

Welcome to POC-365

USER TRAINING MANUAL

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PART 1: USER MANAGEMENT

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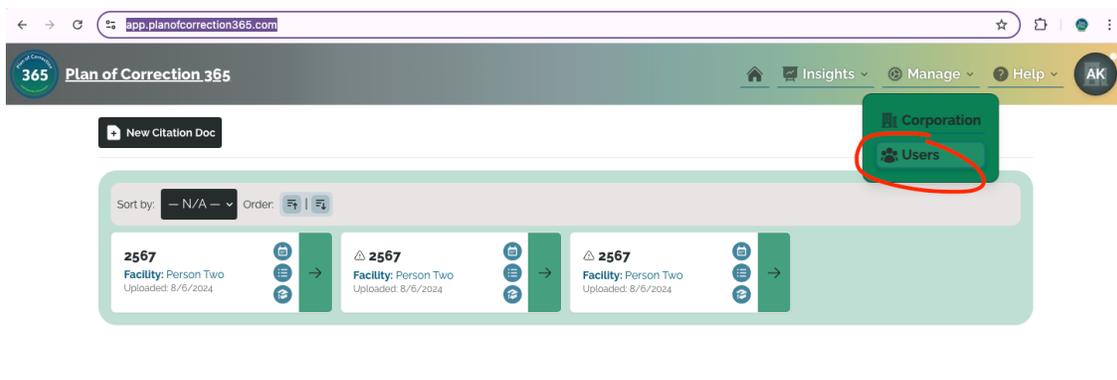


In this guide, we will walk you through the steps to manage users within your organization.

Step-by-Step Guide

Accessing User Management

- **Step 1:** Click on the **Manage** icon at the top of the screen.
- **Step 2:** Select **Users** from the dropdown menu. While you can also modify your corporation here, this guide will focus on managing users.



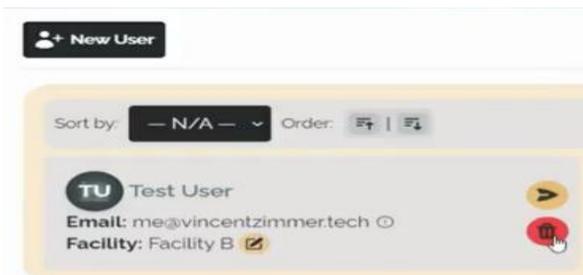
Viewing Users

Step 3: Click on the **User** button to see a list of all current users on your platform, including the community.



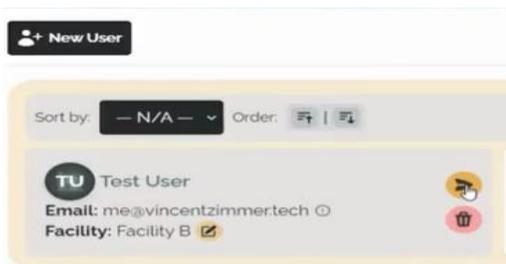
Editing or Deleting Users

- **Step 4:** To edit a user, click on their icon.
- **Step 5:** To delete a user, click the delete icon next to their name.



Resetting Passwords

- **Step 6:** To reset a user's password, click the mail icon. This will send an automatic email to the user, allowing them to reset their password.



Creating a New User

- **Step 7:** Click New User.



- **Step 8:** Enter the first name and last name of the individual.

The screenshot shows a 'New User' form with the following fields and controls:

- First Name:** A text input field with an asterisk indicating it is required.
- Last Name:** A text input field with an asterisk indicating it is required.
- Role:** A dropdown menu with 'Facility' selected and an asterisk indicating it is required.
- Facility:** A dropdown menu with 'Facility B' selected and an asterisk indicating it is required.
- Email:** A text input field containing 'example@example.com' and an asterisk indicating it is required.
- Temporary Password:** A text input field with an asterisk indicating it is required.
- Confirm Password:** A text input field with an asterisk indicating it is required.

At the bottom right of the form are two buttons: 'Cancel' and 'Add User'.

- **Step 9:** If you have multiple communities under your corporate umbrella, select the community and facility here.

