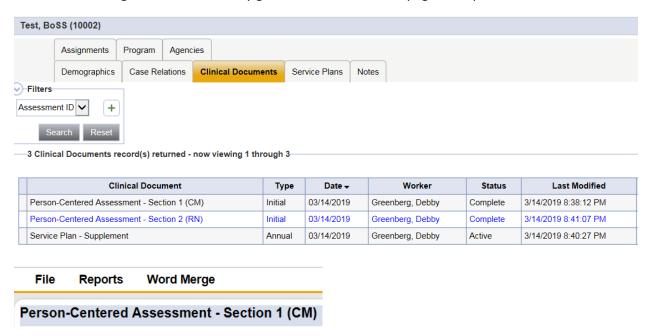Case Managers and Registered Nurses print summaries of Assessments and Service Plans using reports that compile the data entered in Clinical Documents as well as other pages. **For the Service Plan, the Start Date in the header of the Service Plan - Supplement must match the Plan Info and Dates page.** Reports are designed similar to the paper forms. Users run the report, save it to the computer desktop as an electronic file in PDF format, and print it to share with Participants. After opening the Participant record from the Agencies work list, they go to Clinical Documents page and open the relevant one.

Test, BoSS (10002)

Assignments	Program	Agencies

Demographics	Case Relations	**Clinical Documents**	Service Plans	Notes

Filters

Assessment ID ▼ ＋

Search   Reset

3 Clinical Documents record(s) returned - now viewing 1 through 3

Clinical Document	Type	Date ▾	Worker	Status	Last Modified
Person-Centered Assessment - Section 1 (CM)	Initial	03/14/2019	Greenberg, Debby	Complete	3/14/2019 8:38:12 PM
Person-Centered Assessment - Section 2 (RN)	Initial	03/14/2019	Greenberg, Debby	Complete	3/14/2019 8:41:07 PM
Service Plan - Supplement	Annual	03/14/2019	Greenberg, Debby	Active	3/14/2019 8:40:27 PM

File	Reports	Word Merge

Person-Centered Assessment - Section 1 (CM)

1. Move the mouse to the Reports menu to display and select the Report name.
2. To view all pages on the screen, scroll using the arrows next to the page numbers at the top.
3. To save (export) on the computer, click the arrow on the disk icon and select PDF.
4. Click on Save, then Save As, enter file name (e.g., PCA1CM Last First MMDDYY), and Save.

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AGED AND DISABLED WAIVER: PERSON-CENTERED ASSESSMENT – SECTION 1 (CM)

Participant:	Test, BoSS	**DOB:**	03/01/1989	**Date of Assessment:**	03/14/2019
Worker:	Greenberg, Debby			**Type:**	Initial
Status:	Complete			**Date Completed:**	03/14/2019

Do you want to open or save **rp_custom_PersonCenteredAssessmentReport_CM.pdf** from **fw1.harmonyis.net**?   Open   Save ▾   Cancel   ✕

File name: PCA1CM Test Boss 031419   ▼

Save as type: Adobe Acrobat Document   ▼

de Folders   Save   Cancel