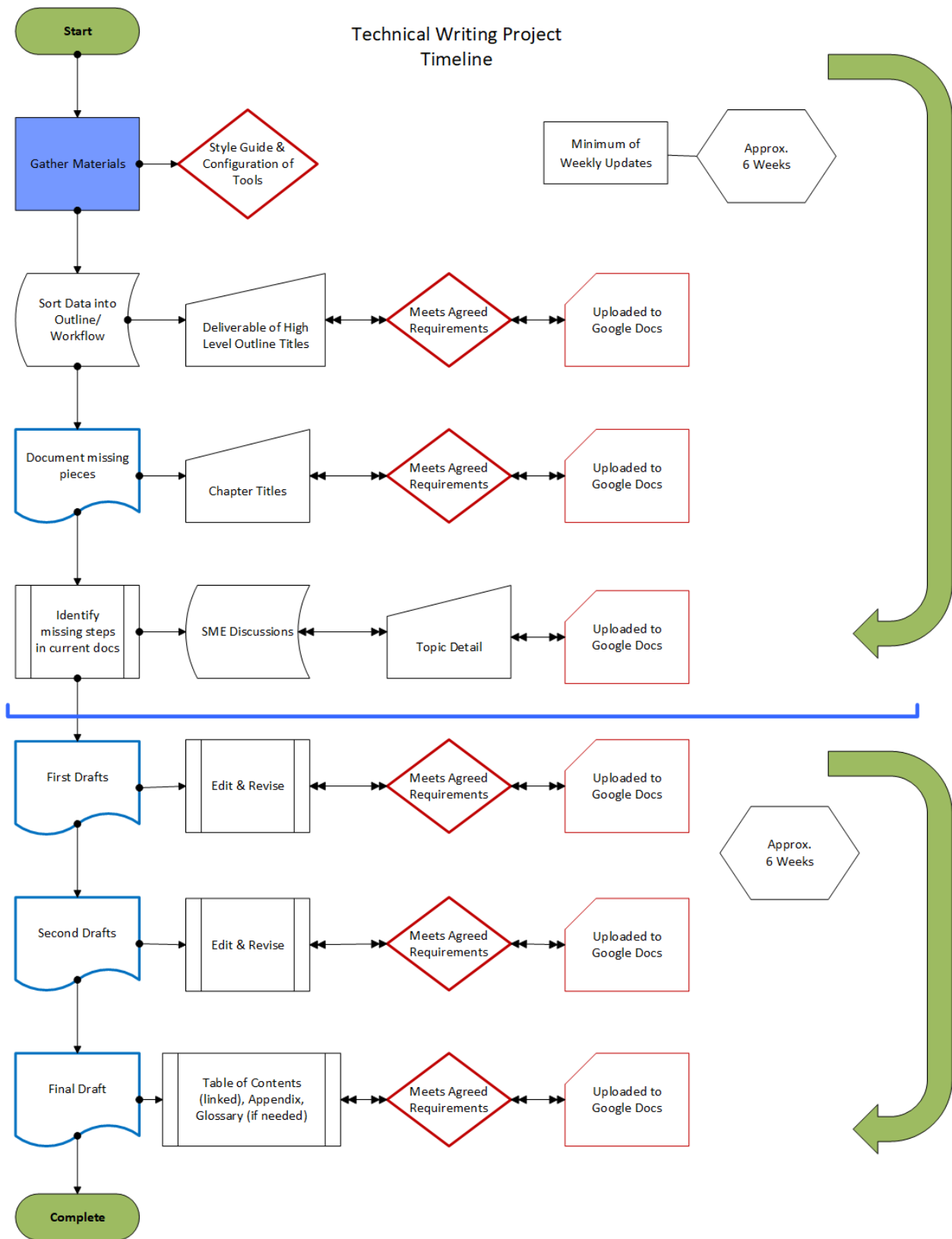
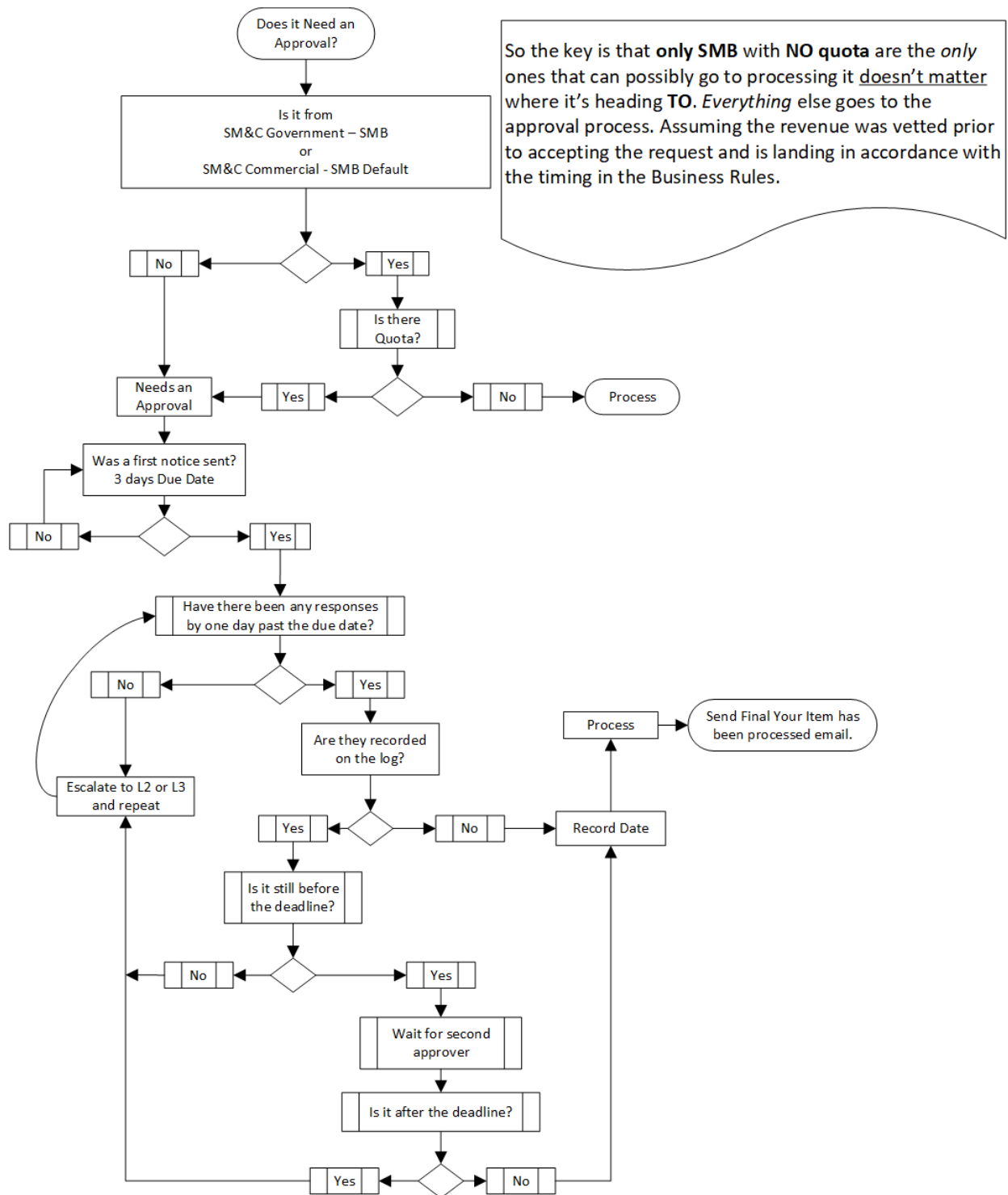


