



ShareCare Fundamentals Manual
v.b

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Features of this Manual

References – References to screen names, “tabs”, “flags”, buttons, and hyperlinks are presented in **bold** type.

Special Icons – The manual provides three icons that indicate something for the reader to acknowledge. Explanations of the icons are below.



The Example Icon

Sometimes a clear real world example helps to explain a concept or feature in more detail. When you see this icon, look for an example of how to use ShareCare in the best manner possible.



The Warning Icon

Using ShareCare is a user-friendly experience; however, there are cases when doing specific actions can cause issues to arise. Look to this icon to avoid these problems.



The Tip Icon

Setting up and using ShareCare can be an even easier process when you utilize the tips and best practices seen with this icon.

Introducing Share Care Fundamentals

The theory behind the Fundamental portion of ShareCare University is to familiarize new users with some basic principles and tools to successfully use the ShareCare System.

Within the instruction, users will learn how to correctly log into ShareCare, how to use the main menu, basic terminology, searching, keyboard shortcuts and adding and updating information.

Internet Explorer Settings for ShareCare

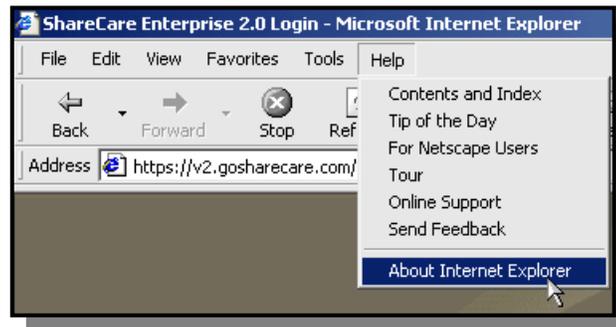
ShareCare can be accessed using Internet Explorer. As a general rule, most of the default settings installed for Microsoft's Internet Explorer 6.0 (IE6.0) will allow the ShareCare system to function properly. This portion of the document will allow the end user to verify the settings required for the best ShareCare performance.

Verifying your Internet Explorer version

Every user should be using Internet Explorer version 6.0SP1. Before beginning any work in ShareCare a user should check to make sure their computer has the correct version. To do this, double click the Internet Explorer icon on the desktop or select Internet Explorer from the Programs area of the Windows Start Menu.



When Internet Explorer has opened, select **About Internet Explorer** from the **Help** menu.



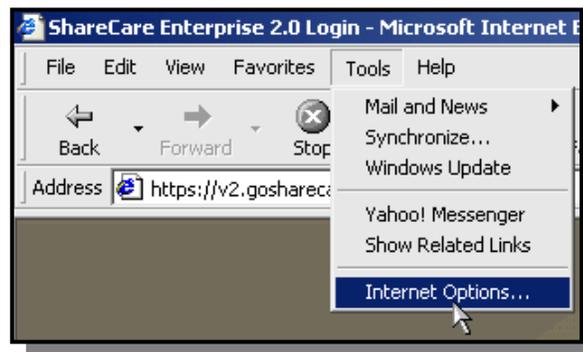
The following screen will appear. Make sure the Version is listed as **6.0SP1**. The numbers after **6.0** are insignificant to ShareCare usage. Also, make sure the Update Version has either **SP1** listed. After reviewing the information click the **OK** button.



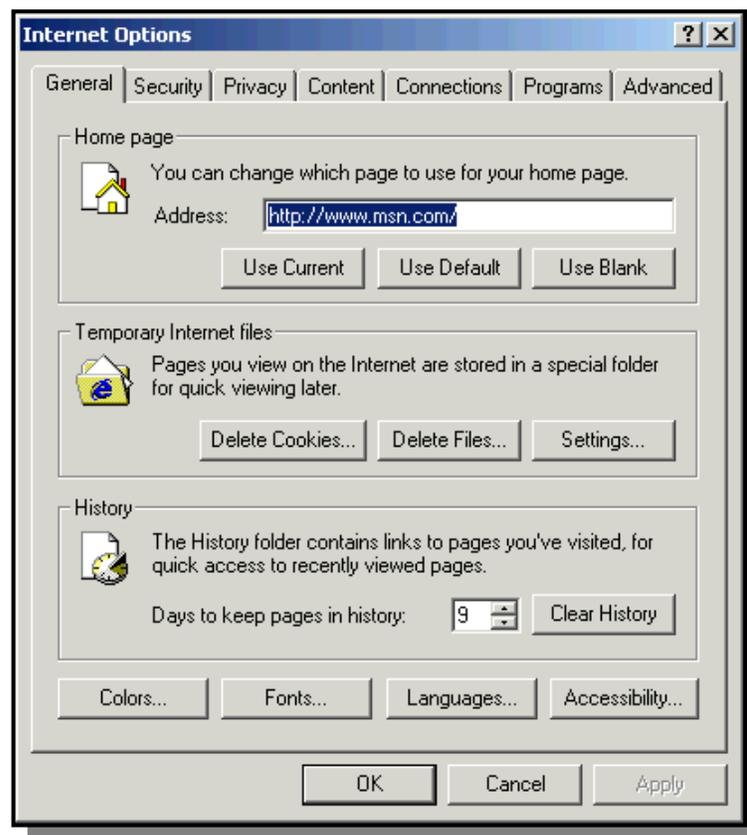
Accessing the Internet Explorer Options Menu

There are some settings in Internet Explorer that should be checked before beginning any ShareCare session. Users can learn how to change or verify these options in this section.

Select **Internet Options** from the **Tools** menu.

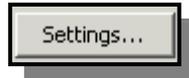


A multi-tab window titled "Internet Options" will open on the screen.



General Tab

Click on the **Settings...** button in the "Temporary Internet files" section to bring up the window titled "Settings".



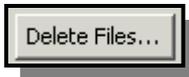
The system will open the Settings window. It is important to have the system check for newer versions of stored pages on "Every visit to the page".

Windows default enables the "Automatically" button. Please make sure that the radio button labeled "Every visit to the page" is selected.

