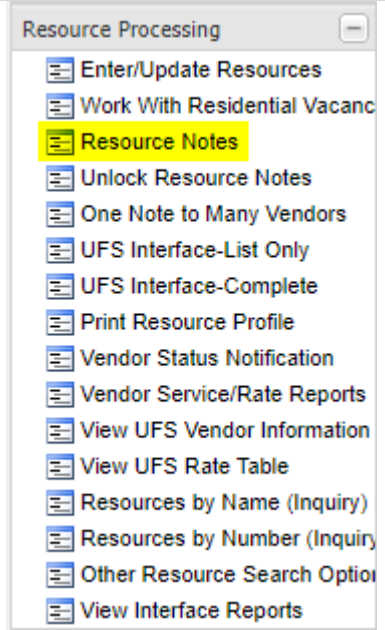


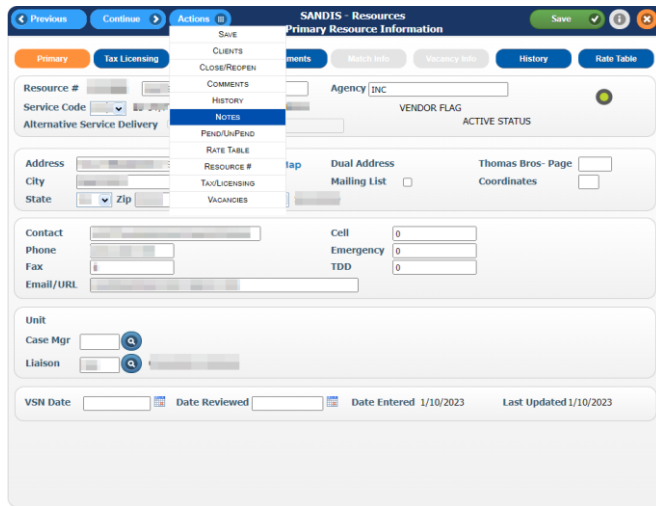
Resource Notes

The **Resource Notes** program enables users to document important information pertaining to each vendor record such as visits, correspondence and many more.

From Resource Processing, select **Resource Notes**.



The main Resource Notes screen can also be accessed by clicking on the **Actions** button and selecting **Notes**.



The Resource Notes menu will display with four options:

Resource Notes:

Displays a vendor’s notes history in chronological order and provides an option to enter new notes.

Print Notes by Vendor#:

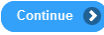
Generates a report to display all notes for specified vendor by custom date range

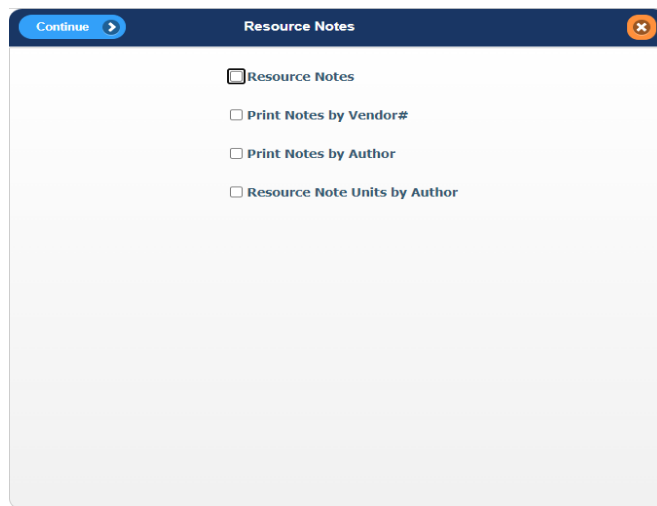
Print Notes by Author:

Generates a report with all notes written by specified caseload within a custom date range

Resource Note Units by Author:

Generates a report containing the total units worked by caseload for a custom date range

