Lauris Online

Quick Start Guide

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This guide is separated into 3 sections and is designed to help a new user set up a PC or laptop to use Lauris Online, process new forms, access existing forms and manage the approval process on the site.

Section 1: Getting Started with Lauris Online

General Information

Lauris Online (www.laurisonline.com) can be accessed by any device with internet access using any web browser. Features of the site that are accessible by the user will vary based on

- ➢ User Permissions (permission for access to pages on the site and client charts is set by the administrator))
- ➢ The operating system of the device
- ➢ The settings within the web browser
- ➢ Applications that have been downloaded to the device (applies to devices with Windows operating systems).

In order to access and use Lauris Online for the first time, please follow the steps listed below:

1) **Access the web site**
2) **Install the viewer**
3) **Set the security settings in Internet Explorer as needed**
    a. **Allow pop-ups from this site**
    b. **Prompt for installation of ActiveX controls where needed**

Website: www.laurisonline.com

Logging In:

The administrator of your site will provide you with a User ID and Password. Enter this information into the appropriate boxes and click on the Login button. The User ID is not case sensitive but your Password is.

Sign Out

When you are ready to exit from Lauris online, the proper way to sign off is to click on **Back** from within the program (contained within the solid blue line at the top of the Lauris

Online window) until the Main Menu screen appears, and then click on **Sign Out**.

If you have not used this process to exit the program, you will be required to enter your password a second time the next time you log in to the site.

Messages:
Once you are logged in you will receive a screen with any messages from your administrator if applicable.

A. Please review them

B. If you prefer to delete the message, click on ☐ **Don't show this message again..**

C. After you have reviewed messages (if applicable), click the Continue... button.

The Main Menu Page will appear:

User Information

Uploading Your Signature and Credentials

Signatures for users are applied electronically on forms either when a user clicks on Apply Signature Image before processing or approving a form or when an approver clicks to approve a form as shown: Approve Form . On most staff and approver signature lines the user's printed name, signature, credentials and date appear. The user's signature and credentials are managed in **User Information**.

Tip: A signature field can only be applied to a field in a form one time and once applied cannot be changed.

- Have the user log in to Lauris Online using his/her User ID and Password
- From the Main Menu page click **User Information**.

- Click Get Signature

Tip: In order to upload signatures you must:

-Be using Internet Explorer as your web browser

-Install the Signature Capture software from the Downloads page on the site

-Set the security setting in Internet Explorer

-Install the ActiveX control for the User Information page the first time when prompted

-Plug the Topaz signature pad in to a USB port on your computer.

- Have the user sign his/her name (without credentials) using the signature pad as shown:

- If the user wants to start over click CLEAR
- If the signature is acceptable click ACCEPT SIGNATURE .
- At the prompt select and Yes then OK.
- Click CLOSE

Add Your Credentials
- Then have the user type his/her credentials as they should appear on forms in the field as shown:

Credentials Stamp: | BA, QMHP

- Either press the Enter key on your keyboard or [Update User Information] to save the information. **(or proceed as described below)**

Changing Your Password and Other User Information
In general an administrator will assign a temporary password for access to the site.

The first time you log in to Lauris Online you should change your password. This can be done in the **User Information** section of the page:
- Enter a new password as shown:

Password: | ●●●●●●●●

- Re-type the password as shown:

Password (re-enter): | ●●●●●●●● ⬆

- **Tip: Your password must be between 8 and no more than 12 characters and contain 3 or the following 4 elements:**
- **Upper case letters**
- **Lower care letters**
- **Numbers**
- **Special characters**

Additional User Information
In addition your may change your User ID to any unique user name that has not been used within any Lauris Online site and/or enter your email address:
- Enter new user name if desired: Username: | davea
- Enter your email if desired (allows email alerts to be sent if applicable):

Email Address: | dabrams@integratedimaging.com

- Either press the Enter key on your keyboard or [Update User Information] to save the information.
- Click [Lauris Online • Back]
- From the Main Menu page click **Sign Out**

Please Note: If a signature pad is not available another option for capturing the staff electronic signature is to browse out to an image file of the signature on the PC (i.e. scanned signature) and upload it using the Browse option.

Preparing to Work with Forms
Allowing Pop-up Windows for Lauris Online
In order to complete new forms while working online, popup windows need to be allowed for Lauris Online within the browser you are working with. In order to allow popup windows:
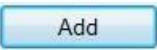
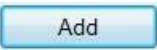## Allowing Pop-ups in Internet Explorer

Tip: If the Internet Explorer menu options do not appear at the top of the window, click the Alt key on your keyboard. If this does not work try the F10 key.

Tip: The user must have Administrative Access to the pc or laptop in order to install software and possibly to change settings on the computer. Please contact your IT department for assistance if needed

In addition, the downloading of files from Lauris Online for installation on the computer may be blocked by the user's anti-virus software or a firewall. Please contact your IT department or tech support at Lauris Online at 540.767.0143 for assistance if needed.
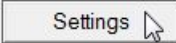
- From within Internet Explorer click on the Tools menu
- Move the cursor over Pop-up Blocker and the following options will appear:
    - Turn off Pop-up Blocker If this option reads Turn on Pop-up Blocker the next option is greyed out and does not apply.
    - Click Pop-up Blocker settings and in the screen that appears:
    - Type exactly as shown: * (press and hold the shift key and press the number 8>>then add a period then laurisonline.com as shown below)
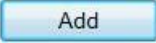
      Address of website to allow:

      *.laurisonline.com
    -
    - Click Add

Tip: If Pop-up Blocker does not appear in the Tools menu with the version of Internet Explorer that you are using instead click on Internet options >> Privacy >>

Pop-up Blocker

☑ Turn on Pop-up Blocker   Settings **>>enter *.laurisonline.com >>click**
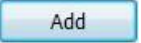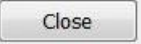
Add

In addition to allowing pop-up windows for Lauris Online the following items may need to be set up based on the role of the user in the organization.

Internet Explorer Security settings
Lauris Online should be added to the **Trusted Sites** within Internet Explorer. In addition there are **ActiveX** controls in Internet Explorer that are not available in any other web browser. These **ActiveX** controls are used to upload signatures with the signature pad and for uploading scanned documents.