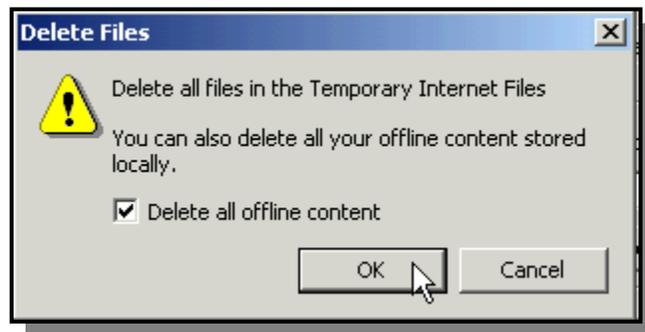
Click the **OK** button when finished.



The next step is to delete the Temporary Internet files that have been saved to the system. Select the **Delete Files** button on the "Temporary Internet files" section



Checkmark the Delete all offline content box and click the **OK** button. This process may take a few seconds if it has not been completed in an extensive amount of time. The system will return the user to the General Tab.



Deleting Cookies

It is also useful to delete cookies before beginning a session with ShareCare. When the system deletes the Temporary Internet files it does not also delete the cookies at the same time. The users must do this manually.

To do this, begin by selecting the **Delete Cookies** button on the General Tab. Then select the **View Files** button in the Settings window.

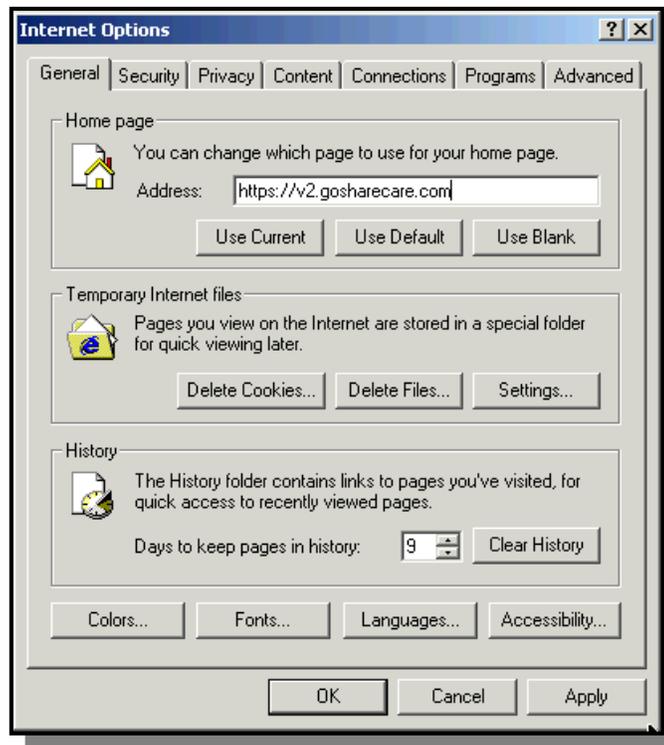


The system will display the following box. Click **OK** to delete your cookies.



Setting ShareCare as the Home Page

If users do not wish to type in the IP address for ShareCare every time they want to use the system, they can set the IE homepage to be the login screen for ShareCare. In the Internet Options screen, on the General tab, in the Home page section, type the appropriate ShareCare IP address. Click the **OK** button. The next time an IE window is opened the ShareCare site should appear on the screen. Your system administrator will give you the correct IP address to enter.

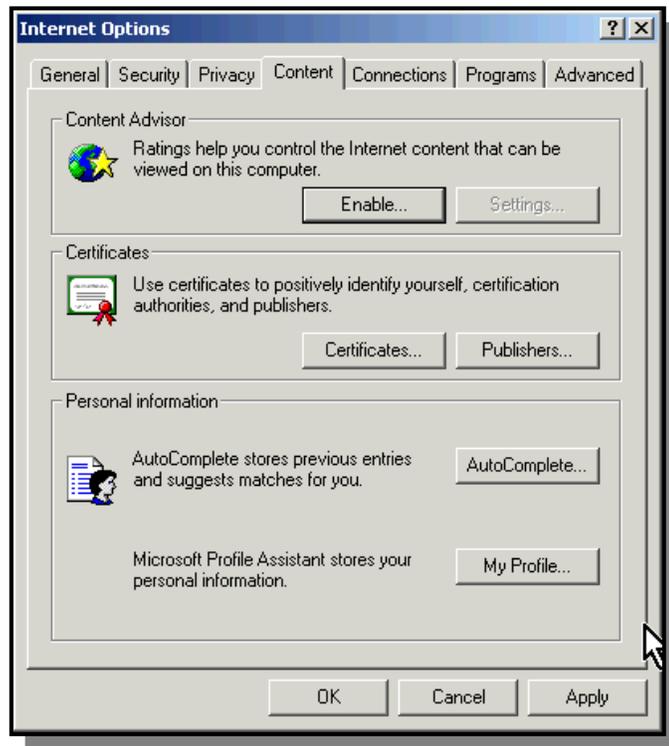


Do not set a favorites link for the Share Care IP address.

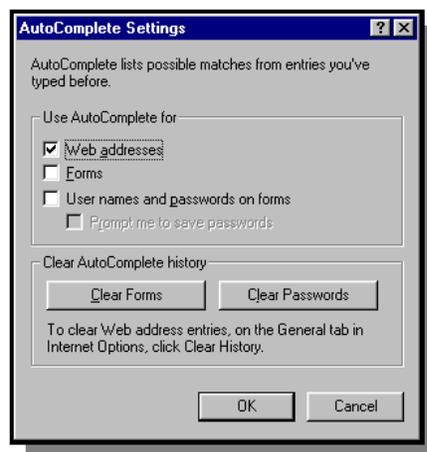
Some users have experienced problems when they have added the Share Care IP address to their favorites section. Doing so may cause problems with screen displays and data-entry.

Content Tab

While not essential it is recommended to turn off the Auto Complete function. This function is accessed through the Content Tab by selecting the **Auto Complete** button.



The AutoComplete Settings window will appear on the screen.



Remove the checkmarks for **Forms** and **User names and passwords on forms**. It is acceptable to leave the Web addresses checked. Click the **OK** button.

The system will return to the Internet Options window. Click the **OK** button.

