CRM Referral Source Management

20.4 Release Setup Guide

Release Setup Guide Updated: December 21, 2016

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Section 1. Account Performance Report

In order to configure the account rating report to filter the information based on the Referring Account's line of business, the **Manage Line of Business Config** needs to be updated.

Setup Task	Setup Steps
Update Line of Business Config for the Account Performance Report	1. Click **ADMINISTRATION** from the top navigation bar. 2. Click **Manage Line of Business Config**. 3. Select the **LOB Segment**. 4. Select the **Rating LOB** that that should be associated with the **LOB Segment**. This will allow the report to filter only accounts with a Line of Business that matches the Rating LOB. 5. Be sure the Lines of Business selected (the bottom right box of the configuration page) contains all of the Referral's Line of Business. This will filter the list of Referrals on the Account Performance Report that are associated to the LOB Segment. 6. Click the disk icon.

Section 2. Patient Pre-Admission Assessment Module

There are 5 Secured Actions that can be configured to support the appropriate workflow for your organization to use the Pre-Admission Assessment Module.

These options are:

- Clinical Information – View
- Clinical Information – Edit
- Qualifying Information – View
- Qualifying Information – Edit
- Print PreAssessment

Setup Task	Setup Steps
Setting a secured action for a role for the Pre-Admission Assessment workflow.	1. Click **ADMINISTRATION** from the left hand navigation bar. 2. Click **Secured Actions**. 3. Locate and click on the appropriate secured action: Print the PreAssessment • Entities/SNFResidency/PreAdmissionAssessmentReport Tab Access to Edit/View • Entities/SNFResidency/ViewQualifyingInfo • Entities/SNFResidency/EditQualifyingInfo • Entities/SNFResidency/ViewClinicalInfo • Entities/SNFResidency/EditClinicalInfo 4. Click the green plus. 5. Search for and click on the role that should be granted access. 6. Click OK. 7. Click the disk icon.

Section 3. SNF Residency Outbound Interface Messaging Viewing

By default, users with Administrative access to SigmaCare CRM will have access to view this tab. If you need to grant other roles to be able to view this tab, follow the steps below to add the secured action.

Setup Option	Setup Steps
Add Secured Action for the SNF Residency Outbound Interface Messages Viewing	1. Click **ADMINISTRATION** from the left hand navigation bar. 2. Click **Secured Actions**. 3. Locate and click *Administration/Outbound Events* 4. Click the green plus. 5. Search for and click on the role that should be granted access. 6. Click OK. 7. Click the disk icon.