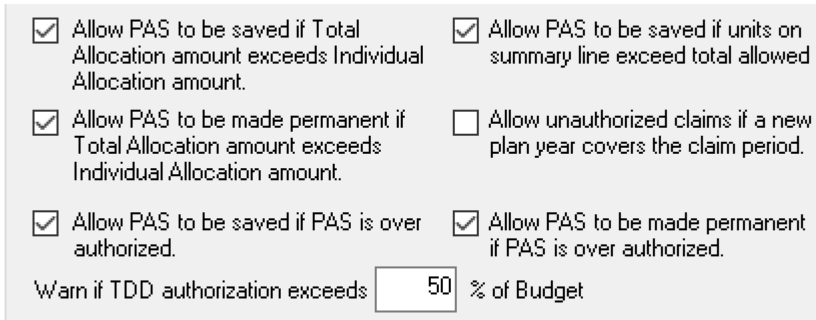


- View PAS Locks
  - This allows user to determine who has the PAS window open at any given time.



- Provider Pools
  - The checkbox identifies those who are part of the Provider Pool

- Authorization Rules
  - Checkboxes provided basis of how PAS can be saved/made permanent.



- Show on PAS Form
  - Authorization Contact
    - Defines the security of the signer of the PAS
      - By Relationship – defined in People window
      - By Service Category Access – defined by Service Category in Security window
    - Relationships
      - Used if choosing By Relationship above
- Consumer Assessment
  - Determines individual's funding based on the Primary Funding Source field.
- Fiscal Agent
  - Used for SELF Waivers and notes the current and prior Fiscal Agency defined by DODD along with the latest effective date.

Billing

- Billing paths
  - This page contains a group of 9 paths that may be set up if billing from Gatekeeper.
- Record Attendance
  - No longer used – from old CAFS billing
- System Calendar
  - No longer used – from old CAFS billing

Case Notes

- Default Service Code
  - Sets a global service code for Case Note window – not recommended
- Default Other Source
  - Sets a global Other Source Code used in Billing window of People – not recommended
- Confidential Warning

    - User may set up the statement that will default when a confidential case note is opened by someone without security.
- Issue Warning for case note length
    - Determines at what length of time the user will see the prompt that the note has exceeded.
- Issue Warning for office hours
    - Determines the hours of operation and any note outside of this time will see a prompt
- When creating group notes
    - Adjust Start/End or Ratio – the system is set to ratio. Adjusting or changing this setting is not recommended
- Case Notes – Time Only
    - Users may key minutes instead of start/end times when button is checked.
- Require note to be filled in
    - Requires users to have a note before the case note may be saved.
- Check Overlapping times for consumer with more than one note for multiple people
    - This setting will highlight any notes that are for the same time/same person so the biller can determine if they meet rule requirements
- Imported Files
    - Path set for where imported files are kept
- Select vendor based on service authorization
    - This is used for time only case notes – local billing
- Display documentation timer
    - This checkbox allows the user to see the timer as they enter a note.
- Number of minutes before timer stops
    - This set up dictates when the timer will stop due to inactivity by the user. There is a maximum setting of 10 minutes.

IDS

- IDS Fields to import
    - Users may decide which fields can be overwritten by the IDS file pulled from DODD. (See IDS Import documentation)

Receivables

- Payment File paths
    - This is the path where payment files are imported and where they are housed after payment is applied
- Reimbursable Billing – Rec Authorization
    - This denotes if the agency is choosing to use the Receivable Authorization for any reimbursable billing. This is required for TXX billing.

Workshop – no longer applicable

Workshop Entry – no longer applicable

Transportation

- Service Type to Bill
  - Users are required to enter one transportation service here in order to bill transportation
- Trip Sheet Legend
  - Users may customize the trip sheet with 2 lines of information that will pull into the report.
- Transportation Service
  - Users are required to enter one transportation code here in order to utilize transportation.
- Allow 'Do Not Bill'
  - Gives the user the ability to denote billing that will not be billed for waiver services.
- Include SSN on Route Sheet
  - This setting gives the user the option of including/not including SSN on a route sheet.

TOB – no longer applicable

Imaging – no longer applicable

Day Services

- Service Type
  - Users are required to enter one day service type in order to track day services.
- Validates active locations
  - Checkbox in order to determine what files may be imported for day services.

Incident Tracking

- Incident Required Fields
  - Determine which fields are required on the Incident Tracking window for Incidents only.
- UI Required Fields
  - Determine which fields are required on the Incident Tracking window for UI only.
- MUI Required Fields
  - Determine which fields are required on the Incident Tracking window for MUI only.

Plan

- After Span Dates have passed
  - No longer applicable
- Plan remains active
  - No longer applicable
- Remove rich text from reports
  - No longer applicable
- View Plan Locks
  - No longer applicable

Mental Health – no longer applicable

Personnel – no longer applicable

Customer Care – no longer applicable

Outcomes & Services

- Allow activity setting
  - This determines how many days back the user may enter activity – PSI recommends 7-10 days.
- Numeric Frequency Occurrence
  - This setting determines how often the activity may occur. This is a setting that must be completed by PSI staff.

FSS

- Funding Source
  - Determines which funding source FSS payments will pull
- Auto create Simple Billing Entry
  - Checking will allow user to automatically create a simple billing entry for every payment noted in FSS window.
- Show Co-Pay Percentage
  - This setting allows users to utilize the co-pay option in FSS.

Employment – used for OOD billing – no longer applicable

Anywhere

- Use Absent Feature in Anywhere Roster – check box will turn on the absence feature. Not recommended for county boards.
- Use Progress Notes in Anywhere Roster – check box will turn on the progress notes in Anywhere. Not recommended for county boards.
- Minutes before Anywhere logs out due to inactivity – sets the amount of time (up to 30 minutes) that the system will remain open without activity.
- Enable Two-Factor Authentication – checkbox to turn on 2FA that requires users to receive a code before opening Anywhere.
- Custom Login Text – Users may create a text that will display on the Anywhere login window.

- Voice to Text
    - Azure API Key – allows users that have contracted with Microsoft to enter a key to open the V2T feature in Anywhere.
    - Enable for case notes – turns on this feature for Anywhere Case Notes
- Plan Report Order
    - This allows customers to change the order of the plan report by moving the arrows up/down depending on order requirements.