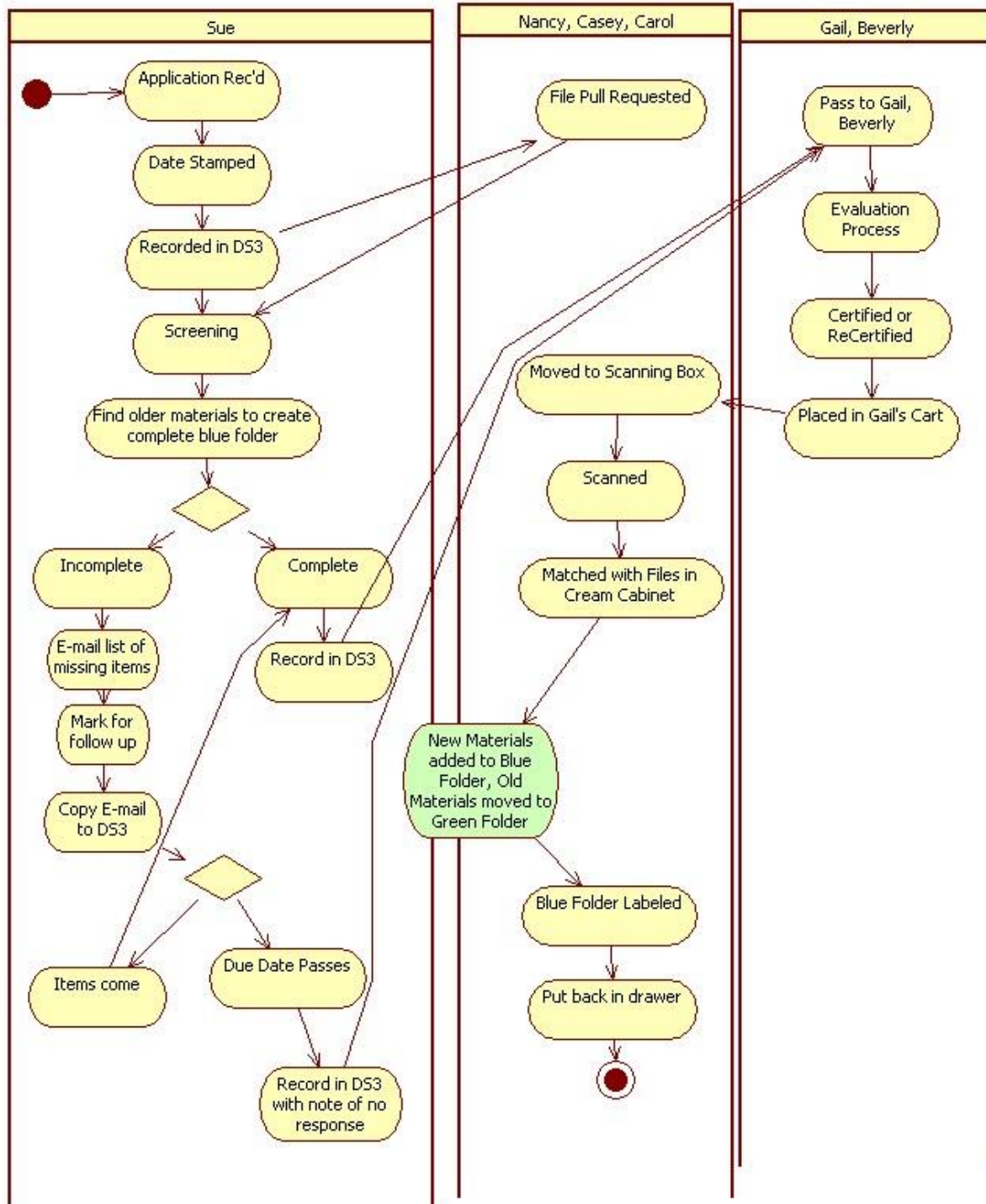
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