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What is EIS

The EIS is an Enterprise Information System that is used to track data for all people and organizations related to or served by the Department of Health and Human Services, Aging and Disability Services. The EIS allows for the integration of data across all service populations and providers.

Think of the EIS as a toolbox, from which you will be able to pull tools that will help you with your job; and just as every carpenter knows, you have to know which tool to use to get the job done right.
Components

EIS is comprised of several component systems. These are tools in the EIS toolbox available to help you do your job. Each user profile within the system has access to specific tools. For PCP users, the tools are:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>People</strong></td>
<td>Information for all people related to or served by the Office of Aging and Disability Services.</td>
</tr>
<tr>
<td><strong>My Events</strong></td>
<td>Utilized for quick access to clients by adding available clients to My Clients list.</td>
</tr>
<tr>
<td><strong>Assessments</strong></td>
<td>Used for all sorts of assessment tools. The PCP assessment will be located in this menu.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>Allows for capturing narrative text on service recipient’s PCP and related team meetings notes. Notes will be attached directly to the PCP through the Notes region of the PCP assessment.</td>
</tr>
</tbody>
</table>
Accessing EIS

You will be accessing the Enterprise Information System (EIS) through the Internet using Internet Explorer. The link to EIS can be found from the Behavioral Health Data Center home page. (**Note: EIS will ONLY work with the Internet Explorer browser. Currently, EIS has only been tested to up to Version 8 of EIS. If you happen to have a newer version, please contact your local IDS (Incident Data Specialist) within your District for instructions on how to make your system compatible. **)  

http://www.maine.gov/dhhs/bh/EISsystem/InternetIndex.html

Above is the web address to the Behavioral Health page. This page provides you with the button to Log onto EIS. (**Note: This should be the page that you bookmark (favorite) and/or create a shortcut for your desktop**):

1. **Click on the Log onto EIS button**

![Image of Log onto EIS button](http://www.maine.gov/dhhs/bh/EISsystem/InternetIndex.html)
This will bring you to the **Log on** screen for EIS. This is where you will enter your *Username* and *password*.

Username:
Password: (it is case sensitive).

2. Click **Log On**

(If you try three times and lock yourself out of the system then you will need to contact Lisa Merrill to reset your password)

- 493-4121
  Lisa.Merrill@maine.gov

**Note:**

Your username is unique to you and it determines your security access in the EIS system. If you find that you need additional information or functionality that you cannot currently access, contact your supervisor.
The EIS Home Page

The first page of the EIS that appears after logging on is the Home page. You can access this page at any time by clicking HOME in the EIS menu bar.

Note:
The EIS system has a security feature that logs you off the system if you do not use it for 33 minutes.
Navigating in EIS

At the top of every EIS screen (in the EIS header) is a navigation bar that can be used to go back to previously visited screens. It looks like this (once you have navigated through the system):

![Navigation Bar](image)

In addition, on some list pages, **PREVIOUS PAGE** and **NEXT PAGE** buttons appear at the bottom to aid in navigating through a longer list.

![Previous Page and Next Page Buttons](image)

Your **BACK** and **FORWARD** buttons in Internet Explorer should **NOT** be used to navigate, because you will lose your history and your changes will not save.

**Note:**

To minimize Internet Explorer tools, press the **F11** key on your keyboard. Press **F11** again to bring them back.
Locating and Anchoring a Person

There are multiple ways to locate a person within the EIS system,

Locate person through *People* Menu

1. Click on **PEOPLE** in the EIS Menu.

2. View the *People List* page.

3. Click on **NEXT** to see additional people in your people list (if any).
4. Click on your designated individual’s **ID** number (to the left of their name) to **Set Anchor**.

Now that the person has been *set as an anchor*, all navigation through the system is connected directly to that person and lists will be filtered to show only those items directly connected to them.
Helpful Hint:

You may also type in the beginning of the individual’s last name before the % symbol in **LAST NAME QUICK FIND** and then click the **GO** to find your individual.