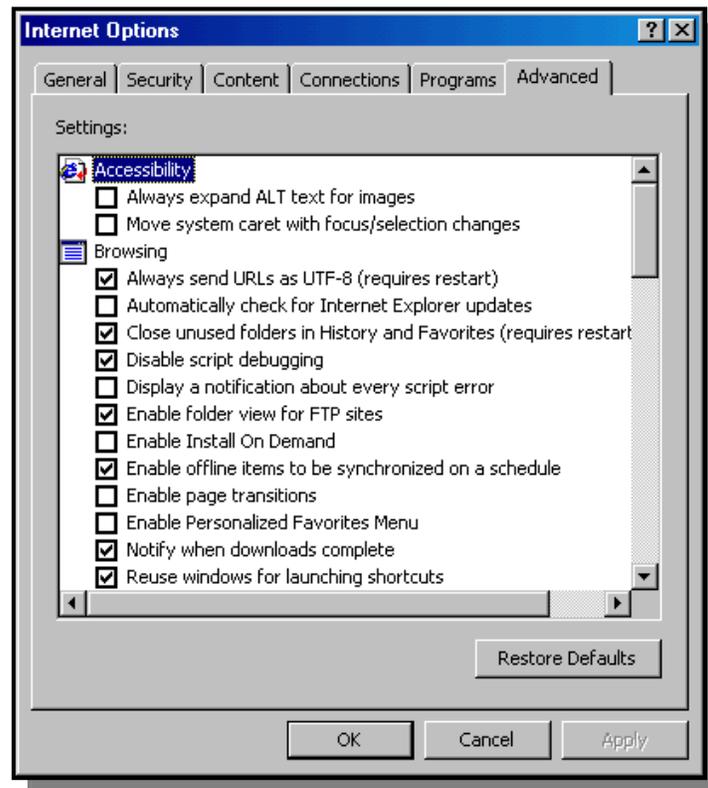
Advanced Tab

Certain code in ShareCare can make IE display error messages when in fact no real error has occurred. It is recommended that the Script Debugging option in the Advanced tab be checked for the proper setting prior to beginning any ShareCare session.

To check the setting, select Internet Options from the Tools menu in IE.



Click on the **Advanced** tab to view the settings. A checkmark should be in the box titled "Disable Script Debugging". Click **OK** when finished.



Logging into ShareCare

To locate the Share Care site, users must first enter the correct address in the IE Address field. A System Administrator will provide users with this information. Once the address has been entered, click the **Go** button or press **Enter** on your keyboard.



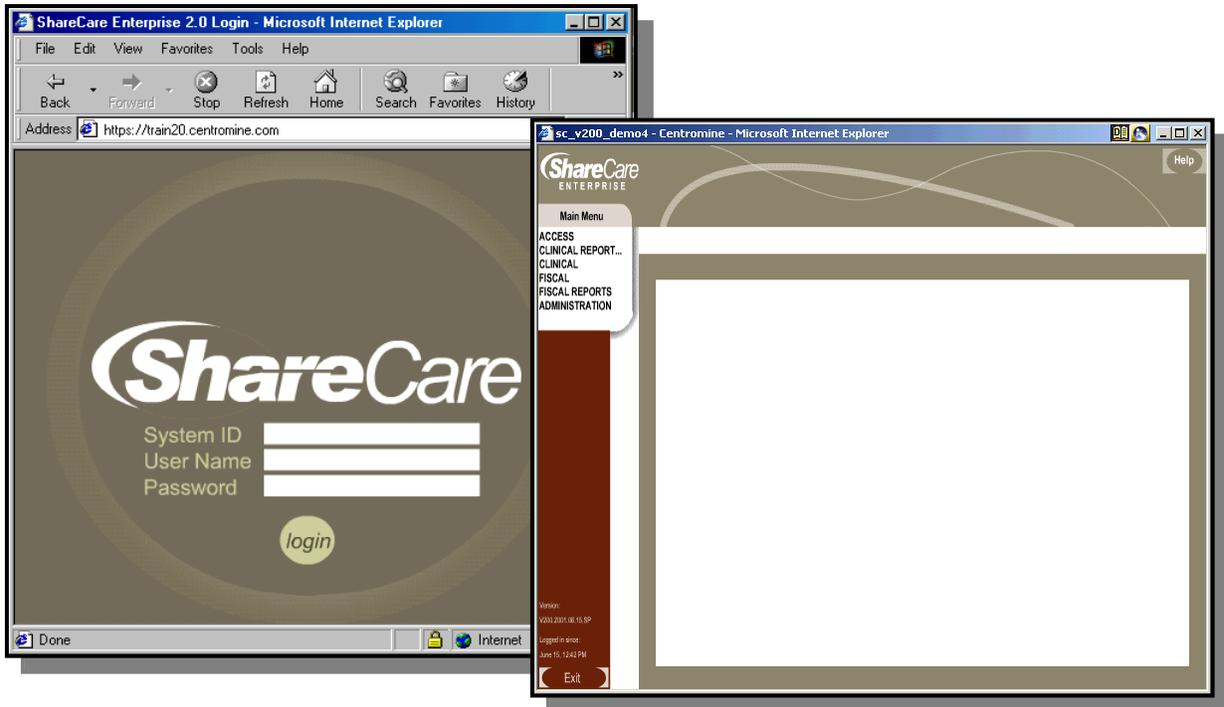
The main ShareCare screen will now appear allowing users to enter their System ID, User Name and Password information.



Once the given information has been typed, click the **login** button to enter the system.

Successful Login

Once the login button has been clicked, ShareCare will launch a new Internet Explorer window opening the main ShareCare screen. Successful login has occurred if the user can see the main menu and the **Exit** button located in the lower left corner of the screen. The original window no longer needs to be open and can be closed if desired



The main ShareCare screen notifies the user as to which version they are working on and the date and time that they logged into the system.



If a user was inadvertently logged off the system or tries to login on another computer they will receive the following message on their screen.



To continue the login process click the **Yes, log in** button. To stop the login process click the **No, go back** button.

Unsuccessful Login

Occasionally users mistype their User ID, password or both. In this case they would not see the main ShareCare screen with the main menu and exit button. They will likely see an error message informing them of the incorrect portion of the information that they typed on the login screen.

User Name Error

The system looks at the user name information first when trying to allow a user into the system. If this information is incorrect the user will receive the following message.