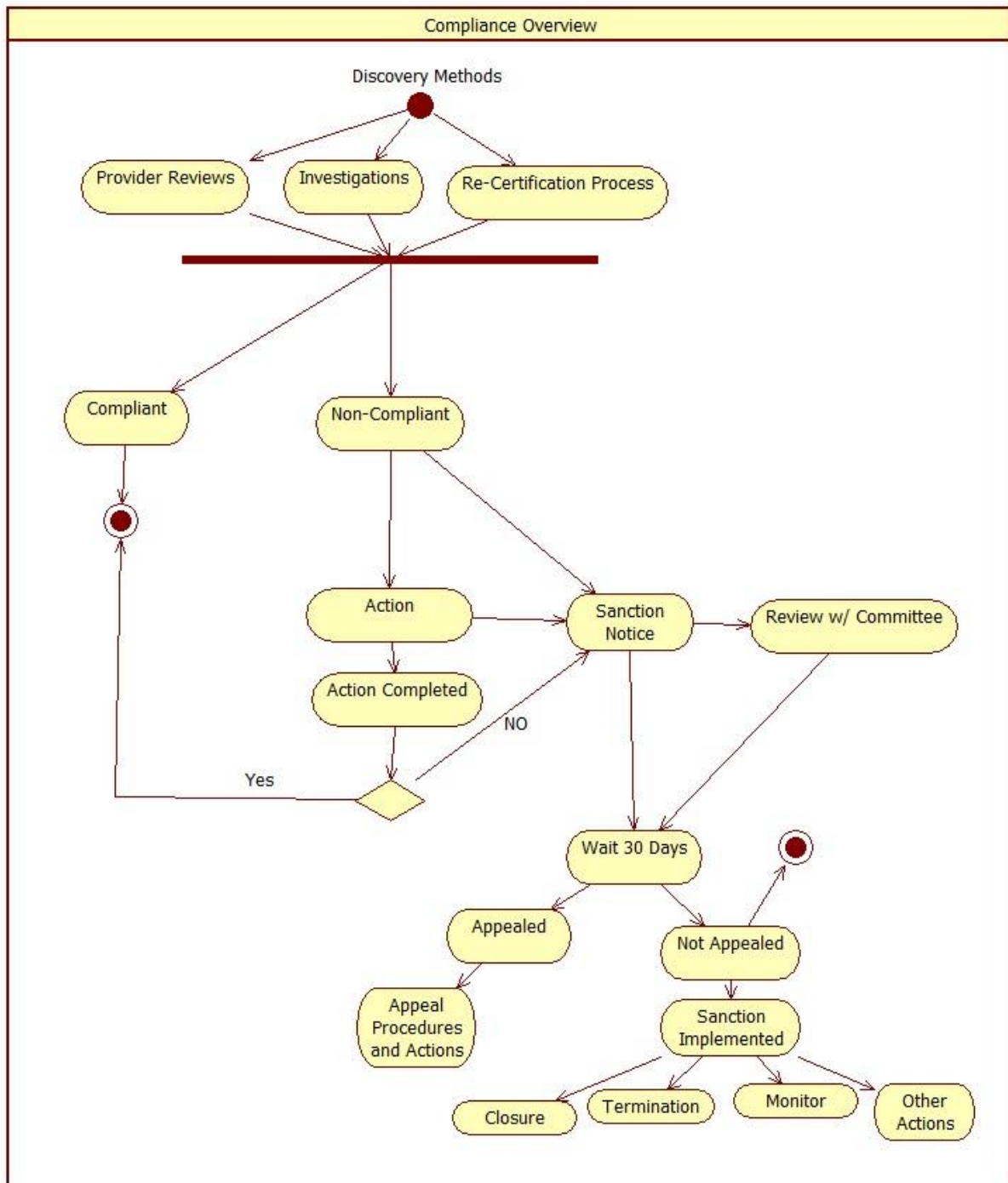
PORTFOLIO



