SASH® a caring partnership
SUPPORT AND SERVICES AT HOME

PHL Frequently Asked Questions

PHL Basics and Navigation

1. **The language used in the PHL system doesn't match SASH language. Which words equate to which SASH terms?**

SASH Language	PHL Language
Participant	Client
SASH	Company
Panel Name	Agency
Contact	Visit
New Referral	New Participant

2. **If I am working in a pop-up window and I have saved the information I entered, how do I know if it has been saved?**
You will need to close the pop-up window and look at the table behind it. The information you just entered should be in this table.

3. **I'm not able to use the backspace key for the date fields in PHL. Am I doing something wrong?**
No. When you are in a date field, you must highlight it and type over it or choose a calendar date.

4. **I'd like to practice in PHL. Can I create fake users or TEST names in the system?**
No. Please only use real participant data in the system. The fake names and information will show up in your reports if they are entered. Note: Please use the form to send Madeline the names of any test participants you have already entered so that she can remove them.

Adding a New Participant (New Referral)

5. **When adding in a new participant, do I go to the Client Tab and click on New Client?**
No. You should add a New Referral. Go to the Client Management tab and click on New Referral. Then follow the steps starting on page 21 in the manual.

6. **At the bottom of the new referral page, there is a checkbox "primary contact same as above." What is this asking for?**
The primary contact would be the participant. They are the person you are contacting directly so it will save you entry time later to check that box.

7. **For staff member name, should I just choose myself?**
The first time you add a new participant, please be sure to choose everyone who works in that

panel so everyone can see the participant on his or her caseload.

8. **When creating a new referral, some of the clients listed didn't appear to be mine? Is that a concern?**
   You should only see the clients in your caseload. If you see others, there is a bug at the moment that is being fixed. Be specific when typing in search information (such as first name and last name) so that you are more likely to only see your people caseload. This is not a HIPAA breach.

9. **For the HIPAA consent checkbox, who do I check this for?**
   When filling out the "contacts" for participant's emergency contacts, if that contact is listed on the blank line of the Use & Disclosure form, then they have "HIPAA Consent" and you should check that box.

10. **What is the CBO#? Is this something I create?**
    The CBO number is the participant number. Historical data will automatically upload the number from current participants. For new participants, PHL will auto generate this number. The number will start with "SASHVT" and will be followed by 9 digits.

Visit Tabs

11. **There are some tabs that are new. Am I supposed to fill in everything on every tab?**
    No. Ignore the Income & Assets tab, as well as the following Visit tabs: Med Review, Risk Stratification, Readmit Root Cause, Transition Planning, Health Literacy, SRM, and CG Monitor. These will be removed in the future.

12. **Do I need to update the Care Utilization tab?**
    We have a contract with Patient Ping. Once this contract starts, the information from this resource will automatically be uploaded into the site. If there are other resources that aren't connected to Patient Ping, you may need to update this information manually.

13. **When I look at the list of medications, I don't see the ones I need. Will this be updated or should I just add to the list?**
    Please don't add any new medications. Submit a jot form request with the medications you would like to add to the list. We want to ensure consistency for reporting purposes.

14. **In the SASH Coordinator Assessment tab, none of the questions have an asterisk, does that mean they're not required?**
    No. At this time, all of the questions require an answer. If you are only planning to fill out one part of the assessment, please choose N/A for the answers to the other questions.

15. **There are additional questions on the Social Connectedness tab. What are these for?**
    The first 7 questions match the Lubben scale. Three additional questions have been added at the bottom of the page; these questions are the UCLA Loneliness Scale. You must answer all of

the questions.

16. **I can't find the MAHC-10. Where is it?**
We are no longer using the MAHC-10 assessment for falls. For any assessments done between 6/1/17 and 8/10/17 - Please enter the MAHC-10 total score in the Notes section at the bottom of the Falls Risk Assessment tab. The other questions do not need to be recorded. Moving forward with new assessments, please use the Falls Risk Assessment in PHL (CDC STEADI)

17. **If one of the participants has multiple immunizations of the same type, should I just type over an immunization that is already there and update the date?**
No. Please add an additional immunization for each time they receive one. Don't change the date of prior immunizations unless you know the date you have entered is incorrect.

18. **What do I do if I get a "Yes" answer to #11 in the Suicide Assessment?**
All staff will receive a training on the Columbia Suicide Severity Rating Scale Assessment in the future which will help answer this question. If you need help in the meantime, talk with your Supervisor or contact Melissa Southwick.

19. **If I want to print out a list of all the medications a participant is taking, how do I do that?**
A medication list can be printed out using the Summary page. This feature isn't live in PHL at this time, but will be shortly. We will alert you when it is up and running.

20. **During a webinar, it was mentioned that we would be able to add a follow-up date for goals that would then email us so we could follow-up. Is that in the new system?**
Unfortunately, it isn't in the system yet, but it will be in the future. Staff alerts and a scheduler option are coming soon.

21. **How do I know where to put SASH Assessment data into the PHL system?**
Please refer to the "SASH to PHL Location Guide" frequently. This is a great guide for inputting your data into the system in the correct location.

Notes

22. **If I want to add my Encounter Notes to the Notes section that I've kept in a Word document, could I add them to the Notes section as one document?**
Yes. If you have been using a Word document, you can copy and paste it into the Notes section as one Note. Just save it/call it Notes from one date to another date. There is a size limit to this space so you may have to save it as two separate notes files.

23. **How do I know who entered what notes?**
Please be sure to add your initials to every note you create. In the future, we hope to have the system let us know who wrote what note.

Troubleshooting

24. **Who do I contact for questions?**
    Please email Madeline Morris, the Data Systems Manager at Morris3@cathedralsquare.org, call her at 802.859.8818 or go to the forum and fill out the jot form.

25. **Where do I access additional information on PHL?**
    Please refer to the following links:
    - *SASH to PHL Location Guide*
    - *User Manual*
    - *SASH Assessment for PHL (paper version)* Now much shorter!!!
    - *PHL Q&A*