Click the **OK** button, retype the user name and continue with the rest of the login process.

Password Error

User Passwords are case sensitive. If the user has entered their password incorrectly they will receive the following message.



Click the **OK** button, retype the password and continue with the rest of the login process.



What happens if I do not see the main menu and exit button?

If a successful login does not occur it may be due to an incorrect password or an incorrect shutdown of ShareCare. It may be necessary to contact the system administrator for assistance. If a user is automatically logged out of ShareCare due to an unexpected interruption (i.e. power failure or system crash), they will have an opportunity to log back into the system without having their User ID and Password reset by the System Administrator.

Exiting ShareCare

Users should always end their ShareCare session by clicking the **Exit** button located in the lower left corner of the screen.



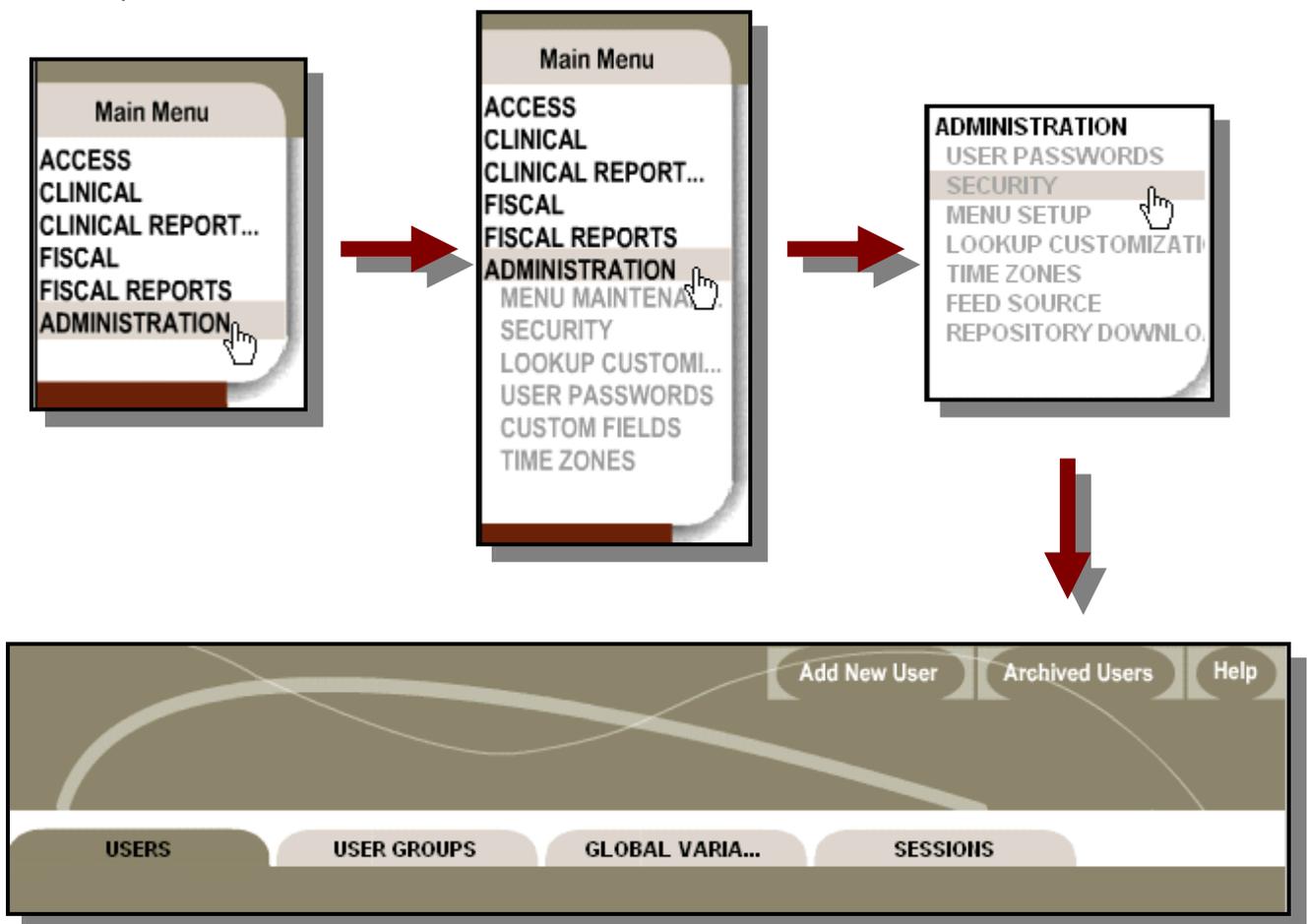
Following this procedure will ensure that the user is logged out of the system properly and avoid error messages at the time of next log in.

Using the Main Menu

The Main Menu must be used to launch any screen in ShareCare. Upon first logging in the Main Menu will appear in the left area of the window. The Main Menu is made up of several areas ranging from Access, Clinical, Fiscal, Reporting, Systems Administration, and more. The System Administrator configures every user's Main Menu, so each user's Main Menu may not look exactly the same as other users.

Clicking a sub-menu from the Main Menu expands it to reveal the sections relating to that area. Click on the section name to launch the window.

An example:



When the system is processing any type of request sent by the user, it will inform the user that it is doing so. Users will see a message at the bottom of the screen informing them that the system is working and they should wait before trying another task.

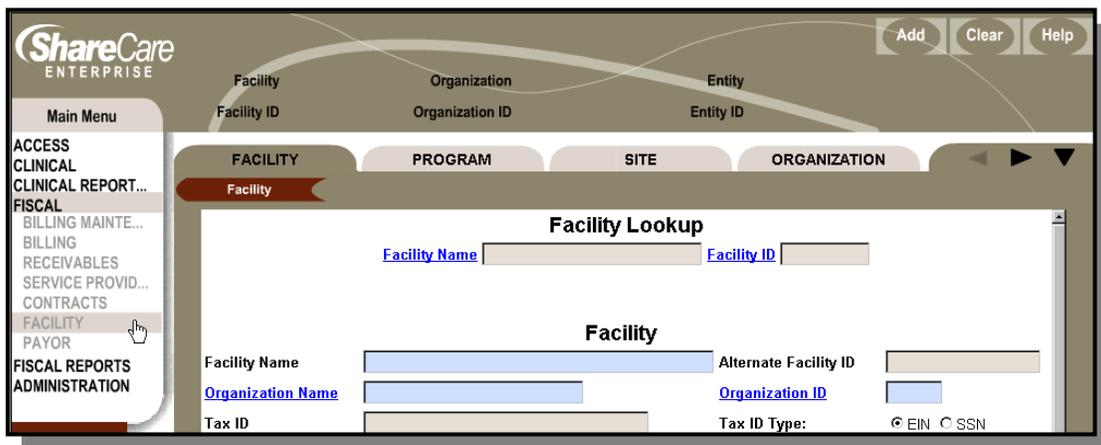


What are tabs and flags?