PORTFOLIO



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QA Providers

Archive Tutorial
New File Entry Only
2013

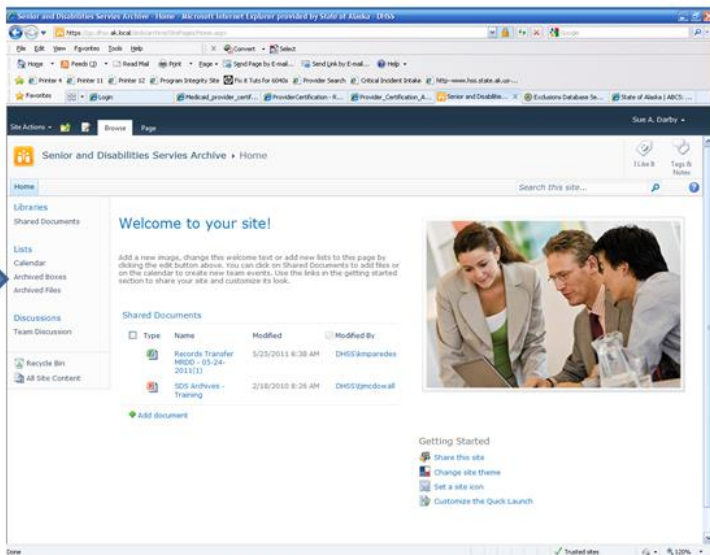
<https://go.dhss.ak.local/dsds/archive/SitePages/Home.aspx>

PORTFOLIO

Home Page

1. Log In
Your home page will look something like this
2. Click on Archived Boxes

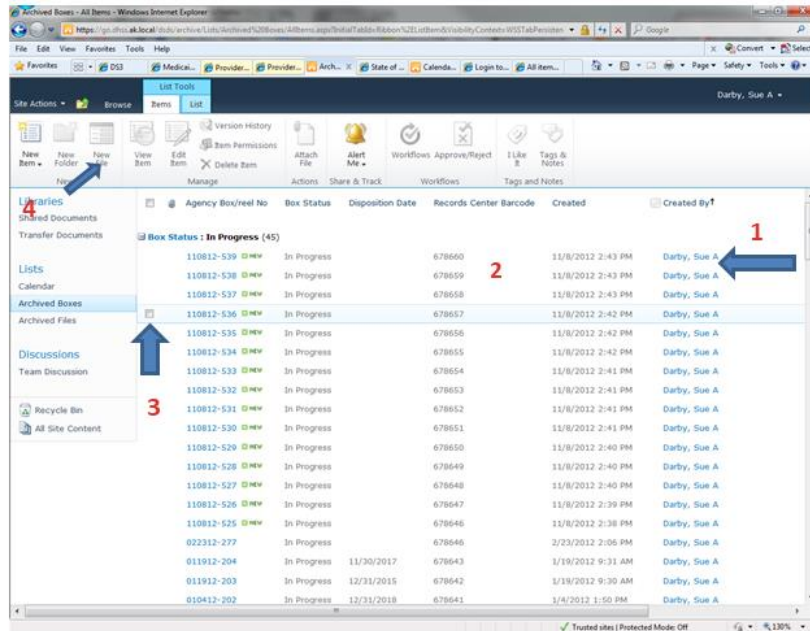
2



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Find your box

1. Boxes created by Sue Darby
2. Start with the smallest barcode and move to larger numbers
3. As you hover over the one you want a small check box will appear, click it to select it
4. Then click “New File”



Add a New File to the Box (pt 1)

1. Source is Certification
2. Inclusive Date is the date the Agency Closed
3. Retention Schedule is Provider Certification – Approved – 1 OR Provider Care and Treatment Records - 1 OR Provider Certification (Denied/Revoked)-1 OR Quality Assurance Reviews

This is based on the type of files found in the box you are working on.

The screenshot shows a 'New Archive File' form with the following fields and values:

- Agency Box/reel Number: QA Test Box-174
- Source: Certification (indicated by red arrow 1)
- Inclusive Date: 1/31/2005 (indicated by red arrow 2)
- Retention Schedule: Provider certification - Approved - 1 (indicated by red arrow 3)
- Recipient: Recipient (radio button selected)
- Date of Birth: N/A
- Disposition Date: 1/31/2010 (5 years)
- Records Center Barcode: (empty field)
- Notes: (empty text area)

Buttons at the top: Edit, Save, Cancel, Commit.

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Adding a New File Cont. (pt 2)

1. Recipient – Choose “Agency” for most providers OR “Individual Provider” for CMs
 - a) Disposition Date will be calculated automatically
2. Records Center Barcode was assigned to the whole box. It will pop up automatically!
3. **Notes – Certification period, handbooks only, audit file etc.**
4. Click Save

The screenshot shows the 'New Archive File' form with the following fields and values:

- Agency Box/roll Number:** QA Test Box-174
- Source:** Certification
- Inclusive Date:** 1/31/2006
- Retention Schedule:** Provider certification - Approved - 1
- Recipient:** ☒ Recipient ☐ Agency ☐ Individual Provider ☐ Other
Acme Test Agency (CMGSOA)
- Date of Birth:** N/A
- Disposition Date:** 1/31/2011 (5 years)
- Records Center Barcode:** (Empty field)
- Notes:** Ready for Destruction