Adding Lauris Online to Trusted Sites
- From within Internet Explorer click on the Tools menu
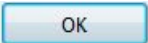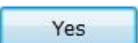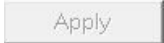- Click Internet options
- Click Security
- Click Trusted sites — This zone contains websites that you trust not to damage your computer or your files. — Sites
- Type exactly as shown: Add this website to the zone: *.laurisonline
- Unckeck Require server verification (https:) for all sites in this zone
- Click Add
- Click Close

Additional Internet Explorer Security Settings
The following settings need to be changed to prompt the user to install the **ActiveX** Control the first time a page is selected where an ActiveX control needs to be installed. Once the ActiveX control is installed it will appear each time the page is opened with Internet Explorer:

- From within Internet Explorer click on the Tools menu
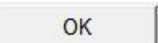- Click on Internet options
- Click Security
- Click Custom level...
- Scroll down and change the following settings to Prompt
  - Allow Scriptlets
    - Disable
    - Enable
    - Prompt
  - Download unsigned ActiveX controls
    - Disable
    - Enable
    - Prompt
  - The next item on the list: Initialize and script ActiveX controls not marked as safe for s
    - Disable
    - Enable
    - Prompt
- Click OK then Yes then (if not greyed out) Apply then OK

Now go to the following pages and install the ActiveX control as shown:

  - From the Main Menu page click **User Information**

- You will be prompted to install the ActiveX control for the page. Click on Yes and Install where prompted.
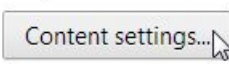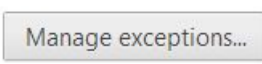- From the Main Menu page click **Consumers**
- Click 🔍 next to any consumers name on the list to open the chart
- You will be prompted to install the ActiveX control for the page. Click on Yes and Install where prompted.
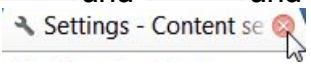
Allowing pop-up windows in Google Chrome

Google Chrome can be used for completing new forms and viewing existing forms from within consumer charts in Lauris Online (**New User Access Viewer - Beta** is required to view existing forms that are stored as images in charts or for viewing multiple forms from a list that appears in the viewer for the selected forms)

- Log on to www.laurisonline from within Google Chrome using your User ID and Password.
- Click ≡
- From the menu that appears click Settings
- Click Show advanced settings...

Privacy

- In the Privacy section click Content settings...
- Scroll down to Pop-ups and click on Manage exceptions...
- At the top of the page click on the 📄 Lauris Online - User tab to see and make a note of the address for the server your Lauris Online site is on i.e.www4.laurisonline.com.
- Click back on the 🔧 Settings - JavaScript tab
- In the box provided enter as shown and click Allow:

Hostname pattern	Behavior
www5.laurisonline.com	Allow

- Click Done and Done and then close the Settings tab at the top of the page as shown 🔧 Settings - Content se ⊗

Tip: In order to enlarge the font size on web pages in Google Chrome press and hold the Control key on your keyboard and press + until the desired font sized is achieved.

Allowing pop-up windows in Safari

Safari does not provide the ability to allow pop-up windows from individual websites.

- When you click **Add Session**>>select consumer under Unique ID>>Choose a Form and click Continue if the data entry screen for the form fails to open and instead you have to log back in to the site, this is due to Safari blocking pop-up windows. In order to correct this issue, please update your Privacy Settings to allow pop-up windows.
- In the data entry screen for completing forms click (☑ Don't Show Preview Window)

Downloads

The information below is organized to describe applications available on the **Downloads** page beneficial to users based on site sections, features or processes as applicable to the user's role within the organization.

New User Access Viewer - Beta
New forms can be completed and processed in Lauris Online through **Add Session** from the Main Menu page or from within consumer charts or from within **Saved Sessions.** When selecting the online form to complete, the data fields for the form may be entered by using any web browser that is set to allow popup windows from Lauris Online (*.laurisonline.com).   Therefore the viewer is not required for completing new forms.

However, by installing the Viewer on PCs or laptops with Windows operating systems, the user will receive the following benefits:
- √   Multiple forms may be opened for viewing at the same time
- √   Selected forms can be converted to PDF with or without password encryption. With password encryption forms can be emailed as long as the password is communicated separately from the email
- √   Multiple forms can be selected for viewing as part of the approval process. (with appropriate permissions)
- √   Forms can be approved from within the viewer
- √   Forms can be marked for removal (with appropriate permissions) from within the viewer

Viewing forms from within consumer charts or staff files is dependent on when your Lauris Online site was first developed and what operating system is on the device the user is working from.

Viewing previously completed forms:

For sites using form processes that save forms as images (IIF files using previous forms development process):
- • Windows® operating system-install the **New User Access Viewer - Beta**
- • For devices with a Mac OS® (operating system) such as a Mac® or iPad® form images can be viewed as PDF files with Adobe Acrobat Reader®

For sites using form processes that save forms as data (current form development process):
- • Forms will open as a web view on any internet enabled device. However, if the user is allowed to save or export the form(s), the forms can be exported to a PDF file which will open in Acrobat Reader. Therefore Reader will need to be installed on the device.

- In addition, the viewer will be useful for viewing multiple forms instead of having to open them individually as well as in the approval process.

> **Tip: Lauris Online can also be accessed by mobile devices with internet access. Although Lauris Online downloads can currently only be installed on devices with Windows operating systems, additional downloads from 3rd party software may enhance the user's ability to complete new forms or view existing forms in client charts. Possible downloads include but are not limited to:**
> **-Opera®: A browser that allows the popup windows used in Lauris Online to complete new forms**
> **-Dragon Speak-Voice recognition software that will translate voice to text for entering information into form fields**
> **-Acrobat Reader-For viewing forms in PDF file format from the device**

A. Lauris Online Viewer Installation

> **TIP: If you have a previous version of the Viewer installed on your computer, please uninstall it before proceeding using the process used with your PC's operating system.**
>
> **Uninstall process in XP:**
> **My Computer>>>Control Panel>>>Double-click on "Add or Remove Programs">>>from the list choose USER ACCESS>>>click on "Remove"**
>
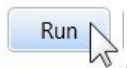> **Uninstall process in Windows 7:**
>
> **-Click on** **>>Select Control Panel>>click Progams and Features>>select program to be removed (either User Access or IIFVIEW depending on which version of the viewer is installed)>>at the top of the page click Uninstall**

To install the viewer:
Please note: In order to install the Viewer, the user <u>must</u> have administrative rights on the PC
   • Select **New User Access Viewer - Beta** .

Computers running Windows XP

- At the prompt click on_____.
- Once the file is downloaded click on Run again at the next prompt.
- Follow the installation steps until the installation is complete.

Computers running Vista, Windows 7 or Windows 8
- At the prompt click on the drop down arrow and select Save As. In the window that opens, click on Desktop from the list and click Save.

Do you want to run or save **ViewerBetaSetup.exe** (1.70 MB) from **www2.laurisonline.com**?

⚠ This type of file could harm your computer.

Run   Save ▾   Save / Save as / Save and run

- Once the file is downloaded, click on the x to close the prompt and minimize Lauris Online so that you can see the desktop.