The tabs in ShareCare break down the different sections into easy to view and easy to use portions. The flags break down the tabs into even smaller easy to use portions of information regarding the tab that it is connected with.

Accessing Tabs

Clicking on any sub-menu item located within the main menu accesses a screen and the tabs associated with it. Every section has a different number of tabs.



If a section has more tabs than can be displayed on the screen, black arrows will appear to the far right of the screen next to the last tab bar. Clicking on the arrow pointing to the right will move the tabs to the left.

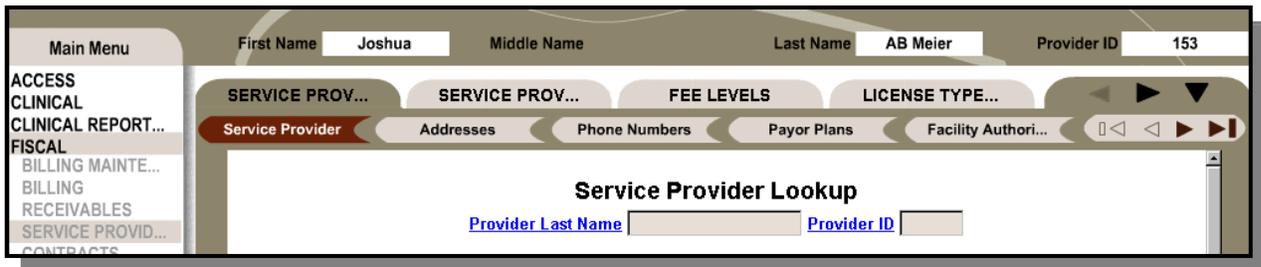


The down arrow can be utilized to see a list of all available tabs. Selecting the appropriate tab hyperlink will then access the desired tab.



Accessing Flags

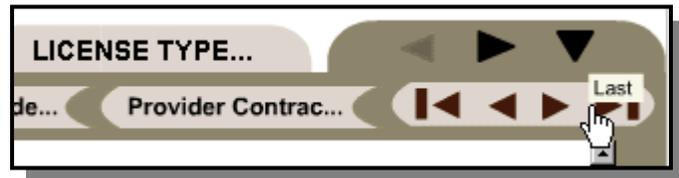
Clicking on a tab will bring up any flags that are associated with it. Each tab can have any number of flags on it. A tab may also not contain any flags.



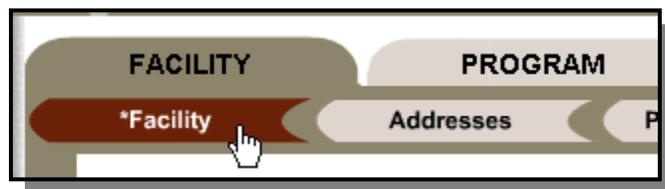
If a tab has more flags than can be displayed on the screen, black arrows will appear to the far right of the screen next to the last flag. Clicking on the first arrow pointing to the right will move the flags one at a time to the left.



Clicking on the second arrow will move the flags to the very last available flag.

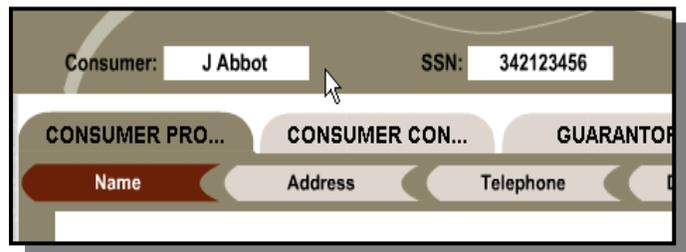


If a user is changing or entering information on a screen and attempts to leave the screen before adding or updating the new information, ShareCare will display an asterisk on the flag being utilized. Save the data and the asterisk will be removed.



Information Bars

When a user looks up different types of information within ShareCare the system will provide the user with a reminder of the item that is currently in use. ShareCare will display the information in the Info Bar area located above the tabs.



Once a record is selected, it will "follow" the user around the system until another record is selected. It is important to periodically look at the info bars to ensure that the correct record is being viewed/updated or deleted.

Action Buttons

The Action Buttons are located in the top right hand corner of every screen within ShareCare. The buttons vary based on the tab/flag that is being utilized and will always be available to the user. They are used to add/update information, clear the screen, access the help file and complete a variety of other functions. All users will see the same set of action buttons. Error messages will be received if a user does not have access to perform the function associated with a particular button.



Add and Update

One of the most critical steps in using ShareCare is saving data back to the server. Commonly, when information is entered into a screen there will be an **Add** or **Update** button. The **Add** button will save data for the first time, the **Update** button will save changes in the future. Usually the **Add** button is replaced with the **Update** button once information has been saved for the first time. If users forget to use these buttons, and leave the screen, data may need to be reentered. Click the buttons once to save your data. Double-clicking may cause duplicate records.

The Help Button

Each ShareCare screen contains an online Help file to assist users when they have questions about a screen's purpose and function. To utilize Help, users do not have to exit the application, they simply must click on the **Help** button at the top of the screen and a dialog box will display, listing all of the information relating to that screen.

