

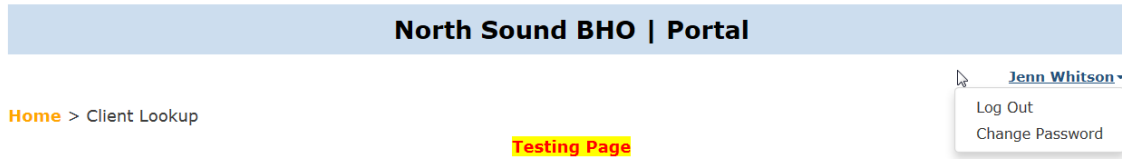
GRIEVANCE PORTAL

North Sound BHO

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Notes:

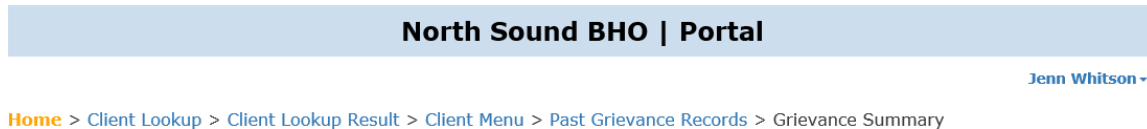


Inactivity:

The Grievance Portal will time-out and close after 15 minutes of inactivity.

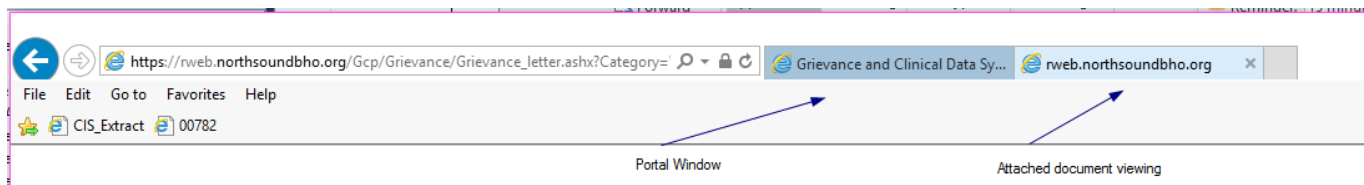
Navigation

As you navigate the portal you will see the path change according to where you are in the system. In this example, the path shows the user to be in the Grievance Summary – you may click any of the blue named areas are clickable and you will be brought to that area.



For example – clicking on Client Lookup will bring you back to the client search screen. **Be cautious of using this form of navigation when in Edit/Add mode. If you are in the middle of adding a summary and click the Client Lookup selection, the changes for your current screen will be canceled.**

When viewing letters in the Grievance portal, your internet browser will open a new internet browser window. To return to the Grievance Portal click on the Grievance Tab:



Edit Mode

When you have opened a page in Edit mode, you will need to press the Back button to cancel or the Submit button to save the change.

Entering Dates

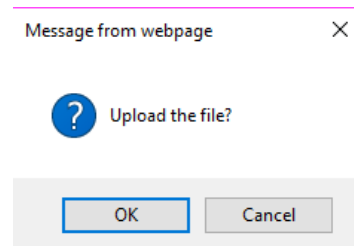
When a calendar has popped up for a date field, you may type in the full date DD/MM/YYYY or click on the date in the calendar.

^ Caret is the name of this symbol

NPI National Provider Identifier

Uploading Documents

To upload documents, be sure the document has been saved in the **PDF** format. After browsing your files and selecting a file to upload, you will be prompted to confirm upload.



Feedback

The feedback link is for website specific non-PHI messages.

Log in

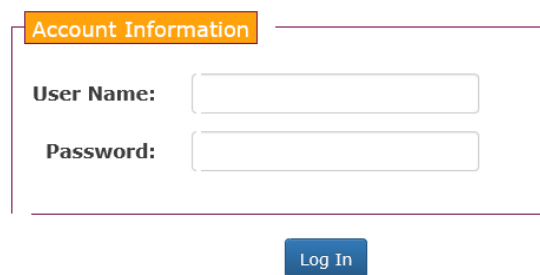
<https://rweb.northsoundbho.org/Gcp/Login.aspx>

For login setup or questions on how to use the portal: email Grievance@northsoundbho.org. Be sure to send securely in a HIPAA compliant format when sending PHI.

If your agency is not equipped with a secure email system please send an email to Grievance@northsoundbho.org and request a secure reply.

Log In

Please enter your username and password.

