

User Guide

Restrictive Measures

May 3, 2024

Table of Contents

1 Introduction.....	1
2 Security Roles	2
2.1 Security Roles	2
3 Logging in for the First Time.....	3
3.1 Reset Password	15
3.2 Unlocking an Account.....	28
4 Accessing the Restrictive Measures Site	39
4.1 Filter for Requests	48
4.2 Member Dashboard	49
5 Creating a New Restrictive Measure Request for an Existing Member	50
5.1 Submitting a Restrictive Measure Request to DHS	61
5.2 Withdrawing a Restrictive Measure Request	61
6 Creating a Restrictive Measure Request for an Unlisted Member	63
7 Reviewing and Updating a Restrictive Measure Request	64
8 Editing a Restrictive Measure	65
9 Reporting the Use of an Approved Restrictive Measure	68
9.1 Capturing Utilization Data	70
9.2 Viewing Utilization Data	72
9.2.1 Accessing PDF.....	73
9.3 Editing Utilization Data	73
10 Discontinuing an Approved Restrictive Measure	74
11 Viewing Restrictive Measure Request History.....	80
12 Restrictive Measure Request Renewal	81

13 Add a Restrictive Measure to a Certified Request.....	82
14 Accessing the PDF Report.....	84
15 Accessing the Summary PDF	86
16 Appendix A: Support Resources	88
17 Appendix B: Glossary	89

1 Introduction

The internet-based Restrictive Measures application is the tool used to request Wisconsin Department of Health Services' (DHS) approval for the use of restrictive measures to support individuals who live in community settings in all Medicaid-funded adult long-term care programs. Medicaid-funded adult long-term care programs include: Family Care, Family Care Partnership, IRIS (Include, Respect, I Self-Direct) and PACE (Program of All-Inclusive Care for the Elderly). Community settings include individuals residing in their owned or rented home, in other supported living arrangements, adult family homes, community-based residential facilities, and residential care apartment complexes. Community-based vocational settings and day service programs are also community settings.

Managed care organizations and IRIS consultant agencies access the Restrictive Measures application via the Long Term Care Information Exchange System to request approval for use of restrictive measures, submit data on the use of approved restrictive measures, and notify DHS when a restrictive measure has been discontinued. Use of restrictive measures must comply with policies outlined in the [Restrictive Measures Guidelines and Standards publication](#).

2 Security Roles

2.1 Security Roles

Several different security roles are available through the Long Term Care Information Exchange System. Access to certain features or functions on the Restrictive Measures application is determined by the security role assigned to a user. Security roles and allowable functions are as follows:

- **State Admin.**—This DHS role receives emails for all requests. They can unlock requests to further edit, certify, approve, or deny measures and require further information from the user per measure. They can also enter a discontinue date and reason to a certified measure.
- **State Read Admin.**—This DHS role can only read the requests and measures.
- **Normal User**—This role is assigned for a specific organization. They can create, update, and send requests to DHS for approval. They can also enter a discontinue date and reason to a certified measure. Users with administrative permission can also set up new users, inactivate users, and manage permissions for users.

Information about setting up new users, inactivating users, and managing permissions is available in the User Management Guide, which can be accessed from the menu on the left side of the LTCare Information Exchange home page. This link will only appear for users who have access to these functions.

Note: Users are recommended to use Google Chrome or FireFox web browsers. Resources for helpdesk support are available in [Appendix A: Support Resources](#).

3 Logging in for the First Time

Restrictive Measures account users will be required to complete the steps for multi-factor authentication (MFA) when logging in for the first time and every 60 days thereafter.

With MFA, users are asked to provide two authentication methods to verify their identity when logging in to the Restrictive Measures application. MFA will protect accounts against unauthorized access in case user login credentials are compromised.

MFA will be required to log in when a user changes any of the following account information:

- Account password
- Email address

When using MFA, a user will be sent a one-time code through their choice of email, text message (SMS), or phone call.

1. Access the Restrictive Measures application at <https://ltcareies.forwardhealth.wi.gov/restrictiveMeasures/#/login>.

The Restrictive Measures login page will be displayed.

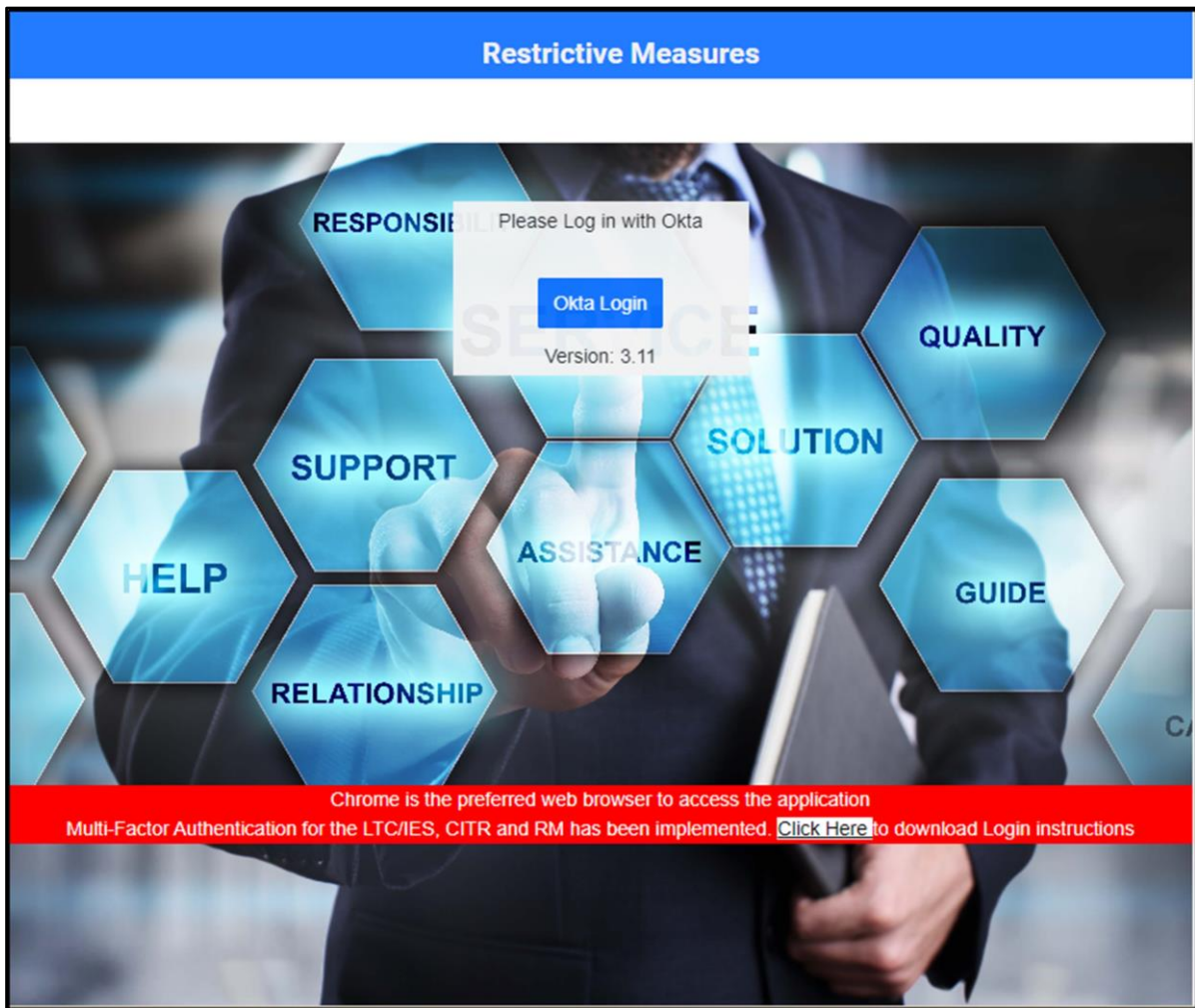
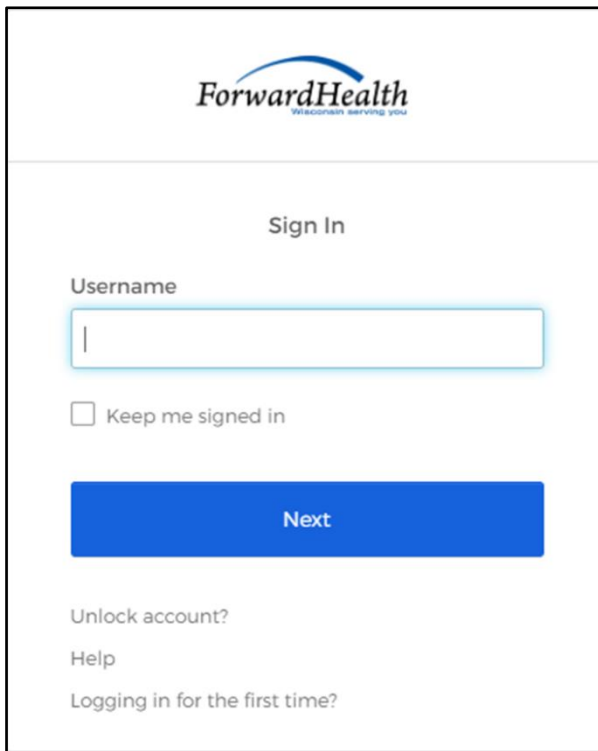


Figure 1 Restrictive Measures Login Page

2. Click **Okta Login**.

A Sign In box will be displayed.



ForwardHealth
Wisconsin serving you

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

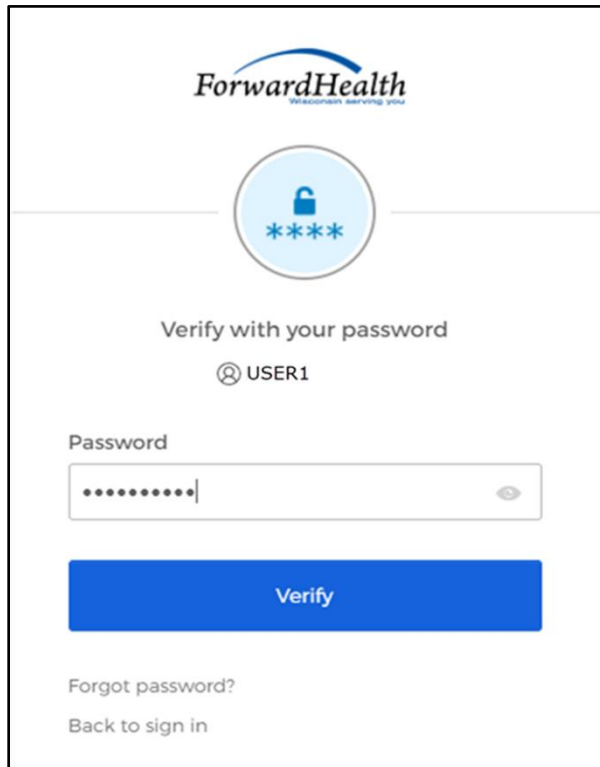
[Help](#)

[Logging in for the first time?](#)

Figure 2 Sign-In Box

3. Enter the user's username.
4. Click **Next**.

A Verify with your password box will be displayed.



ForwardHealth
Wisconsin serving you

Verify with your password

USER1

Password

Verify

Forgot password?
Back to sign in

Figure 3 Verify With Your Password Box

5. Enter the user's password. Note: If the user's password expires when setting up MFA, a change password box will be displayed, and the user will be prompted to enter and re-enter their new password.
6. Click **Verify**.

A Get a verification email box will be displayed.

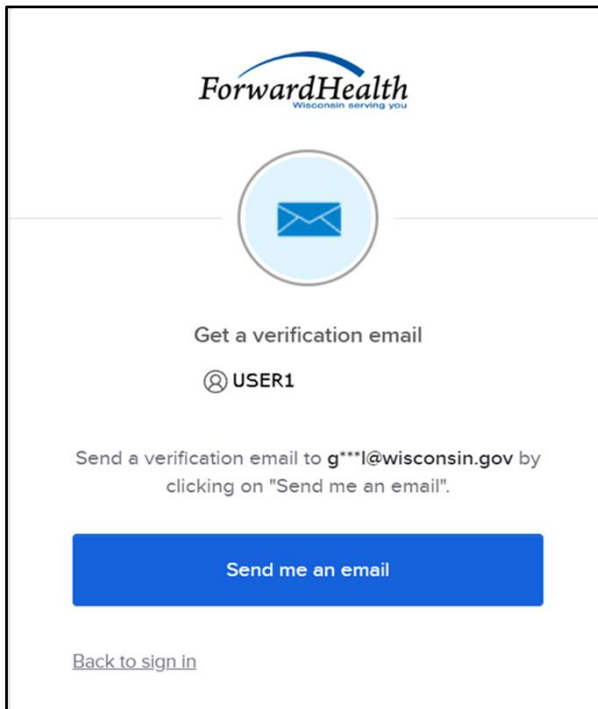


Figure 4 Get a Verification Email Box

7. Click **Send me an email**.

A box will be displayed indicating the email has been sent with a link to enter the code from the email.

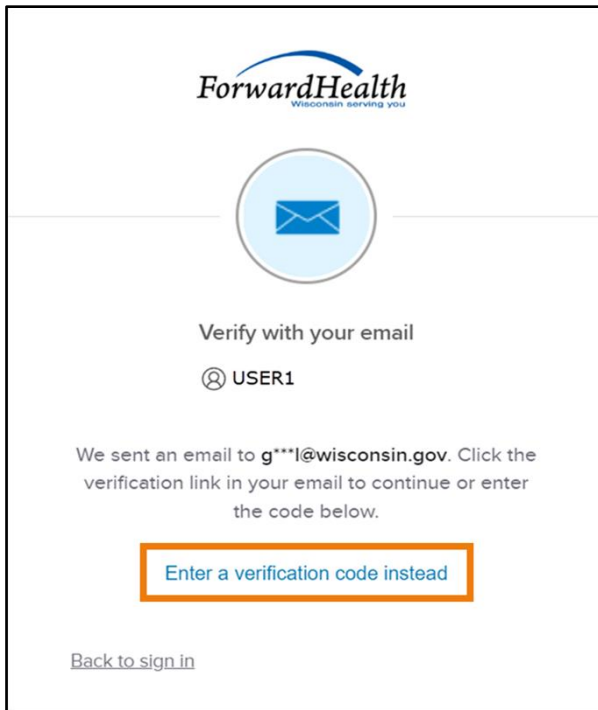


Figure 5 Verify With Your Email Box

- 8. The email with the verification code sent to the user's email address also includes a Sign In link.

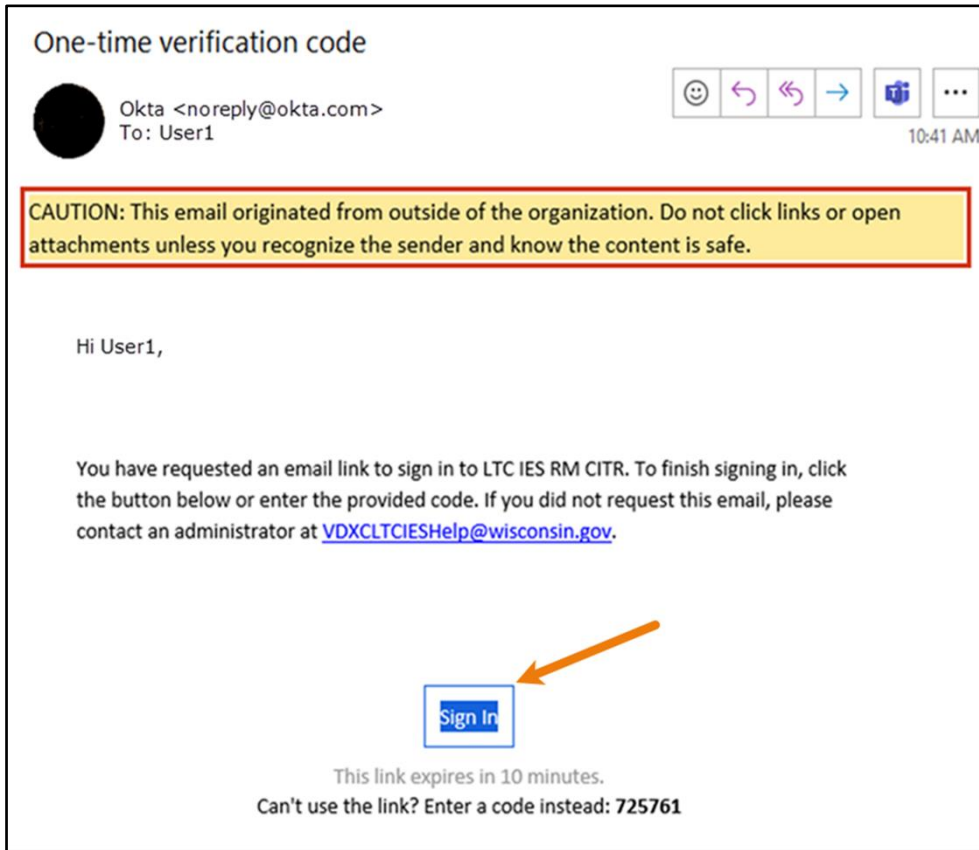
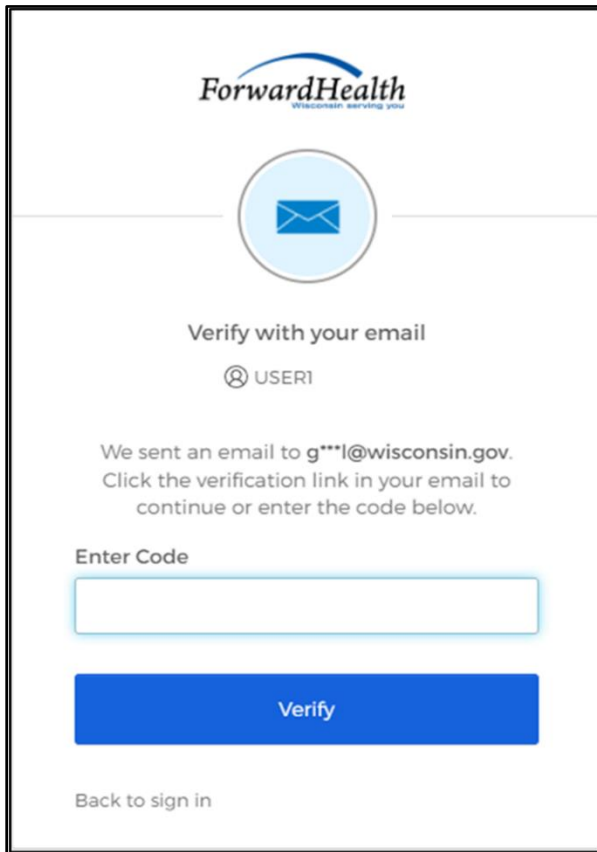


Figure 6 One-Time Verification Code Email

9. The user can choose to either:

- Click the **Sign In** link from the email.
- Capture the verification code in the email, return to the browser window, and click **Enter a verification code instead**. Enter the code from the email and click **Verify**.



ForwardHealth
Wisconsin serving you

Verify with your email

USER1

We sent an email to g***l@wisconsin.gov.
Click the verification link in your email to
continue or enter the code below.

Enter Code

Verify

[Back to sign in](#)

Figure 7 Verify With Your Email Box

A Set up security methods box will be displayed.

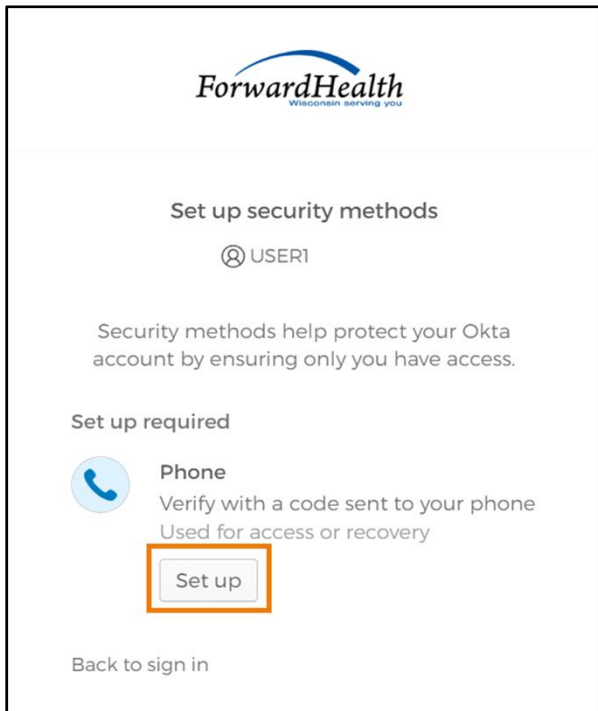



Figure 8 Set Up Security Methods Box

10. Click **Set up**.

A Set up phone authentication box will be displayed.

ForwardHealth
Wisconsin, serving you



Set up phone authentication

USER1

Enter your phone number to receive a verification code via SMS.