> o <u>If Save As is not an option</u> click on Save. The file once downloaded will be contained in the Downloads folder. One way to locate the file is to click with your right mouse button on and select Open Windows Explore as
>
> Page: Properties / Open Windows Explorer
>
> shown
> o Click on 📥 Downloads
> o Right click on the ViewerBetaSetup file and select Run as Administrator as
> shown: 🗔 ViewerBe 🛡 Run as administrator
> o Click to extract the file and follow the prompts to install the file

- Click with your right mouse button on the file you downloaded:
- Select Run as administrator
- Follow the prompts to extract and install the file.
- Update the file per the instructions below.
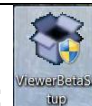
<mark>Windows Vista, Windows 7 and Windows 8 users may have to choose *Continue* or *Yes* for a *User Access Protection* dialog box</mark>
Please note: After saving the file it may not appear on the desktop or in the Downloads folder. If this happens your anti-virus software has probably blocked installation of the file. Temporarily disable your anti-virus software, install the file and re-enable your anti-virus software. Call for Tech Support if needed.

TIP: For Windows 7, 8 and Vista users, the first time that you attempt to open a form in the Lauris Online viewer, you may encounter a message that the .Net Framework needs to be updated to version 4. Click on the link and select Download. After completion you will need to restart your computer to complete the process

B. Installing the Software to use the Topaz T-S460 Signature Pad

For users that will be capturing signatures from clients, parents, guardians, etc. to be uploaded with forms please install **Signature Capture for SignatureGem 1x5**

- From the **Downloads** page click on
  Signature Capture for SignatureGem 1x5

Computers running Windows XP

- At the prompt click on .
- Once the file is downloaded click on Run again at the next prompt.
- Follow the installation steps until the installation is complete.

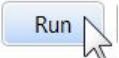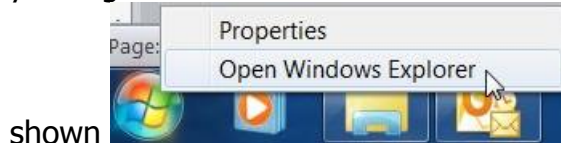**Computers running Vista, Windows 7 or Windows 8**
- At the prompt click on the drop down arrow and select Save As. In the window that opens, click on Desktop from the list and click Save.
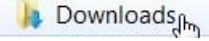

- Once the file is downloaded, click on the x to close the prompt and minimize Lauris Online so that you can see the desktop.
  - o If <u>Save As is not an option</u> click on Save. The file once downloaded will be contained in the Downloads folder. One way to locate the file is to click with your right mouse button on and select Open Windows Explore as


    shown
  - o Click on
  - o Right click on the Sig1x5 file and select Run as Administrator as shown:

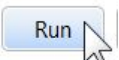 - o Click to extract the file and follow the prompts to install the file

- Click with your right mouse button on the file you downloaded:
- Select Run as administrator
- Follow the prompts to extract and install the file.

Windows Vista, Windows 7 and Windows 8 users may have to choose *Continue* or *Yes* for a *User Access Protection* dialog box

C. Installing Offline Forms
Offline Forms is a secure desktop application that can be installed on a user's laptop for use in the community where internet access is not available. Forms can be completed (including capturing signatures using the signature pad) and stored in Offline Forms until internet access is regained at which time the forms can be uploaded to the site ad then client charts.

- From the **Downloads** page click on
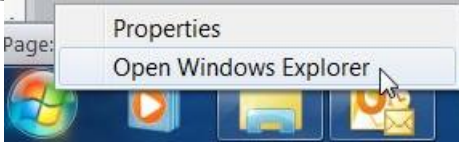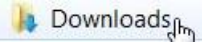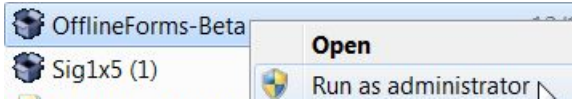**Computers running Windows XP**

- At the prompt click on **Run**.
- Once the file is downloaded click on Run again at the next prompt.
- Follow the installation steps until the installation is complete.

Computers running Vista, Windows 7 or Windows 8
- At the prompt click on the drop down arrow and select Save As. In the window that opens, click on Desktop from the list and click Save.

- Once the file is downloaded, click on the x to close the prompt and minimize Lauris Online so that you can see the desktop.
  - o If Save As is not an option click on Save. The file once downloaded will be contained in the Downloads folder. One way to locate the file is to click with your right mouse button on [Windows icon] and select Open Windows Explore as shown
  - o Click on Downloads
  - o Right click on the Offline Forms-Beta file and select Run as Administrator as shown:
  - o Click to extract the file and follow the prompts to install the file
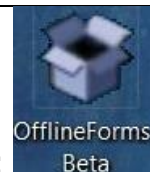
- Click with your right mouse button on the file you downloaded: **OfflineForms-Beta**
- Select Run as administrator
- Follow the prompts to extract and install the file.

Windows Vista, Windows 7 and Windows 8 users may have to choose *Continue* or *Yes* for a *User Access Protection* dialog box

Update the Offline Forms Application
Once the file is downloaded, you will need to run an update:

- Double click on the Offline Forms shortcut on your desktop **offlineforms Shortcut**.
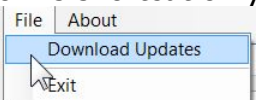
- From the File menu, click on **Download Updates**.
- At the prompt click on OK:

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- Click on the installation Bar that appears on your desktop.
- Close Offline Forms.
- Click on the prompt that appears on your desktop.

D. Installing the Audio Notes Recorder-<mark>for Approvers</mark>

For users that are reviewing and approving forms, the Audio Notes Recorder can be used to record a message (using any microphone attached to the computer) prior to rejecting a form. The audio message link appears along with the form that is returned to the user for revision.

- From the **Downloads** page click on

Computers running Windows XP

- At the prompt click on .
- Once the file is downloaded click on Run again at the next prompt.
- Follow the installation steps until the installation is complete.

Computers running Vista, Windows 7 or Windows 8

- At the prompt click on the drop down arrow and select Save As. In the window that opens, click on Desktop from the list and click Save.

- Once the file is downloaded, click on the x to close the prompt and minimize Lauris Online so that you can see the desktop.

  - o If Save As is not an option click on Save. The file once downloaded will be contained in the Downloads folder. One way to locate the file is to click with your right mouse button on and select Open Windows Explore as

    shown

  - o Click on
  - o Right click on the CasewWorksAudioNotes file and select Run as

    Administrator as shown:
  - o Click to extract the file and follow the prompts to install the file
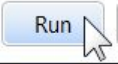
15

CaseWorksAudioNotes
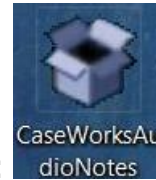
- Click with your right mouse button on the file you downloaded:
- Select Run as administrator
- Follow the prompts to extract and install the file.

