CONSOLO BASICS

This guide will explain basic Consolo functionality. This guide focuses on general functionality and navigation. Additional important information can be found in other user guides.

These guides can be found in Training Tools (Help) / Reference Documents.

Additionally, basic functionality may be enhanced by periodic updates to Consolo’s software. While we endeavor to keep these manuals up to date, in order to stay abreast of current functionality, you should always review the Release Notes, and attend pre-release training, whenever a new version of Consolo is released.
INTERNET BROWSERS

Consolo is an internet-based software program. That means you access it via an internet connection—nothing is downloaded or stored on your computer. In order to access the internet, you need an internet connection and a compatible web browser. Consolo does not function in Internet Explorer. Consolo functions in:

- Google Chrome
- Mozilla Firefox
- Apple Safari
- Android Tablets and Devices

You must have one of these browsers installed on your computer in order to use Consolo. To install one of these free browsers, simply search for them on the Internet, and follow the Download prompts.

BROWSER UPDATING

Browsers periodically update to newer versions. Consolo works best in the most current version. Please make sure to keep your web browser up to date. Firefox and Chrome will both update automatically. To manually update, see:

- http://support.google.com/chrome/bin/answer.py?hl=en&answer=95414

CACHE CLEARING

This is web browser maintenance that you should perform regularly. It’s best to make this part of your regular work routine. For example, do it every Monday morning, or at every IDG meeting. It’s also helpful to do this every time Consolo releases a new version of its software. Instructions for cache clearing can be found in Training Tools / Reference Documents.

CONSOLO WEB ADDRESS

Your hospice agency has its own unique Consolo website. You’ll need to enter this web address into your web browser’s address box in order to access Consolo. You may save your Consolo website as a “Favorite” or “Bookmark”, or set it as your homepage, to make future access easier. Your Consolo website address will be: https://youragency.consoloservices.com

In the address for your hospice, “youragency” will be replaced by the name of your hospice agency. When entering this address into your browser’s address box, don’t forget the ‘s’ in ‘https’. That stands for ‘secure’, and you won’t be able to get to your Consolo website without it.
CONSOLO LOGIN SCREEN

This is where you login, or enter, your Consolo website. Enter your login name (assigned to you by your hospice agency). Then enter your password (assigned to you by your hospice agency.) Then click the “login” button.

Sometimes, you will see announcements from Consolo services on this screen. PLEASE READ THESE ANNOUNCEMENTS. They contain important information about changes to the software, new updates, system downtime, etc.

The first time you login to Consolo, you will use a password provided to you by your hospice agency. Once you login, you’ll be prompted to change this password to a new, unique password on this screen:

In the “Old Password” box, enter the password given to you by your hospice agency - the same one you just used to login for the first time.

In the “New Password” box, enter a new password that only you will know. It must be complex enough to match the “Minimum Password Complexity” specified to the right of the New Password box. As you type in your new password, a status bar will let you know how complex your password is. We recommend that your password contain a mix of capital and lowercase letters, numbers, and alphanumeric symbols.

DO NOT SHARE YOUR PASSWORD WITH ANYONE.

Next, re-enter your password in the “Password Confirmation” box.

Finally, create a “Password Reminder Question” and “Password Reminder Answer”. This should be a question which you’ll be able to remember easily, but that someone else won’t be able to guess. In the event that you ever forget your password, Consolo will offer you the option of answering this password reminder question. If you answer it correctly, a new temporary password will be emailed to you so that
you can re-login. In order for this to work, however, you must have a valid email address configured in your User profile (your hospice agency will set this up for you).

Your new password will not be visibly stored in your agency’s Consolo database, nor will it be visible to anyone at Consolo Services. It is totally private and unique to you.

Important Note: Consolo Support cannot help you re-set your password, or access the system if you’ve been locked out. You must ask someone in your hospice agency for assistance.

Once you’ve created your new password, you’re ready to use Consolo. Just click on the logo at the top left corner of the screen.

DASHBOARDS

Clicking on the logo in the top left corner of the screen brings you to your default Dashboard. For most users, this is the Classic Dashboard. This Dashboard displays a summary of all the patients to whom you’re assigned, along with several options for filtering these patients, and different types of Alerts about the patients.

You may have the Tracker Dashboard or the War Board Dashboard set as your default Dashboard. The Tracker Dashboard provides information about recent patient activity (referrals, admissions, discharges, etc.), while the War Board provides a summary view of every patient that’s active in your hospice agency today, with associated team members and Services.