This close-up shows the 'Role' dropdown menu with 'Facility' selected and a mouse cursor hovering over it. Below it, the 'Facility' dropdown menu is also shown with 'Facility B' selected.

- **Step 10:** Choose between two role levels: **Corporate** or **Facility**.
- **Step 11:** Enter the user's email address and create a temporary password.

This close-up shows the 'Email' input field containing 'example@example.com' and the 'Temporary Password' input field, both with asterisks indicating they are required.

- **Step 12:** Confirm the password and click **Add User**.

This close-up shows the 'Confirm Password' input field with an asterisk indicating it is required. Below it are the 'Cancel' and 'Add User' buttons, with a mouse cursor pointing at the 'Add User' button.

User Email Notification

- **Step 13:** The new user will receive an email with their provided email address. This email will allow them to access the system by creating a new password and will include the appropriate link to log into the system.

Conclusion

This concludes the training on how to manage users within your communities.

PART 2: UPLOADING CITATIONS

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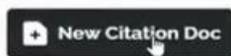


In this guide, we will walk you through the simple steps to upload a new citation document and showcase the powerful capabilities of our AI system in action.

Step-by-Step Guide

- **Uploading a Document**

Step 1: Click on New Citation Document



- **Selecting the Community**

Step 2: Choose your community from the drop-down list. This is useful if you manage multiple communities under your corporate umbrella.

Upload New Citation Doc

Fields marked with * are required

Facility: *

- **Selecting Document Type**

Step 3: Select the type of document you are uploading. You'll see a few options listed.

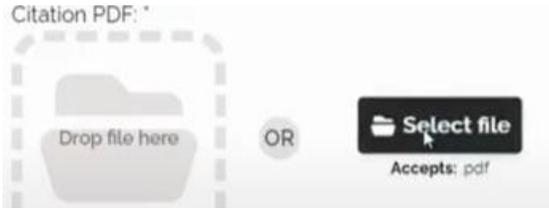
Document Type: *
 +

If you need to add a new document type, click the plus icon and add it for future use.

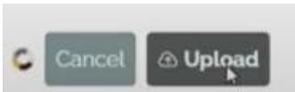
Document Type: *
 +

- **Uploading the File**

Step 4: Select the file or drag and drop it into the designated area.

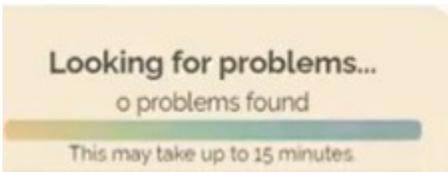


Then, click Upload and let the magic happen.



- **Processing Time**

Note: It might take up to 15 minutes for your citation to load and for our AI to write the plan of correction. This depends on the document size and type, so please be patient.



System Functionality

- **PDF Conversion:** Our system converts your PDF into a readable format.
- **Citation Parsing:** It then scans the document for various citations and deficiency details.
- **Example:** In this example, the document had two deficiencies with 2 K tags.

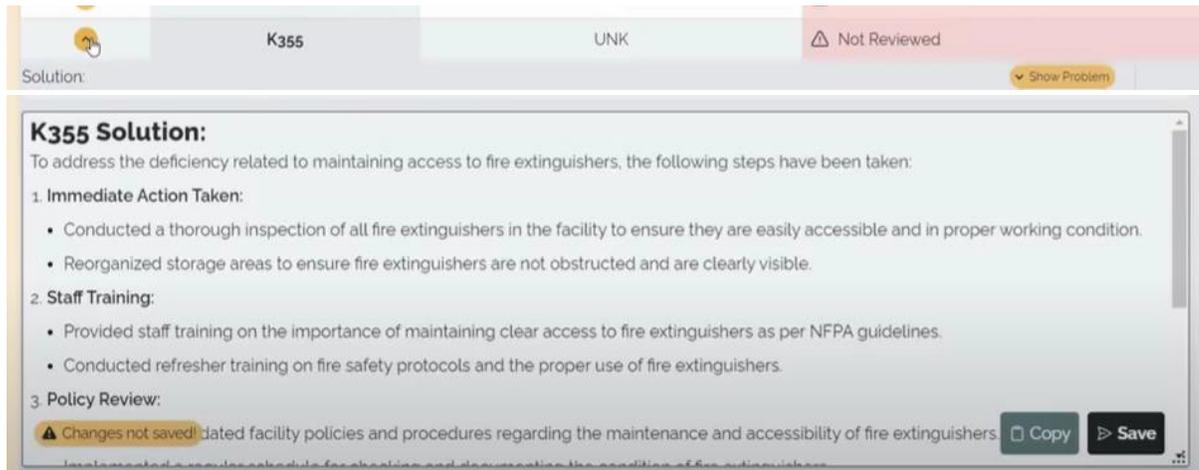
Life Safety  			
Facility: Facility B  			
Uploaded: 6/6/2024			
Tag	Severity	Solution Status	
K211	F	⚠ Not Reviewed	
K355	UNK	⚠ Not Reviewed	