<div style="border:1px solid black; padding:5px;">
<mark>Windows Vista, Windows 7 and Windows 8 users may have to choose *Continue* or *Yes* for a *User Access Protection* dialog box</mark>
</div>

Additional Downloads

The applications described below are available to users responsible for organizational processes such as scanning or billing

E. Installing the Remote Scanning Software

Installation of **Remote Scanning Software** is required in order to upload files to Lauris Online

- From the **Downloads** page click on **Remote Scanning Software**

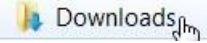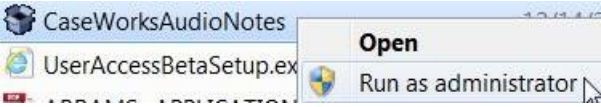**Computers running Windows XP**

- At the prompt click on **Run**.
- Once the file is downloaded click on Run again at the next prompt.
- Follow the installation steps until the installation is complete.

Computers running Vista, Windows 7 or Windows 8

- At the prompt click on the drop down arrow and select Save As. In the window that opens, click on Desktop from the list and click Save.

Do you want to run or save **iwsetup.exe** (19.3 MB) from **www5.laurisonline.com**?

This type of file could harm your computer.

| Run | Save | ▾ |

Save
Save as
Save and run

- Once the file is downloaded, click on the x to close the prompt and minimize Lauris Online so that you can see the desktop.

<div style="border:1px solid black; padding:5px;">

  o If Save As is not an option click on Save. The file once downloaded will be contained in the Downloads folder. One way to locate the file is to click with

   your right mouse button on and select Open Windows Explore as

   Properties
   Open Windows Explorer

   shown
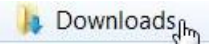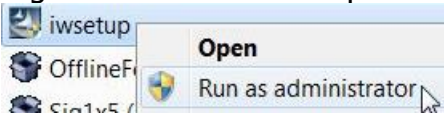
  o Click on Downloads
  o Right click on the iwsetup file and select Run as Administrator as shown:

   iwsetup
   Open
   Run as administrator

  o Click to extract the file and follow the prompts to install the file
</div>

- Click with your right mouse button on the file you downloaded:
- Select Run as administrator
- Follow the prompts to extract and install the file.

<mark>Windows Vista, Windows 7 and Windows 8 users may have to choose *Continue* or *Yes* for a *User Access Protection* dialog box</mark>
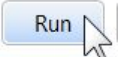
F. The Billing Center Software

For organizations that are using The Billing Center to bill through Lauris Online Billing Center - Beta will need to be installed on the desktop for users that will be printing invoices, uploading electronic claims (837) and/or posting payments or importing remit information (835) into the Accounts Receivable software that comes with the optional billing module.

Users cannot install Billing Center - Beta without assistance. Please call tech support at (540) 767-0143 for assistance with this application

Information for Mac Users

For users that are accessing Lauris Online with a Mac device the following information is applicable:

- New forms can be processed using any web browser including Safari as long as the browser is set to allow the pop-up windows used to create your forms and access other features on your site.

- Viewing forms in client charts-Click on next to a form from an appropriate page in a client's chart to open the form in Acrobat Reader as a PDF for viewing on your Mac device.

- The following applications are Windows-based and require a Windows operating system to be installed on your computer:
  - o User Access Viewer-Used to view previously completed forms and scanned documents that are posted to client charts.
  - o Signature Capture software-Used for uploading signatures with a signature pad including staff signatures for application as electronic signatures to forms and for applying client and other signatures needed on intake forms, treatment plans and other forms.
  - o Scanning software-Used for scanning or importing documents or electronic files to client charts.
  - o Audio Notes Recorder-May be used as part of the approval process by supervisors to record a message to give instructions to staff for form corrections or skills improvement if desired.

- o Offline Forms-Used for completing forms and storing them in a secure desktop application when internet access is not available. The forms can then be uploaded to the site and your client charts once internet access is regained.
- Approval Process-Supervisors that need to review forms can click on next to a form in order to open and review forms as needed. Actions taken to approve or reject the form must be managed from the Approval page.
  - o Staff that receive an alert for a rejected form do not need to open the form to make revisions. The user can click on Edit Form and make revisions in the data entry screen which is a pop-up window.
- Most Macs come with the ability to install a Windows operating system Ie. Windows 7. Once Windows is installed on your Mac, you may switch to Windows when access to client charts in order to use the additional applications such as for use of the signature pad.
- For older Macs or iPads, bridge software such as Parallels Desktop 7 will be needed before a Windows operating system can be installed on your machine. For older systems it is also possible that more memory (Ie. 2 Gb) will also be needed.

Section 2: Getting to Work in Lauris Online

You will be working with the following screens and features to process forms and access Consumer information within Lauris Online:

- **Consumers**
- **Add Session**
- **Saved Sessions**
- **Approvals (Refer to Section 3)**

User Alerts / Messages

Based on your login to Lauris Online, a series of alerts will appear on the Main Menu screen. The purpose of each alert is dependent on your role within the organization. (These alerts and messages may change from time to time.)

Alerts that may apply to you:

You have 8 forms that need approval ...

For users that have permission to approve forms, an alert displays when forms are in the queue for approval as well as the number of forms that are in the queue. Click on the alert message to view the list of forms awaiting approval.

You have 2 forms that have been rejected ...

For users that have processed forms that are forwarded to an Approver for review, an alert displays when forms have been rejected and returned to the Submitter for revision as well as the number of forms that are in the queue. Click on the alert message to view the list of forms awaiting revision and to listen to any audio messages that have been recorded (if applicable).

You have 12 form alert(s) ...

Click on this alert message to view the list of Consumer or Staff forms that are due for updating. This alert will stay in the queue until you have acknowledged that this task has been completed.

Consumers

Consumers in Lauris Online are used as a generic term. This can be a list of clients or staff that you have permission to access. Instructions for viewing forms in charts that open in the viewer when clicking on 🔍 please refer to the instructions at the end of this section.

> **TIP: Permissions may be set by the Administrator that will determine which Consumers' information may be accessed by a User in Lauris Online. This applies to both Active and Discharged Consumers.**

Searching for Consumers

An easy way to find a Consumer in this section of the site is by using the search feature. A Consumer may be located by entering the Name, Social Security Number or Date of Birth.