Other Dashboards include Alerts Dashboard, Upcoming Visits and Scheduled Visits. All of these Dashboards can be viewed by clicking on the “Main Menu” tab. For a complete discussion of Dashboards, see the Dashboard guide.
Regardless of which Dashboard you’re using, clicking on a patient’s name will open the patient’s chart (Homepage) in a new browser Tab. You can then switch back and forth between the two tabs. This allows you to work on your patient’s Homepage, and switch back to your Dashboard, without closing either.

**PATIENT HOMEPAGE**

Click the “More” button at the top center of patient’s homepage to view pertinent details about the patient.
All Patient Homepages display the same sections and items, regardless of what has been charted within them. The Patient Homepage is broken out into different sections. Clicking on any item will open that section of the patient’s chart. See the Homepage User Guide for more info.

To immediately create a new entry, click the “+” symbol next to the desired item.

Click the “Clinical Charts” link to view a summary of all clinical charting for the patient. The summary can be searched or sorted by clicking on the column headers or using the “Filter Options”. See the various clinical discipline guides for more details:
CUSTOM PATIENT ALERTS

Custom Patient Alerts are a convenient way for your team to communicate about specific patient scenarios. Custom Patient Alerts display on the Patient’s Homepage and on the Classic Dashboards of all users assigned to the patient.

To create a Custom Patient Alert, click on the “+” link on the Patient’s Homepage “Administration Info” section.

You’ll see the following screen:

Complete the three sections as needed.
- Expiration Date – How long the message will stay visible on the Patient’s Homepage and Classic Dashboards
- Role – Who will see the message on their Classic Dashboard
- Message – Text field for you to enter the alert.
To remove an Alert that was needed, but is no longer appropriate, edit the Alert and change the Expiration Date to a historical date. This will cause the Alert to drop off the Patient Homepage and Classic Dashboards, but it will be preserved in the patient’s Custom Patient Alert history. To remove an Alert that was entered in error, use the Delete icon on the Custom Patient Alert summary screen.

Your Custom Patient Alert will display on the patient’s homepage (above) and Classic Dashboards of users assigned to the patient:

SEARCHING FOR PATIENTS

There are two places to search for patients in Consolo. They both function the same way. One location is in the top right corner of every screen. The other location is in the Patients Tab.

The small search box at the top right corner of every screen will accommodate searches for Active patients. The Search feature in the Patients Tab will facilitate searching for any patient.

You may search by entering all or part of:
- Patient last name
- Patient MRN
- Patient social security number.

Search results are based on what you type in- so if you mis-type your search term, you will get inaccurate results, or no results. You can search by entering only a partial last name; this returns more results, and helps reduce search errors due to mis-spelled names.
The Patients / Search screen provides a number of filters to assist in your Search. Searching with all filters blank will return all active and pending referral patients. Multiple Patient Care Status filters may be selected.

Use the Show/Hide columns tool to make the results table show only the information you’re interested in.

If you’re unable to find a patient that you’re sure should be in your database:
- Try checking all patient care status filters, but leave all other filters blank
- Click the “filter” button
- Use the small Search box (bottom left corner of the screenshot above) to start typing in the patient name.
- Double-check the spelling or try alternate spellings if you’re not certain of the spelling

The icons at the far right of the Search results table can be used to Print or Export the search results.

SERVICES

Services are people, places, and companies that serve your patients. Services are stored in the Services Tab. Once entered there, they can be assigned to individual patients in their Hospice Assignments screen.

Think of Services as your “Yellow Pages” or “Rolodex” of people, places, and companies that serve your patients. Before you can assign one of them to a patient, they must first be entered in the appropriate section of the Services Tab. In other words, if you’re trying to add a Service to a patient’s Hospice Assignments, and you can’t find it in the list, you must go to the Services Tab and add the Service there first.

The Services Tab contains locations to save information about the following Services:
- Physicians (attending and referring physicians; physicians automatically count as a Referral source)
- Family Contacts & Referral Sources (all family members for all your patients are stored here, and
are automatically counted as Referral sources; other Referral sources entered here as well)
- Facilities (Hospitals, Nursing Facilities, Assisted Livings, etc.)
- Pharmacies
- Funeral Homes
- Private Insurance Companies
- Transportation Providers

Each Service can be associated to a specific Office, Area, Region or Corporation. This affects which patients they can be assigned to; please see the related Video and Release Notes for Version 3.0.8.