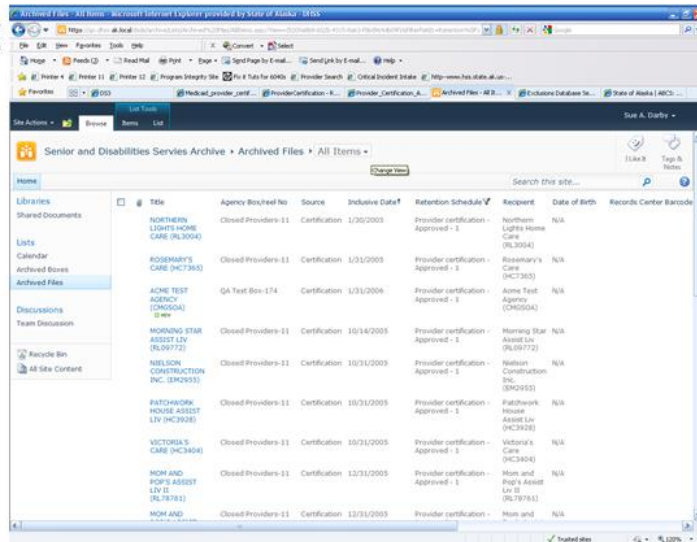
Numbered annotations on the form:

- 1** points to the **Recipient** section.
- 2** points to the **Records Center Barcode** field.
- 3** points to the **Notes** field.
- 4** points to the **Save** button at the bottom right.

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Your single file is in the system!

1. You will see a long list of various files
2. From this screen you can sort by title, retention schedule, inclusive dates, barcode etc.

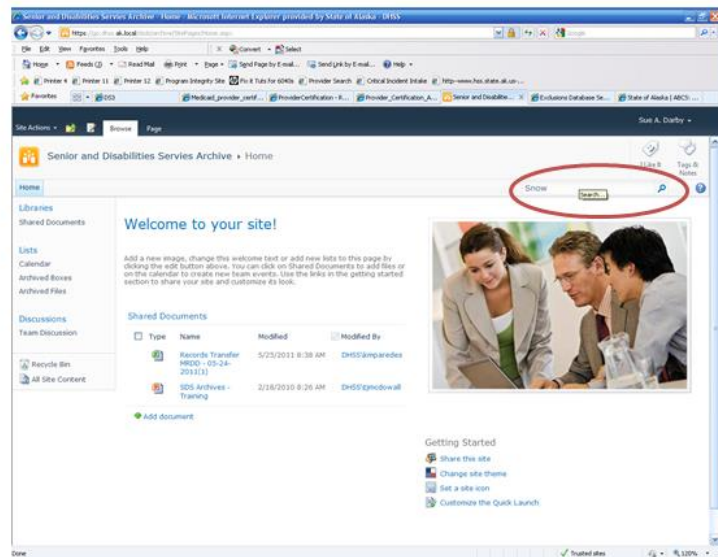


The screenshot shows a web browser window displaying a list of files in a 'Senior and Disabilities Services Archive'. The list is sorted by title and includes columns for Agency, Source, Inclusive Date, Retention Schedule, Recipient, Date of Birth, and Records Center Barcode. The list contains 10 items, each representing a different agency or service provider.

Title	Agency	Source	Inclusive Date	Retention Schedule	Recipient	Date of Birth	Records Center Barcode
NORTHERN LIGHTS HOME CARE (PL3004)	Closed Providers-11	Certification	1/30/2005	Provider certification - Approved - 1	Northern Lights Home Care (PL3004)	N/A	
ROSEMARY'S CARE (HC7365)	Closed Providers-11	Certification	1/31/2005	Provider certification - Approved - 1	Rosemary's Care (HC7365)	N/A	
ACME TEST AGENCY (CM0504)	QA Test Box-174	Certification	1/31/2006	Provider certification - Approved - 1	Acme Test Agency (CM0504)	N/A	
MORNING STAR ASSIST LTV (PL09772)	Closed Providers-11	Certification	10/14/2005	Provider certification - Approved - 1	Morning Star Assist Ltv (PL09772)	N/A	
MELSON CONSTRUCTION INC. (EM0655)	Closed Providers-11	Certification	10/31/2005	Provider certification - Approved - 1	Melson Construction Inc. (EM0655)	N/A	
PATCHWORK HOME ASSIST LTV (HC3928)	Closed Providers-11	Certification	10/31/2005	Provider certification - Approved - 1	Patchwork Home Assist Ltv (HC3928)	N/A	
VICTORIA'S CARE (HC3404)	Closed Providers-11	Certification	10/31/2005	Provider certification - Approved - 1	Victoria's Care (HC3404)	N/A	
MON AND POP'S ASSIST LTV IL (PL78761)	Closed Providers-11	Certification	12/31/2005	Provider certification - Approved - 1	Mon and Pop's Assist Ltv IL (PL78761)	N/A	
MON AND	Closed Providers-11	Certification	12/31/2005	Provider certification -	Mon and	N/A	