SMS

Voice call

Country

United States ▼

Phone number

+1

Receive a code via SMS

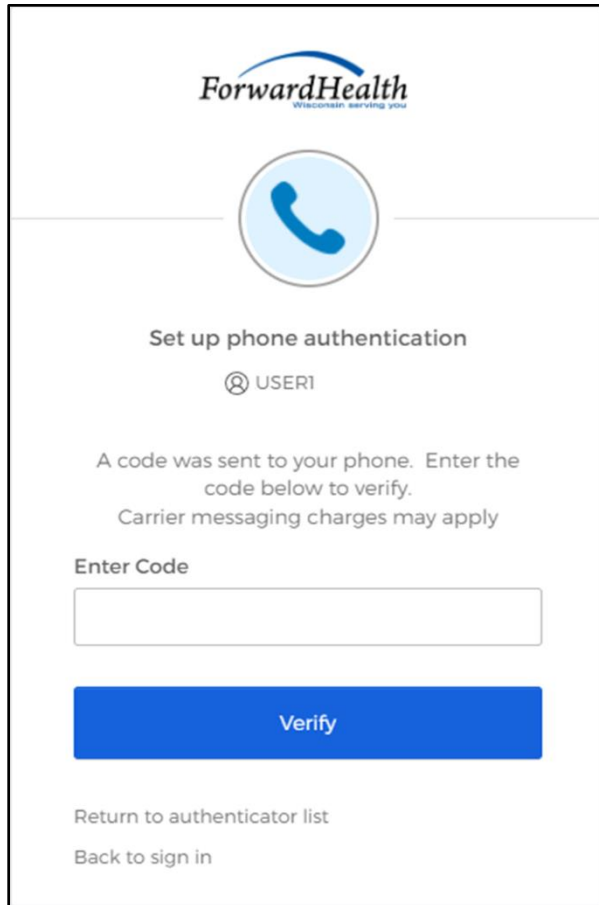
[Return to authenticator list](#)

[Back to sign in](#)


Figure 9 Set Up Phone Authentication Box

11. Select **SMS** or **Voice call** for the phone authentication method.
12. Enter the phone number.
13. Click **Receive a code via SMS** or **Receive a code via Voice call** depending on which option is selected.


A Set up phone authentication box will be displayed.



ForwardHealth
Wisconsin serving you



Set up phone authentication

 USER1

A code was sent to your phone. Enter the code below to verify.
Carrier messaging charges may apply

Enter Code

Verify

[Return to authenticator list](#)

[Back to sign in](#)

Figure 10 Set Up Phone Authentication Box

14. Enter the code that was sent via text or voice call in the **Enter Code** box.
15. Click **Verify**.

A Set up security methods box will be displayed.

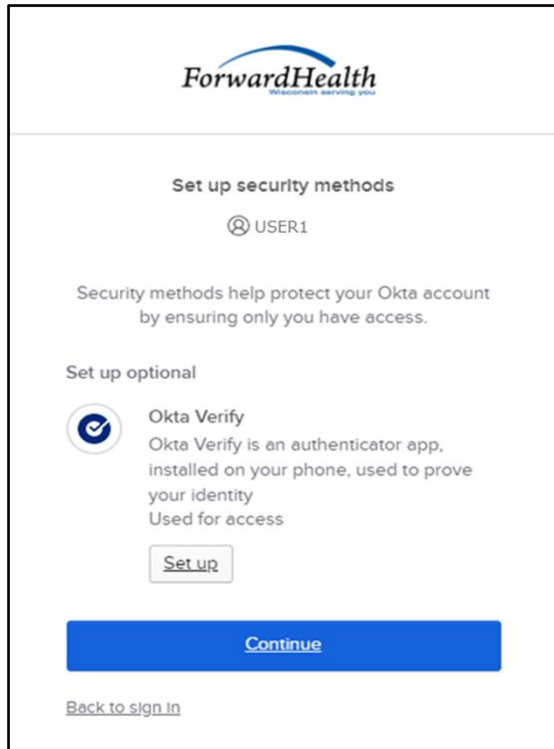


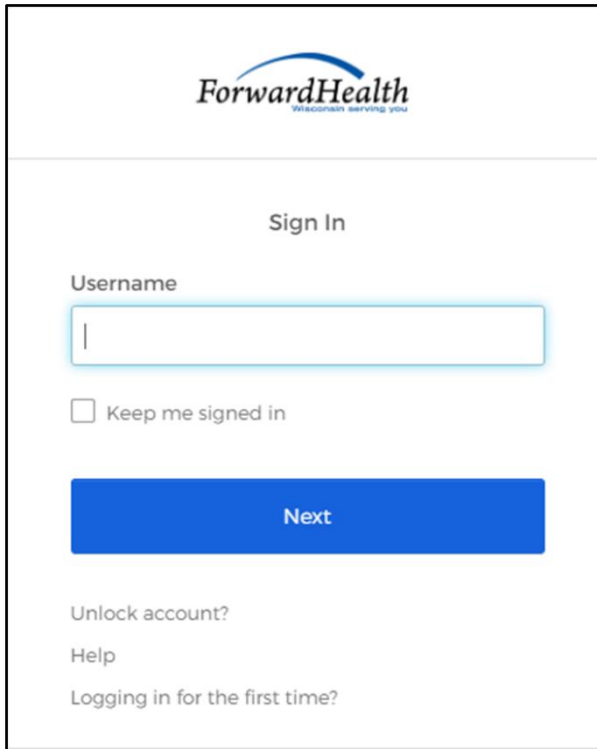
Figure 11 Set Up Security Methods Box

16. Click **Continue**.
17. MFA will be set up and the user will be signed in to the Restrictive Measures Application.

3.1 Reset Password

1. Access the Restrictive Measures application.
2. Click **Okta Login**.

A Sign In box will be displayed.



ForwardHealth
Wisdom serving you

Sign In

Username

Keep me signed in

Next

Unlock account?
Help
Logging in for the first time?

Figure 12 Sign In Box

3. Enter the user's username.
4. Click **Next**.

A Verify with your password box will be displayed.

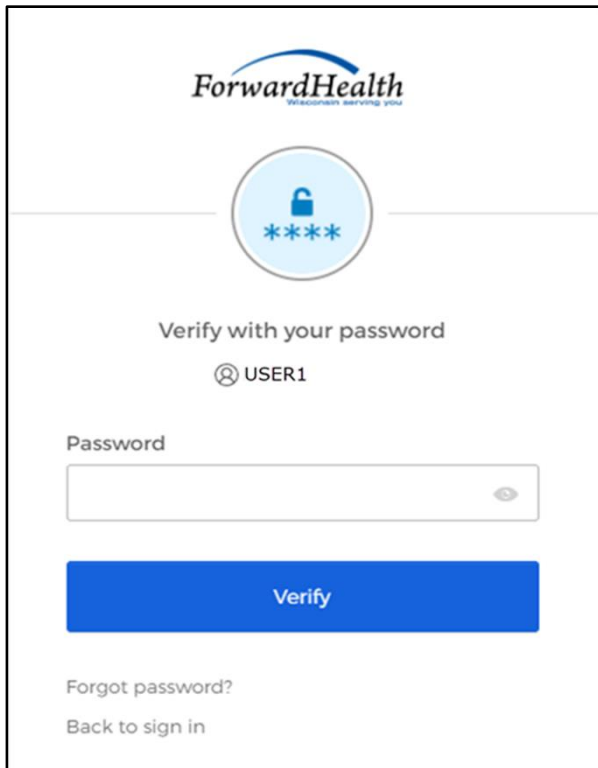


Figure 13 Verify With Your Password Box

5. Click **Forgot password?** Note: Do not enter a password here.

A Reset your password box will be displayed.

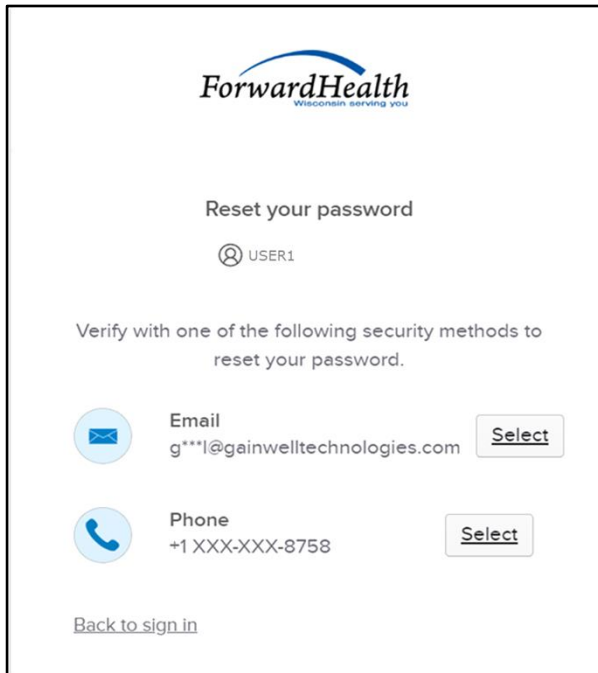


Figure 14 Reset Your Password Box

6. Click **Select** to receive a verification via email or phone.

- If the user clicks **Select** for email:
 - a. A Get a verification email box will be displayed.

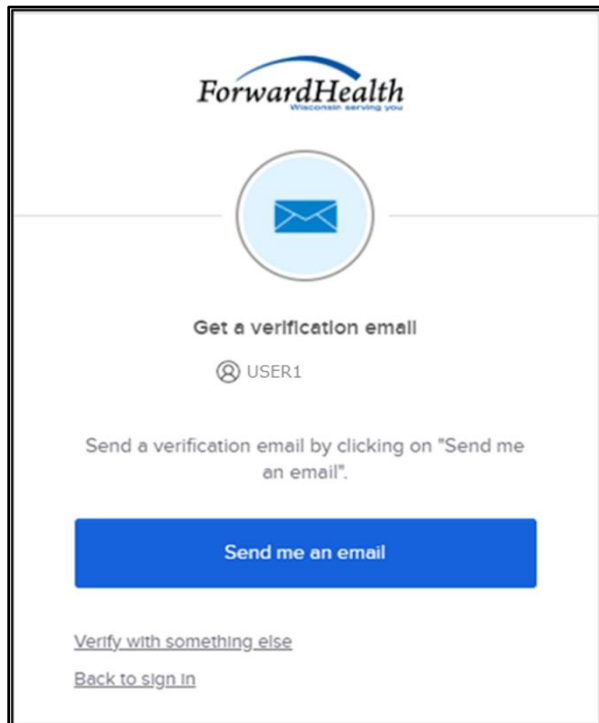


Figure 15 Get A Verification Email

- b. Click **Send me an email**. Note: The user also has the option to select **Verify with something else**, which will take them back to the Unlock account box or **Back to sign in**, which will take them back to the sign in page.

A verify with your email box will be displayed and an email will be sent.

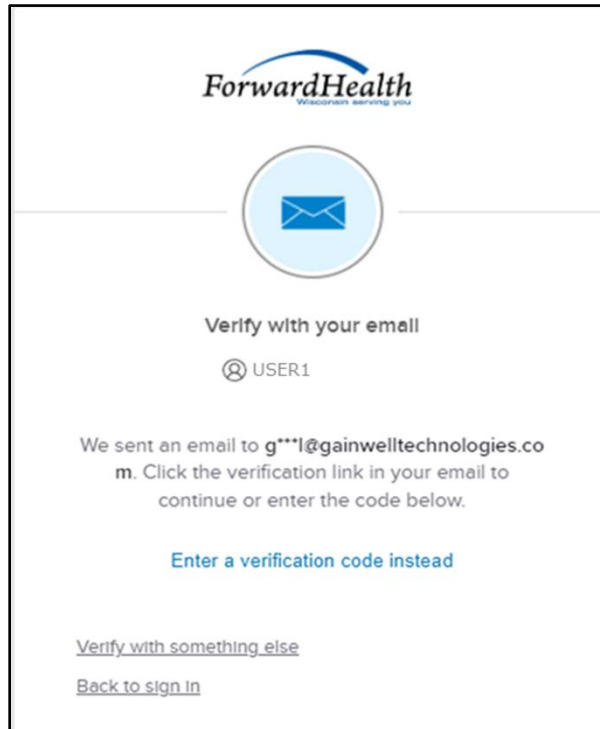


Figure 16 Verify With Your Email Box

- c. Proceed to [Step 7](#).

- If the user clicks **Select** for phone:
 - a. A verify with your phone box will be displayed.

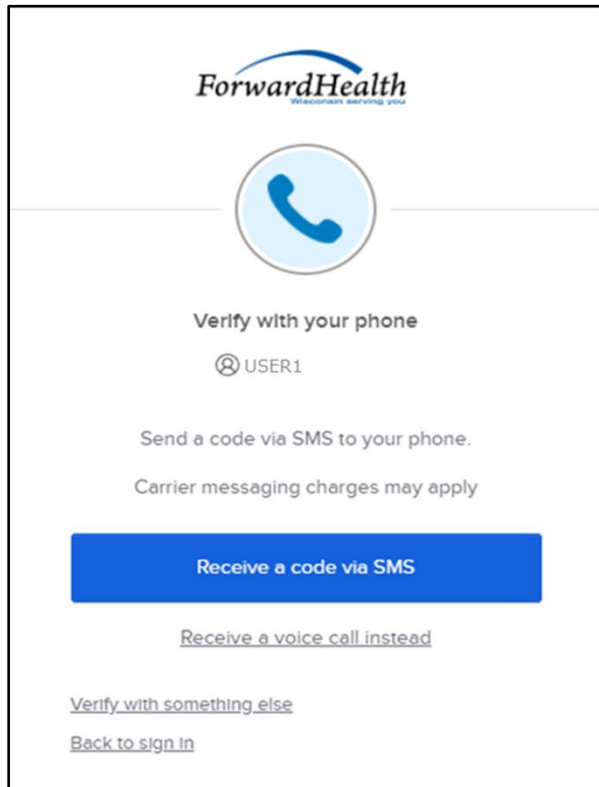


Figure 17 Verify With Your Phone Box

- b. Click **Receive a code via SMS (text)** or **Receive a voice call instead**. Note: The user also has the option to select **Verify with something else**, which will take them back to the Unlock account box, or **Back to sign in**, which will take them back to the sign in page.

A Verify with your phone box will be displayed.

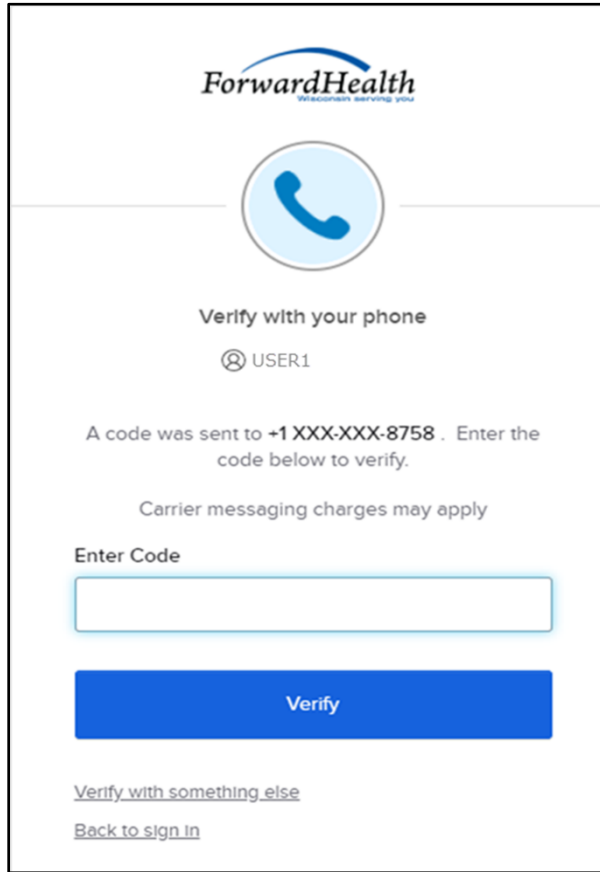


Figure 18 Verify With Your Phone Box

- c. Enter the code that was sent.
- d. Click **Verify**.

A Get a verification email box will be displayed.

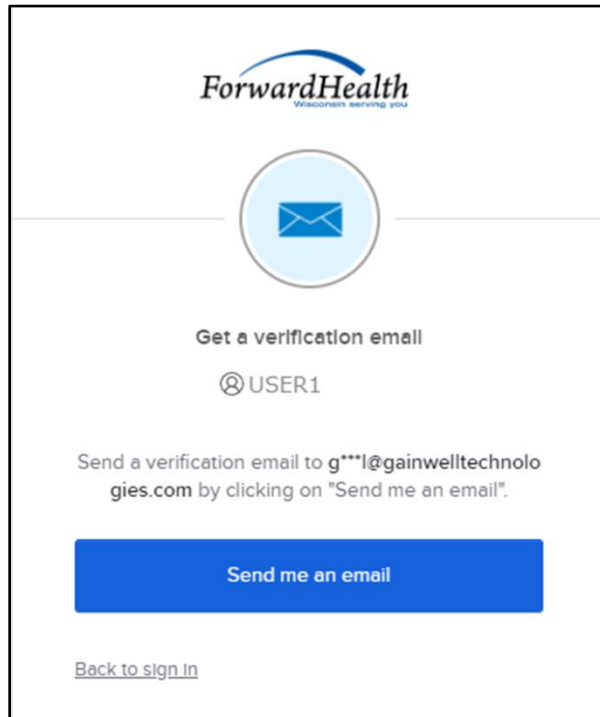


Figure 19 Get A Verification Email Box

- e. Click **Send me an email**.

A Verify with your email box will be displayed and an email will be sent.

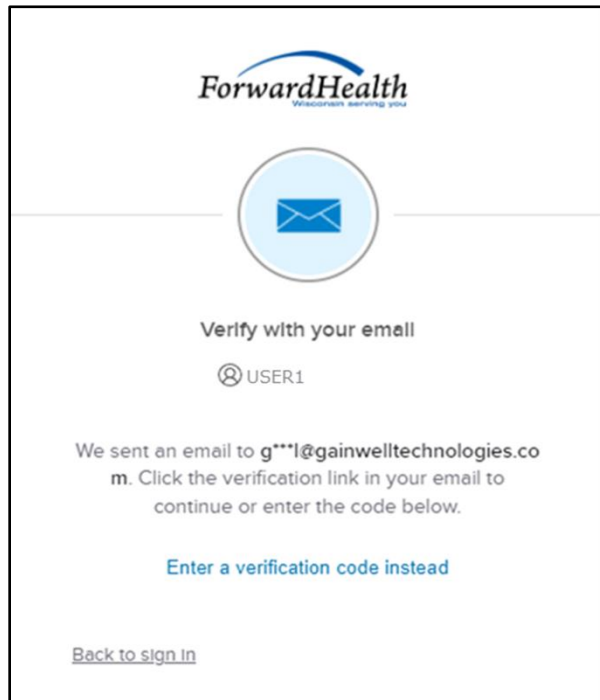


Figure 20 Verify With Your Email Box

- 7. The email sent to the user's email address includes a **Reset Password** link (Option 1) and a verification code (Option 2).

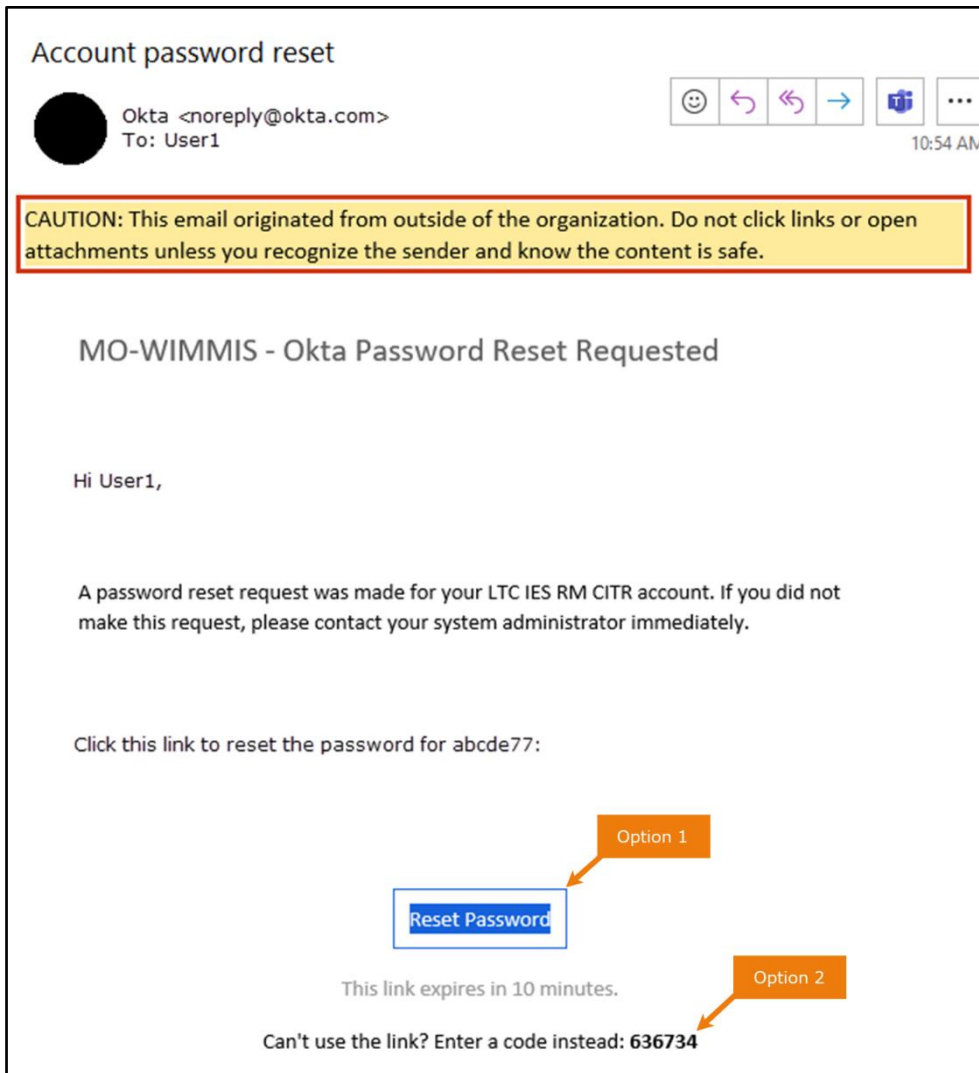


Figure 21 Account Password Reset Email

8. The user can choose to either click the **Reset Password** link (Option 1) or enter the verification code from the email (Option 2).
 - Clicking the **Reset Password** link from the email will display a verification code box.