Consumers	SSN	Date of Birth

Search Consumers

- Begin entering the name of the Consumer to be searched for.
- After a few letters have been entered a list will appear that fits the search criteria.
- Click on the appropriate selection from the list.
- Click on 🔍 next to the Consumer's name to open the chart or file.

> **Tip: If the Consumer you are looking for is not on the list, they have either not been assigned to your Case Load or been admitted to create him/her in the database. In either case please contact your administrator.**

General Information

This page contains an at-a-glance view of important information regarding the client such as demographics, guardian contact information, physician contact information, dtae of admission, diagnoses, due dates or other items .

Also on this page:
- The 10 most recent completed forms appear in a list for convenient access.
  - Click on the viewer or the Acrobat Reader icon next to a document to view the image(s).
- A link to Scan Documents to scan or import documents to the client's chart.

- A link to Medline Plus allows a search of a national database or educational resources and medication information regarding a consumer's

  ![MedlinePlus depression GO]

  diagnosis i.e.
  This information can be used for staff training or provided to clients as educational material.

Add Session

A new form may be launched for the client from within his/her chart by clicking on the Add Session button. The client's name will be pre-selected. Simply select the form from the list, enter the information in each field as appropriate and at the bottom of the screen click on *Process Form*. (Please note: clicking Save Form Data only saves the form temporarily to Saved Sessions instead of processing the form. Refer to Add Session on page 11 for further information)

Authorization Information Authorization information regarding services requested and/or approved for your clients may be viewed by clicking on the arrow to the left of an authorization item to view details in real time such as start date, end date and remaining units.

Documents
All forms completed for the Consumer may be accessed for viewing and/or printing from this page.

> Printing a client's chart:
> - Click on the check box at the top of the forms list.
> - Scroll to the bottom of the screen and click on the Print Selected button. All forms will print in a batch.
> - Any check box may individually be selected or de-selected prior to clicking on the Print Selected button.

> Form viewing options:

> - 🔍 Click on this icon to view the selected form.
> - Edit Form Forms that have not yet been approved may be edited with updated information. Once an Approver clicks on the Approve Selected button during the approval process, the form on the list will state Editing Disallowed.

> Search Options:

> - Search-Forms may be retrieved for viewing by entering a date or date range.
> - Sort–Click on the Header at the top of a column to sort the list.

>> Sort options:

- **Form** (Search by form name)
- **Who Entered** (Name of staff member that created and processed the form)
- **Document Date** (Date of Service)
- **Date Added** (Date the form was uploaded to Lauris Online)

ActiveFile

Charts have been organized on the site so that forms or scanned documents may be retrieved by type of form that is related to the section of the client's chart the form is posted to.

Using the Viewer to work with forms.

Click on next to a form to open and view the form. Please note that forms created in our Alt View process open as PDFs and therefore the following information regarding using the viewer does not apply to those forms.

Sample form opened in the viewer:

Viewer Settings:

- Click on the Program Settings button as shown below to change settings for the viewer.
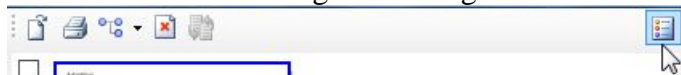
- Options for viewer settings include:
  - Window split: Controls how much area on the left displays thumbnails of forms to be selected versus the viewing area on the right that displays the form image
  - Thumbnail Size: select from 1 to 5 to control the size of the thumbnail image on the left
  - Default image size: This setting controls the size of the image in the viewer on the right
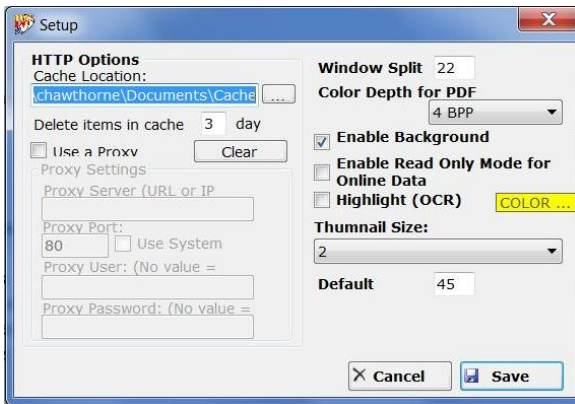
Remember to click Save to save your settings in the viewer

Viewing Options

Click with your right mouse button on the form image to display viewing options:

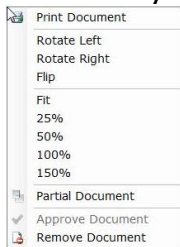- Click on print document to print from the viewer
- Rotate or flip the image in the viewer
- Resize the image in the viewer
- Partial Document: Select this option to copy portions of the form that are to be printed or emailed instead of sending the whole document as follows
  - Hold your left mouse button down while dragging your cursor around each area on the form to be copied. After each box is drawn click **Copy** at the bottom of the screen
  - After the partial image has been created right click on the image to print,

  email or save the partial image as a PDF
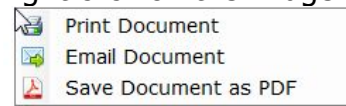
- If opened from the approval page the form can be approved from this menu
- If the user has permission to mark forms for removal, Remove Documents can be selected. (Please note that an administrator will need to approve the removal request to complete the process of deleting a form from the client's chart

After approving a form or marking a form for removal click on the Upload Changes button in order to save your changes
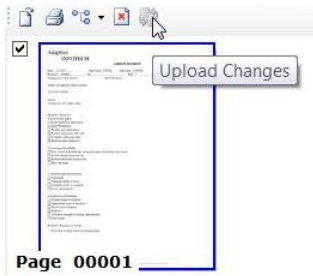
Form Options

Click on the check box next to the thumbnail for each form image where an action is to be applied. To Select All right click on a thumbnail image and click on Select All from the menu that appears
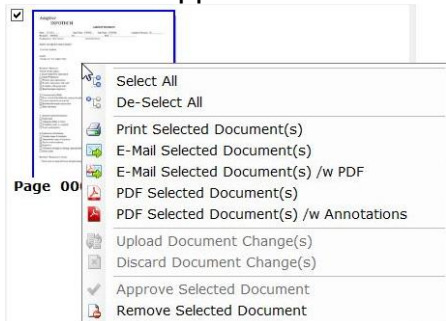

- Print Selected Documents: Allows batch printing of all selected documents
- Email Selected Documents: Use this option only for encrypted email processes
- PDF Selected Documents: If this option is selected a prompt will appear that will allow the PDF to be password encrypted. As long as the password is sent separately from the document the form(s) can be emailed with HIPAA compliance.

Please Note: An appropriate consent form must be on file in the client's chart before a disclosure is made to prevent violation of client confidentiality.