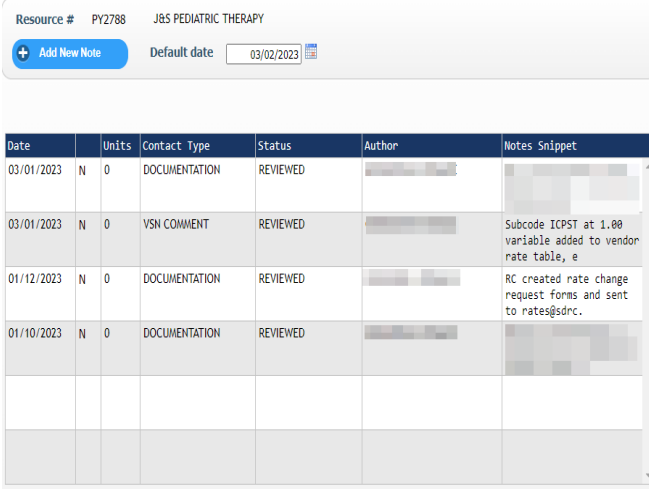
Select the desired option and then click  .



Viewing Resources Notes

After selecting Resource Notes from the prior screen, a chronological view of notes will be displayed. By default, the order of notes displayed will be from newest to oldest.

The sort order of the dates and any other fields can be changed by clicking on the blue header to toggle between **Ascending** and **Descending**.



Resource # PY2788 JBS PEDIATRIC THERAPY

+ Add New Note Default date 03/02/2023

Date	Units	Contact Type	Status	Author	Notes Snippet
03/01/2023	N 0	DOCUMENTATION	REVIEWED		
03/01/2023	N 0	VSN COMMENT	REVIEWED		Subcode ICPST at 1.00 variable added to vendor rate table, e
01/12/2023	N 0	DOCUMENTATION	REVIEWED		RC created rate change request forms and sent to rates@sdr.c.
01/10/2023	N 0	DOCUMENTATION	REVIEWED		

Right-click a record to view the available options:

Copy:

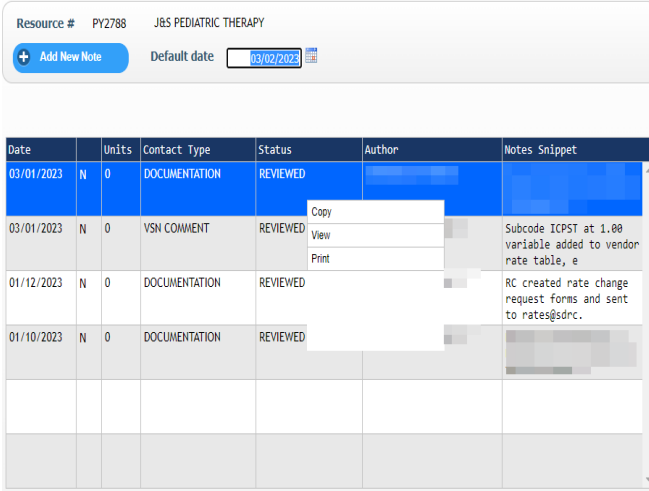
Copy the contents, contact date and unit type of the selected note into a new note.

View:

View the contents of the note in read-only mode.

Print:


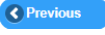
View the note and displays the prompt to either print the specified note to the user's default printer or email the note to the user's email.




Resource # PY2788 JBS PEDIATRIC THERAPY

+ Add New Note Default date 03/02/2023

Date	Units	Contact Type	Status	Author	Notes Snippet
03/01/2023	N 0	DOCUMENTATION	REVIEWED		
03/01/2023	N 0	VSN COMMENT	REVIEWED		Subcode ICPST at 1.00 variable added to vendor rate table, e
01/12/2023	N 0	DOCUMENTATION	REVIEWED		RC created rate change request forms and sent to rates@sdr.c.
01/10/2023	N 0	DOCUMENTATION	REVIEWED		

After right-clicking the record and selecting **View**, the screen displays the full content of the note along with the units, unit type, contact date and author note. Click the  or  button to exit.