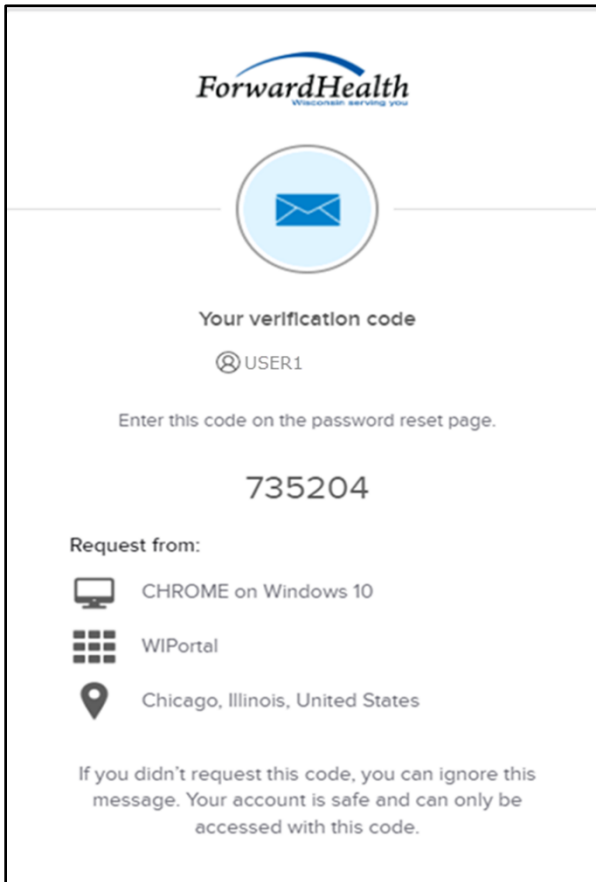


Figure 22 Verification Code Box

9. Copy the verification code from the verification code box or from the account password reset email, return to the verify with your email box, and click **Enter a verification code instead**.
10. Enter the code from the verification code box or the code from the account password reset email and click **Verify**.

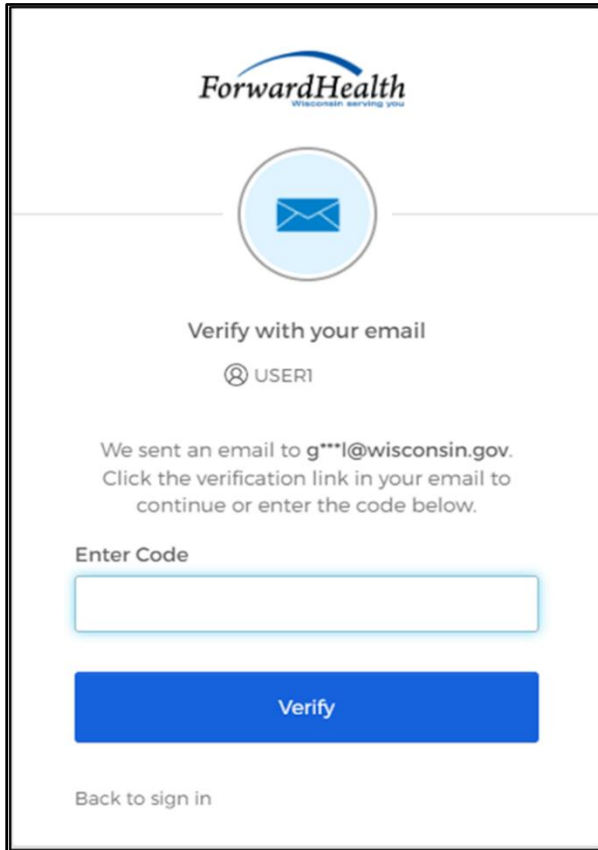
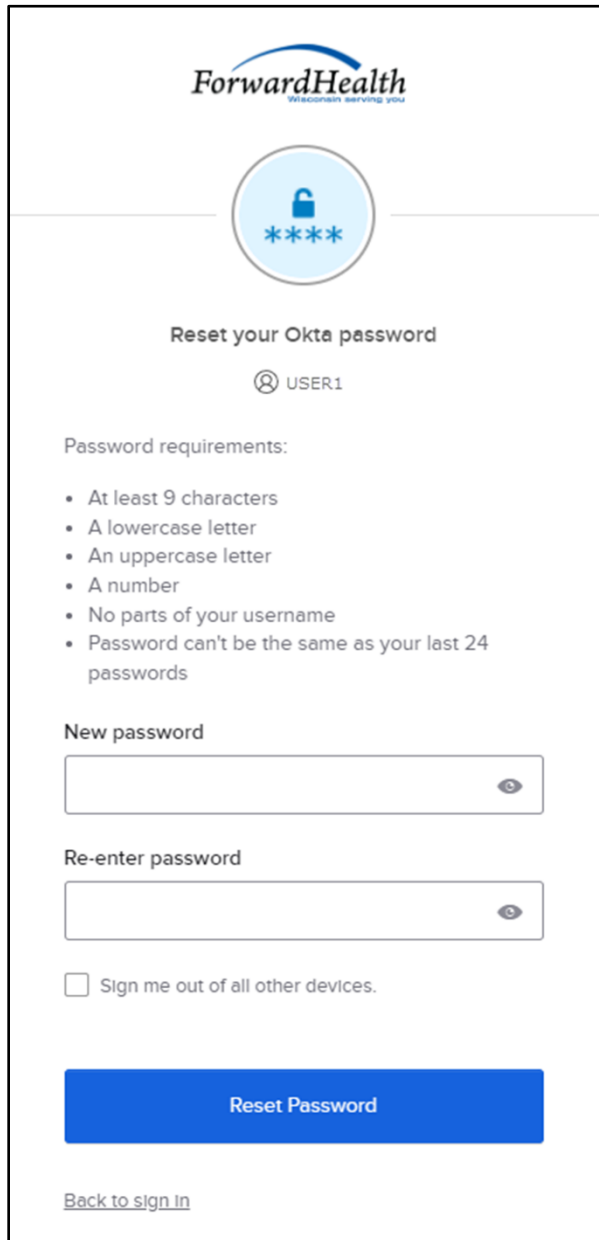


Figure 23 Verify With Your Email Box

The Reset your Okta password box will be displayed.



The screenshot shows a web form for resetting an Okta password. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a padlock and four asterisks. The main heading is 'Reset your Okta password' followed by a user identifier 'USER1'. A section titled 'Password requirements:' lists five criteria: at least 9 characters, a lowercase letter, an uppercase letter, a number, and no parts of the username. Below this are two input fields: 'New password' and 'Re-enter password', each with a toggle for visibility. A checkbox labeled 'Sign me out of all other devices.' is present. A prominent blue button labeled 'Reset Password' is at the bottom, with a link 'Back to sign in' below it.

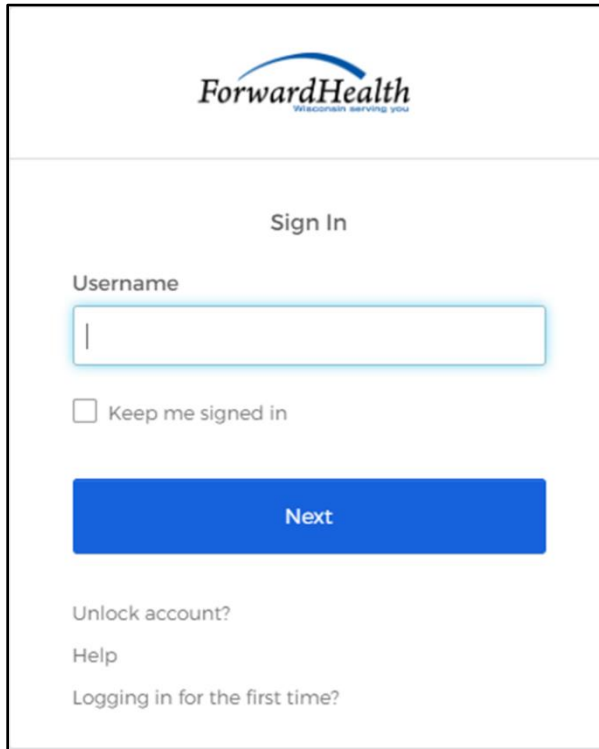
Figure 24 Reset Your Okta Password Box

11. Enter a new password (twice for confirmation).
12. Click **Reset Password**. The password will be changed, and the user will be logged in to the Restrictive Measures application.

3.2 Unlocking an Account

1. Access the Restrictive Measures application.
2. Click **Okta Login**.

A sign In box will be displayed.

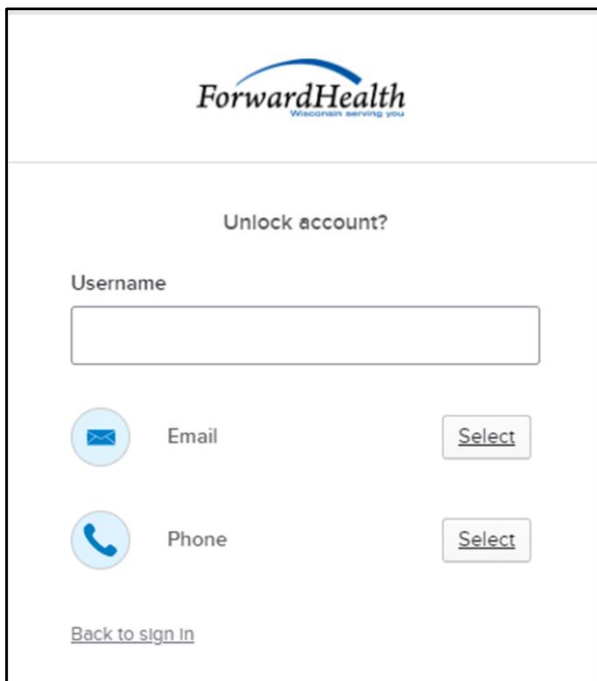


The screenshot shows the ForwardHealth Sign In interface. At the top is the ForwardHealth logo with the tagline "Wealth working you". Below the logo is the text "Sign In". There is a "Username" label above a text input field. Below the input field is a checkbox labeled "Keep me signed in". A blue button labeled "Next" is positioned below the checkbox. At the bottom of the form, there are three links: "Unlock account?", "Help", and "Logging in for the first time?".

Figure 25 Sign In Box

3. Click **Unlock account?**

An Unlock account box will be displayed.



The screenshot shows a web form titled "Unlock account?" with the ForwardHealth logo at the top. The logo includes the text "ForwardHealth" and "Wisconsin serving you". Below the title is a "Username" label and a text input field. There are two radio button options: "Email" with an envelope icon and "Phone" with a telephone handset icon. Each option has a "Select" button to its right. At the bottom left, there is a link labeled "Back to sign in".

Figure 26 Unlock Account Box

4. Enter the user's username.
5. Click **Select** to receive a verification via email or phone.

- If the user clicks **Select** for email:
 - a. A Get a verification email box will be displayed.

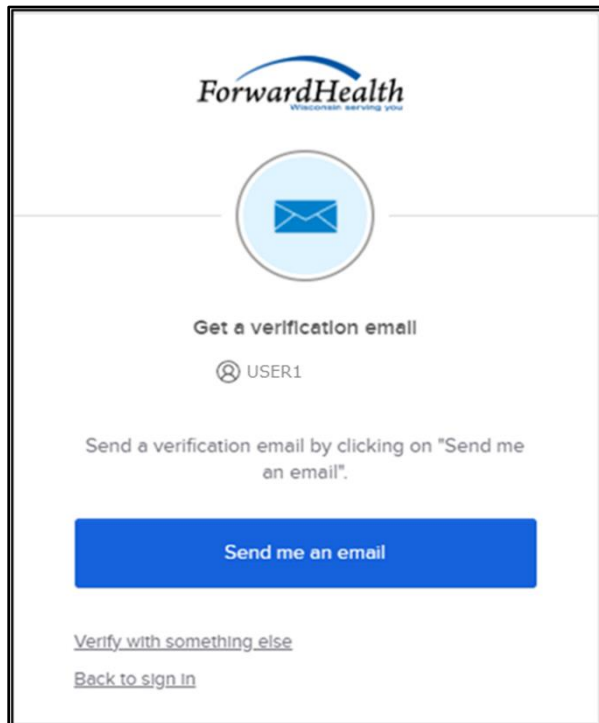


Figure 27 Get A Verification Email

- b. Click **Send me an email**. Note: The user also has the option to select **Verify with something else**, which will take them back to the Unlock account box, or **Back to sign in**, which will take them back to the sign in page.

A verify with your email box will be displayed and an email will be sent.

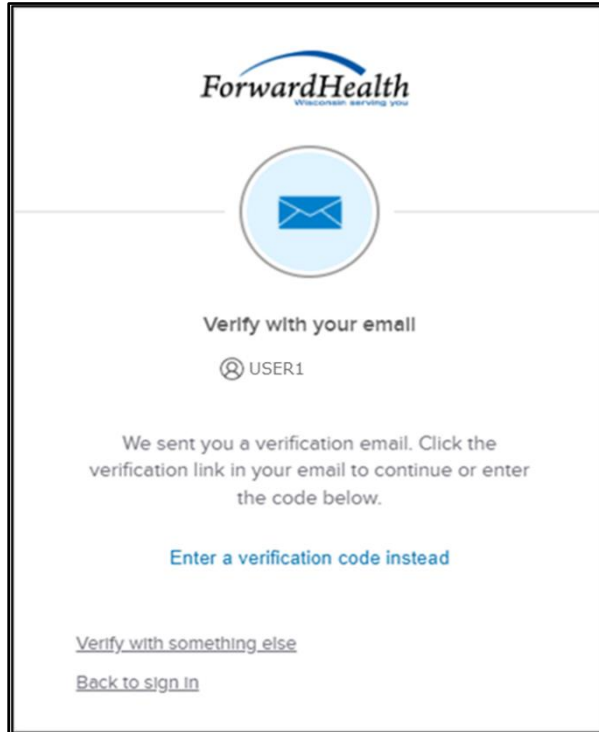


Figure 28 Verify With Your Email Box

- c. Proceed to [Step 6](#).

- If the user clicks **Select** for phone:
 - a. A verify with your phone box will be displayed.

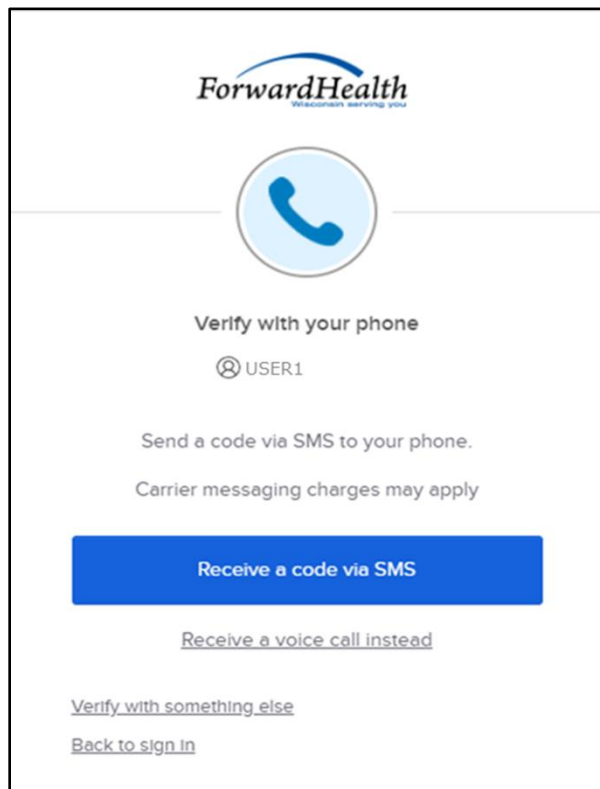
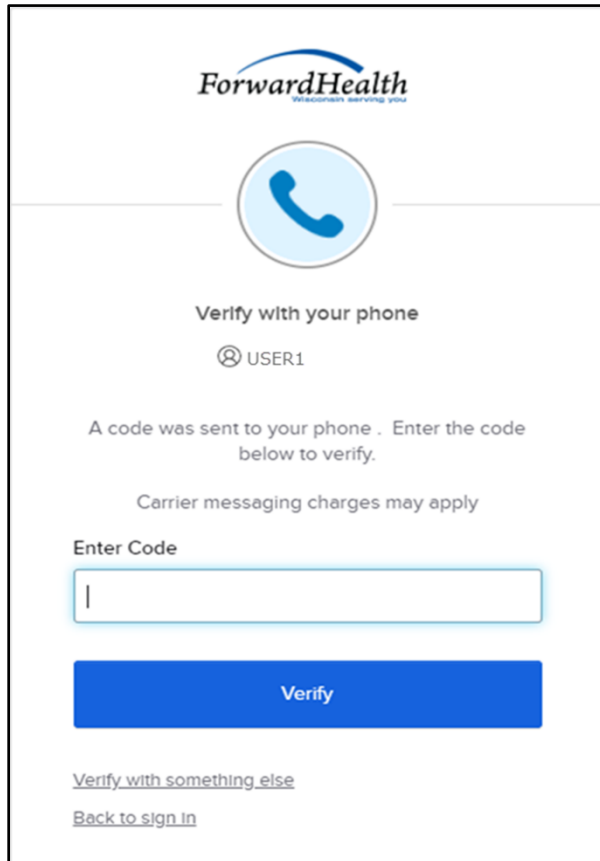



Figure 29 Verify With Your Phone Box

- b. Click **Receive a code via SMS** (text) or **Receive a voice call instead**. Note: The user also has the option to select **Verify with something else**, which will take them back to the Unlock account box, or **Back to sign in**, which will take them back to the sign in page.

A Verify with your phone box will be displayed.



ForwardHealth
Wealthier serving you



Verify with your phone

Ⓜ USER1

A code was sent to your phone . Enter the code below to verify.

Carrier messaging charges may apply

Enter Code

Verify

[Verify with something else](#)

[Back to sign in](#)

Figure 30 Verify With Your Phone Box

- c. Enter the code that was sent.
- d. Click **Verify**.

A Get a verification email box will be displayed.

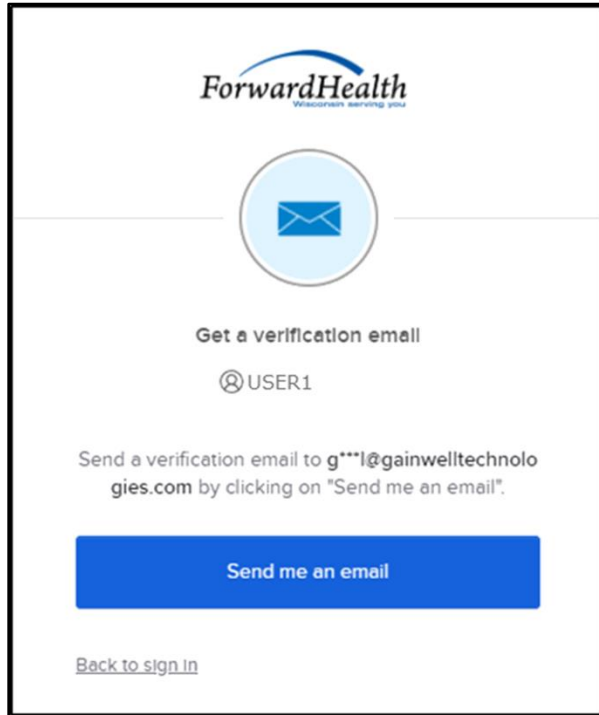


Figure 31 Get a Verification Email Box

- e. Click **Send me an email**.

A Verify with your email box will be displayed and an email will be sent.

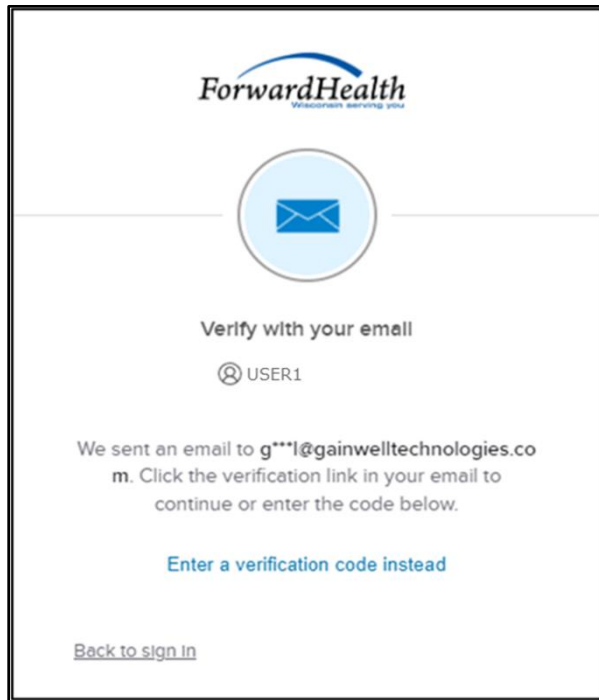


Figure 32 Verify With Your Email Box

- 6. The email sent to the user’s email address includes an **Unlock Account** link (Option 1) and a verification code (Option 2).