---

Remember to Click on your designated individual’s *ID* number (to the left of their name) to **Set Anchor** before proceeding to the next step.
Locate person from My Clients List in My Events Menu

Add Client to My Clients in MY EVENTS page

1. Click on (Set My Preferences) located bottom middle of My Events page.

2. Add your e-mail address to profile page, SAVE.

3. Scroll to top right, CLICK show menu and select Client Preferences.
4. Click on clients name in **Available Clients** list, Click > button to move client to the **Selected Clients** box.

5. **SAVE** and return to My Events Page.
6. Click on your designated individual’s **GO** (to the right of their name) to **Set Anchor**.

Now that the person has been set as an anchor, all navigation through the system is connected directly to that person and lists will be filtered to show only those items directly connected to them.

**Helpful Hint:**

If you press the **CTRL** key on your keyboard and use your scroll ball on your mouse, you can make the text on the screen larger or smaller.

**Helpful Hint:**

Clicking on **HOME, PEOPLE, MY EVENTS**, or logging off the EIS system will clear the anchor point.
Accessing and Updating an Open PCP Assessment

1. After setting anchor to designated client, select **Assessments** from EIS Menu.

   ![Assessment List](image)

   This brings you to the **assessment list** page. (**NOTE**Providers will not see the Open Assessment until the Case Manager enters an initial PCP assessment.) Case Manager’s see page 16 to “Open an initial PCP Assessment”.

2. You will notice that you now have a **DS PCP FORM** listed for the client that you anchored on.

3. Click on the **ID** number corresponding to the Open Assessment (No End Date) **DS PCP FORMS**.

4. The system will bring you to the **Assessment General** page.
5. In order to access the PCP information, click on the **Show** menu located on the right hand side of the **General Assessments** screen, and then click on **Questionnaire**.

You will then be brought to the first **Dimension** of the **PCP Assessment, Personal Plan Face Sheet**:
Assessments are made up of several Dimensions. The PCP Assessment also has many dimensions in order to capture all of the information related to the PCP.

In order to access the specific dimensions, click on the drop down titled **Dimensions** in the middle of the page.

(**NOTE** Remember to click the Save button before moving on to another Dimension):
CASE MANAGERS ONLY

Adding an Initial PCP Assessment –

1. Once anchored on client, click on Assessments.

This will bring you to the Assessment List page. If you are entering an initial PCP Assessment, this page will not list any Assessments for view.
2. To create an Initial PCP Assessment, click the Add button.

You will receive a screen asking for the Start Date of the Assessment. The system Autofills the clients name and the Organization that you, the user, is assigned to.

3. Please enter the Start Date to reflect the date of opening the assessment. Click the Next button.
4. Click on the Instrument Type: **DS PCP Forms (Version 1)**

5. Click **Finish**

After clicking the Finish button, the system will bring you to the **Assessment General** page.
6. In order to access the PCP information, click on the **Show** menu located on the right hand side of the screen, and then click on **Questionnaire**.

You will then be brought to the first **Dimension** of the PCP Assessment, **Personal Plan Face Sheet**.
Assessments are made up of several Dimensions. The PCP Assessment also has many dimensions in order to capture all of the information related to the PCP.

7. In order to access the specific dimensions, click on the drop down titled **Dimensions** in the middle of the page.

(**NOTE** Remember to click the Save button before moving on to another Dimension):

**IMPORTANT:** Once all portions of the PCP Assessment have been completed and approved by the Case Manager and/or Case Manager Supervisor, please be sure to check the lock check box on the Assessment General page. This is crucial to ensuring that once finalized, the data contained in the Assessment is not altered. See page 25 Lock Completed PCP Assessment)***
CASE MANAGERS ONLY
Create a new version for PCP changes, addendums and new annual PCP date

Create a NEW VERSION from a Completed PCP Assessment

1. Follow the instructions on page 7 anchoring on a client.

2. After anchoring on your client, click on Assessments in the left hand menu.
3. You will notice that you now have a DS PCP Assessment listed for the client that you anchored on.