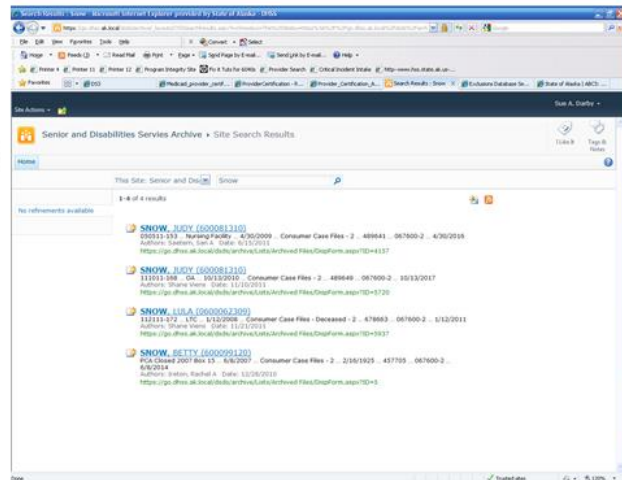
Retrieving a file from the system

- From Home click on the Search this site box and type in the name you are looking for



Search Results

- Figure out which entry you need and click the entry to gather the information such as the barcode of the box so that the file can be recalled easily!



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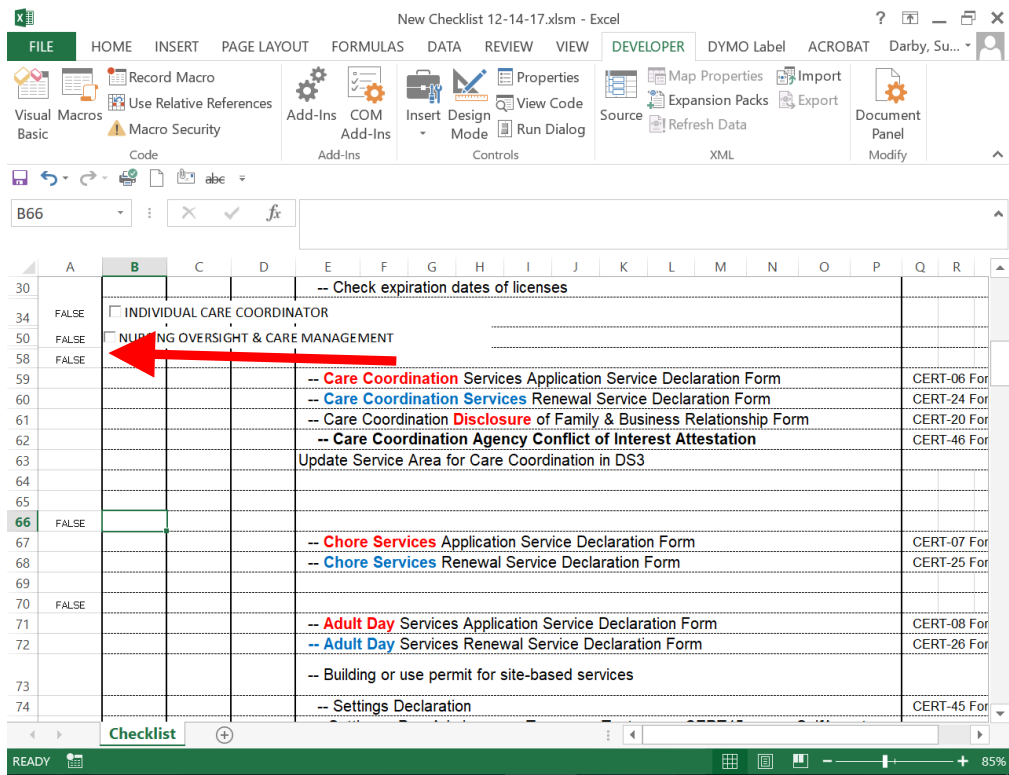
SIMPLE SHOW & HIDE CHECKLISTS

PURPOSE:

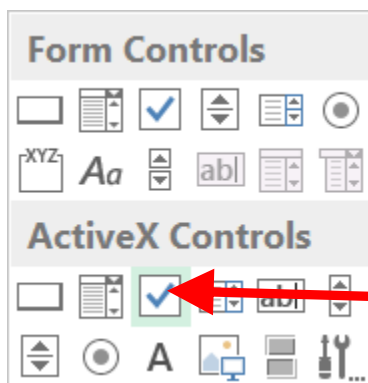
This is for a simple checklist where a group of items are based on a True or False statement.