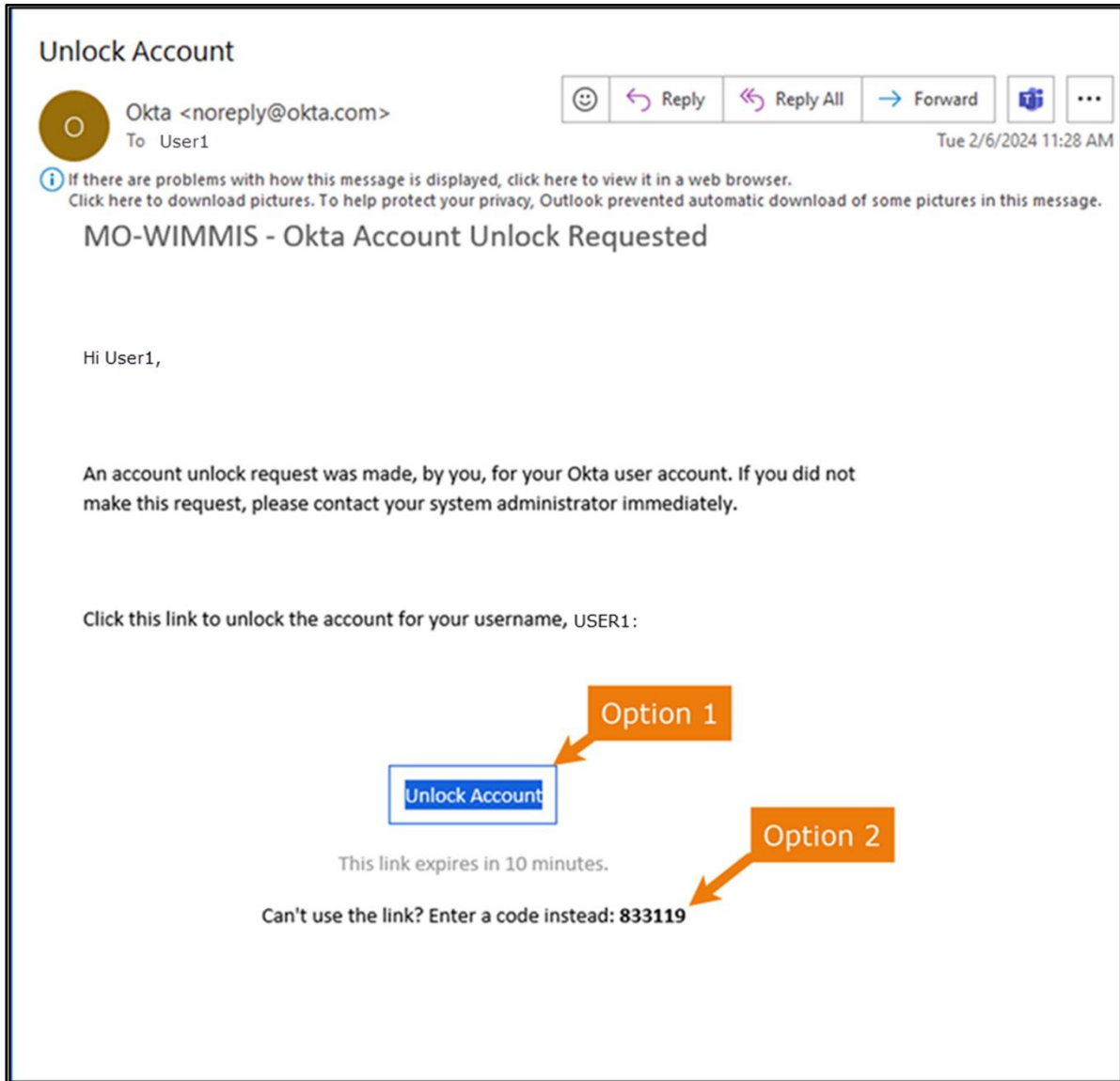


Figure 33 One-Time Verification Code Email

- 7. The user can choose to either click the **Unlock Account** link (Option 1) or enter the verification code from the email (Option 2).

- Clicking the **Unlock Account** link from the email will display a verification code box.

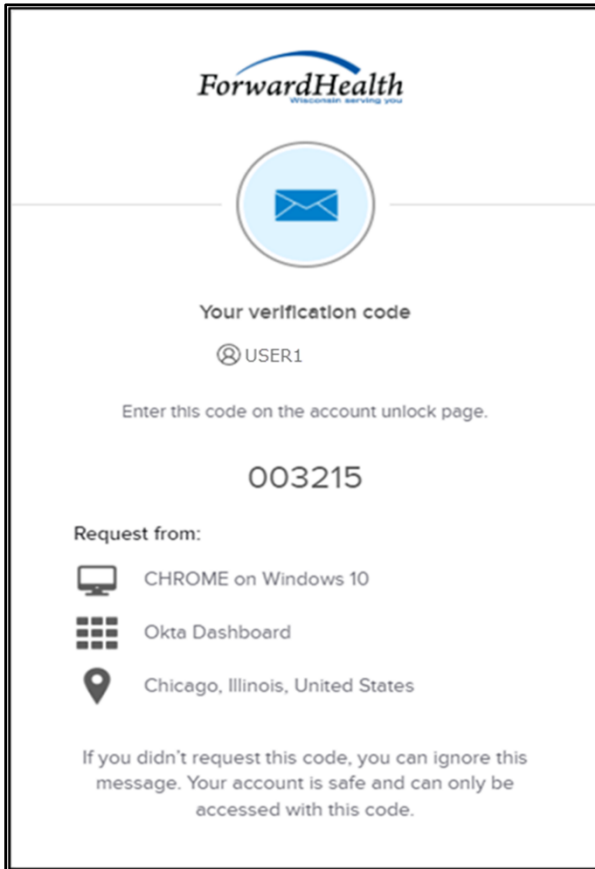
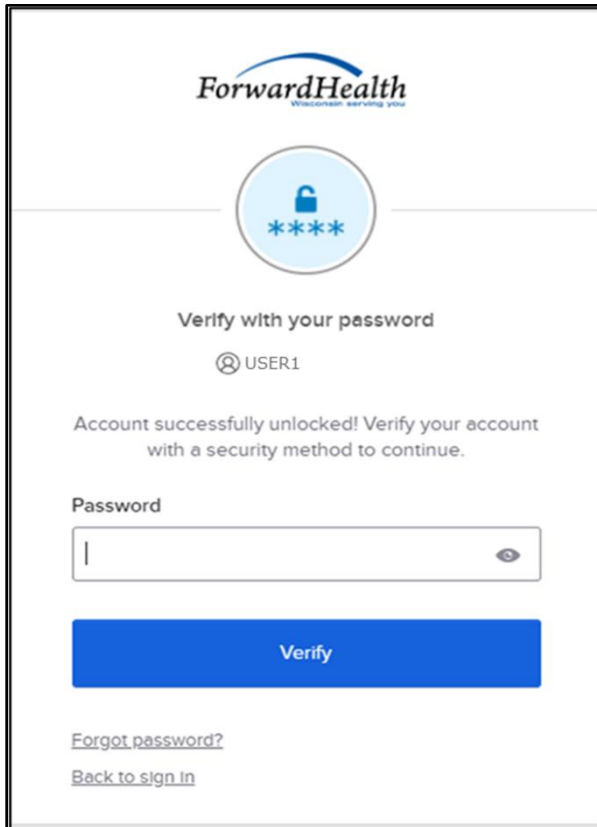


Figure 34 Verification Code Box

8. Copy the verification code from the verification code box or from the unlock account email, return to the verify with your email box, and click **Enter a verification code instead**.
9. Enter the code from the verification code box or from the unlock account email and click **Verify**.

A Verify with your password box will be displayed with a message stating the account has been successfully unlocked.



ForwardHealth
We're here to help you

Verify with your password

USER1

Account successfully unlocked! Verify your account with a security method to continue.

Password

Verify

[Forgot password?](#)

[Back to sign in](#)

Figure 35 Verification Code Box

10. Click **Back to sign in** to log in.

4 Accessing the Restrictive Measures Site

1. Access the Restrictive Measures application at <https://ltcareies.forwardhealth.wi.gov/restrictiveMeasures/#/login>.

The Restrictive Measure login page will be displayed.

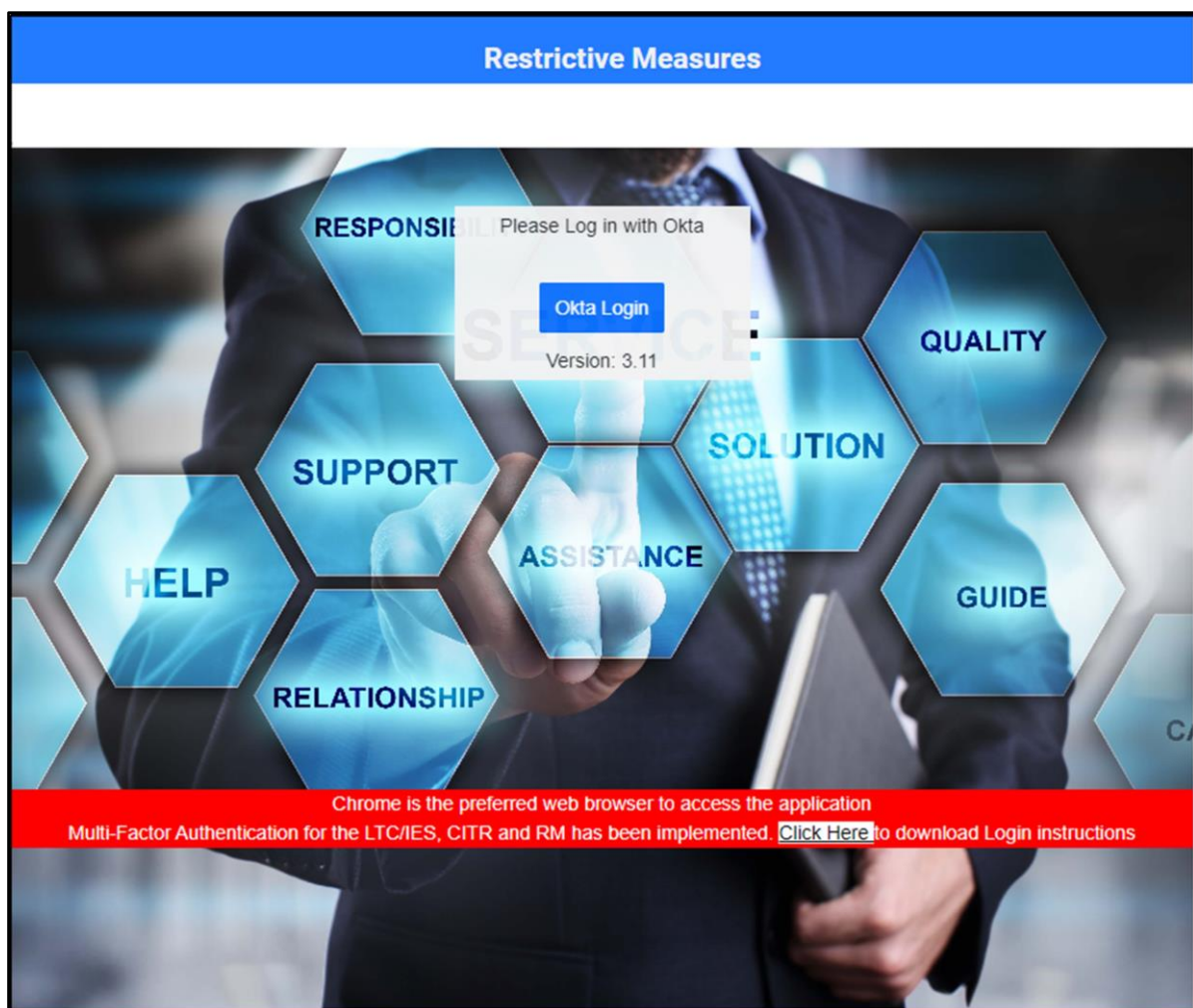
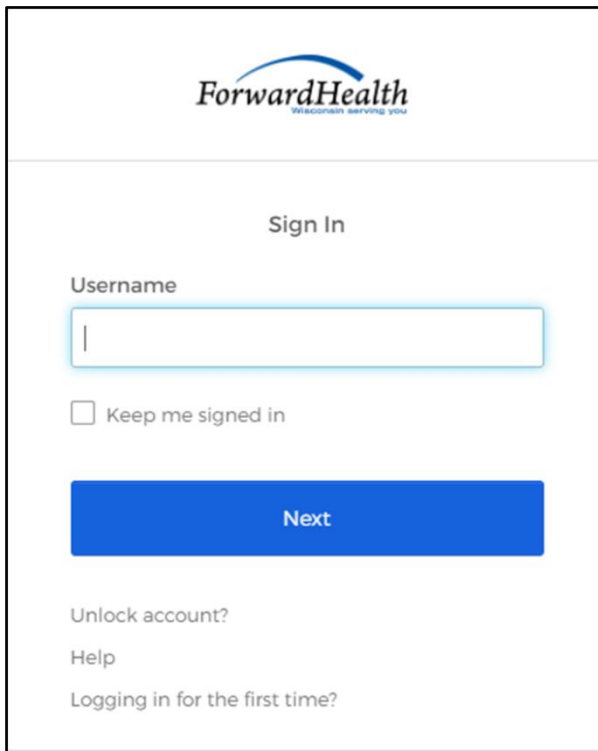


Figure 36 Restrictive Measures Login Page

2. Click Okta Login.

A Sign In box will be displayed.



ForwardHealth
Wisconsin serving you

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

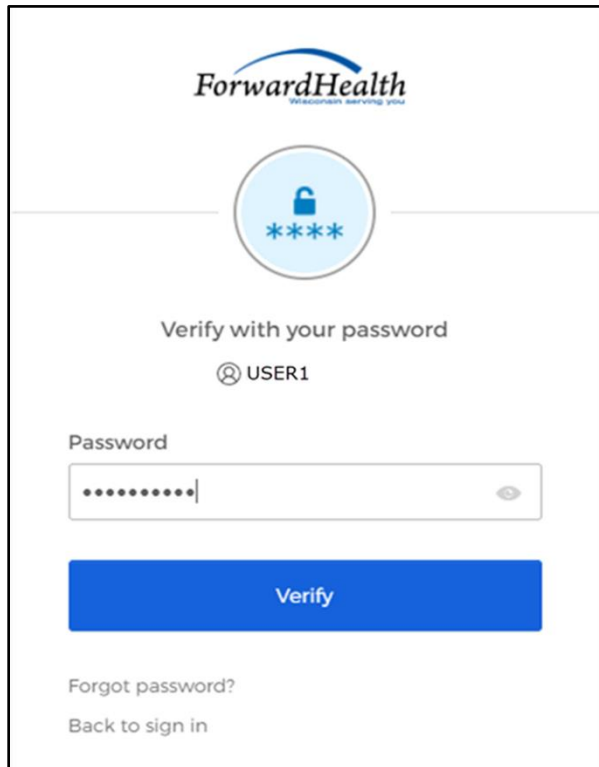
[Help](#)

[Logging in for the first time?](#)

Figure 37 Sign-In Box

3. Enter the user's username.
4. Click **Next**.

A Verify with your password box will be displayed.



The screenshot shows a web interface for password verification. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a blue padlock and four asterisks. The main heading is 'Verify with your password'. Underneath, there is a user identifier 'USER1' with a small icon. A 'Password' label is positioned above a text input field that contains several dots and a toggle icon on the right. A prominent blue button labeled 'Verify' is centered below the input field. At the bottom left, there are two links: 'Forgot password?' and 'Back to sign in'.

Figure 38 Verify With Your Password Box

5. Enter the user's password. Note: If the user's password expires when setting up MFA, a change password box will be displayed, and the user will be prompted to enter and re-enter their new password.
6. Click **Verify**.

A Get a verification email box will be displayed.

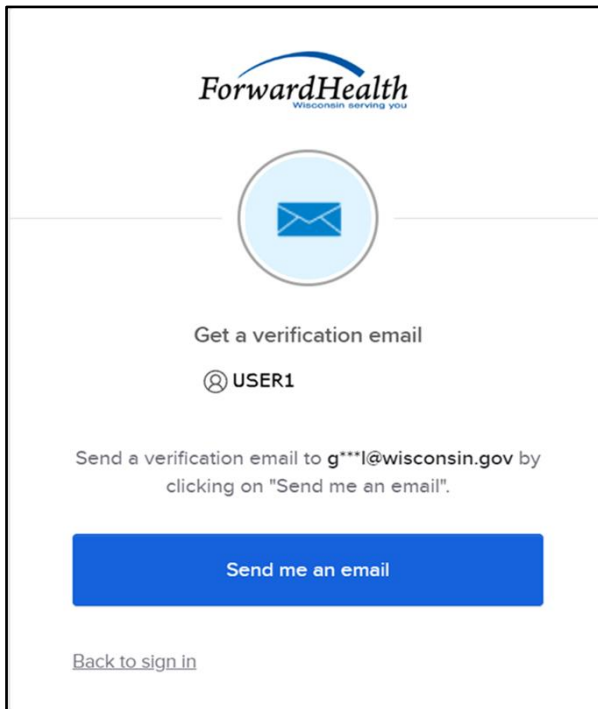


Figure 39 Get a Verification Email Box

7. Click **Send me an email**.

A box will be displayed indicating the email has been sent with a link to enter the code from the email.

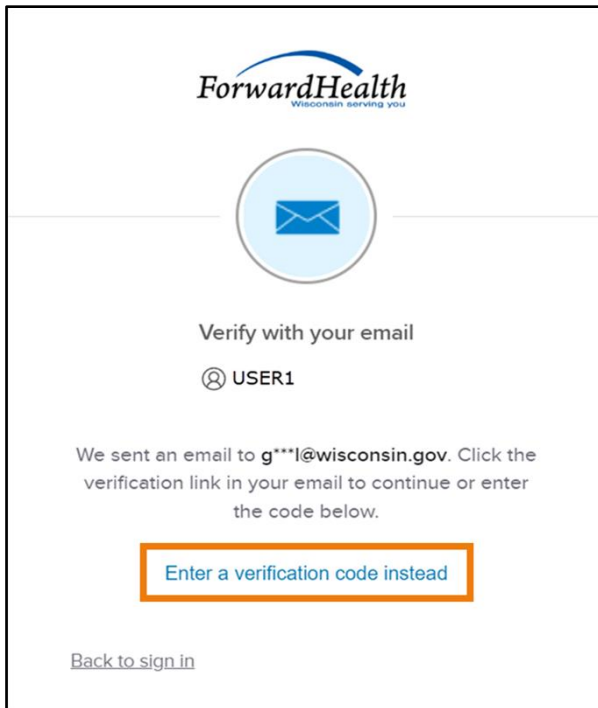


Figure 40 Verify With Your Email Box

- The email with the verification code sent to the user's email address also includes a **Sign In** link.

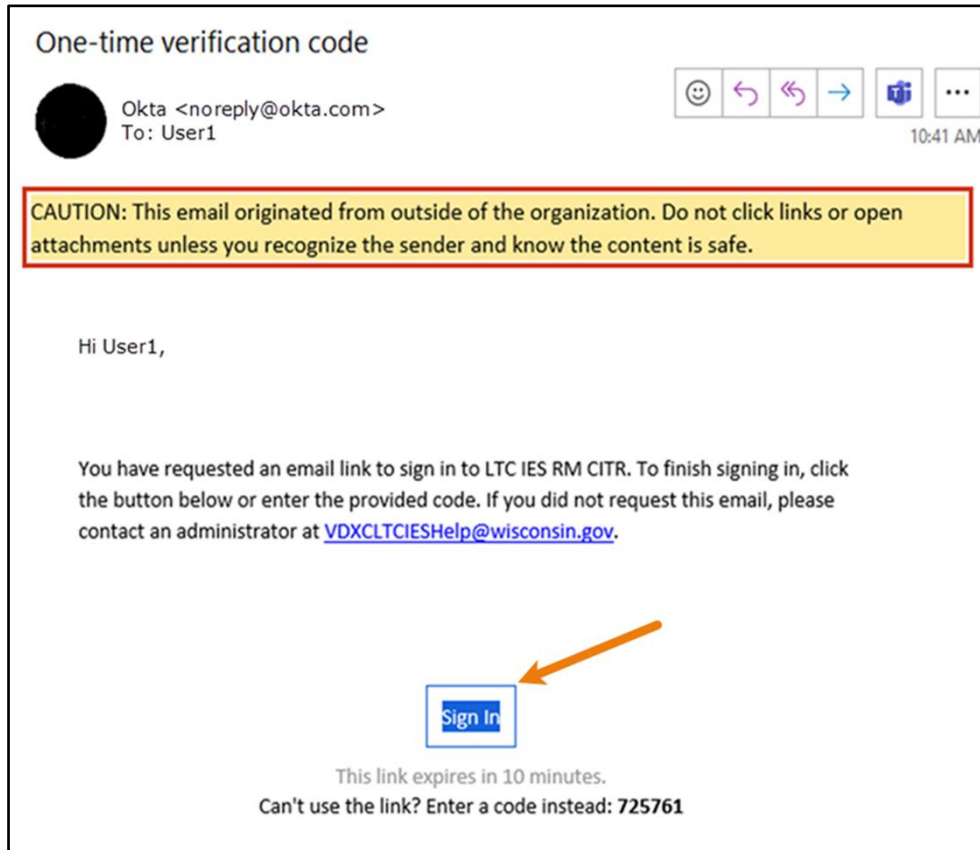


Figure 41 One-Time Verification Code Email

- The user can choose to either click the **Sign In** link or enter the verification code from the email.

- Clicking the **Sign In** link from the email will display a verification code box.

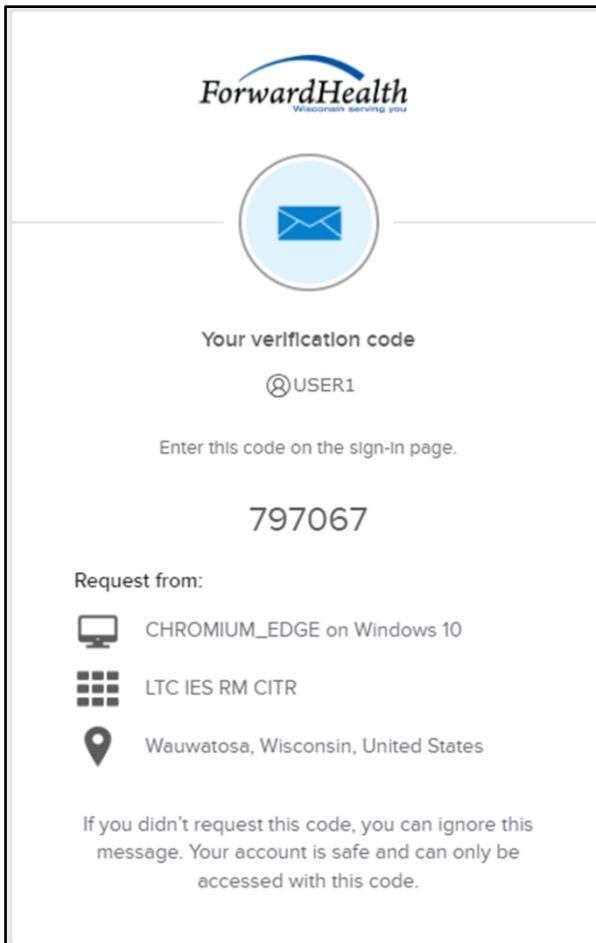


Figure 42 Verification Code Box

10. Copy the verification code from the verification code box or from the one-time verification code email, return to the verify with your email box, and click **Enter a verification code** instead.
11. Enter the code from the verification code box or the code from the one-time verification code email and click **Verify**.