- Remove Selected Document: From this page multiple documents may be selected and marked for removal. Click on Upload Changes in order to save the changes to the selected forms. Please note: An administrator must approve the request to remove the selected forms in order to complete the process.

Add Session

This section of the site is used for working with online forms:

- Click on the drop down list under Unique ID: to select a consumer from the available list.
- Click on the drop down menu under Choose a Form: to select the form to be completed and processed for the consumer.

- Click on the Continue button.

Online Form Entry

- A window will open containing the data boxes for the form you have selected.
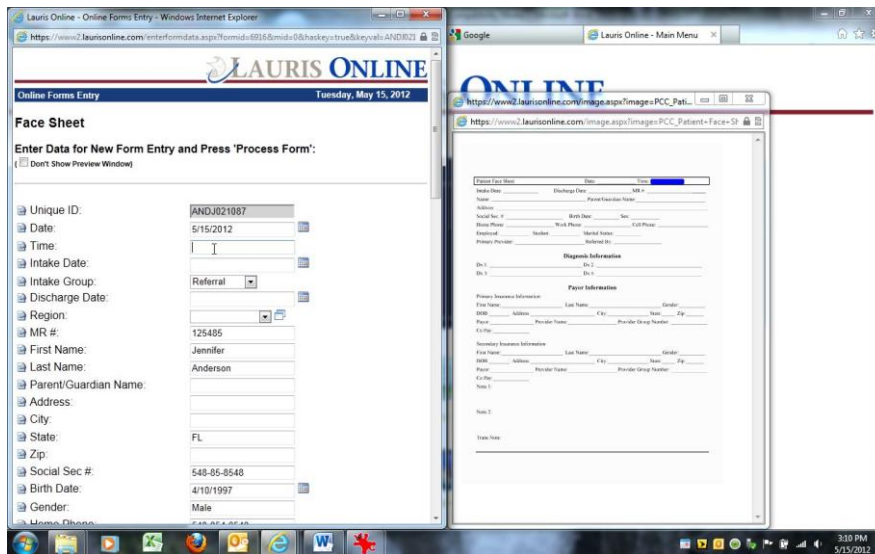
- Click within any data box and an image of the corresponding form will appear.
  Note: As you click between the data boxes on the form the corresponding field on the form will be highlighted.
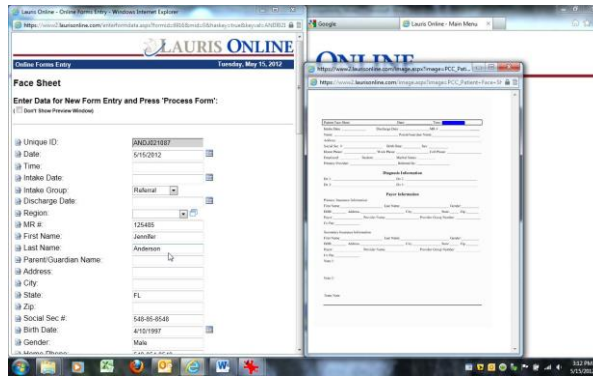
- Some fields will be auto-populated based on information currently in the database.

Tip: Information within the fields that auto-populate onto forms may not be changed. If any of the information has changed or is incorrect, please contact your administrato to notify the appropriate individual(s) in order to have the information corrected.

- Fill in the additional fields of the form as desired:
  - If there is a drop down menu button for a data box, you may select an item from the list.
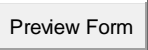 - If you are unable to change the information within a data box, the field is read only and users are not allowed to change or fill in these fields on the form.

Please note: If View Additional Information appears in the data entry screen click on this link to view a PDF with additional information or instructions regarding the form.

- We encourage users to preview the form to verify that the information entered is correct.

  - Scroll to the bottom of the page and select [Preview Form].
  - If satisfied with the content, the form may be printed from this page (See working with forms). **Note:** If the form is printed from the Preview Form screen, a watermark will appear on the page signifying the document was printed before being processed.
  - Close the preview and
    - Make corrections if needed
    -and/or-
    - Save the form by clicking the [Save Form Data] button.
    -and/or-
    - Process the form by clicking on the [Process Form] button.

- Saving the Form before Processing: If you need to save the information so that you may return at a later time to complete and process the form, select the [Save Form Data] button. Any required fields must have information in them to be able to save the form. It will prompt you to fill in any that are missing information. See **Saved Sessions** section for more information on retrieving online forms that are to be saved for completion at a later time.

What happens when you select the [Process Form] button?

- The form will be processed, stored in the client's chart and displayed for viewing.

- **Tip: Please do not press the process form button more than one time to avoid creation of a duplicate form, even if it takes few seconds or more to process the form.**

- The form may be printed if desired.
- The form may be retrieved by selecting the client from the **Consumers** section of the site and selecting the form from the list within the Documents tab.

What happens if you select the "Close" button?
- **If the Close button is selected, the data boxes for the form will close without saving changes. Only select this option if you decide not to complete and save any information on the form at this time.**

Tips: When the Process Form **button is selected an alert is displayed if there is a problem with processing the form. The following conditions may trigger an alert:**

-If an entry is missing from a required field, a message will appear above the appropriate field that prompts the user to enter the information before continuing.

-If a field is for a time to be entered such as <start time> or <end time> and a proper time format such as AM or PM s missing, a message will be displayed prompting the user to correct the entry.

-Billable documents such as Progress Notes or Service Notes normally require an authorization to be in place for the Consumer before a form may be processed.

Saved Sessions

If you have any forms that you have previously saved and you would like to continue working on them and/or process them click on the **Saved Sessions** icon from the Main Menu page.

This will display a list of all saved forms.
- Click on 🔍 to the left of a form to open the form with the data fields displayed that have previously been completed.
    - Complete additional fields as desired.
    - The form may be saved to continue to add future information to it prior to processing the form or the form may be processed upon completion.
- As an alternative, click on ⇨ to transfer the form data to a new form.

- Add or edit an additional data to the form and click on the Process Form button in order to complete the process.
- Click on the ☒ to the right of the **Date Added** to delete the session directly from the list. If this option is chosen the form will not be processed and saved. The information on the form will not be retained.

Section 3 Managing the Approval Process

Approvals

Forms that require review and approval and rejected forms are accessed in this section of your Lauris Online site.
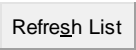
Approver forms queues

Forms I Need to Approve (Requires appropriate permissions to be set by the administrator)

- The list of forms to be approved may be accessed in one of 2 ways:
  1. If you have any forms requiring approval, the link at the top of the Main Menu page will become active and will indicate the number of forms currently in the queue to be approved. Click on the link to access the list of forms to be approved.