AI Plan of Correction

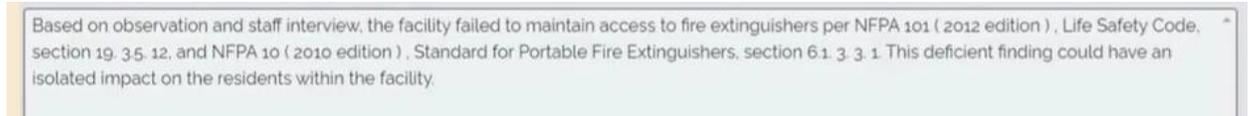
Once processing is complete (the spinning arrow will disappear), the AI will have written the plan of correction.

Viewing the Plan:

- Click on the drop-down menu to see the solution.

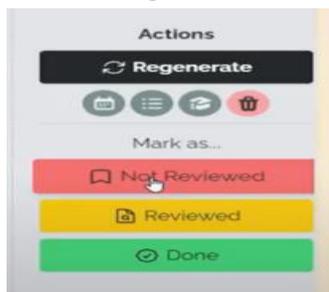


- To view the initial problem, click the Show Problem button.



Review and Completion

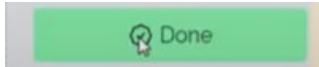
- **Reviewing:** Mark each citation as Done, Reviewed, or Not Reviewed.



- **Collaboration:** Multiple users can work in the system at the same time, making the process more efficient.
- **Professional Review:** While AI creates an initial plan of correction, it's important to have your team review it to ensure it aligns with the original problem.

Final Steps

Step 5: Click Done to indicate that the citation has been reviewed and completed. The citation will now be stored on our citation page, marked as done.



Conclusion

That's it! You've successfully learned how to upload a citation document using POC-365.

PART 3: TRAINING AND EDUCATION

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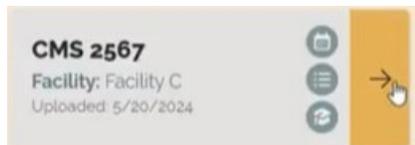


In this training, we will guide you through the process of creating educational or training documents tailored to specific deficiencies within your organization's compliance framework.

Step-by-Step Guide

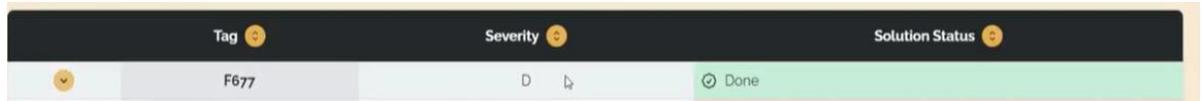
1. Accessing Deficiency Details

- **Step 1:** Navigate to the deficiency document and locate the citations you want to create training documents for.

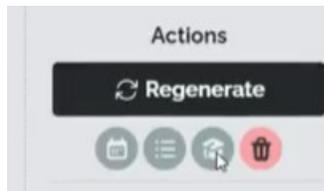


2. Creating Training Documents

- **Step 2:** Click on the appropriate tag associated with the deficiency where you want to create a training document.



- **Step 3:** Click **Create Training** to initiate the creation of an educational or training document.



Then fill out the fields including the target audience and any specific key learning objectives that you might want to cover. Then click "Generate." (See next page)

Generate a Training Plan for F731 ✕

- The facility has implemented a system for monitoring and oversight to ensure that licensed nursing staff are consistently available on a 24-hour basis.