PROCESS

1. Setup one column with **FALSE** on the row you want to have as the *section header*

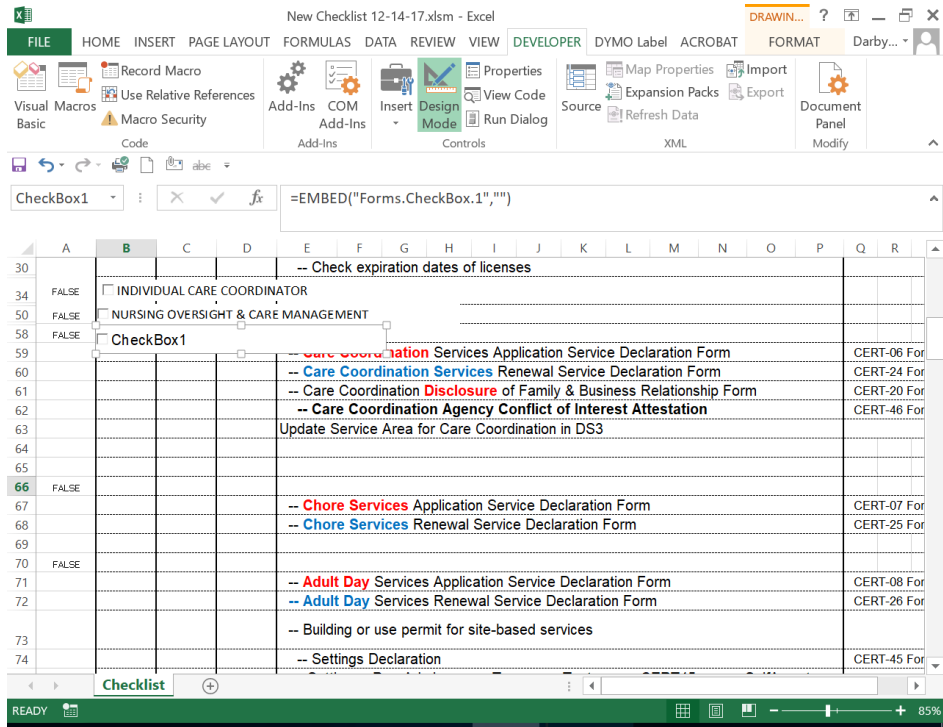


2. On the **Developer Toolbar** click **Design Mode**
3. Still on the **Developer Toolbar** click **Insert > Active X Control** and choose the checkbox

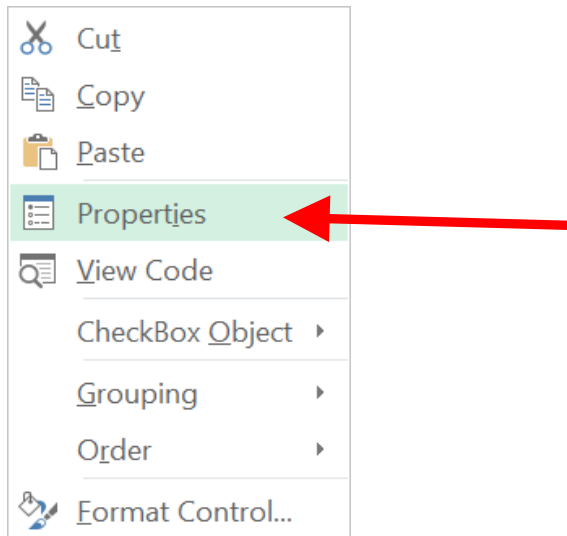


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4. Draw your checkbox where desired



5. Right click on the checkbox and go to **Properties**



6. Name your checkbox and add your caption

7. In the linked cell add a \$<column>\$<row> absolute link, i.e., \$A\$58 this tells the macro where to look to perform the code you are about to program.

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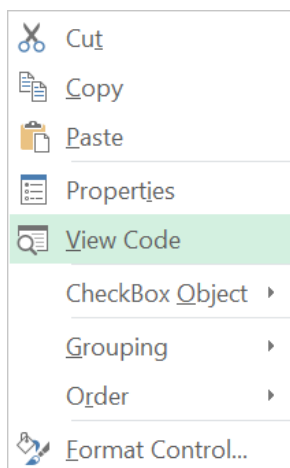
Properties