  -OR-
  2. Click on **Approvals** to access the page.
- The list of forms for approval will be displayed.
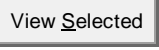
Options from this screen include Refresh List . View Selected , Approve Form , Reject Form and

Cancel .

Click on this check box to select the form. Multiple forms may be selected. From this

screen you may choose Refresh List , Approve Selected . Reject Selected , or View Selected .

Record a message prior to rejecting a form. (This feature requires installation of the Audio Notes software available from the **Downloads** page on the site and a microphone to be attached to the user's pc.)
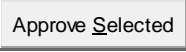
Click to view a form on the list.

Edit Form This option appears to the left of forms that are not specified in Lauris Online as billable forms. By clicking on this option, the Approver is able to edit or add to and update the form.

- Rather than opening and closing each form separately, multiple forms may be selected and opened for review at the same time by clicking on the check box next to each form as desired and clicking on the View Selected button.

Approval Options

- Individual or multiple forms may be approved from the Forms I Need to Approve page.

- Click on the ☐ next to each form to be selected for approval.
- Click on the [Approve Selected] button.
- Click on the [Refresh List] button to view the remaining forms on the list if desired.

Approving forms from within the Lauris Online Viewer.
- Multiple forms may be open for viewing at the same time.
- Forms may be approved from within the viewer without having to close the viewer as a convenience.
  - ii. Select a form within the viewer by clicking on the check box next to the pages in the form. (One form at a time may be approved)
  - iii. Once the form to be approved has been selected, right click on the image of the current form in the Viewer and click on **"Approve Document"**.
  - iv. At the prompt, click on **"Yes"** to confirm the approval.
  - v. Repeat this process for each form to be approved.
  - vi. From the File Menu select "Upload Document Change(s)".
  - vii. At the prompt click on "Yes" to confirm your selection.

Rejecting a form
Forms are rejected from the Forms I Need to Approve page. Forms may only be rejected one at a time.

- Select the check box next to the form to be rejected for revision. If this box is grayed out then click on ✅ next to the form to be sent back for revision.
- Click on the [Reject Selected] button at the bottom of the list.
- A text box will appear that requires the Approver to document the reason the form is being rejected.
- After documenting the reason for rejecting the form, click **"OK".**
- The form will be transferred back to the queue of the person that originally submitted the form so that it may be revised.

Recording a message for Supervision or communication
Prior to rejecting a form, a message may be recorded for supervision purposes or to give verbal instructions as to how to revise a rejected form so that it may be approved or for skills building purposes.

> **Tip: In order to record a message in Lauris Online:**
> **-A microphone must be attached to the PC.**
> **-The Audio Notes Recorder must be installed on the computer (Please refer to Downloads in Section 1 for instructions)**

- Click on the 🔵 button to the left of the form to be rejected in order to record a message.

- The audio recorder will appear.
- Click on **"Record"** and speak in to the microphone to record the message.
- The message may be paused and resumed at any time
- When the message is complete, click on **"Stop"**.
- Click on **"Play"** to review the message.
- Click on **"Upload"** to save the message.

Tip: If the Audio Recorder is closed prior to uploading the message, the message will not be saved.

Forms I Approved

To access the list of forms previously approved, the Approver may click on Forms I Approved.

Approval Date Range:

| 7/6/2009 | 8/5/2009 |

<>

[Refresh List]
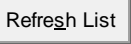
- Enter a date or date range for the list of approved forms to be viewed and click on the [Refresh List] button.
- The list of forms that have been approved may be sorted for easy review by clicking on the Header at the top of a column
  - Sort by **Form** type.
  - Sort by **Service**.
  - Sort by **Who Added Form**.
  - Sort by **Date Added**.
  - Sort by **Date Approved**.
  - Sort by **STBID** (form ID number)
- Click on 🔍 to view any form on the list.
- Click on ↰ to unapproved a form so that changes may be made. (Requires permission from administrator to use this feature)

Forms I Rejected

Click on Forms I Rejected to access the list of forms that you have rejected that are awaiting revision.

Rejected Date Range:

| 1/6/2009 | 8/5/2009 |

<>

[Refresh List]

- Enter a date or date range to view a list of forms that are awaiting revision and click on the Refresh List button.
- The list of forms that have been rejected may be sorted for easy review by clicking on the Header at the top of a column
    - Sort by **Form** type.
    - Sort by **Service**.
    - Sort by **Who Added Form**.
    - Sort by **Rejection Reason**.
    - Sort by**. Date Rejected.**
    - Sort by **Date Added.**
    - Sort by **STBID** (form ID number)
- Click on 🔎 to view any form on the list.

Tip: Once the Submitter has revised and updated the form it will reappear in your Forms I Need to Approve queue and be removed from the Forms I Rejected list.

My Rejected Forms

If a form that you have processed does not meet the Approver's criteria for approval, it will be rejected and show up in your My Rejected Forms queue. An alert will be generated

- The reason for the rejection will be displayed.
- If an audio message is attached to the rejected form an audio button will appear next to the form on the list.
- Click on the button, **Click to download audio file**.
- At the prompt click on "open" to listen to the file in order to listen to the message.

Tip: The volume on your computer should be turned up in order to hear the file. If speakers are connected to the computer there will be more control over the volume.

Revising rejected forms
- Click on 🔎 to view the form.
- Click on Edit Form to the far right of a form on the list in order to open the data boxes for the form so that it may be revised.
- After you are satisfied that the form has been updated and is ready to be re-submitted for approval, click on the Update Form button at the bottom of the page.
- The form will be re-submitted for approval.

My Approved Forms

Click on My Approved Forms to view a list of forms that you have completed that have been approved. If a form has been processed and goes into an approval process it will not show up on your My Approved Forms list until it has been approved. This allows you to track where the form is in the approval process.

Form Entry Date Range:

7/7/2009	8/6/2009

<>

Refresh List

- Enter a date or date range
- Click on the Refresh List button to view the list of forms within the selected date range.
- The list of forms that have been approved may be sorted for easy review by clicking on the Header at the top of a column
    - o Sort by **Form** type.
    - o Sort by **Service**.
    - o Sort by **Date Added.**
    - o Sort by **Date Approved.**
    - o Sort by **STBID** (form ID number)
- Click on 🔍 to view any form on the list.