4. To update the PCP Assessment, click on the ID # to the current (No End Date) DS PCP FORMS Assessment.

5. This will bring you to the Assessment General page.
6. To create a workable copy of the Assessment, click on the **New Version** button:

7. A screen will appear that already auto fills the **Organization** of you the User.

8. You will need to enter a **Start Date** for this New Version of the PCP. Leave the **End Date** blank, click the **OK** button.
Your screen will refresh and bring you to the **Assessment General** page. This is now a workable document for you to make any necessary changes. By Creating a New Version of the current PCP Forms, the EIS copies all of the entered data in the Questionnaire into a workable document allowing the user to just make necessary changes.

9. **Click on the Show menu, go to Questionnaire.**

10. Make any necessary changes in any of the dimensions.

**NOTE** Remember to **save** your changes before switching to a new dimension.

**IMPORTANT:** Once all portions of the PCP Assessment have been completed and approved by the Case Manager and/or Case Manager Supervisor, please be sure to check the **lock check box** on the **Assessment General page**. This is crucial to ensuring that once finalized, the data contained in the Assessment is not altered. See page 25 Lock Completed PCP Assessment)***
CASE MANAGERS ONLY
Lock Completed PCP Assessment

Once all portions of the PCP Assessment have been completed and approved by the Case Manager and/or Case Manager Supervisor, please be sure to check the lock check box on the Assessment General page. This is crucial to ensuring that once finalized, the data contained in the Assessment is not altered.

1. Open the DS PCP Form (no end date) for the client that you have completed and approved the PCP Assessment for.

2. Click Locked box.

3. Click OK to message box.

4. Click SAVE
Attaching the DS Plan Review Note

The *DS Plan Review Note* is a note specific to the annual PCP, and is a place to document quarterly and semi-annual PCP reviews. This note is *attached* to the *DS PCP Assessment*.

**NOTE:**

If changes/modifications are done to the Plan then the Assessment needs to be Re-versioned and changes made (see pg. 21)

1. Follow instructions on page 7 to *anchor a client*.
2. Click on *Assessments* on left hand menu.
3. Click on the **Assessment ID #** of the current **DS PCP Forms Assessment**:

![Image of the Enterprise Information System (EIS) interface with the Assessment ID # highlighted]

4. Click on the **Show** menu and select **Notes** from the DS PCP FORMS Assessments.

![Image of the EIS interface with the Notes tab highlighted]

Welcome to EIS Page 27
5. This will bring you to the **Notes List** page and will connect this Note to the PCP Assessment. Click the **Add** button.

6. Please provide a **brief title** of the **Note** (**Note** please do not use clients name or initials in the **Title**).

7. **Enter a Start Date** (should be the date of the meeting) and an **End Date** (Most generally the same as the start date). Click the **Next** button.
8. Click on the **DS Plan Review Note (Ver1)**; Click **Finish**.

9. Fill out the **Note** with information from the meeting. Please remember to Click on the **Save** button often, as this is a lengthy document. (**Note** Notes are open for editing for 24 hours.)
Printing the DS PCP Form

To *Print* the *PCP Form*, from the *Questionnaire* dimensions of the *Assessment*,

1. Click on the *Printer icon* in the top right hand corner.

A window will open that will list available reports.

2. Click on the *Report* that you would like to run. Use the > button to view more available reports.
The **DS PCP Form-Assess 4531-All Forms** will bring all of the information entered in the Assessment into a PDF format that will allow you to print the entire assessment. Additional print friendly Reports are listed for individual Dementions.
Assistance with EIS

If you need assistance with EIS, please contact Lisa Merrill.

- (207) 493-4121
- Lisa.Merrill@maine.gov

If you are unable to reach Lisa, you can also contact your local IDS (Incident Data Specialist) within your District for EIS technical assistance.

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