5. **Quality Assurance Measures:**

- Quality assurance measures have been put in place to regularly review staffing levels and ensure compliance with regulatory standards.

6. **Communication with Regulatory Authorities:**

- The facility has communicated with the relevant regulatory authorities regarding the steps taken to address the deficiency and prevent future occurrences.

Summary

The facility has taken immediate action to address the deficiency related to the availability of licensed nursing staff on a 24-hour basis. By implementing the above corrective measures, the facility aims to ensure ongoing compliance with regulatory requirements and provide quality care to residents.

Cancel ↻ **Generate**

3. Accessing Educational Training Page

- **Step 4:** All created documents are stored on the educational training page. You can access this page by clicking on the specific icon or through the original citation page.



4. Viewing Specific Documents

- **Step 5:** On the training and educational creation page, each tag will have a linked training or educational session/document.

CMS 2567
Facility: Facility C
Uploaded: 5/20/2024

	Tag	Audience
▼	F677	Nurse
▼	F881	Nurse
▼	F550	Nurse
▼	F645	Nurses
▼	F804	Nurses

- **Step 6:** To view a document, click the drop-down arrow next to each tag.

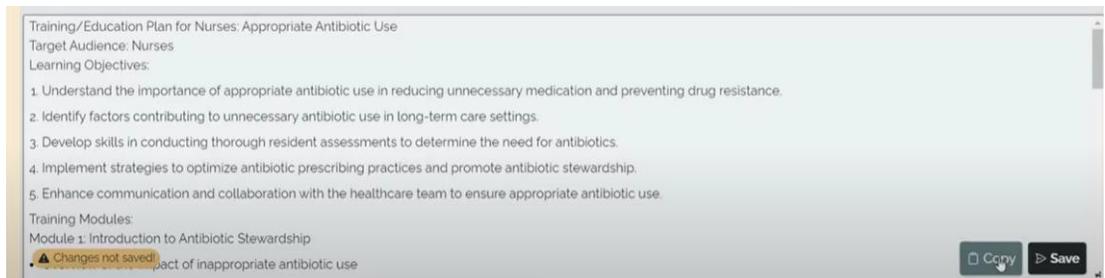


5. Editing and Exporting Documents

- **Step 7:** You can edit any document by clicking into the text box and making changes. Remember to click **Save** before exiting.
- **Step 8:** Export documents to PDF or Word format for easy access and use.



- **Step 9:** Use the **Copy** button to paste content into a Word document for further modification.



Conclusion

You've learned how to efficiently create education or training documents for specific deficiencies in POC-365. These tools empower you to enhance compliance training and educational efforts within your organization

PART 4: HOW TO GENERATE REPORTS

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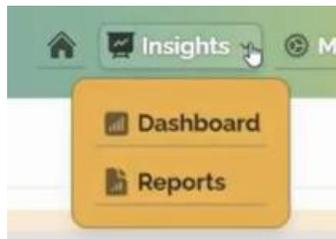


In this training, we will guide you through the process of generating reports to streamline your compliance efforts.

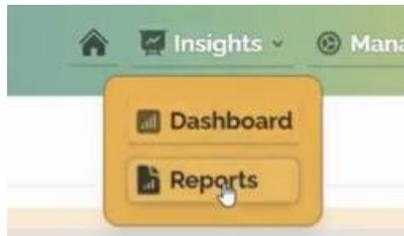
Step-by-Step Guide

1. Accessing Reports

- **Step 1:** Click on the **Insights** button at the top of the screen.



- **Step 2:** Hover over **Reports** and click to access the report page.



2. Setting Up Your Report

- **Step 3:** Choose a **Start Date** and enter an **End Date** for your report period.

Run a Report

Fields marked with * are required

Start Date: *	<input type="text" value="mm/dd/yyyy"/>	File Type: *	<input type="text" value="PDF"/>
End Date: *	<input type="text" value="mm/dd/yyyy"/>	Document Type: *	<input type="text" value="Select a Type"/>
Facility: *	<input type="text" value="All Facilities"/>	Report Type: *	<input type="text" value="Select a Report"/>

- **Step 4:** Select the communities you want the report to cover, especially if you manage multiple communities under your corporate umbrella.