ForwardHealth
Wisconsin serving you

Verify with your email

USER1

We sent an email to g***l@wisconsin.gov.
Click the verification link in your email to
continue or enter the code below.

Enter Code

Verify

[Back to sign in](#)

Figure 43 Verify With Your Email Box

The Request Dashboard will be displayed. Users will see the restrictive measures requests that have been entered for their agencies. If there are no requests for an agency, the user will not see any measures on this page.

Request#	Status	Updated Date	Organization ID	Member ID	Member Full Name	Created By	Request End Date	Expedite	Renewal	Add Measure
16348	Certified	04-20-2020	00000000	9999999999	test, test	User, Admin	01-19-2022	N	16348	16348
16901	Certified	12-30-2020	00000000	9999999999	test, test	User, Admin	02-01-2021	N	16901	16901
16901	Certified	12-30-2020	00000000	9999999999	test, test	User, Admin	12-30-2020	N	16901	16901
16079	Draft	12-18-2020	00000000	9999999999	test, test	User, Admin		N	Not Certified	Not Certified
16876	Certified	12-18-2020	00000000	9999999999	test, test	User, Admin	12-21-2020	N	16876	16876

Figure 44 Request Dashboard Panel

The Request Dashboard panel includes information about each request displayed across 10 columns. The user can select the number of entries they want to view on each page by selecting the **Show entries** drop-down menu. They can choose to display 10, 20, 30, 40, or 50 entries per page.

The panel will include the following information related to the request:

- The [Request#](#) column displays a button with the request number that allows users to bring up all the information related to the request.
- The *Status* column displays the status of the request.
- The *Updated Date* column displays the date the request was last updated.
- The *Organization ID* column displays the ID number of the organization.
- The *Member ID* column displays the ID number of the member.
- The *Member Full Name* column displays the full name of the member.
- The *Created By* column displays the individual who entered the information.
- The *Request End Date* column displays the end date of the request once it is certified; otherwise, this column is blank.
- The *Expedite* column displays Y if the request needs to expedited and N if the request does not need to be expedited.
- The [Renewal](#) column displays a button with the request number that allows users to create a new request that is pre-filled with information from a previously certified request.

- The [Add Measure](#) column displays a button with the request number that allows users to add a restrictive measure to a certified restrictive measure request.

Note: Users can search for any of the fields displayed on the panel by populating the **Search Table** box next to the magnifying glass icon.

4.1 Filter for Requests

Users can filter for the status of requests by choosing from the following statuses listed at the top of the Request Dashboard:

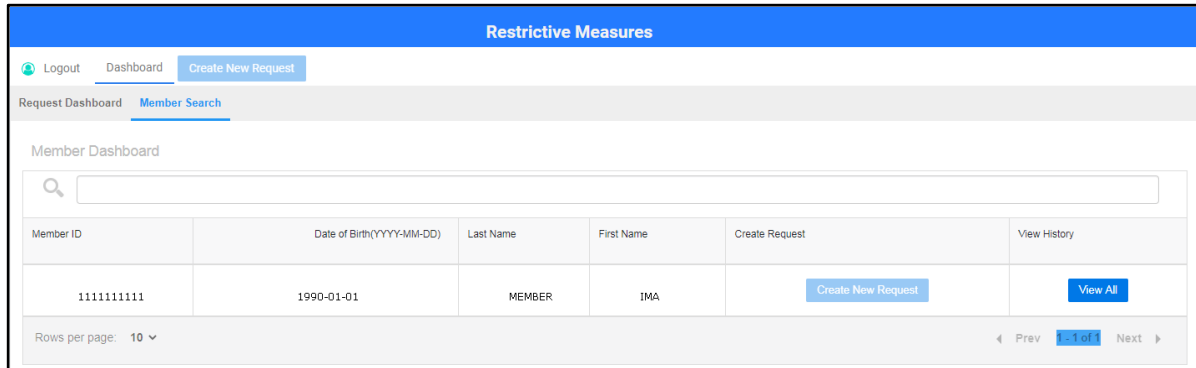
- Draft—This status indicates the request is still being drafted.
- Submitted for DHS Review—This status indicates the request has been submitted and DHS is reviewing.
- Pending Additional Items—This status indicates the request needs additional documentation or information from the user.
- Withdrawn by User—This status indicates the entire request was withdrawn.
- Certified—This status indicates that DHS has completed review and the request is complete.

1. To filter for the status of request, the user will check the box for the appropriate filter(s).
2. Filters will be applied when the user clicks **Apply Filter**. All requests with the status indicated will be displayed.

4.2 Member Dashboard

The Member Dashboard panel allows users to view all of their agencies' members and search/filter through the data. Users can create a new request for one of the members or view the history of a member.

1. On the Request Dashboard panel, click **Member Search** from the menu at the top of the panel. The Member Dashboard panel will be displayed. The Member Dashboard panel lists all of the members in an organization. Information about the member will be displayed across six columns.



Member ID	Date of Birth(YYYY-MM-DD)	Last Name	First Name	Create Request	View History
1111111111	1990-01-01	MEMBER	IMA	Create New Request	View All

Rows per page: 10 ▾

◀ Prev 1 of 1 Next ▶

Figure 45 Member Dashboard Panel

The dashboard may include the following information:

- The *Member ID* column displays the ID number of the member.
- The *Date of Birth* column displays the member's date of birth in yyyy-mm-dd format.
- The *Last Name* column displays the member's last name.
- The *First Name* column displays the member's first name.
- The [Create Request](#) column displays a button that allows users to create a request by clicking the Create New Request box.
- The [View History](#) column displays a button that allows users to view the prior history of the member by clicking the View All box.

5 Creating a New Restrictive Measure Request for an Existing Member

This function allows users to create a restrictive measure request for an existing agency member.

1. On the Request Dashboard, click **Member Search** from the menu at the top of the panel. The Member Dashboard panel will be displayed.
2. Click **Create New Request** in the Create Request column.

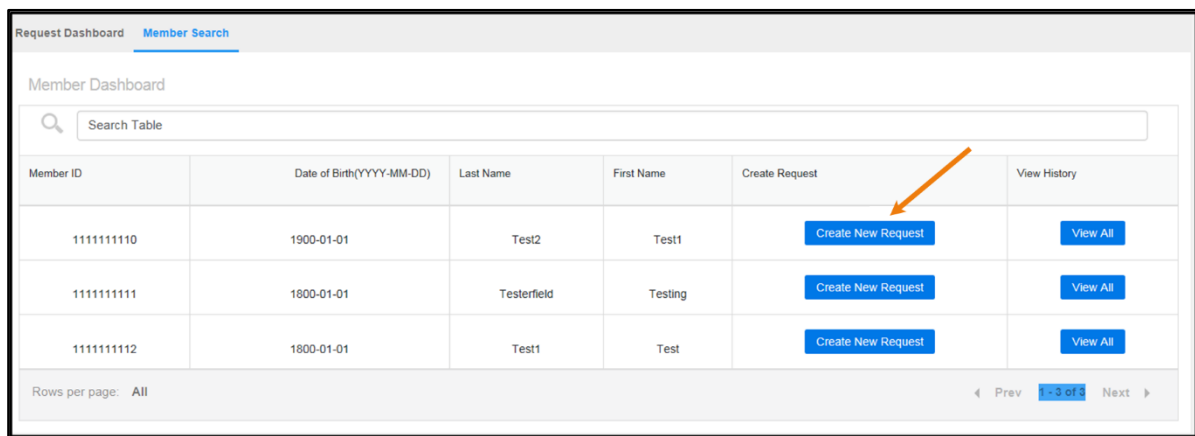


Figure 46 Member Dashboard Panel

3. A dialog box will appear to confirm that the user wants to create a new request for the member selected.

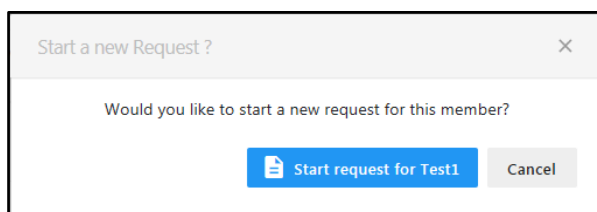


Figure 47 Dialog Box

4. Click the start request box. The Request panel will be displayed. The panel will be pre-filled with the member's information.

Request

Expedite

Would you like to expedite this request? * Indicates a Required Field

Yes, expedite
 No, do not expedite

Expedite Reason

0400887401

Maximum 500 characters

Member Information

Member ID * Search

1111111111

Must be 10 Character only *

Agency *

IRIS RM Test-29700001

Is this Person Supported by your Agency today? *

Yes *
 No *

County of Placement *

019-FLORENCE

County of Responsibility *

018-EAU CLAIRE

Last Name *

0400887401

Maximum 60 characters *

First Name *

0400887401

Maximum 35 characters *

Middle Name

0400887401

Maximum 25 characters

Address 1 *

0400887401

Maximum 60 characters *

Address 2

0400887401

Maximum 35 characters

City *

0400887401

Maximum 25 characters *

State *

Indiana

Zip Code *

0400887401

Date of Birth *

mm/dd/yyyy

Height (ft) *

4

Height (in) *

2

Weight (lbs) *

040

Maximum 3 characters *

Date of Last Physical

mm/dd/yyyy

Save & Continue

Figure 48 Request Panel

- In the “Expedite” section, answer the question asking if the user would like to expedite the request by selecting **Yes, expedite** or **No, do not expedite**. If yes, enter the expedite reason for the request in the **Expedite Reason** box. Text is limited to 500 characters.

Note: All required fields are marked with a red asterisk.

- In the “Member Information” section, enter the Member ID in the *Member ID* field. This field must be 10 characters only.

Note: Users can search for a member by entering the member ID and clicking the search button. If the search finds the member in the database, the name and date of birth fields will be prefilled.

7. Select the agency in the *Agency* field using the drop-down menu.
8. Select **Yes** or **No** to the question asking if the member is supported by the user's agency. If no, enter the reason in the **Reason** box that will be shown when no is selected. Text is limited to 500 characters.
9. Select the county of placement in the *County of Placement* field using the drop-down menu.
10. Select the county of responsibility in the *County of Responsibility* field using the drop-down menu.
11. Enter the member's name in the *Last Name*, *First Name*, and *Middle Name* fields. Text is limited to 60 characters for the last name, 35 characters for the first name, and 25 characters for the middle name.
12. Enter the member's address in the *Address 1* field. Text is limited to 60 characters.
13. Enter the member's second address in the *Address 2* field if necessary. Text is limited to 35 characters.
14. Enter the city the member resides in in the *City* field. Text is limited to 25 characters.
15. Enter the state the member resides in in the *State* field.
16. Enter the zip code in the *Zip Code* field.
17. Enter the member's date of birth in the *Date of Birth* field in mm-dd-yyyy format. Enter the date by clicking the icon that appears on the right side of the text box.
18. Select the member's height (feet) in the *Height (ft)* field using the drop-down menu.
19. Select the member's height (inches) in the *Height (in)* field using the drop-down menu.
20. Enter the member's weight in the *Weight (lbs)* field. Text is limited to three characters.
21. Enter the date of the member's last physical in the *Date of Last Physical* field in mm-dd-yyyy format. Enter the date by clicking the icon that appears on the right side of the text box.
22. Click **Save & Continue**. A dialog box will appear to confirm the user wants to continue to the next section.

Note: The information entered on a page will be lost whenever **Save & Continue** is not clicked.

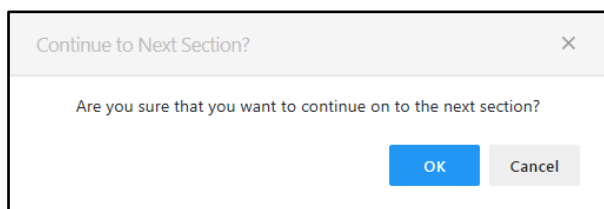


Figure 49 Dialog Box

23. Click **OK**. The request moves to the Add/Review Measures stage and the Measures Overview panel will be displayed. After entering the initial member information, a system-generated request ID will be displayed at the top of the screen that will appear throughout the remainder of the request.

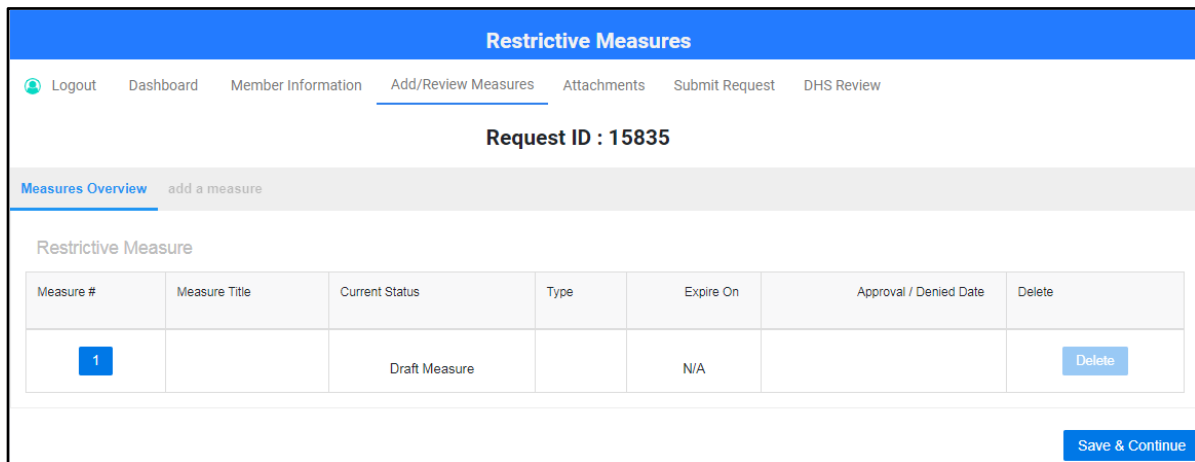


Figure 50 Measures Overview Panel

The Measures Overview panel displays a list and status of the measures created for a request. The panel includes the following information:

- The *Measure #* column displays a button that allows users to update or modify a measure.
 - The *Measure Title* column displays the title of the restrictive measure.
 - The *Current Status* column displays the current status of the restrictive measure.
 - The *Type* column displays the type of restrictive measure. Types of restrictive measures are identified as follows:
 - a. MED—Medical
 - b. BEH—Behavioral
 - The *Expire On* column displays the expiration date of the restrictive measure.
 - The *Approval/Denied Date* column displays the date the restrictive measure was approved or denied.
 - The *Delete* column allows users to delete a measure.
24. To add a measure, click **add a measure** from the menu at the top of the Measures Overview panel. A blank Measures Overview panel will be displayed with “Measure 1” added as an option.

Note: A measure may only be added for requests in “Draft,” “Pending Additional Items,” or “Certified” status.

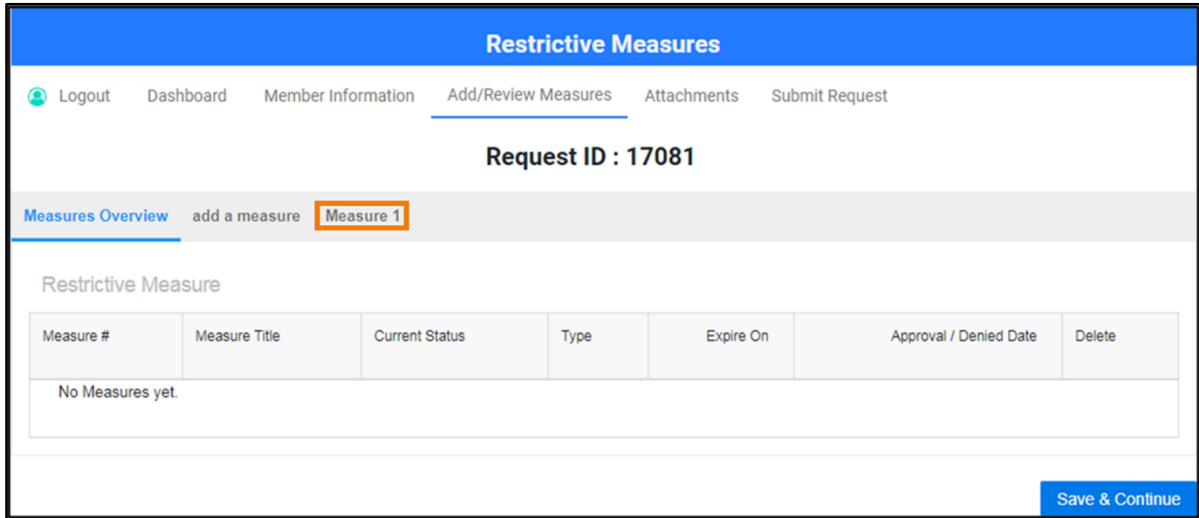


Figure 51 Measures Overview Panel

25. Click **Measure 1**. A blank Measure 1 panel will be displayed.

Restrictive Measures

Logout Dashboard Member Information Add/Review Measures Attachments Submit Request

Request ID : 17081

Measures Overview add a measure **Measure 1**

Measure Data * Indicates a Required Field

Measure Title *

 Maximum 100 characters *

Type of Restrictive Measure *

 Measure Purpose *

Measure Category *

Previously Attempted Methods *

 Maximum 4000 characters *

Justification *

 Maximum 4000 characters *

Risk and Benefits *

 Maximum 4000 characters *

Training Frequency *

 Training Method *

Training Description

 Maximum 4000 characters

Figure 52 Measure 1 Panel

26. In the “Measure Data” section, enter a measure title in the *Measure Title* field. Text is limited to 100 characters.

27. Select the type of restrictive measure in the *Type of Restrictive Measure* field using the drop-down menu.
28. Select the measure purpose in the *Measure Purpose* field using the drop-down menu.

Note: If the user selected MED—Medical for the type of restrictive measure, the only selection available for measure purpose will be 00—Medical.
29. Select the measure category in the *Measure Category* field using the drop-down menu.
30. Enter previously attempted methods in the *Previously Attempted Methods* field. Text is limited to 4,000 characters.
31. Enter justification for why the measure is required in the *Justification* field. Text is limited to 4,000 characters.
32. Enter the risks to the person that could result due to the use of the measure in the *Risk and Benefits* field. Text is limited to 4,000 characters.
33. Select the training frequency in the *Training Frequency* field using the drop-down menu.
34. Select the training method in the *Training Method* field using the drop-down menu.
35. Enter the training description including who will train staff, what the trainer qualifications are and how often training is provided in the *Training Description* field. Text is limited to 4,000 characters.
36. Under the “Provider Details—1” section of the Measure 1 panel, answer the question asking if the provider’s name is a person or business name by selecting Person’s Name or Business Name.

Provider Details - 1

Is the provider's name a person or business name? *

Person's Name

Business Name

Provider Type *

NPI/EIN/LICENSE #
Maximum 10 characters

Setting *

Figure 53 Measure 1 Panel

- Select Person’s Name if the provider is a person. Enter their name in the *Last Name*, *First Name* and *Middle Name* fields that will appear when Person’s Name is selected. Text is limited to 60 characters for the last name, 35 characters for the first name, and 25 characters for the middle name.
- Select Business Name if the provider is an organization. Enter the name in the *Organization Name* field that will appear when Business Name is selected. Text is limited to 80 characters.

37. Select the provider type in the *Provider Type* field using the drop-down menu.

38. Enter the provider’s National Provider Identifier (NPI) or Employer Identification Number (EIN) in the *NPI/EIN#* field. If entering an NPI or license number, the number will be validated. If the number is invalid, users can use the “Other” option from the provider type drop-down menu. Text is limited to 10 characters.

39. Select the setting in the *Setting* field using the drop-down menu. Provide a setting description in the *Setting Description* field that will appear if 99—Other is selected as a setting. Text is limited to 100 characters.

Note: Users can choose to add or remove a provider by clicking the **Add Provider** or **Remove Provider** buttons. Up to five providers can be listed.

40. Click **Save & Continue**. The Measures Overview panel will be displayed. It gives a list and status of the measures created for a request. Users can [update or modify a measure](#) by clicking the button in the Measure # column. Users can delete a measure by clicking the button in the Delete column.

Measure #	Measure Title	Current Status	Type	Expire On	Approval / Denied Date	Delete
1	testing	Draft Measure	MED	N/A		Delete

Figure 54 Measures Overview Panel

41. To add additional measures, click **add a measure**. A panel will be displayed and “Measure 2” will be added as an option to add the next measure. Up to 10 measures can be added.

42. When finished, click **Save & Continue**. A dialog box will appear to confirm the user wants to continue to the next section.

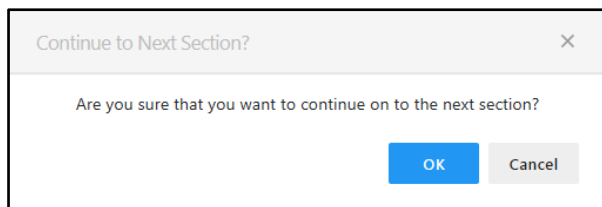


Figure 55 Dialog Box

43. Click **OK**. The request moves to the Attachments stage, and the Attachments panel will be displayed. A [PDF Report](#) button is located under the Generated PDFs heading and is available for any request status. A [Summary PDF](#) button is available for requests that have been “Certified.”
44. Under the “Request Attachments” section, click **Select files** to attach any attachments. The following file extensions allowed for uploading are: .pdf, .doc, .docx, .xls, .xlsx, .csv, .txt, .rtf, .zip, .jpg, .jpeg, .png, or .gif. The maximum allowed size is 100 MBs.