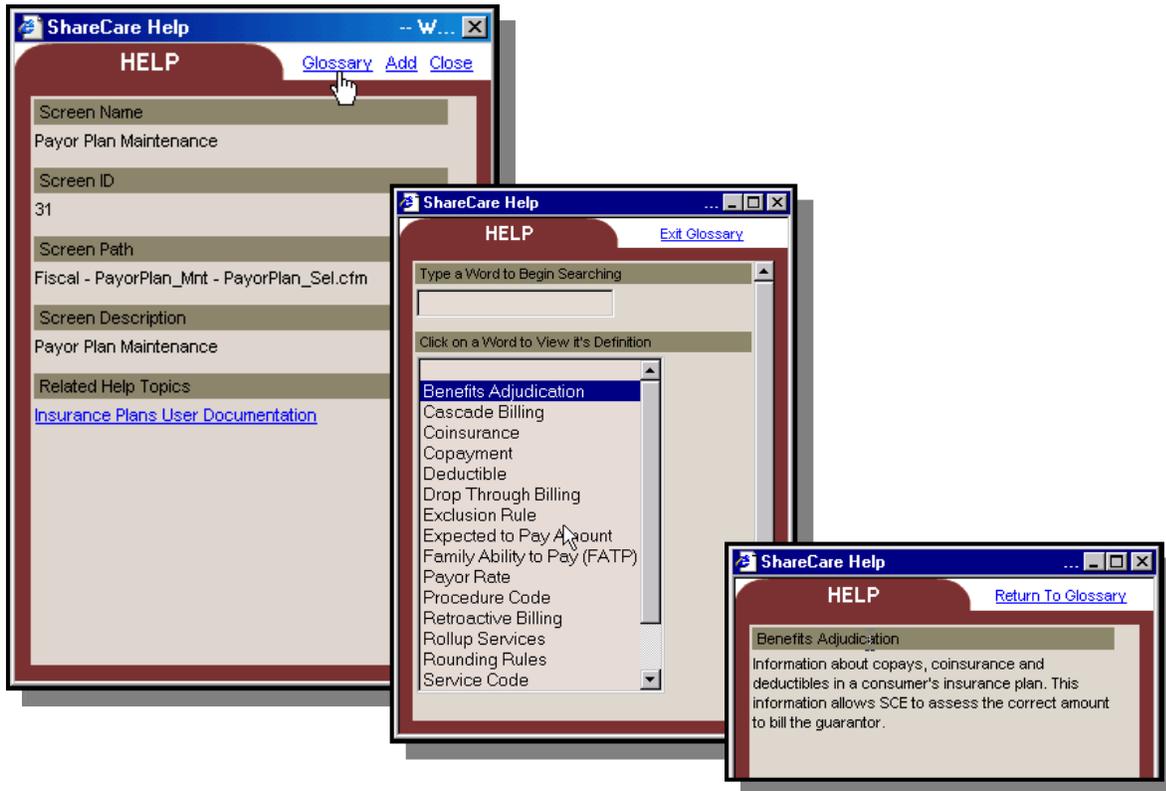
Each Help screen contains the Screen Name, Screen ID and Screen Path. This information may be helpful to the Technical Support Staff if they are contacted for support purposes. Each screen also includes a Screen Description and describes where the screen is in the ShareCare Workflow. This data may help the user understand what the purpose of the screen is and the type of data that should be entered

Users can also access documentation relating to the screen by clicking on the blue hyperlink in the Related Help Topics section.



The Glossary

The glossary is available to provide the users with a list of commonly used terms within the system and what role they play. Access the glossary by clicking the Glossary hyperlink. A list of available terms will display. Select the desired term and the information will appear.



Click the **Return To Glossary** hyperlink when finished. Search another glossary topic or click **Exit Glossary** to return to the main help section.

Each Organization can customize the help files to fit their needs. The system administrator will be the person who enters the customizable information. It will be displayed on the screen along with the pre-defined information.

Terminology

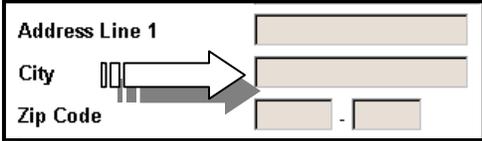
- **Consumer** – Client, Patient, Person receiving the services.
- **Pre – Consumer** – A potential Consumer, Client, Patient or Person that has not officially been added to the system as a consumer. Can be seen only on the **Call Logging** and **Screening** screens.
- **Guarantor** – A guarantor is the person who will be billed for all charges not covered by payor plans or other publicly financed services.
- **Facility** – The key contracting, billing and accounting / budgetary entity.
- **Program** – Linked to Facilities, Provides services for a designated population
- **Service Code** – Service Code is the identifier that is used to describe what services are provided by an agency.
- **Service Provider** – Employees or contract providers; Individuals that provide services.
- **Authorization** – Represents internal/external permission for a Provider to perform services for a consumer.

Using Form Screens

Many of the screens in ShareCare are forms, which users can enter data into. Moving around these screens is easy, both with the mouse and keyboard. You can use your mouse to click in a field or menu, or use the **TAB** key to move around the screen if you choose.

Text fields

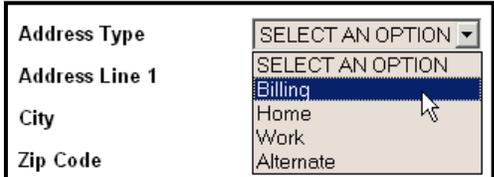
Since forms have many fields, ShareCare shows the active field with a blinking cursor to aid in moving through the screen.



A screenshot of a form with three text input fields: "Address Line 1", "City", and "Zip Code". A white arrow points to the "City" field, which has a blinking cursor inside it. The "Zip Code" field is split into two boxes separated by a hyphen.

Option Lists

Many fields in ShareCare are menus that you select from. Click on the "down arrow" to view these menu selections. Option Lists with red asterisks are for System Administrators. They denote the ability to customize a specific option list.



A screenshot of a form with four fields: "Address Type", "Address Line 1", "City", and "Zip Code". The "Address Type" and "Address Line 1" fields have dropdown menus. The "Address Type" dropdown is open, showing options: "SELECT AN OPTION", "Billing", "Home", "Work", and "Alternate". A mouse cursor is pointing at "Billing".

Multi Select Option Lists

Similar to Option Lists, the Multi Select Option Lists allow users to select any number of valid options. To select more than one option press the **Ctrl** key and click on all appropriate selections with the mouse. Share Care will highlight and record all options selected.