**HIPAA TIME OUT**

In order to protect patient information, Consolo will automatically log you out if you’re inactive for more than 25 minutes. After 25 minutes of inactivity, you will hear an audible alarm warning you that you’ll be logged out in 5 minutes. You’ll also see a message on your screen telling you that you’ll be logged out. This message includes a 300-second (5 minute) countdown timer. Click the “save my session” button within the message window to preserve your session.

Newer areas of Consolo will warn you, and provide an option to Refresh or Save your session, in the lower right corner of the screen:

![Consolo Demo](image)

Often, your device will log you out before Consolo will. For example, your laptop may “sleep” or “hibernate” after just a few minutes. This will sever your internet connection, and you’ll lose any unsaved work in Consolo.

It’s important to save your work frequently. If you’re logged out due to inactivity, any unsaved documents will be irretrievably lost.
Older pages in Consolo have a small “?” symbol at the top right. Clicking on this symbol will give you more information about the screen you’re looking at. Newer pages have a “Help” Menu with a “This page in the Wiki” link.

The support wiki will open a help page in a new tab. Once in the support wiki, you can also search for additional items about which you’d like more information.

Many times the support wiki can answer whatever questions you’re having about Consolo functionality; please check it before calling or emailing for additional support.
TIPS AND TRICKS

Remember these helpful suggestions when using Consolo.

1. **CTRL+F** is a useful keyboard shortcut. Holding down the “CTRL” button on your keyboard and pressing the letter “F” at the same time will produce a small search box on your screen. It will be either at the top right of your screen or the lower left of your screen. Type all or part of a word, date, or number within this search box, and that word/date/number will be highlighted everywhere it appears on your screen. Use the arrows next to the search box to be taken from one occurrence to the next. This is particularly helpful when searching your Dashboard. For example, typing “super” in the CTRL+F search box highlights the word “supervisory” everywhere it appears on my Dashboard, showing me quickly which patients have pending or expired supervisory visits.

2. **NO BACK ARROW**. Your web browser includes Forward and Backward navigation arrows. Please avoid using them while in Consolo. Especially avoid using the Backward, or Back Page navigation arrow.

If you are editing or creating a new document, and click the back arrow, you will be taken away from your document, and the document will NOT be saved. If you Save a document, then click the back arrow, you’ll be taken back to the ‘create’ screen for that document. If you then click Save again, you’ll create a duplicate copy of that document. Please always use the built-in Navigation Links within Consolo.
3. **Right-click to open in new tab.** To view a new screen, without closing the screen you’re currently viewing, hover your mouse over the link you wish to open, right-click it, then select “Open link in new tab”.

4. **Sorting.** Anywhere data is presented in a table, such as Reports, Patient Search, War Board, and Clinical Charts, re-sort the tables by clicking on column headers. Tables default to display information alphabetically, or chronologically. Clicking on column headers re-sorts data in a different order. In the example below, Patient Search was re-sorted by Admission date.

5. **Training Tools / Help.** This Tab contains all the information you’ll need to master Consolo. Training Videos are short videos that cover a specific topic. Reference Documents include all of our User Guides and Release Notes, as well as printable copies of blank documentation forms. Training Tools by Discipline includes longer downloadable training videos that cover functionality for specific disciplines.

6. **Consolo Support.** You can reach us via email at: support@consoloservices.com, or by phone at: 877-846-5831, Ext. 3.
ICONS

These are some of the Icons you’ll frequently see in Consolo.

🔍 Search

?q Support Wiki

ℹ️ Indicates that this information is important!

ℹ️ Indicates that this information flows to the patient’s IDG Snapshot and/or Certification

✉️ or ✉️ Edit

🗑️ Delete

🖨️ Display as a PDF

🖨️ Print

👁️‍🗨️ or 👁️ Click to View the document online

🔗 Copy CSV

You’ll see this at the far-right of most data tables (War Board, Reports, Patient Search, Audit Trail, etc.) From left to right, these icons allow you to:

- Copy to clipboard
- Save as CSV file

🔍 Click to toggle the selection open/closed

焐️ Click to clear, or erase, data from the associated field

⏰ Enters the current time

➕ Immediately create a new item

Clinical Chart tags – Comprehensive Nursing Assessment, Addended Chart, Countable Visit, Countable Nursing Visit
Or

Time helper. Hover your mouse over the time you wish to select, and then click to enter

Date helper. Click on the appropriate date, or use the left/right arrows or month/year dropdown selectors to find the appropriate date. Click on the date to select.

Voice recognition. Click the microphone, and then speak. Consolo will translate speech into text.
Logo. In your Consolo website, this will be your hospice agency’s logo. It will always be at the top left corner of the screen. This is a link that takes you back to your default Dashboard.

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