Creating a new note

To create a new entry for the vendor record, click the  button.


A blank note entry screen will display. Update the following fields as needed:

- **Recorded by**
- **Contact Date**
- **Units**
- **Unit Type**
- **Template** (if available)

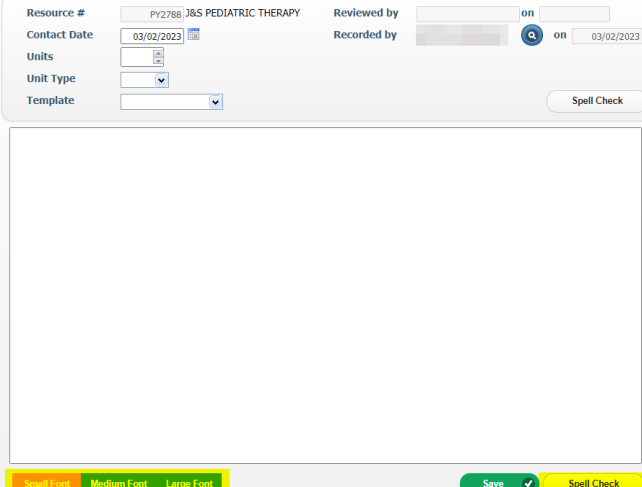
**Templates may differ depending on regional center*

The Spell Check feature is available if needed as well as options to increase the font size while editing or viewing a note.

To save and exit the note, select

. To save the note but remain on the screen, press

.



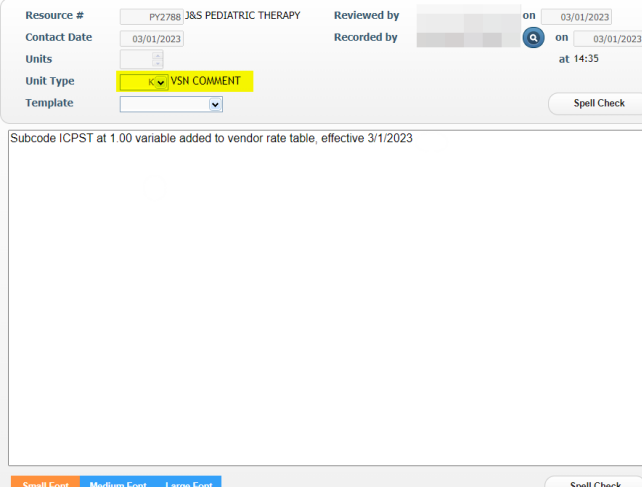
The screenshot shows a form for a resource record. The fields are: Resource # (PY2788 J&S PEDIATRIC THERAPY), Contact Date (03/02/2023), Units, Unit Type, and Template. There are also fields for Reviewed by and Recorded by (03/02/2023). A Spell Check button is visible in the top right corner. At the bottom, there are font size options (Small Font, Medium Font, Large Font) and Save and Spell Check buttons.

Unit Type K: VSN Comment

As of SANDIS R7.13, generating a Vendor Status Notification (VSN) document will no longer use the text in the Comments section of a resource record.

To add or edit a VSN comment, the resource note must be saved under

Unit Type K.

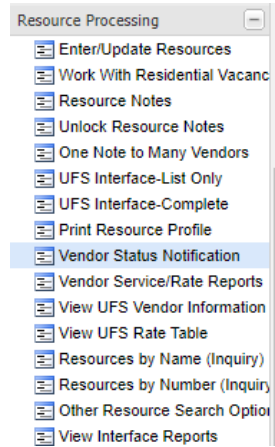



The screenshot shows the same resource record form as above, but with Unit Type set to 'K VSN COMMENT'. The main text area contains the comment: 'Subcode ICPST at 1.00 variable added to vendor rate table, effective 3/1/2023'. The font size options at the bottom are Small Font, Medium Font, and Large Font. A Spell Check button is also present.