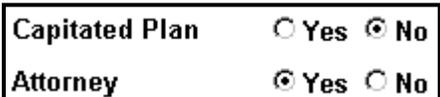


A screenshot of a multi-select dropdown menu. The title is "SELECT OPTION(S)". The menu is open, showing two selected options: "Neat" and "Casual".

If the **Ctrl** key is not used only one item will be saved. Any previously selected items will then be de-selected. The size of the Multi Select Option List is differentiated by its size. Options will appear on the screen before clicking on the arrow and the default value is Select Option(s) instead of Select An Option.

Radio Buttons

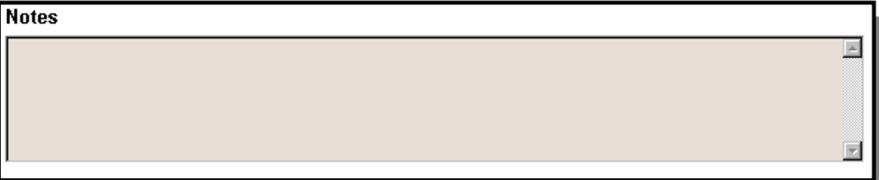
Some questions in ShareCare will have radio button answers. Only one answer can be selected at a time.



A screenshot of two radio button questions. The first is "Capitated Plan" with "Yes" and "No" options; "No" is selected. The second is "Attorney" with "Yes" and "No" options; "Yes" is selected.

Text Areas

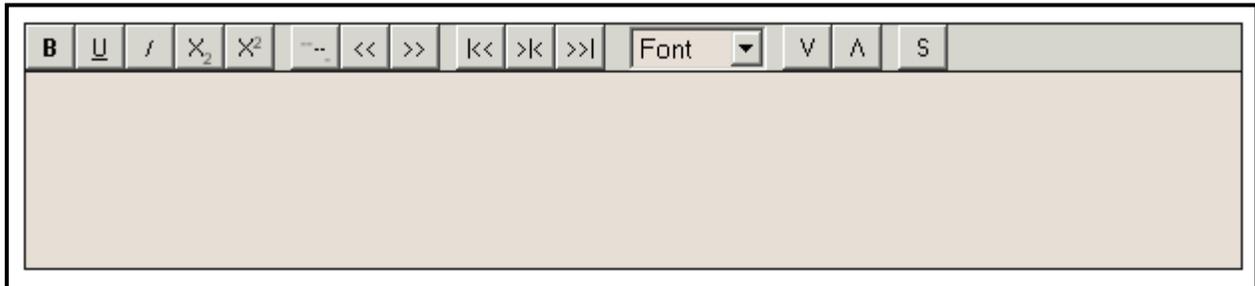
Many screens have text areas for free text input. Type in the box and it will scroll to accommodate the entire entry.



A screenshot of a text area labeled "Notes". It is a large rectangular box with a scroll bar on the right side.

Word Processing Text Area

These fields allow users to enter an unlimited amount of text into the field. The text within the field can be formatted in a variety of ways using the buttons at the top of the field.



What each button does:

- B - Bold
- U - Underline
- / - Italicize
- X₂ - subscript
- X² - notate
- ... - Number the text
- All bracket buttons - Indent and justify text
- Up and Down arrows – Increase and decrease font size
- S – Spell Checks within the text field

These word processing text areas allow users to insert tokens. Tokens are symbols that tell the system to insert specific pieces of data in that exact location. Each token is padded with brackets. As soon as the final bracket is typed the system will automatically convert the token to the text it represents.

What each token does:

- [DOB] - Date of Birth of Selected Consumer
- [FIRST] - First Name of Selected Consumer
- [ID] – ID of Selected Consumer
- [FULL] - Full Name of Selected Consumer
- [LAST] - Last Name of Selected Consumer
- [TIME] - Current Time
- [TODAY] - Current Date
- [ALTID] - Alternate Consumer ID
- [SSN] - Social Security Number

Required Fields

ShareCare identifies required fields by highlighting them in blue. The system will not allow the user to continue until the specified field is completed.

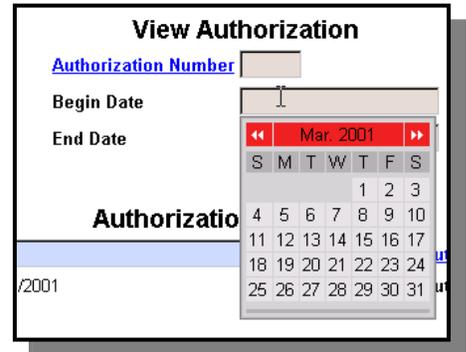
Authorizer ID	<input type="text"/>
Authorization Time	11:33 AM

Some of the Form Screens within the system can be lengthy. It is advised to use the scroll bar on the right side of the screen to move the form up and down. Users can also use a "Smart Mouse" that will provide ease of use of the form as well.

Keyboard Shortcuts

Users can use date and time short-cut keys to enter specific information within date and time fields. As with the other shortcut keys, this will make data entry more easy and efficient for users. It will also ensure that dates are entered appropriately. Users will make fewer errors in determining dates if most dates they enter, such as the current date, can be entered by the application.

- T=Today's Date
- Y=January 1st of the current year
- E=December 31st of the current year (the year's end)
- M=The first day of the current month
- L=The last day of the current month
- N=Now (current time)
- C=A pop up calendar displays, select the date of choice.



Short-cut keystrokes are available throughout the application that allow for the execution of action buttons without using the mouse. This will help users reduce wrist fatigue and make the data entry of multiple records more efficient. The action items available include:

- Ctrl+Shift+A=Add
- Ctrl+Shift+U=Update
- Ctrl+Shift+D=Delete
- Ctrl+Shift+C=Clear
- Ctrl+Shift+P=Print
- Ctrl+Shift+N=New
- Ctrl+Shift+L=Lookup
- Ctrl+Shift+V=View
- Ctrl+Shift+R=Refresh
- Ctrl+Shift+S=Search
- Ctrl+Shift+H=Help

The up and down arrows on the keyboard can be used to scroll through the selections in an option list.

The space bar can be used to perform the same function as clicking on a button with the mouse.

Searching

Looking up information is a common task in ShareCare and there are several options that can be utilized to make searching easier and more efficient.