INDIVCARECOORDINATOR CheckBox

Alphabetic | Categorized

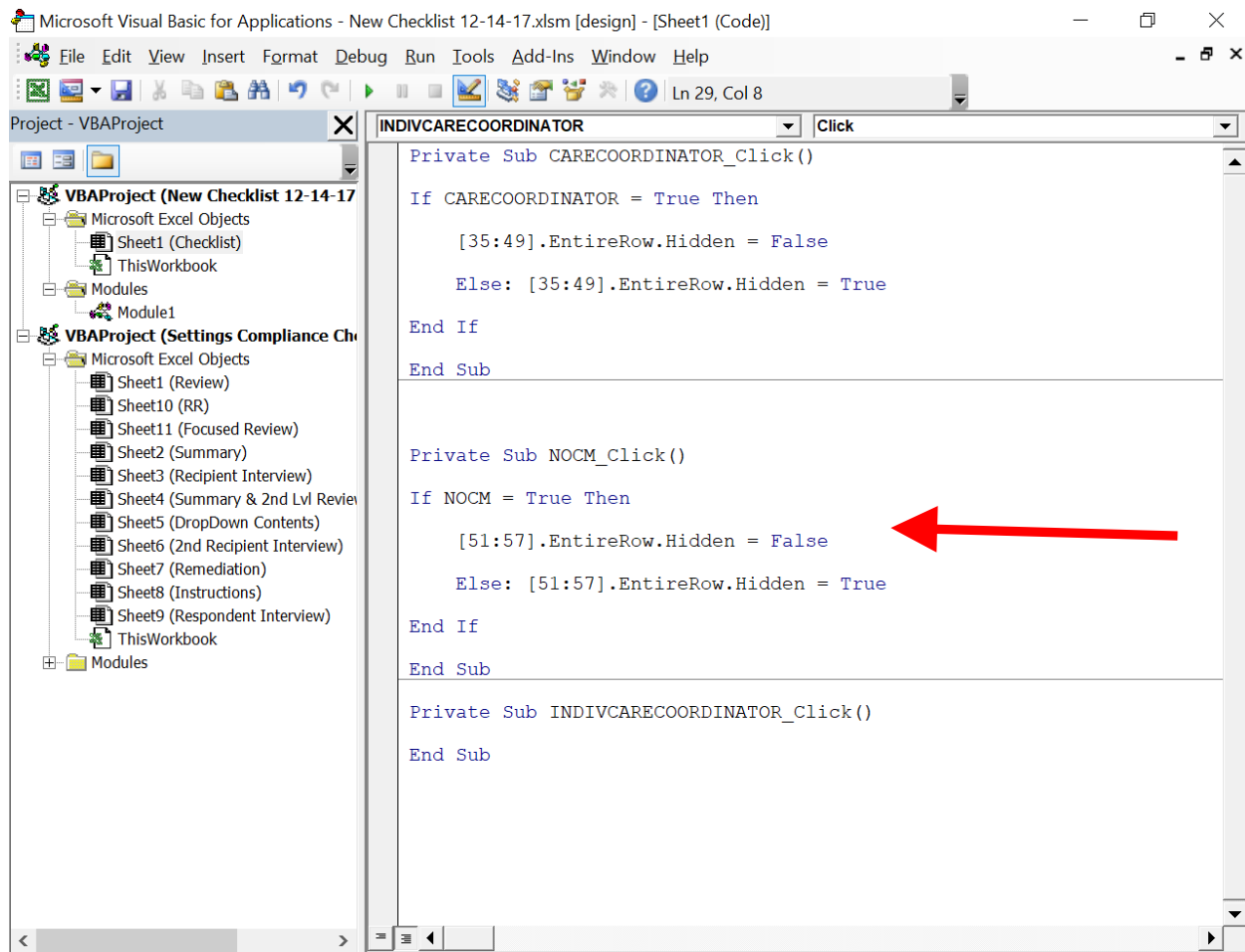
(Name)	INDIVCARECOORDINATOR
Accelerator	
Alignment	1 - fmAlignmentRight
AutoLoad	False
AutoSize	False
BackColor	&H80000005&
BackStyle	1 - fmBackStyleOpaque
Caption	CARE COORDINATOR
Enabled	True
Font	Calibri
ForeColor	&H80000008&
GroupName	Checklist
Height	22.5
Left	48
LinkedCell	\$A\$58
Locked	True
MouseIcon	(None)
MousePointer	0 - fmMousePointerDefault
Picture	(None)
PicturePosition	7 - fmPicturePositionAboveCenter
Placement	2
PrintObject	True
Shadow	False
SpecialEffect	2 - fmButtonEffectSunken
TextAlign	1 - fmTextAlignLeft
Top	417
TripleState	False
Value	False
Visible	True
Width	231.5
WordWrap	True

8. You can also adjust the font and font size, color etc. in this dialog so that it matches the rest of the project



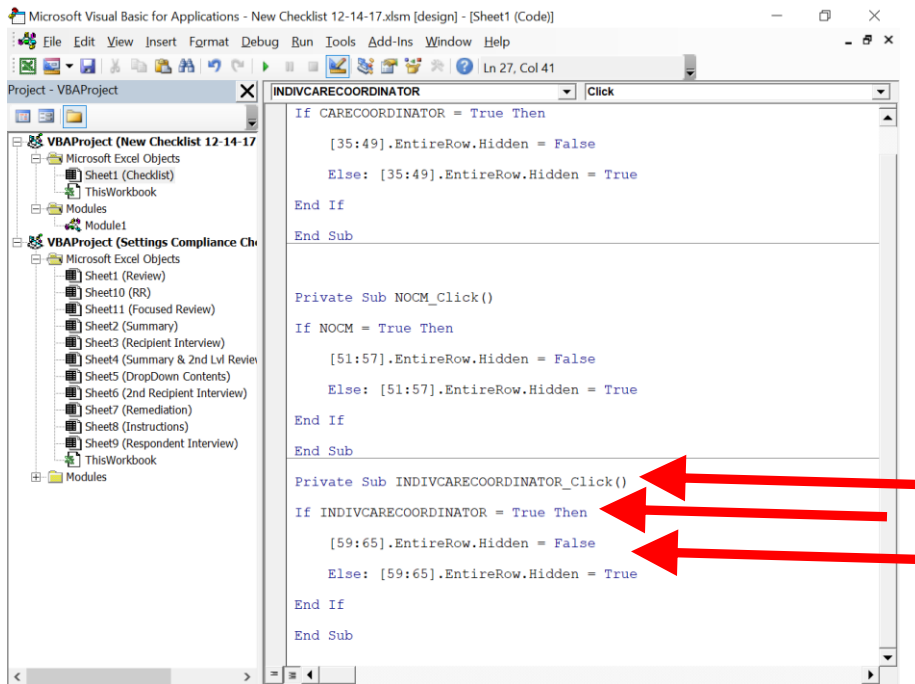
9. Right click on the checkbox and go to **View Code**

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10. Based on the basic premise of **If** → **Then** → **Else** you can reuse the code to create the new function code

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11. Use the first part of the **Private Sub** to fill in the **IF** portion of the statement
12. Change the numbers to show what lines you want to show and hide.

NOTES:

- There are extra lines between sections to easily add new items
- Adding a new line aka INSERTING a whole new row WILL require a recalculation of the show & hides of everything below! You can add new lines to the Common Requirements downward at will.