Appendix 1

Options for Support

Possible sources of training and support for users include:

1. Online support blog. This feature is available 24/7 through the internet.

- Simply click on [Click for Help] from most pages on the site.
- Then click on the link to the support blog at http://support.laurisonline.com/.
- In the search box type in a query then click search as shown:

- Click on the link that opens for information designed to solve the problem:

- The preceding query generated the following results: (applies to an older version of the viewer)

User Access Viewer on Vista - Pegasus Error
by Matt26. August 2009 06:30

A user may encounter a dialog box upon running the User Access viewer telling them about a Pegasus licensing issue. To fix this complete the following steps:

1. Click the **Microsoft Logo** in the bottom left corner.
2. Select **All Programs**
3. Select **Accessories**
4. Right-click **Command Prompt**
5. Left-click **Run as Administrator**
6. Click **Continue**
7. Type **bcdedit /set {current} nx AlwaysOff** and press **Enter**
8. You should see **The operation completed successfully**
9. Close the command prompt window
10. Restart your computer

Additional sources of support include:

2. The Lauris Online administrator
3. Supervisor(s)
4. Your corporate IT Department or

Appendix 2
Lauris Online Site Map and Permission Options

User Login Page
User Message and Notifications Page:

User Alerts:
Forms Approval Alert
Rejected Forms Alert
Consumer Authorization Alert
Form Update Alert
Service Alert
Authorization Summary Report Alert

Site Sections:
Configuration
Authorizations
Approvals
Consumers
Add Session
Saved Sessions
Reports
User Information
Downloads
Sign Out

Section Pages and Access Permissions:
Configuration
All pages within this section require administrative permission to access

User Management
An administrator may set permissions for users to be able to access specific features of the site such as Annotations, permission to request that documents be removed (deleted) from the web site or edit index values. Checking the box to ☐ Allow User to save Word forms locally disables the Save and Save As commands in MS Word documents that have been mapped to Lauris Online.

An administrator may grant administrative access to administrative reports by clicking in the ☐ Give user administrative reports access check box.

An Administrator may assign another user to a User Group or set access permissions as to which pages user may access within various sections of the site by clicking on the **User Permissions** button.

An administrator may restrict another user from editing forms by clicking on the ☐ Allow Read-Only check box.

Forms that the user is to be **excluded** from accessing in the **Add Session** section of the site may be selected

User Groups
An administrator may create User Groups, add members to the group and set up
Group Permissions
Case Load Management
Case Load Management Groups created in this screen may be assigned to view specific Consumer's information. Once a Case Load Management Group has been assigned to a Consumer, only the individuals in this group plus administrators may view the Consumer's information.
Management Console
This screen is used to delete forms and images from the site and requires administrative access.
User Notification
Administrative access is required to send messages to users.
Services / Rates
Either administrative or corporate access is required to set up services in Lauris Online depending on how the site has been configured.
Approvals
Administrative access is required to set up approval processes.
Consumers Setup
Administrative access is required in order to configure this page for staff viewing of Consumer's General Information.
Update Account
Administrative access is required in order to update account information.
Data Key
Do not **ever** change the information n this screen. This should only be done by qualified Integrated Imaging personnel.
Forms
Administrative access is required in order to turn access on or off to specific forms on the site or to set form alerts.
Billing System Setup
This screen is used to enter information related to electronic claims processing.

Authorizations

Authorization Management
All screens require administrative permission to access with the following exception:
All users may access the Authorization Management page to create an authorization request for Consumers they have permission to see (Users can see Consumers assigned to them based on Case Load Management plus any users where viewing access has not been assigned). In addition users must have access to the Authorization Entry Form(s) in order to have permission to access this feature. (Form access permissions are set in User Management.)
Company policies and proper training are required for employees to manage the authorization request process. Employees may be given access to authorization request

forms by the administrator. These employees will be able to create authorization requests for Consumers as appropriate

Users may not view the authorization requests after processing them nor may they approve or reject the authorization request without permission. (The information for the authorization request may be viewed by selecting the client from the list in **Consumers** and clicking on the Authorization Information tab.)

Vendor Management
This screen requires administrative permission for access.
Payor Management
This screen requires administrative permission for access.
Billing Units Management
This screen requires administrative permission for access.

Additional information is available in the Guide to Managing Authorizations

Approvals
Forms I Need to Approve
Only forms specific to the Approver based on user login will show up in this screen.
Forms I Approved
Only forms specific to the Approver based on user login will show up in this screen.
Forms I Rejected
View the current list of rejected forms awaiting revision and updating. Once updated forms are deleted from this list and return to the approval queue.
My Rejected Forms
Only forms specific to the submitter based on his/her login that have been rejected will show up in this screen. Once the user has corrected and updated the form, it will automatically return to the queue of the Approver(s).
My Approved Forms
In this screen the user may view the forms that he/she has submitted that have been approved.

Consumers
Active Consumers
Consumer information may be viewed by users in a Case Load Management Group if assigned to a Consumer. If a Case Load Management Group has not been assigned to the Consumer, all staff may view the Consumer's information. Users with administrative permissions may view all Consumers.
Discharged Consumers
Same as above
🔍 <Consumer Name>
Staff members that have permission to view specific Consumer's In Lauris Online can see all general information, authorization information and documents in the client's chart.
General Information
Authorization Information
Documents
ActiveFile

Notes
Treatment Analysis

Add Session
Unique ID:
The list of Consumers that appears in this field is specific to those the user has been granted permission to see.
New Key Value:
This field is used to create new Consumers or update Consumer information in the database. The user must have access rights to the intake document used for this purpose. I.e. Client information Form
Choose a Form:
Any forms the users that have not been excluded from access by the user will appear on a list in this screen.

Saved Sessions
These screens are for users to save forms for completion and/or processing at a later time by users of the site. Only the user that has saved the form to this area may view the form. Forms in **Saved Sessions** have not been processed and are therefore not available to any other users.
Saved Sessions
Web-based forms saved while the user is online for later access prior to completion and processing are saved here.
Offline Forms
Forms created in the Offline Forms desktop application are uploaded here for finalization (if needed) and processing.
Additional information is available in the <u>Guide to Offline Forms</u>

Reports
Custom Views
Users will see the list of reports available based on whether he/she has administrative access to the site. Administrative access is required to create **Custom View** reports.
Billing Reports:
Other Reports:
Custom Reports:
Additional information is available in the <u>Guide to Staff and Administrative Reports</u>

<u>User Information</u>
This information in this section is specific to the user based on his/her login.
User Information
The user may change the Full Name and email address. The login name and credentials that are tied to the billing process in this area may not be changed by the user.
Digital Signature
Users may upload their signature, change the **Digital Signature** file password and specify the credentials as they should appears on forms processed by the user.

Downloads
All downloads are available to Lauris Online users as appropriate.

REQUIRED DOWNLOADS:
OTHER DOWNLOADS:
BETA DOWNLOADS:
GUIDES:

Sign Out

All users that have been assigned a User ID and Password may access Lauris Online and use this button on the Main Menu screen to log off the site. If the user does not sign out prior to closing the site, he or she will be required to enter the password twice to re-enter the site when next logging in.