A screenshot of a web form showing a dropdown menu for 'Facility:'. The selected option is 'All Facilities'. A mouse cursor is pointing at the dropdown arrow.

A screenshot of a web form showing three dropdown menus: 'File Type:' with 'PDF' selected, 'Document Type:' with 'Select a Type' selected, and 'Report Type:' with 'Select a Report' selected. A mouse cursor is pointing at the 'Select a Type' dropdown arrow.

3. Selecting Document and Report Type

- **Step 5:** Choose the **Document Type** you wish to generate (e.g., PDF or CSV).

A screenshot of a web form showing a dropdown menu for 'Document Type:'. The selected option is 'Select a Type'. A mouse cursor is pointing at the dropdown arrow.

- **Step 6:** Select the specific **Report Type** you need, such as tags, page severity, take specifics, or plans of correction.

A screenshot of a web form showing a dropdown menu for 'Report Type:'. The selected option is 'Select a Report'. A mouse cursor is pointing at the dropdown arrow.

4. Running the Report

- **Step 7:** After entering all necessary fields, click **Run Report** to generate your customized report.

A screenshot of the 'Run a Report' form. The form includes fields for 'Start Date:' and 'End Date:' (both with mm/dd/yyyy format and calendar icons), and 'Facility:' (with 'All Facilities' selected). To the right are dropdown menus for 'File Type:' (PDF), 'Document Type:' (Select a Type), and 'Report Type:' (Select a Report). A red circle highlights the 'Run Report' button at the bottom right.

Additional Information

- Our platform is continually evolving to include more AI-driven components for updates and enhancements to our reporting capabilities.

Conclusion

- You have successfully learned how to generate reports in POC-365, empowering you to efficiently monitor and manage compliance across your organization.

PART 5: POLICY AND PROCEDURE REVIEW OF INITIAL DEFICIEINCY

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In this training, we will guide you through the policy and procedure review function to ensure thorough understanding and effective utilization.

Step-by-Step Guide

1. Accessing Deficiency Documents

- **Step 1:** When you create or upload a deficiency document, it will be stored on our deficiency document page.

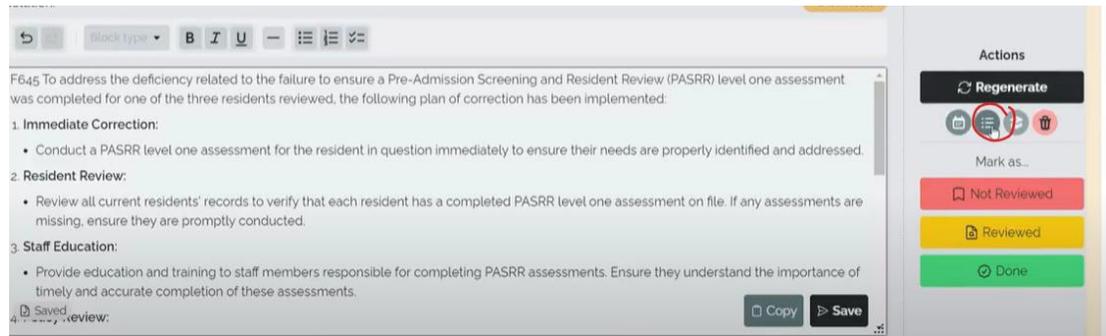


2. Initiating Policy and Procedure Review

- **Step 2:** To review a policy and procedure for a specific deficiency, click the arrow next to the deficiency you wish to review.