A screenshot of a login form. At the top, there is a header "Account Information" in an orange box. Below it, there are two input fields: "User Name:" and "Password:". At the bottom of the form, there is a blue "Log In" button.

Administrator accounts with your agency are used to create

user accounts. Administrator accounts do not have access to the grievances in the database and Admin users should create a user account for themselves to allow access to the grievance information.

User accounts are associated to one NPI. If you have need for accessing information under an NPI you will need an account associated with that NPI.

Power Users may access all NPI's associated with an Organization with a division between Mental Health and Substance Use NPI's. ** being developed

Account Lock: Three failed login attempts will lock an account. Instructions to unlock your account will display on the screen.

Using the Grievance System:

Client Lookup:

1. Type in the search criteria
2. Press ENTER or click on Submit Query

You will be presented with the closest matches.

3. Click on the PN for the client you wish to review.

If your client is not found, return to the Client Lookup screen to refine your search.

Client Lookup

To lookup an existing client in your agency, complete one of the following two criteria and click "Submit Query".

- PN Number or
- Last Name, First Name, and Date of Birth

Input Query

PN Number:

Submit Query

Last Name:

First Name:

Date of Birth (mm/dd/yyyy):

Submit Query

Client Lookup Result

These are Provider Entered Clients.

PN	Provider	Name	DOB
1234567891	105020901 North Sound BHO	FirstN LastN	2000-05-01
2345678901	105020901 North Sound BHO	FirstN1 LastN1	2000-05-02
2345678902	105020901 North Sound BHO	FirstN6 LastN6	2000-05-03

When no matches are found, you will be presented with the 'Enter a new client record' button.

Client Lookup Result

There are no records for this client.

Enter a new client record

Adding a client

1. **PN:** use your agency assigned unique number or P1ID.
2. A client's legal name is that which is found in the ProviderOne results. If the client is not found in ProviderOne, use a legal ID to format the client's name. If the client has no legal ID, use the name as given by the client and update when you have the legal name.
3. Date of Birth
4. Provider-One Client ID: enter complete ID number including the WA at the end of the ID.
5. Click continue to create the client record

North Sound BHO | Portal

Jenn Whitson

Home > Client Lookup > Add a Client Demographics

Testing Page

Add Client Demographic Information

*Required fields

PN (Maximum 11 numbers)* 123456789WA

First Name*

Last Name*

Date of Birth* (mm/dd/yyyy)

ProviderOne Client ID

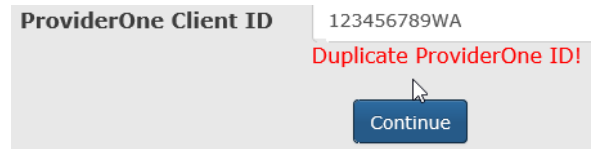
Continue

Feedback

Duplicate Provider-One ID

If you create a client record that has the same Provider-One ID as an existing client, the warning will show as ->

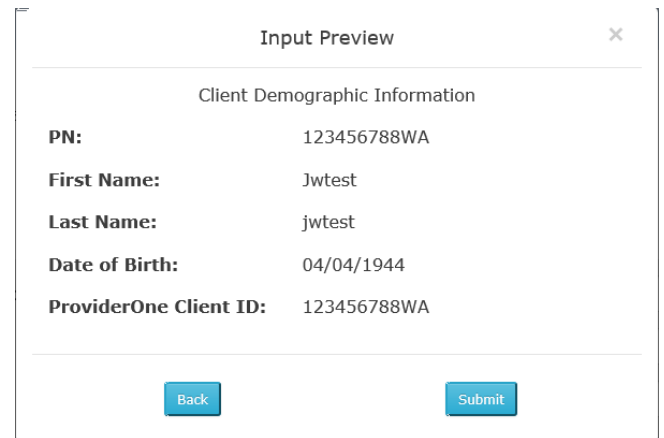
- Return to the Client Lookup window to search for you client again.



When you try to add a client with the same PN as already exists for your agency, the warning will show as -> **Duplicate PN Number!**

When a newly added record has been found to be unique the 'Input Review' screen will pop up.

Click Back to cancel or Submit to continue with the client account information as presented. Clicking Submit will add the client to the Grievance Portal.



The screenshot shows a window titled "Input Review" with a close button (X) in the top right corner. Below the title bar is a section header "Client Demographic Information". Underneath, there are five rows of information:

PN:	123456788WA
First Name:	Jwtest
Last Name:	jwtest
Date of Birth:	04/04/1944
ProviderOne Client ID:	123456788WA

At the bottom of the window, there are two blue buttons: "Back" on the left and "Submit" on the right.