Figure 56 Attachments Panel

45. The document name will populate in the *Document Name* field. Text is limited to 200 characters.
46. Select the document type using the *Document Type* field drop-down menu. The following document types are required:
- Behavioral plan when at least one of the measure categories is behavioral

- Legal decision maker consent form
- Medical consent

Note: Click **Clear** if the user wants to remove a document before it is uploaded.

47. Click **Upload**. A dialog box will appear and indicate if the document was successfully loaded.

48. Click **Continue**. A dialog box will appear to confirm the user wants to continue to the next section.

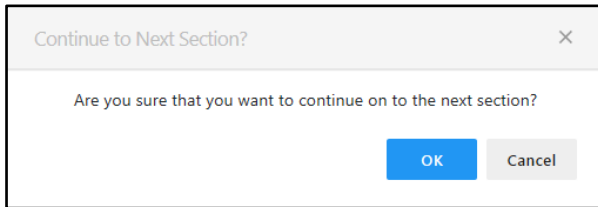


Figure 57 Dialog Box

49. Click **OK**. The request moves to the Submit Request stage and the Submit Request panel will be displayed. The panel lists the measure statuses, attachments that have been downloaded and any errors for the measure request.

Note: Users can choose to delete the measure request and attachments by clicking the **Delete** button available under the Delete column in each section.

Restrictive Measures

Logout Dashboard Member Information Add/Review Measures Attachments Submit Request

Request ID : 17081

Submit Request

Measure Statuses

Measure #	Current Status	Type	Expire On	Delete
1	Draft Measure	MED	N/A	<div style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">Delete</div>

Attachments Overview

Attachment Download	Document Name	Document Number	Document Type	Created Date	Delete
No Attachments yet.					

Errors

Page	Measure #	Provider #	Field	Message
<div style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">REQUEST</div>			City	City is required

Withdraw Entire Request

Send to DHS

Figure 58 Submit Request Panel

Note: If the measure request has any missing fields that are required, they will be listed at the bottom of the page under the “Errors” section of the Submit Request panel. Clicking the blue buttons will take users to the appropriate panel to correct the error. Once the errors have been corrected, the **Send to DHS** button will be enabled, and the following options will be available: [Withdraw Entire Request](#) or [Send to DHS](#).

Note: All information that has been entered is saved and the user can make edits during another session if needed.

Page	Measure #	Provider #	Field	Message
ATTACHMENTS			Member Medication Document	Member Medication Document needs to be uploaded
ATTACHMENTS			Medical Consent	Medical Consent is required
MBR INFORMATION			Expedited Request	You must indicate if this is an expedited request
MEASURE	1		Risk	Risk is required
PROVIDER	1	1	Provider First Name	Provider Firstname is required
PROVIDER	1	1	Provider Last Name	Provider Lastname is required

Buttons: Withdraw Entire Request, Send to DHS

Figure 59 Submit Request Panel

5.1 Submitting a Restrictive Measure Request to DHS

This option will send the request to DHS and an email to DHS and the agency will be generated stating the request has been submitted for DHS review. Once DHS completes its review, an email notification will be sent to the agency.

1. To submit the request to DHS for review, click the **Send to DHS** button in the bottom right corner of the Submit Request panel. A dialog box will appear to confirm the user wants to submit the request.

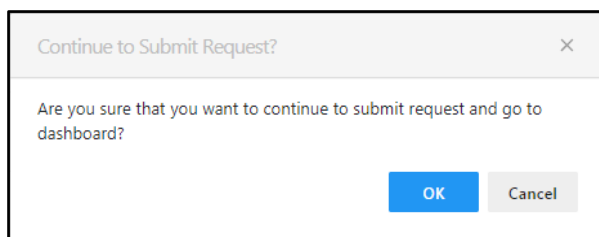


Figure 60 Dialog Box

2. Click **OK**. The request is sent for DHS review. Users will be returned to the Request Dashboard, and the status will indicate "Submitted for DHS Review" in the Status column.

5.2 Withdrawing a Restrictive Measure Request

This option will withdraw the entire request. After a request is withdrawn, users will no longer be able to view, edit, or submit the request.

1. To withdraw a request, click the **Withdraw Entire Request** button in the bottom left corner of the Submit Request panel. A dialog box will appear to confirm the user wants to withdraw the request.

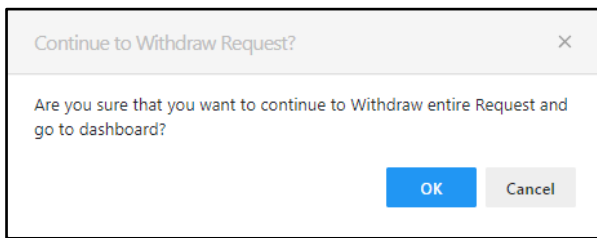


Figure 61 Dialog Box

2. Click **OK**. The user will be returned to the Request dashboard, and the request will be withdrawn.

6 Creating a Restrictive Measure Request for an Unlisted Member

This function allows users to create a new request for a member who may be in the process of being enrolled or transferred to an agency, but who is not yet listed on the Member Dashboard.

1. Click **Create a New Request** located on the menu bar of the Request or Member Search dashboard at the top of the dashboard.

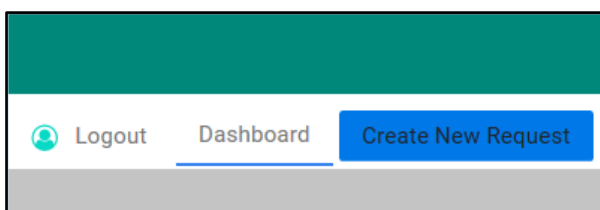


Figure 62 Create New Request

2. A dialog box will appear to confirm the user wants to create a new request.

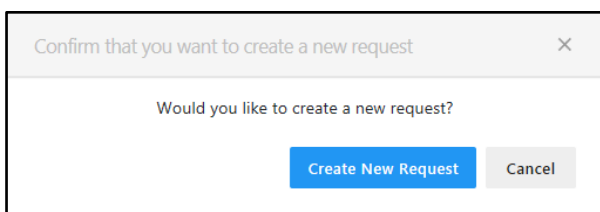


Figure 63 Dialog Box

3. Click **Create New Request**. The Request panel will be displayed. Follow the steps in the "Create a New Restrictive Measure Request for an Existing Member" section beginning with [Step 5](#).

7 Reviewing and Updating a Restrictive Measure Request

This function allows users to review and update an existing request for a member.

1. On the Request Dashboard, click the request number in the Request# column for the member.

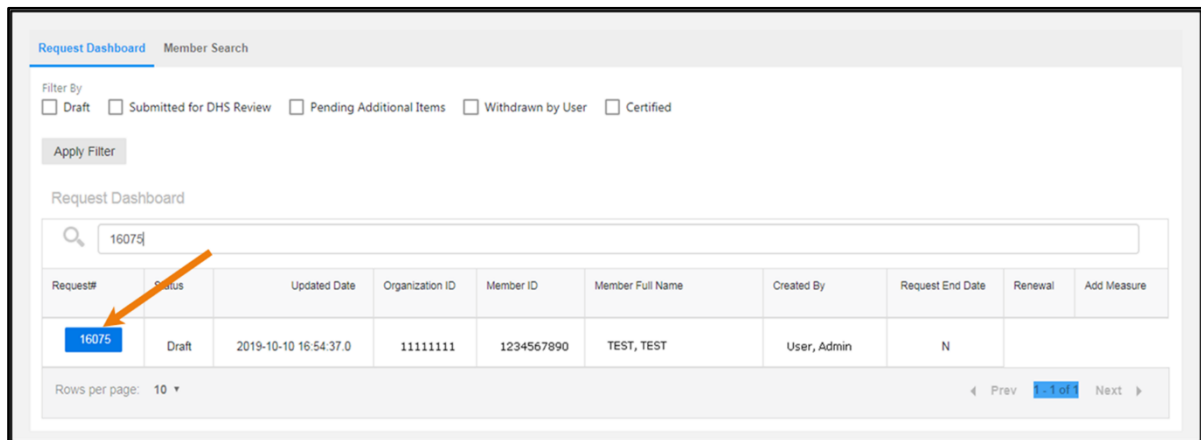


Figure 64 Request Dashboard

2. A dialog box will appear asking if the user would like to view the request.

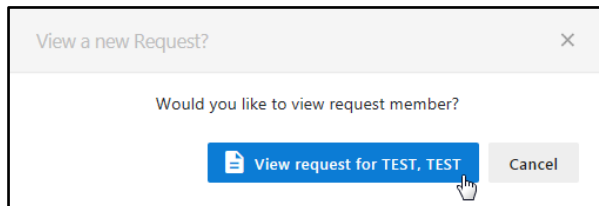


Figure 65 Dialog Box

3. Click the view request box. Users will only be able to access and review or update requests that they started or that are associated with their organization.

8 Editing a Restrictive Measure

This function allows users to edit an existing restrictive measure. Only measures for requests in a status of “Draft” or “Pending Additional Items” can be edited.

1. On the Request Dashboard, click the request number in the Request# column for the member.

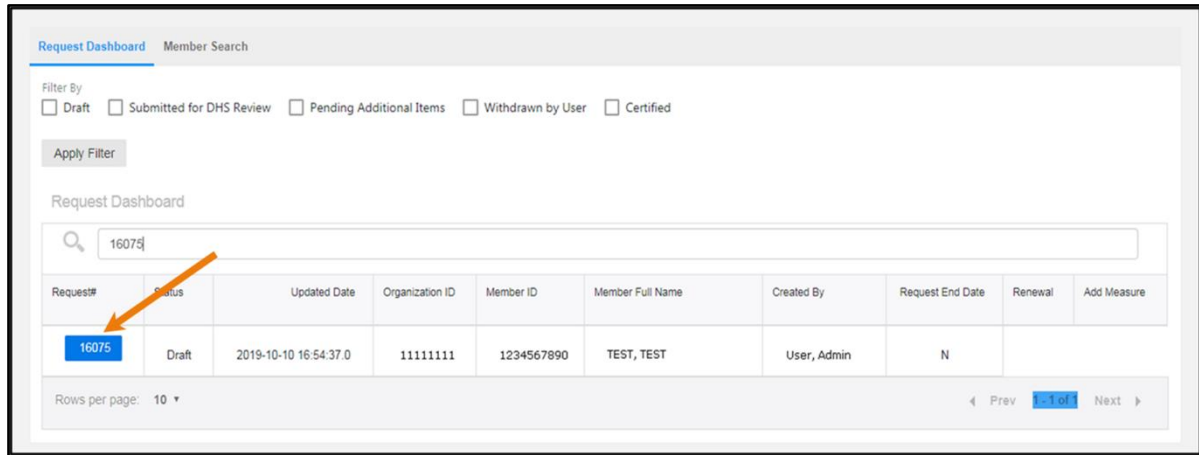


Figure 66 Request Dashboard

2. A dialog box will appear asking if the user would like to view the request.

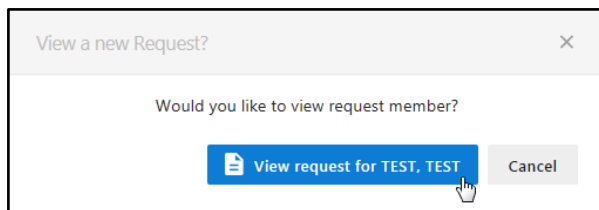


Figure 67 Dialog Box

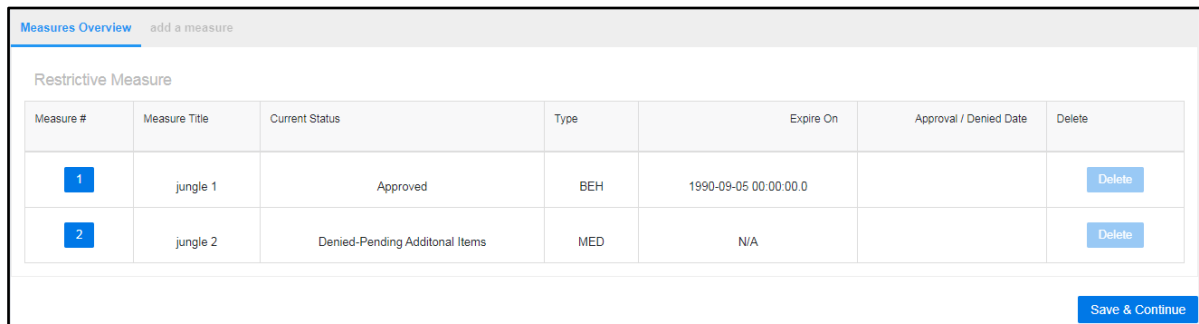
3. Click the view request box. The Request panel will be displayed.

Figure 68 Request Panel

- Click **Save & Continue**. A dialog box will appear to confirm the user wants to continue to the next section.

Figure 69 Dialog Box

- Click **OK**. The Measures Overview panel will be displayed.



The screenshot shows the 'Measures Overview' panel with a table of restrictive measures. The table has columns for Measure #, Measure Title, Current Status, Type, Expire On, Approval / Denied Date, and Delete. Two measures are listed: 'jungle 1' (Approved, BEH, 1990-09-05 00:00:00.0) and 'jungle 2' (Denied-Pending Additional Items, MED, N/A). A 'Save & Continue' button is at the bottom right.

Measure #	Measure Title	Current Status	Type	Expire On	Approval / Denied Date	Delete
1	jungle 1	Approved	BEH	1990-09-05 00:00:00.0		Delete
2	jungle 2	Denied-Pending Additional Items	MED	N/A		Delete

Figure 70 Measures Overview Panel

- Click the measure number the user would like to edit in the Measure # column. A dialog box will appear asking if the user would like to update or modify the measure.

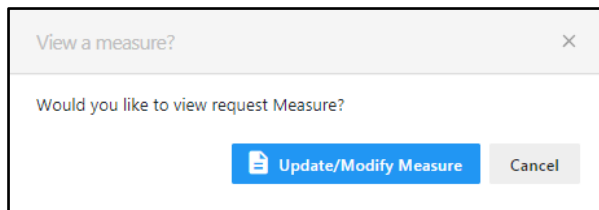
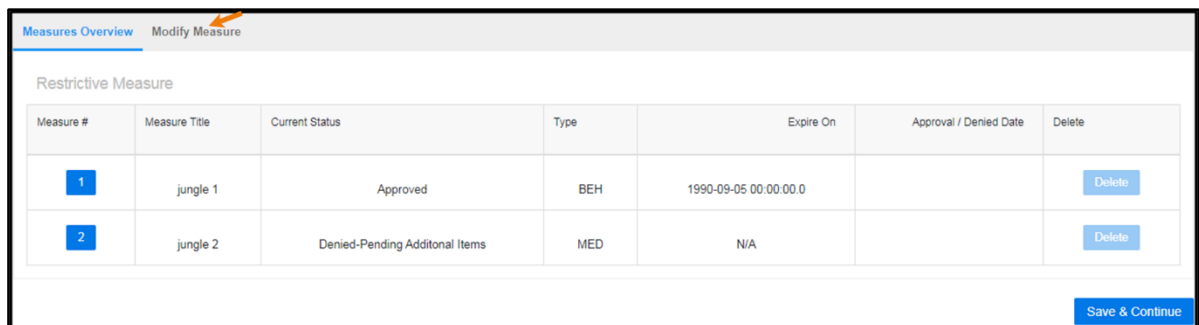


Figure 71 Dialog Box

- Click the update/modify measure box. The Measures Overview panel will be displayed and the Modify Measure option will appear at the top of the panel next to the Measures Overview option.



The screenshot shows the 'Measures Overview' panel with a 'Modify Measure' link at the top. The table of restrictive measures is the same as in Figure 70. A 'Save & Continue' button is at the bottom right.

Measure #	Measure Title	Current Status	Type	Expire On	Approval / Denied Date	Delete
1	jungle 1	Approved	BEH	1990-09-05 00:00:00.0		Delete
2	jungle 2	Denied-Pending Additional Items	MED	N/A		Delete

Figure 72 Measures Overview Panel

- Click **Modify Measure**. The Modify Measure panel will be displayed.
- Make any changes and click **Save & Continue**. The Measures Overview panel will be displayed and the measure will be updated.

9 Reporting the Use of an Approved Restrictive Measure

This function allows the user to report the use of an approved restrictive measure to DHS.

Utilization is required on a quarterly calendar basis and can only be entered for the current month or previous months in that calendar quarter. If there is no usage, the user may leave the field blank. The system will record blank information as a zero (0).

1. On the second page of the request (Measures Overview), click **Utilization** from the menu at the top of the panel. This option is available once the request is certified. The Utilization panel will be displayed.

Note: Any user from the organization can view and update the data. The DHS user can view the data but may not update it.

Restrictive Measures

Logout
Dashboard
Member Information
Add/Review Measures
Attachments
Submit Request
Utilization

Request ID : 15822

Utilization

Member Name:

Organization #:

Measure Utilization

Measure Title:

Approval Date:

Expiration Date:

Type:

Purpose:

Category:

[Utilization Data](#) [Capture Utilization](#)

Utilization Report Year

Year:

Restrictive Measure Utilization Summary

January	February	March	April	May	June	July	August	September	October	November	December	Total
No data for table.												

Provider Utilization

Provider	January	February	March	April	May	June	July	August	September	October	November	December	Total
No data for table.													

Target Behavior

Provider	Target Behavior	January	February	March	April	May	June	July	August	September	October	November	December	Total
No data for table.														

Figure 73 Utilization Panel

- Information in the “Utilization” and “Measure Utilization” sections will be prefilled using input that was previously entered in the database.

9.1 Capturing Utilization Data

This function enables the user to input the data associated with a restrictive measure.

1. In the “Measure Utilization” section, select the measure in the *Measure Title* field using the drop-down menu.

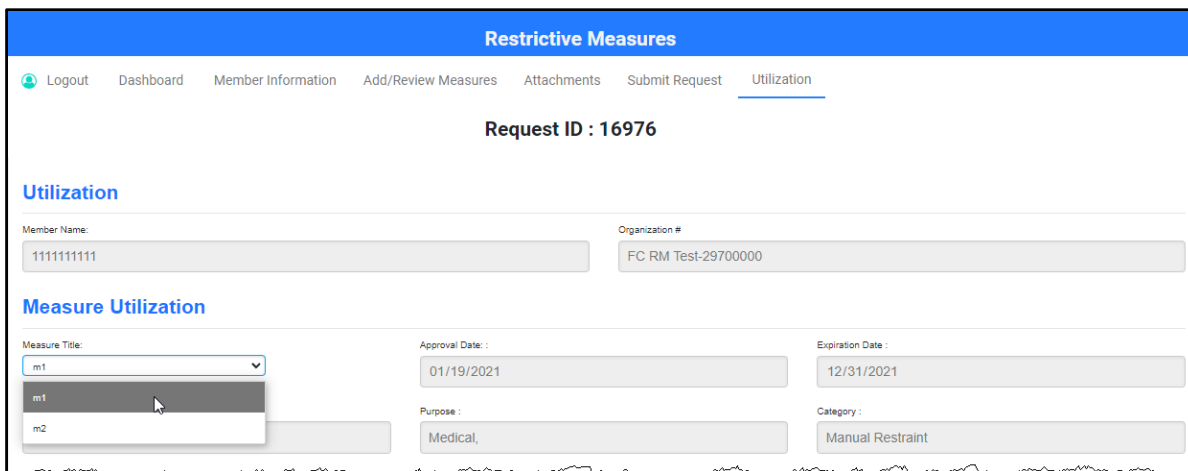


Figure 74 Utilization Panel

2. Click **Capture Utilization**. The “Capture Utilization” section of the panel will be displayed.

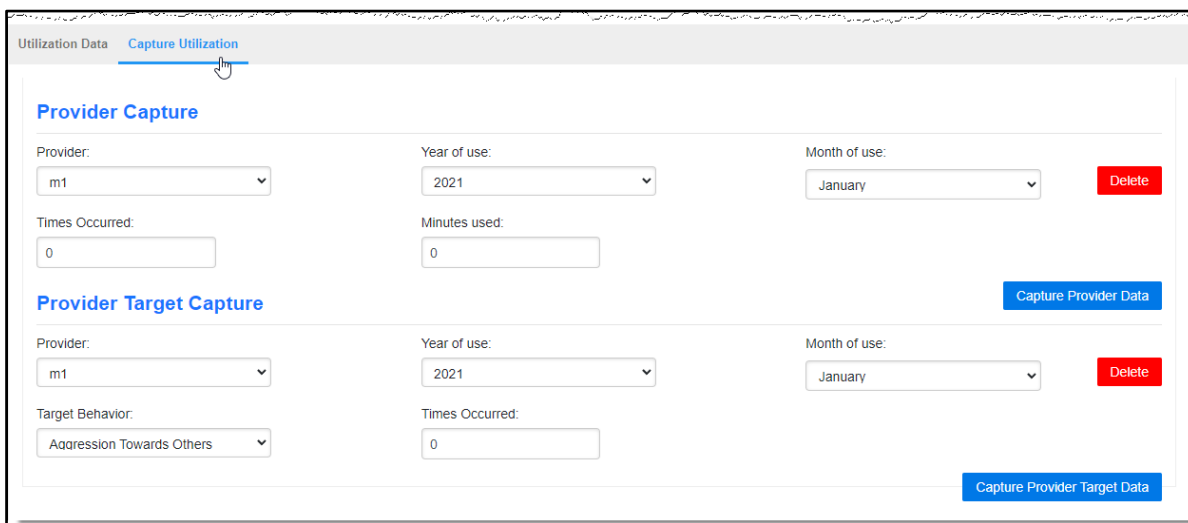


Figure 75 Utilization Panel

3. In the “Provider Capture” section, select the provider in the *Provider* field using the drop-down menu.
4. Select the year the measure was used in the *Year of use*: field using the drop-down menu.
5. Select the month the measure was used in the *Month of use*: field using the drop-down menu.