Many screens have lookup search criteria at the top of the page to facilitate the look-ups. Type the search criteria in the fields and either click in another field, or press the **Tab** key to begin the search.

Consumer Lookup	
Last Name <input type="text"/>	Consumer ID <input type="text"/>

If ShareCare finds only one match for the search, it will fill the data back into the screen. If it finds more than one match, a list of possible matches will pop up that allows the users to select the desired choice. For example: if you were searching for the last name "Smith" and there was only one consumer in the system with that name, their data would be posted to the screen. If there were two "Smiths" in the system, the system would have you confirm which one you were looking for.

Search Results				
Last Name	Consumer ID	First Name	Social Security Number	Date Of Birth
Smith	145	John	101010101	
Smith	146	Nancy	121212121	

When beginning a search it is recommended to enter at least 3 characters of a name. Entering "%" will act as a wildcard for searches. If a percent sign is entered all records in the system will be returned to the screen. The user will then need to locate the desired record.

The first letter of the last name of the person/information needed can also be entered as search criteria. The system will return all records that begin with that letter. The user will then need to select the desired record.

Hyperlink Searches

Some screens have blue hyperlinks that allow an advanced lookup to be done. Click on the hyperlink to open a pop-up window that will let you make your selection. In the consumer screen, if the user clicks on the **Last Name** hyperlink they can begin the advanced look up process. The advanced lookup process allows the user to make a selection based on entering multiple search criteria options. It also allows the user to sort the returned data as desired by clicking on the blue column headers.

Search Criteria

Last Name	<input type="text"/>	Consumer ID	<input type="text"/>
Feed Source	<input type="text"/>	Date of Birth	<input type="text"/>
Social Security Number	<input type="text"/>	First Name	<input type="text"/>
Middle Name	<input type="text"/>		

Search Results

Last Name	Consumer ID	Feed Source	Date of Birth	Social Security Number	First Name	Middle Name
AB Micheals	151	1	1/1/1970	678787878	Sean	J
Abbot	145	1	1/1/1959	342123456	J	BJ

The advanced lookup criteria can be customized for each organization that purchases the software. The system administrator and the Implementation Specialist will complete the customizing during the implementation process.

After the criterion is entered the user must click the **Search** button to initiate the search if an advanced lookup is needed.



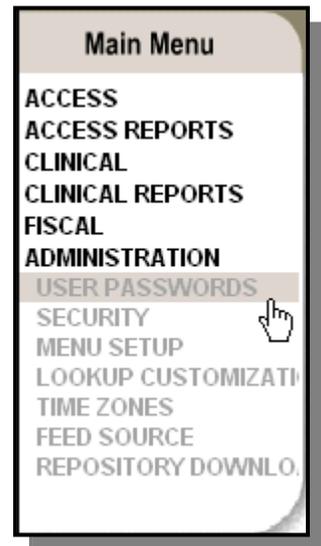
Sometimes when an advanced lookup is done the system could return a very large quantity of records. It would be impossible to display all the data on the screen at one time. If this occurs the system will provide a button allowing the user to view the remaining choices. The button will return the next 10 or 30 records based on the number set by the System Administrator.



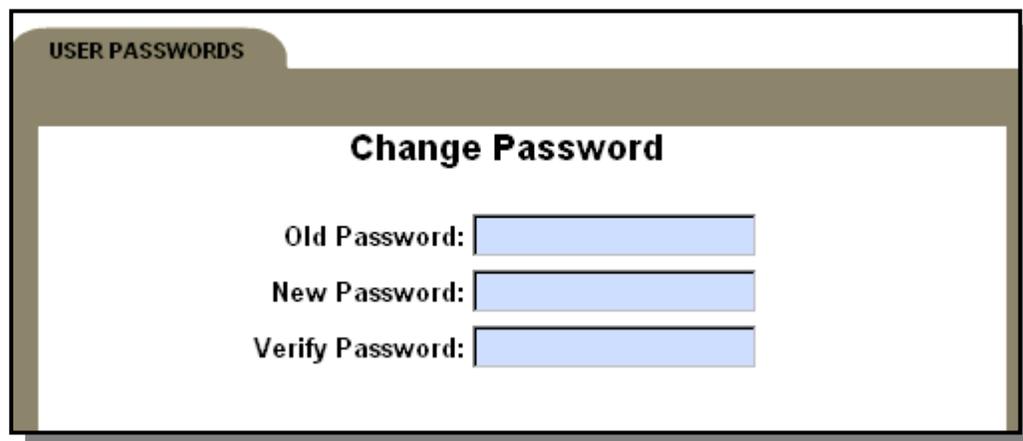
Passwords

Every user will be assigned a user name and password at the time the system administrator creates their user account. Once the user has entered the system for the first time they will have access to change their password as they wish.

To begin, select **User Passwords** from the **Administration** menu.



The system now allows the user to enter the old password, create the new password and verify it.

A screenshot of a web form titled "Change Password". The form is contained within a box with a header "USER PASSWORDS". It features three input fields: "Old Password:", "New Password:", and "Verify Password:", each followed by a blue rectangular text box.

Once all information has been entered, click the Update button.

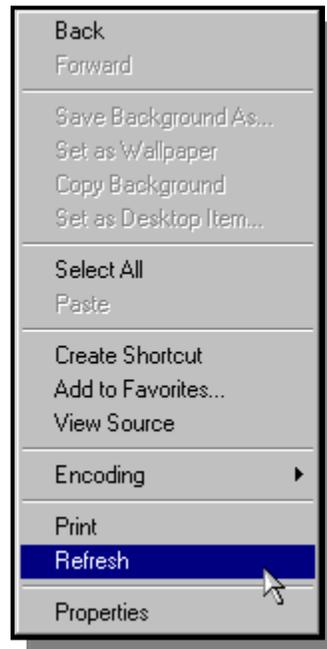


When passwords are changed via this screen they must be at least 8 characters in length. They are also case sensitive.

Refreshing the Screen

Sometimes it is necessary to refresh a screen so that data will appear on it. This is typically done when information is added to option lists.

To refresh the screen in ShareCare, users should right click the mouse and select Refresh.



What happens if I refresh the screen before I click Add/Update?

If a user refreshes the screen before adding or updating information, the unsaved data will be lost.