Return to the Client Lookup screen to open your newly created client. Search for and select the newly added client.

Correcting a client's name

Edit is allowed for the First name and Last name fields of the client record.

1. Search for and Select the client
2. Click the Client Demographic Button
3. Click the Edit button
4. Make the change
5. Click Submit

Add a Grievance

1. Search for a Client
2. Click on the client PN ([blue underlined](#))
3. Click the Add a Grievance Button
4. Click in the 'Date the Grievance was Received' box and a calendar will pop up for you to select the date.

5. Select the Grievance Related To

Grievance Related To*

Pick One...

- Mental Health
- Substance Use Disorder

6. Select the method of Grievance

Grievance Written or Verbal*

Pick One...

- Written
- Verbal

Grievance Reporting

Grievance Case

Date the Grievance was Received*

Grievance Related To*

Pick One... ▾

How Was Grievance Received*

Pick One... ▾

Copy of Written Grievance (PDF only)

Date of Written Acknowledgement to Consumer

Acknowledgement Letter (PDF only)

Upload a Written Grievance letter

When the client has submitted a grievance in writing, Attach the letter to the file.

1. Click on the 'Select File' button
2. Navigate to your copy of the PDF letter to upload.
3. Double click the letter in your browsing window, or click on the letter once and then click the OPEN button.

Grievance Written Letter (PDF only)

C:\fakepath\GrievanceSoftw...

GrievanceSoftwareTraining 20170620.pdf uploaded

When you have successfully uploaded the letter, it will show the file name below the path box/select button as shown above.

If you try to update a letter that is not of the PDF type you will see an [Upload Failed](#) message:

4. Select the Date of Written Ack. To Consumer by clicking in the available box and then **selecting** the date.

Copy of Written Grievance (PDF only)

Upload failed: invalid file type (pdf only)

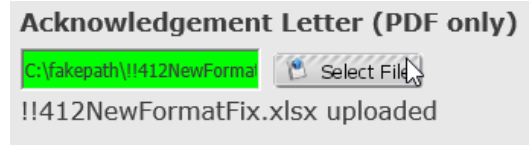
Date of Written Acknowledgement to Consumer

Jun 2017

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Pick One...

Upload the Acknowledgement Letter (PDF) by clicking the Select File button



1. Click on the 'Select File' button
2. Navigate to your copy of the PDF letter to upload.
3. Double click the letter in your browsing window or click on the letter once and then click the OPEN button.

Adding an additional Category – when the grievance Category Resolution is not present then you may add additional Categories.

Grievance Category

You may add multiple Grievance categories. Add one and then click the 'Add Another..' button to add the next Category.

Grievance Category 1

Grievance Category 1 Brief Description

At this point, there is enough information present to save the grievance.

1. Scroll to the bottom of the screen
2. Select the Continue button to save the record.
You will be presented with the Input Preview of the data entered so far.
3. Scroll down and click Submit to save or click on Back to make a correction.

Grievance Resolution

From the Grievance Case Summary screen

1. Select the Category tab. (You can see how many categories this grievance contains by the number in the tab.)
2. Click Edit for the Category to resolve.

In the Edit Preview window

3. Select the Grievance Category Resolution. Once you select the appropriate reason the calendar will pop up for you to
4. Select the Date.

The screenshot shows the 'Edit Preview' window with a navigation bar at the top containing 'Case', 'Category (1)', and 'Extension' tabs. Below the navigation bar is a blue bar. The main content area is titled 'Edit Preview' and contains several fields: 'Grievance Category*' with a dropdown menu showing 'Emergency Services'; 'Grievance Category Brief Description' with a text area containing 'this is the brief description of the'; 'Grievance Category Resolution*' with a dropdown menu showing options: 'Pick One...', 'Information/Referral', 'Conciliation/Mediation', 'Not Pursued', 'Other', and 'Non Agreement'; and 'Date of Category Resolution*' with a date field. At the bottom right, there are 'Back' and 'Submit' buttons.

Grievance Extension Tab

To extend a Grievance navigate to the Extension Tab

1. Select the 14 day Extension menu and
2. Select the answer

Was 14-day extension granted for grievance?*

A dropdown menu with the following options: 'Pick One...', 'Yes', and 'No'.

3. Select the Extension menu and
4. Select the answer

If yes, who initiated extension:

A dropdown menu with the following options: 'Pick One...', 'Client', and 'Provider'.