6. Select the number of times the measure occurred in the *Times Occurred:* field using the up or down arrows.
7. Select the total minutes the measure was used in the *Minutes used:* field using the up or down arrows.
8. Click the Capture Provider Data button to add the information to the “Utilization Data” section.
9. Repeat steps 2 through 8 for each provider.
10. Select the target behavior in the *Target Behavior:* field using the drop-down menu.

Note: Up to four target behaviors can be entered.

11. Select the number of times the target behavior occurred in the *Times Occurred:* field using the up or down arrows.
12. Click the Capture Provider Target Data button to add the information to the “Utilization Data” section.

Note: Users can choose to delete the information that was entered by clicking the **Delete** button located on the far-right side.

9.2 Viewing Utilization Data

This function allows the user to view the data associated with a restrictive measure.

1. On the utilization panel, the “Utilization Data” section of the panel will be displayed.

The screenshot shows the Utilization Panel interface. At the top, there are tabs for 'Utilization Data' and 'Capture Utilization'. Below the tabs, there is a 'Utilization Report Year' section with a 'Year:' dropdown menu set to '2021'. To the right of the dropdown are two buttons: 'REFRESH TABLES DATA' (blue) and 'UTILIZATION PDF' (red). Below this is the 'Restrictive Measure Utilization Summary' table, followed by the 'Provider Utilization' table, and finally the 'Target Behavior' table.

January	February	March	April	May	June	July	August	September	October	November	December	Total
						3 Uses - 30 Min			11 Uses - 35 Min			14 Uses - 65 Min

Provider	January	February	March	April	May	June	July	August	September	October	November	December	Total
m1							1 Uses - 10 Min			4 Uses - 10 Min			5 Uses - 20 Min
name middle - last							1 Uses - 10 Min			3 Uses - 5 Min			4 Uses - 15 Min
123123							1 Uses - 10 Min			4 Uses - 20 Min			5 Uses - 30 Min

Provider	Target Behavior	January	February	March	April	May	June	July	August	September	October	November	December	Total
m1	Aggression Towards Others	1 Occurrences												1 Occurrences
m1	Property Destruction	4 Occurrences												4 Occurrences
name middle - last	Aggression Towards Others	1 Occurrences												1 Occurrences
name middle - last	Property Destruction	6 Occurrences												6 Occurrences

Figure 76 Utilization Panel

2. To view a summary of utilization data for a different calendar year, select the year in the *Year* field using the drop-down menu.

The panel includes the following information:

- The “Restrictive Measure Utilization Summary” section displays the summary of information the user entered on the Capture Utilization screen by measure. The information in each month indicates the total number of times the measure was used by all providers in each month of the reporting period. The total column indicates the total number of times the measure was used by all providers across all monthly reporting periods. To view information for a specific measure, select the appropriate measure from the *Measure Title* field drop-down menu in the “Measure Utilization” section.
- The “Provider Utilization” section indicates the total number of times the measure was used by a specific provider in a reporting period by month. The total column indicates the total number of times the measure was used by a specific provider across all monthly reporting periods.
- The “Target Behavior” section indicates the total number of times the target behavior occurred for a specific provider in a reporting period by month. The total column indicates the total number of times the target behavior occurred across all monthly reporting periods.

If the measure type is behavioral, then at least one target behavior is required. If the measure type is medical, then a target behavior is optional.

Note: To refresh the data in the tables with new information that has been entered, click the **Refresh Tables Data** button located to the right of the Utilization Report Year drop-down menu.

9.2.1 Accessing PDF

1. To view a PDF of the Restrictive Measure Utilization Report, click the **Utilization PDF** button located to the right of the Utilization Report Year heading. A PDF is available once the initial data has been entered and saved.
2. Click the PDF icon that appears in the bottom left corner of the screen. A PDF of the restrictive measure utilization report will be displayed.

Restrictive Measure Utilization Report

Request ID: 15822
Member Name: 1111111111
Org: FC RM Test-29700000

Measure Details

Measure Title	Approval Date	Expiration Date	Type	Purpose	Category
test			Medical	Medical,	Manual Restraint

Figure 77 Restrictive Measure Utilization Report PDF

9.3 Editing Utilization Data

If utilization data was entered incorrectly, the following steps should be taken to delete and re-enter.

1. Click **Capture Utilization**. The “Capture Utilization” section of the panel will be displayed.
2. Select the measure in the Measure Title drop-down in the “Measure Utilization” section.
3. In the “Provider Capture” section, select the provider in the *Provider* field using the drop-down menu.
4. Select the year the measure was used in the *Year of use:* field using the drop-down menu.
5. Select the month the measure was used in the *Month of use:* field using the drop-down menu.
6. Click the Delete button located on the far-right side.
7. Enter the correct data by following steps in [9.1 Capturing Utilization Data](#).

10 Discontinuing an Approved Restrictive Measure

This function allows users to discontinue a restrictive measure after it has been approved by DHS.

1. On the Request Dashboard, click the request number in the Request# column for the member.

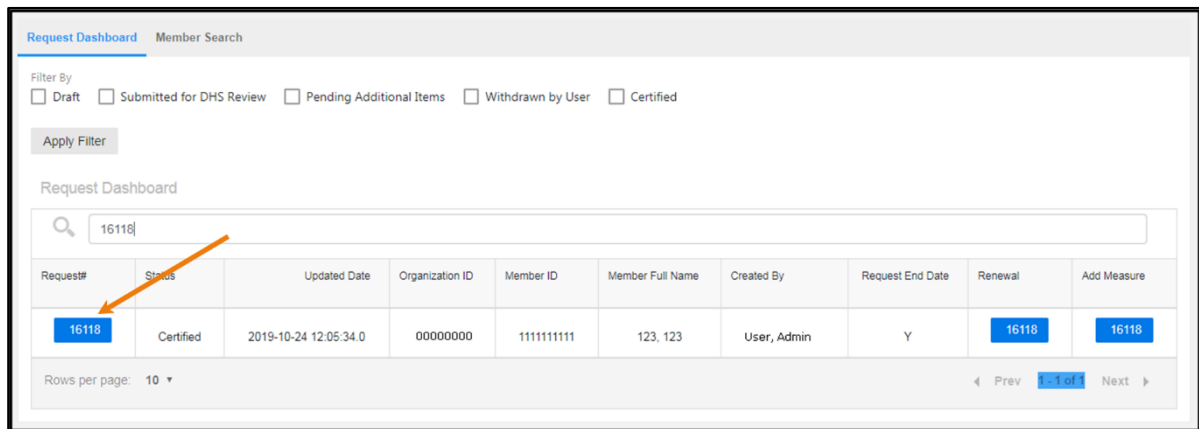


Figure 78 Request Dashboard

2. A dialog box will appear asking if the user would like to view the request.

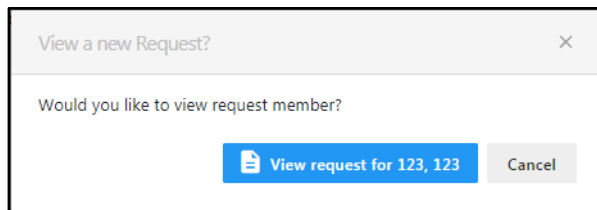


Figure 79 Dialog Box

3. Click the view request box. The Request panel will be displayed.

Request

Expedite

Would you like to expedite this request? * Indicates a Required Field

Yes, expedite

No, do not expedite

Expedite Reason

0400887401

Maximum 500 characters

Member Information

Member ID * Search

1111111111

Must be 10 Character only *

Agency *

IRIS RM Test-29700001

Is this Person Supported by your Agency today? *

Yes *

No *

County of Placement *

019-FLORENCE

County of Responsibility *

018-EAU CLAIRE

Last Name *

0400887401

Maximum 60 characters *

First Name *

0400887401

Maximum 35 characters *

Middle Name

0400887401

Maximum 25 characters

Address 1 *

0400887401

Maximum 60 characters *

Address 2

0400887401

Maximum 35 characters

City *

0400887401

Maximum 25 characters *

State *

Indiana

Zip Code *

0400887401

Date of Birth *

mm/dd/yyyy

Height (ft) *

4

Height (in) *

2

Weight (lbs) *

040

Maximum 3 characters *

Date of Last Physical

mm/dd/yyyy

Save & Continue

Figure 80 Request Panel

4. Click **Save & Continue**. A dialog box will appear to confirm the user wants to continue to the next section.

Continue to Next Section? ×

Are you sure that you want to continue on to the next section?

OK Cancel

Figure 81 Dialog Box

- Click **OK**. The Measures Overview panel will be displayed.

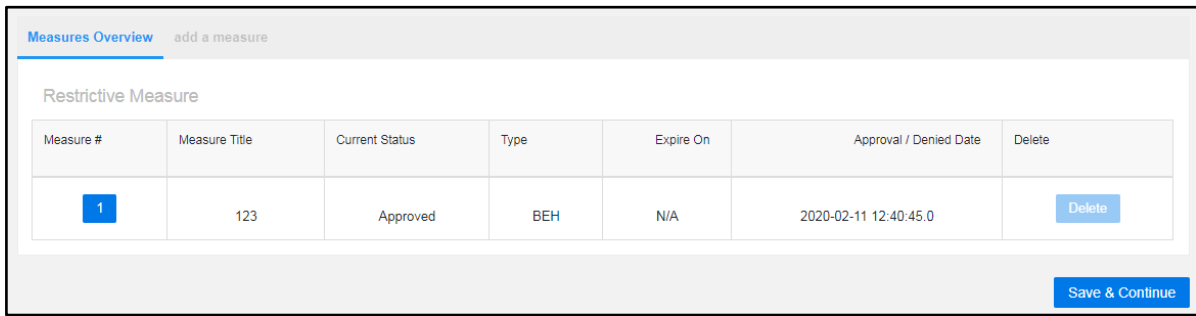


Figure 82 Measures Overview Panel

- Click the measure number button the user would like to discontinue in the Measure # column. A dialog box will appear asking if the user would like to update or modify the measure.

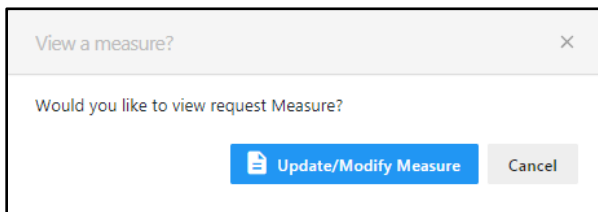


Figure 83 Dialog Box

- Click the update/modify measure box. The Measures Overview panel will be displayed and the Modify Measure option will appear at the top of the panel next to the Measures Overview option.

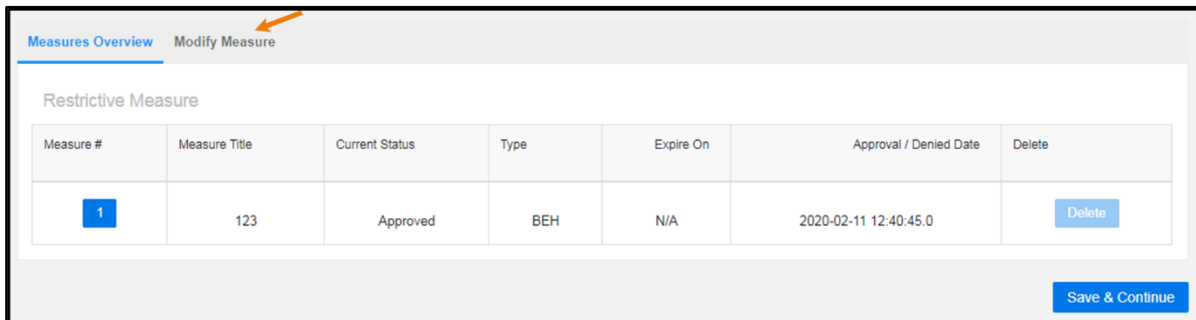


Figure 84 Measures Overview Panel

- Click **Modify Measure**. The Modify Measure panel will be displayed with Measure Discontinue Date and Discontinue Reason fields added to the existing pre-filled measure data fields.

The screenshot shows the 'Modify Measure' form with the following fields and values:

- Measure Title:** test (Maximum 100 characters)
- Type of Restrictive Measure:** BEH-Behavioral
- Measure Purpose:** 03-Risk of Harm to peers
- Measure End Date:** mm/dd/yyyy
- Measure Category:** 03-Isolation
- Measure Discontinue Date:** mm/dd/yyyy
- Previously Attempted Methods:** test (Maximum 4000 characters)
- Discontinue Reason:** Discontinue reason (Maximum 200 characters)
- Justification:** test (Maximum 4000 characters)

An orange arrow points from the 'Measure Discontinue Date' field to the 'Discontinue Reason' field.

Figure 85 Modify Measure Panel

9. Enter the date the measure will be discontinued in the *Measure Discontinue Date* field in mm-dd-yyyy format. Enter the date by clicking the icon that appears on the right side of the text box.
10. Enter the reason for discontinuing the measure in the *Discontinue Reason* field. Text limit is 200 characters.

Note: DHS will be notified via email when a measure discontinue date and reason are entered for a specific measure.

11. Click **Save & Continue**. The Measures Overview panel will be displayed.

The screenshot shows the 'Measures Overview' panel with the following table:

Measure #	Measure Title	Current Status	Type	Expire On	Approval / Denied Date	Delete
1	123	Approved	BEH	N/A	2020-02-11 12:40:45.0	Delete

A 'Save & Continue' button is located at the bottom right of the panel.

Figure 86 Measures Overview Panel

- Click **Save & Continue**. A dialog box will appear to confirm the user wants to continue to the next section.

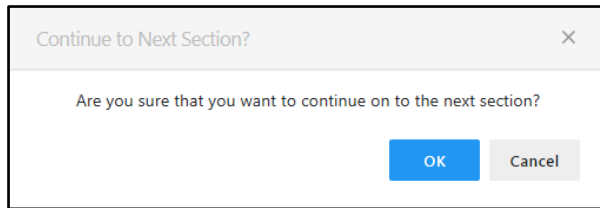


Figure 87 Dialog Box

- Click **OK**. The Attachments panel will be displayed.

Attachment Download	Document Name	Document Number	Document Type	Created Date	Delete

Figure 88 Attachments Panel

- Click **Continue**. A dialog box will appear to confirm the user wants to continue to the next section.

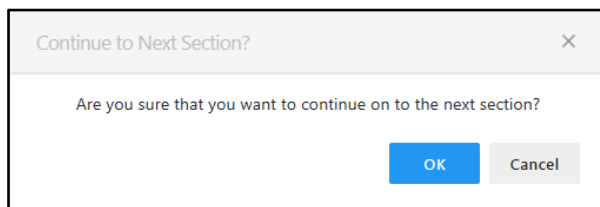


Figure 89 Dialog Box

- Click **OK**.

The Submit Request panel will be displayed.

Submit Request

Measure Statuses

Measure #	Current Status	Type	Expire On	Delete
1	Approved	BEH	N/A	Delete

Attachments Overview

Attachment Download	Document Name	Document Number	Document Type	Created Date	Delete
No Attachments yet.					

Errors

Page	Measure #	Provider #	Field	Message
No errors found.				

[Withdraw Entire Request](#) [Send to DHS](#)

Figure 90 Submit Request Panel

11 Viewing Restrictive Measure Request History

This function allows users to view the prior restrictive measure request history of the member.

1. On the Request Dashboard, click **Member Search** from the menu at the top of the panel. The Member Dashboard will be displayed.
2. Click the **View All** button in the View History column.

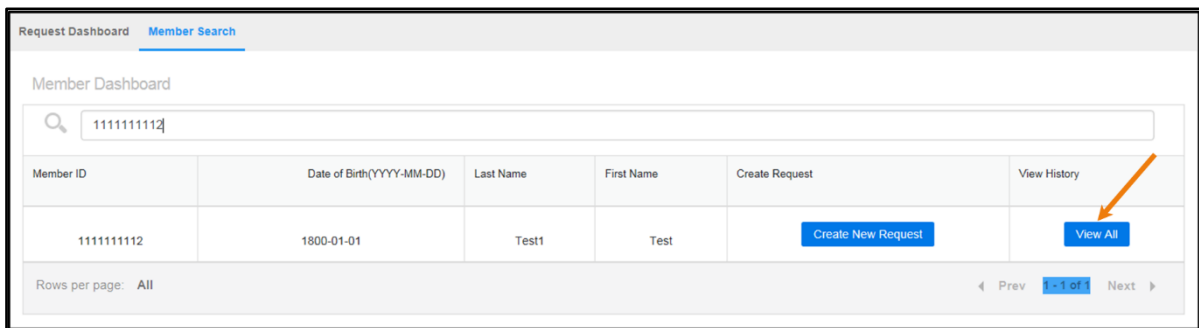


Figure 91 Member Dashboard

3. The Request Dashboard will be displayed with all the requests for the member.

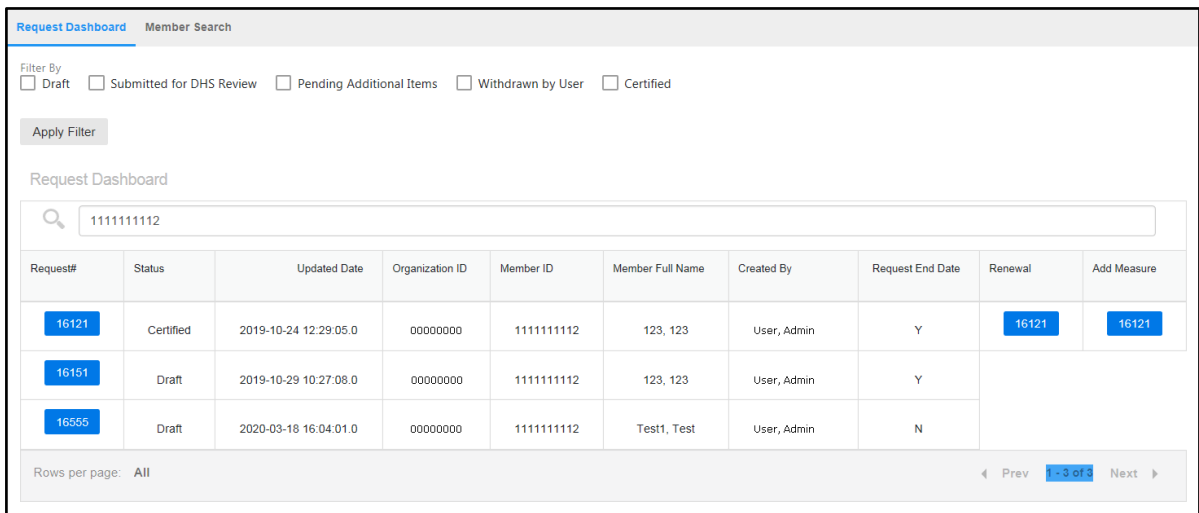
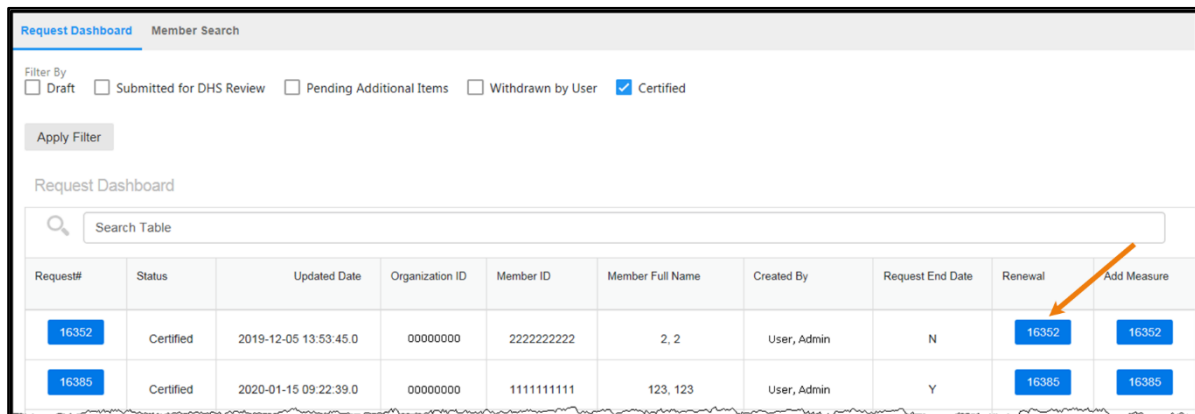


Figure 92 Request Dashboard

12 Restrictive Measure Request Renewal

This function allows users to create a new request that is pre-filled with information from a previously certified request.

1. On the Request Dashboard, click the request number in the Renewal column for the member.



The screenshot shows the 'Request Dashboard' interface. At the top, there is a 'Member Search' section with a 'Filter By' dropdown menu. The filter options are: Draft (unchecked), Submitted for DHS Review (unchecked), Pending Additional Items (unchecked), Withdrawn by User (unchecked), and Certified (checked). Below the filters is an 'Apply Filter' button. The main content area is titled 'Request Dashboard' and contains a search bar labeled 'Search Table'. Below the search bar is a table with the following columns: Request#, Status, Updated Date, Organization ID, Member ID, Member Full Name, Created By, Request End Date, Renewal, and Add Measure. The table contains two rows of data. The first row has a blue button with the number '16352' in the 'Renewal' column, which is highlighted by an orange arrow. The second row has a blue button with the number '16385' in the 'Renewal' column.