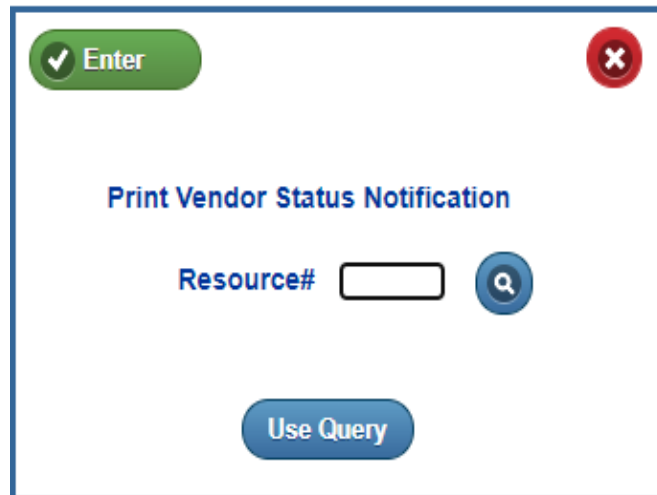
Vendor Status Notification

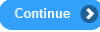
The **Resource Notes** program enables users to document important information pertaining to each vendor record such as visits, correspondence and many more.

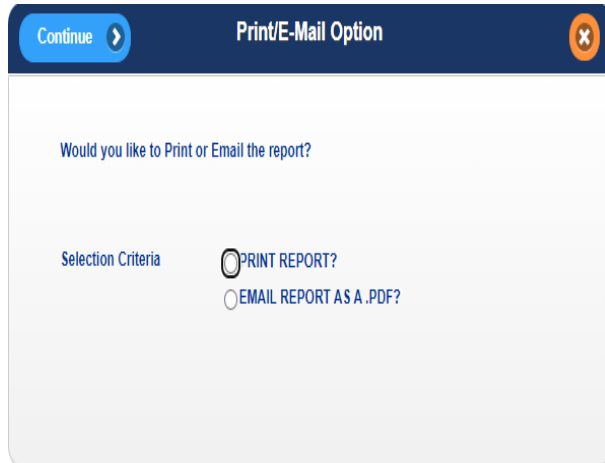
To generate a new VSN document, select the **Vendor Status Notification** option under **Resource Processing**.



Enter the **Resource #** or click on the  to search for a vendor by name.



Select the desired method of delivery to receive the report and then click .



The generated document will contain the notes with unit type K. Notes will be displayed in the VSN document in descending order (from oldest to newest.)

VENDOR STATUS NOTIFICATION SAN1858 (05/09)

FROM: _____ DATE PRINTED: 03/02/2023
 TYPE OF NOTIFICATION: _____ LAST UPDATE: 01/10/2023
 INFORMATIONAL COPY

VENDOR#: PY2788
 VENDOR NAME: J&S PEDIATRIC THERAPY INC
 SERV ADDR: _____ CA _____
 MAIL ADDR: SAME AS SERVICE ADDRESS
 COUNTY: _____

TAX ID: _____ TYPE: E VENDOR CATEGORY: C CORP-NG 1099
 TAX NAME: _____
 VENDORIZING REG CTR: _____

TYPE OF VENDOR: _____

SERVICE CODE: _____
 RATE SOURCE: _____
 BUDGET CATEGORY: _____

CONTACT PERSON: _____ PHONE: _____
 EMAIL: _____
 CELL#: _____ EMERGE#: _____
 TDD #: _____ FAX #: _____

OTHER SERVICES PROVIDED: _____ RATE SOURCE _____

COMMENTS:

1/11/22 - RG

 Note date: 03/01/2023 Author: _____

 Note date: 03/02/2023 Author: _____

 *****End of new Notes*****