'The Date extension was initiated' calendar will pop up if you previously selected an answer to the Extension in the question above.

5. Select the date, or click the next field to clear the calendar.

Date extension was initiated

A date input field with a calendar icon on the right.

Grievance Extension Letter

1. Click the Select File button
2. Navigate to the location of the PDF letter and double click the file or single click and click Open.

Grievance Resolution

When there is no Resolution, as with a newly added record, you will see this message:

The screenshot shows the 'Grievance Case Summary' screen with the 'Extension' tab selected. The navigation bar at the top contains 'Case', 'Category (1)', 'Extension', and 'Resolution' tabs. Below the navigation bar is a blue bar. The main content area is titled 'Grievance Case Summary' and contains the text 'Records for: FirstN2 LastN2'. Below this is a message: 'There is no grievance extension to the grievance case. Add a grievance extension using the form below.' The form contains the following fields: 'Was 14-day extension granted for grievance?*' with a dropdown menu; 'If yes, who initiated extension?' with a dropdown menu; 'Date extension was initiated' with a date field; and 'If provider initiated extension, attach PDF of Extension Letter' with a file input field and a 'Select File' button. At the bottom right, there is a 'Continue' button.

If provider initiated extension, attach PDF of Extension Letter

A file input field with a 'Select File' button.

There is no grievance resolution to the grievance case. Add a grievance resolution using the form below.

1. Click the Date of Resolution field and
2. Enter the date. This date will be on or after the Grievance Case Details date from the Case tab

Grievance Case Summary
Records for: FirstN2 LastN2

Case Category (1) Extension Resolution

There is no grievance resolution to the grievance case. Add a grievance resolution using the form below.

*Required fields

Date of Written Resolution Letter*

PDF of Resolution Letter to Consumer*

Were Ombuds involved during this grievance?*

Date Ombuds became involved

Were Ombuds offered for assistance during this grievance?*

Continue

Upload the Resolution letter

1. Click the Select File button
2. Navigate to the location of the PDF letter and double click the file or single click and click Open.

PDF of Resolution Letter to Consumer*

Select File

Ombuds involved

When Ombuds were involved

1. Click in the box
2. Select Answer

Were Ombuds involved during this grievance?*

Pick One...
Yes
No

Ombuds involved – first Contact

1. Click in the box
2. Select Answer

Date Ombuds became involved

Indicate if Ombuds was offered

1. Click in the box
2. Select Answer

Were Ombuds offered for assistance during this grievance?*

Pick One...
Yes
No

Edit/Change the information of Past Grievance Case

1. Search for the client
2. Click on the client PN number
3. Click on the “Past Grievance Cases” button and existing grievances will be listed:
4. Click on the date for the Grievance you wish to review and the record will open for you to edit/view.

Grievance Case
Records for: FirstN2 LastN2

Date Grievance Rec'd	Grievance Related To	Acknowledged Date	Created Date
5/1/2017	Mental Health		6/8/2017
4/5/2017	Mental Health		6/10/2017
2/1/2017	Mental Health	2/2/2017	6/7/2017
2/2/2017	Mental Health	2/14/2017	6/5/2017
2/1/2017	Substance Use Disorder	2/8/2017	6/6/2017

Grievance Case Summary

Shows each of the sections of the Grievance

Case:

Category:

Extension:

Resolution:

Grievance Case Summary

Records for: FirstN2 LastN2

Case	Category (3)	Extension	Resolution
Grievance Case Details			
Grievance Received Date:	2/1/2017		
SUD or MH Grievance:	Mental Health		
Grievance Written or Verbal:	Verbal		
Grievance Letter:	View		
Written Ack To Consumer Date:	2/2/2017		
Acknowledgement Letter:	View		
Edit			

Finalize a Grievance

Once a Resolution date is entered and the Submit button click you will be asked to finalize the grievance **and it will lock the record.**

Locked Grievance A grievance that has been Resolved will be locked and no user will be able to edit. Should a correction be needed for a locked grievance, please send a secure email to grievance@northsoundbho.org

Edit Preview ×

***Required fields**

Grievance Category*

Grievance Category Brief Description

notes by Jenn... client called on 06/01/17 and declined to pursue

Remaining characters: 190

Grievance Category Resolution*

Date of Category Resolution*
(mm/dd/yyyy)

[Back](#) [Submit](#)

For login setup or questions on how to use the portal: email Grievance@northsoundbho.org