Request#	Status	Updated Date	Organization ID	Member ID	Member Full Name	Created By	Request End Date	Renewal	Add Measure
16352	Certified	2019-12-05 13:53:45.0	00000000	222222222	2, 2	User, Admin	N	16352	16352
16385	Certified	2020-01-15 09:22:39.0	00000000	111111111	123, 123	User, Admin	Y	16385	16385

Figure 93 Request Dashboard

2. A dialog box will appear asking if the user would like to create a renewal.

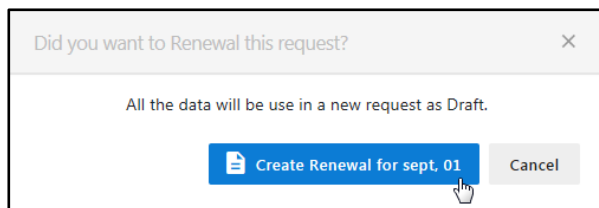


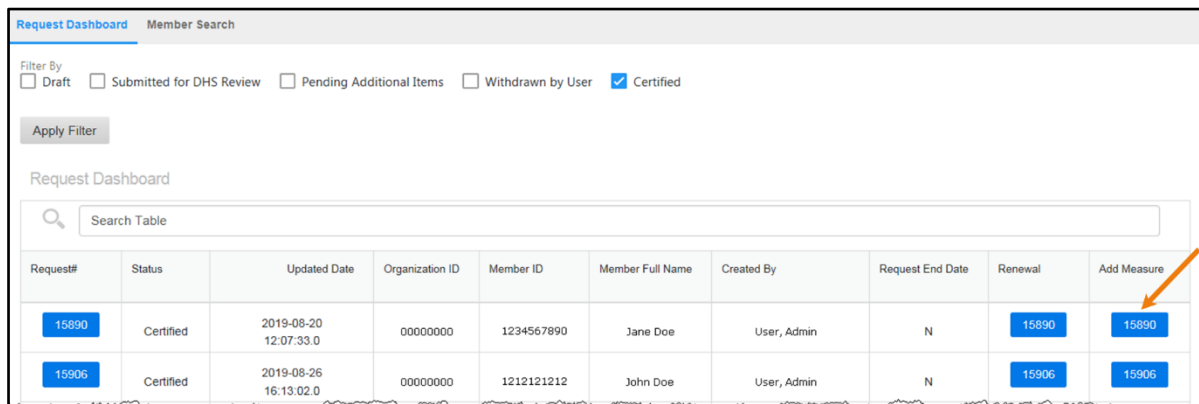
Figure 94 Dialog Box

3. Click the create renewal box. A new request is created and the user will be able to edit any of the panels that are pre-filled with information from the previous request. Follow the steps in the "Create a New Restrictive Measure Request for an Existing Member" section beginning with [Step 5](#) if step-by-step instructions are needed for the renewal request.
4. Click **Send to DHS** when complete.

13 Add a Restrictive Measure to a Certified Request

This function allows users to add a restrictive measure to a certified restrictive measure request.

1. On the Request Dashboard, click the request number in the Add Measures column for the member.



The screenshot shows the 'Request Dashboard' interface. At the top, there are filter options: 'Filter By' with checkboxes for 'Draft', 'Submitted for DHS Review', 'Pending Additional Items', 'Withdrawn by User', and 'Certified' (which is checked). Below the filters is an 'Apply Filter' button. A search bar labeled 'Search Table' is present. The main content is a table with the following columns: Request#, Status, Updated Date, Organization ID, Member ID, Member Full Name, Created By, Request End Date, Renewal, and Add Measure. Two rows are visible, both with 'Certified' status. The first row has Request# 15890 and Member Jane Doe. The second row has Request# 15906 and Member John Doe. In the 'Add Measure' column, there are blue buttons with the request numbers. An orange arrow points to the button for request 15890.

Request#	Status	Updated Date	Organization ID	Member ID	Member Full Name	Created By	Request End Date	Renewal	Add Measure
15890	Certified	2019-08-20 12:07:33.0	00000000	1234567890	Jane Doe	User, Admin	N	15890	15890
15906	Certified	2019-08-26 16:13:02.0	00000000	1212121212	John Doe	User, Admin	N	15906	15906

Figure 95 Request Dashboard

2. A dialog box will appear asking if the user would like to add a measure to the request.

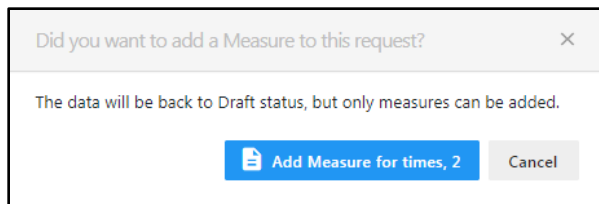


Figure 96 Dialog Box

- Click the add measure box. The Measures Overview panel will be displayed.

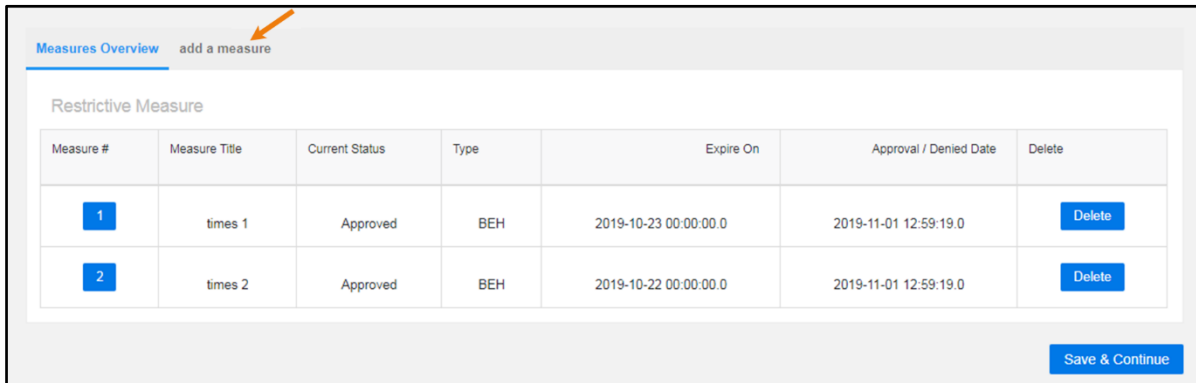


Figure 97 Measures Overview Panel

- Click **add a measure** from the menu at the top of the panel. The Measures Overview panel will be displayed and “Measure 1” will be added as an option. Follow the steps in the “Creating a New Restrictive Measure Request for an Existing Member” section beginning with [Step 25](#).

Note: A measure may only be added for requests in “Draft,” “Pending Additional Items,” or “Certified” status.

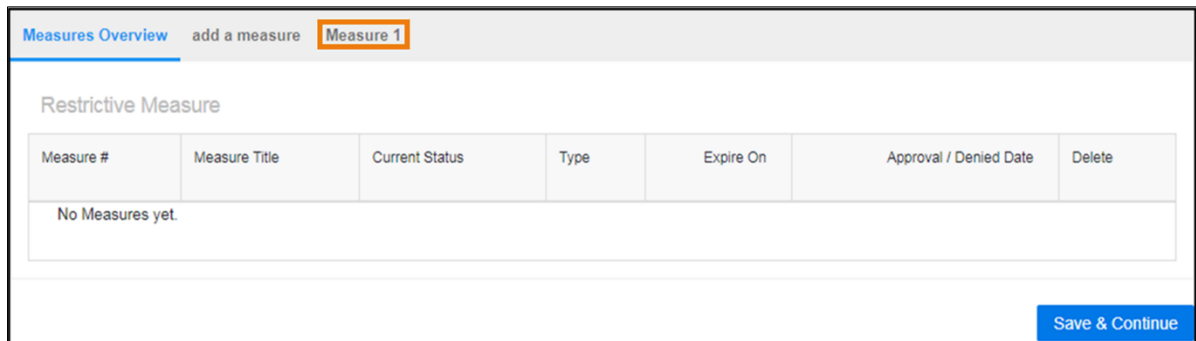
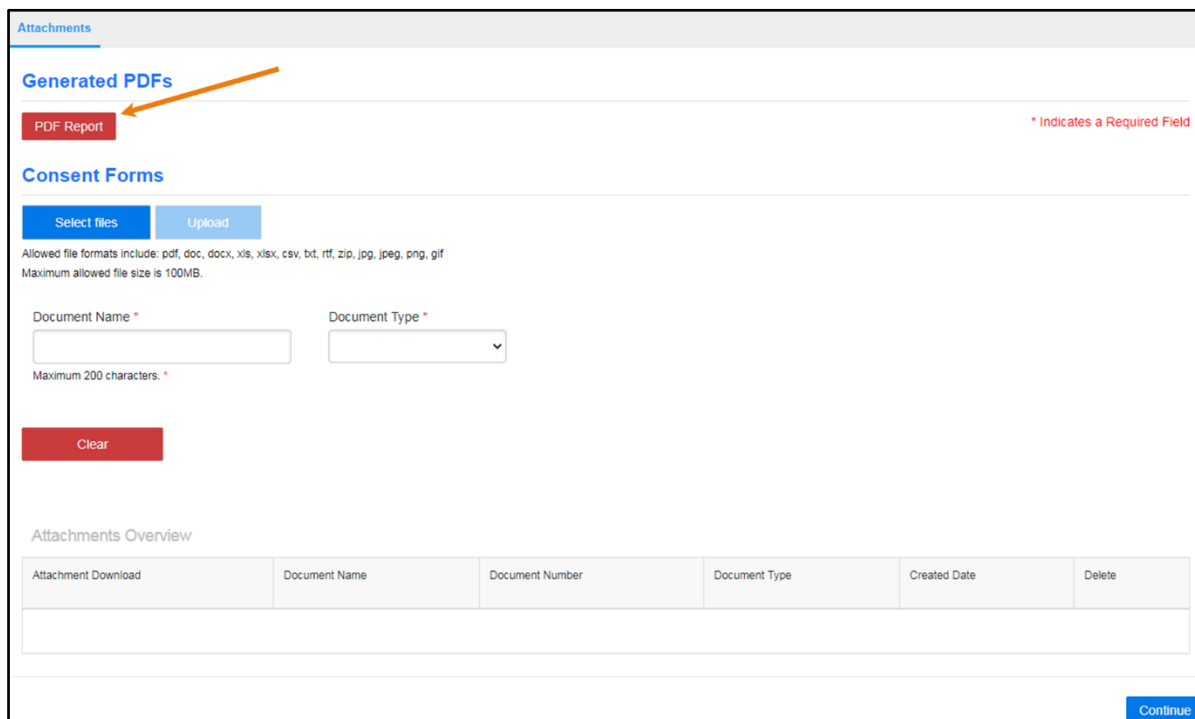


Figure 98 Measures Overview Panel

14 Accessing the PDF Report

The PDF Report displays a full PDF of the entire restrictive measure request and is available for any request status. The PDF Report displays the information entered by DHS in the State Comments field for requests in “Denied-Pending Additional Items” status.

1. To view the PDF Report, click the **PDF Report** button located under the Generated PDFs heading available on the Attachments panel.



The screenshot shows the 'Attachments' panel with the following elements:

- Generated PDFs** section containing a red 'PDF Report' button, which is highlighted by an orange arrow.
- Consent Forms** section with 'Select files' and 'Upload' buttons, and a list of allowed file formats (pdf, doc, docx, xls, xlsx, csv, txt, rtf, zip, jpg, jpeg, png, gif) and a 100MB size limit.
- Form fields for 'Document Name' (with a 200-character limit) and 'Document Type' (a dropdown menu).
- A red 'Clear' button.
- Attachments Overview** table with columns: Attachment Download, Document Name, Document Number, Document Type, Created Date, and Delete.
- A blue 'Continue' button in the bottom right corner.

Figure 99 Attachments Panel

2. Click the arrow next to the PDF icon that appears in the bottom left corner of the screen.

- Click **Open**. The PDF Report will be displayed.

Restrictive Measure PDF Report

Request ID: 16055
 Member ID: 6696969699
 Member Name: test test test

Member Information

Expedite Request	N
Expedite Reason	
Member ID	6696969699
Agency	FC RM Test-29700000
Program Code	
County of Placement	001-ADAMS
County of Responsibility	001-ADAMS
Last Name	test
First Name	test
Middle Name	test
Date of Birth	2019-10-01
Address1	test
Address2	test
Height(ft/in)	8 / 0
Weight(lbs)	199
Date of Last Physical	2019-10-01
Certify Date	2019-10-02 14:48:47.0

Measure Information

Measure 1:

Measure Title	test
Type of Restrictive Measure	Medical
Measure Purpose	
Measure Category	Manual Restraint
Measure Status	Approved
Previously Attempted Methods	test
Justifications	test
Risk and Benefits	test
Training Frequency	Monthly
Training Method	Contracted Trainer - in person training
Training Description	test
Measure Created Date	2019-10-02
Measure Discontinue Date	
Measure Discontinue Reason	
Measure End Date	

Provider information for Measure 1

Provider#	Provider Name	Provider Type	NPI/EIN	Setting	Setting Description	Begin Date	Provider End Date
Provider 1	test	Participant Hired Worker	5656868985	Jail			

State Comments Section

Measure Id	State Comments
1	gfdgfdgfdg

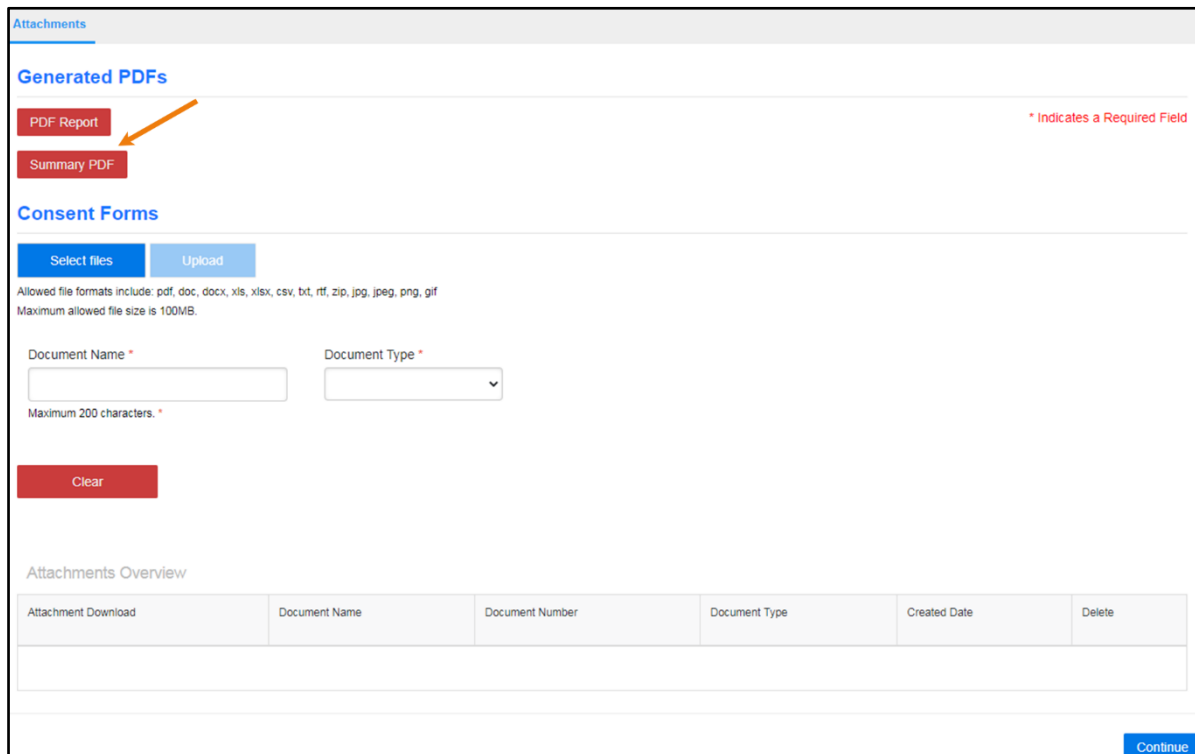
Attachments:

Figure 100 Restrictive Measure PDF Report

15 Accessing the Summary PDF

The Summary PDF is available for restrictive measure requests that have been “Certified.” The Summary PDF displays a summary of the member’s information, the measures in the request, whether the measures have been approved or denied, and if approved, the request end date.

1. To view the Summary PDF, click the **Summary PDF** button under the Generated PDFs heading available on the Attachments panel.



The screenshot shows the Attachments Panel interface. At the top, there is a header "Attachments" with a blue underline. Below it, the "Generated PDFs" section contains two red buttons: "PDF Report" and "Summary PDF". An orange arrow points to the "Summary PDF" button. To the right of these buttons is a red asterisk with the text "* Indicates a Required Field". Below the "Generated PDFs" section is the "Consent Forms" section, which includes "Select files" and "Upload" buttons, a list of allowed file formats, and a "Maximum allowed file size is 100MB" note. There are two input fields: "Document Name *" and "Document Type *", with a "Clear" button below them. At the bottom of the panel is an "Attachments Overview" table with columns for Attachment Download, Document Name, Document Number, Document Type, Created Date, and Delete. A "Continue" button is located in the bottom right corner.

Figure 101 Attachments Panel

2. Click the arrow next to the PDF icon that appears in the bottom left corner of the screen.
3. Click **Open**. The Summary PDF will be displayed.

Request Measures Summary Information PDF Document								
Member Information:								
Request Number	22222							
Agency (MCO)	00000000							
Member Info	test, test 2019-11-01 324 Any St. madison, Wisconsin 53704							
Certify Date	13-MAR-20							
Restrictive Measures Information:								
RM Number	Measure Category	Measure Title	Provider Sequence Number	Provider Name	Provider Setting	Measure End Date	Reapply By	Measure status
1	Manual Restraint	wisconsin badgers	1	test, test	Institute for Mental Disease	2019-11-25 00:00:00.0	2019-10-11 00:00:00.0	Approved
2	Seclusion	Philadelphia badgers	1	test, test	AFH 3-4 bed Licensed Adult Family Home			Denied
Important Message about the Request Member Status Update:								
Once approved, the Department may rescind approval at any time upon determination there has been a negative impact on the individual. If the use of the restrictive measure is discontinued, please enter the discontinue date into the database. If the use of the restrictive measure is amended or changed, please contact the BAQO Restrictive Measures Coordinator as soon as possible.								

Figure 102 Summary PDF

16 Appendix A: Support Resources

If users have questions or need assistance, they may contact Information Exchange System Support at DHSLTCareEncounterHelp@dhs.wisconsin.gov.

17 Appendix B: Glossary

Behavioral Requests: The team must submit a behavioral request if a restrictive measure is necessary to ensure safety during a situation when the individual's behavior will put themselves or others at imminent risk of serious harm. If the measure is necessary to act as a form of behavioral control during a medical procedure or while a medical condition exists, the team must also submit this information as a behavioral request.

Isolation: Isolation is the involuntary physical or social separation of an individual from others by the actions or direction of the staff, contingent upon behavior.

Isolation by Staff Withdrawal: Isolation by staff withdrawal occurs in situations where, for safety reasons, the support team determines staff should withdraw from the individual due to the presence of behaviors that present imminent risk of harm to staff. When the staff withdraws, they retreat to a predesignated room or area for a specific amount of time to allow the individual to calm.

Manual Restraint: A manual restraint, including physical holds and escorts, involves one or more people holding the limbs or other parts of the body of the individual in order to restrict or prevent their movement.

Medical Procedure Restraint: Medical procedure restraints utilized while under the care of medical professionals in a medical or dental office or while receiving treatment in a clinic or hospital, do not need to be approved by DHS as long as the medical provider is directing staff who accompanies the individual.

Medical Requests: The team must submit a medical request if a restrictive measure is necessary to ensure the safety of an individual due to a medical procedure or condition.

Protective Equipment: Protective equipment includes devices that restrict movement or limit access to areas of one's body. Protective equipment refers to devices applied to any part of an individual's body to prevent tissue damage or other physical harm, **and** the individual cannot easily remove the device. Protective equipment must not impair or inhibit visual or auditory capabilities or prevent or impair speech or other methods of communication.

Restraint: A restraint is any device, garment, or physical hold that restricts the voluntary movement of, or access to, any part of an individual's body, and the individual cannot easily remove it.

Restraint to Allow Healing: The treatment of acute medical conditions such as lacerations, fractures, post-surgical wounds, skin ulcers, or infections may require the use of a restrictive measure to allow healing. The use of a restraint to allow healing must include a protocol for use. The protocol must be for the specific device or procedure, include the rationale for its use, and specify the limited period of time it may be used. The managed care organization or IRIS consultant agency must submit a restrictive measures request to DHS if the restraint to allow healing will be utilized for more than three months.

Restrictive Measure: The term used to encompass any type of manual restraint, isolation seclusion, protective equipment, medical procedure restraint, or restraint to allow healing.

Seclusion: A restrictive measure in which staff physically set the individual apart from others inside a room using locked doors equipped with a pressure-locking mechanism.

Restrictive Measure Review Statuses:

- **Certified**—This status indicates that DHS has made a final decision about all measures in the request. The user is able to add a measure, enter a discontinue date and reason for a measure, and upload additional attachments to the request. Measures previously approved or denied are locked for editing in the request.
- **Draft**—This status indicates that the user has started the request. The request is able to be edited by the user.
- **Submitted to DHS**—This status indicates that the user has submitted the request to DHS for review. The request is locked for editing by the user.
- **Denied-Pending Additional Items**—This status indicates that DHS has entered comments in the DHS comments section for one or more measures. Request information and measure data is able to be edited by the user. If a measure has a status of “Denied-Pending Additional Items” for more than 45 days, the status of the measure will be updated to “Closed” and will be locked for editing.
- **Denied**—This status indicates that DHS has denied approval for use of the measure. The request is in certified status. The user is able to add a measure to the request. Previously denied measures in the request are locked for editing.
- **Approved**—This status indicates that DHS has granted approval for use of the measure. The request is in certified status. The user is able to add a measure to the request. Users may enter a discontinuation date and reason for previously approved measures in the request and upload additional attachments to the request.