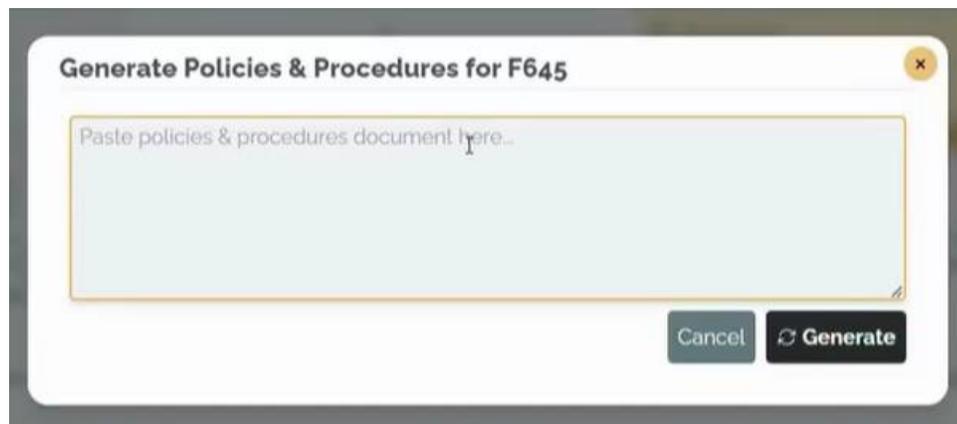
Tag
F677
F804
F732
F550
F645
F881

- **Step 3:** Click the **Policy and Procedure View** button.



3. Generating Review

- **Step 4:** Copy and paste the relevant policies and procedures into the text box provided. If you don't have a policy and would like to our AI to generate one for you, just click generate.

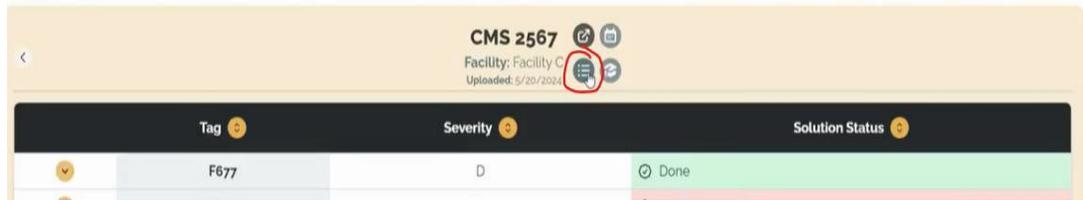


- **Step 5:** Click **Generate** to activate our AI, which will analyze your policies and procedures in relation to the deficiency specifics

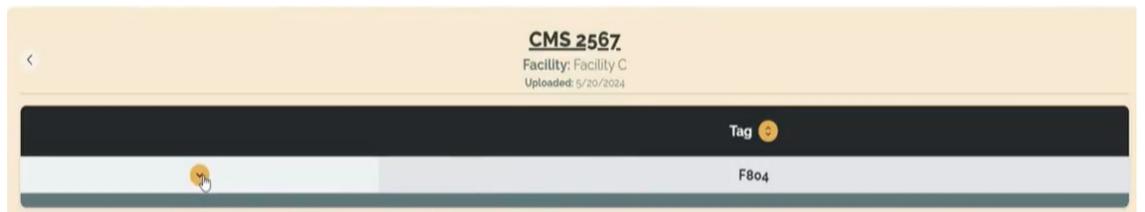


4. Accessing Review Results

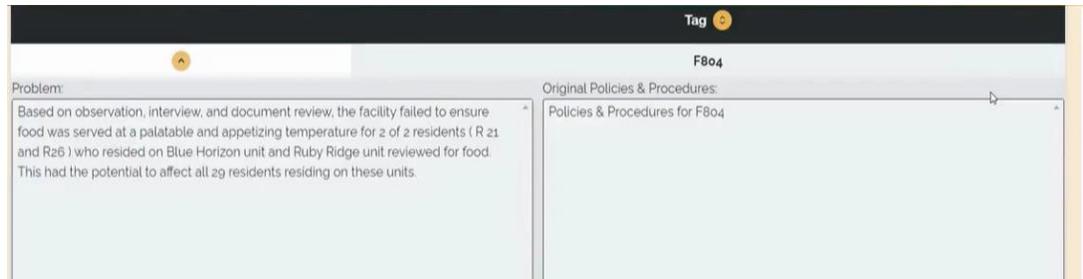
- **Step 6:** After AI review, results will be housed on our training page.
- **Step 7:** Access the **Policy Procedure Page** by clicking the icon.



- **Step 8:** Expand each tag associated with a policy and procedure to view details.



- **Step 9:** You can compare the original policy and procedure with the updated version related to your deficiency (see next page).

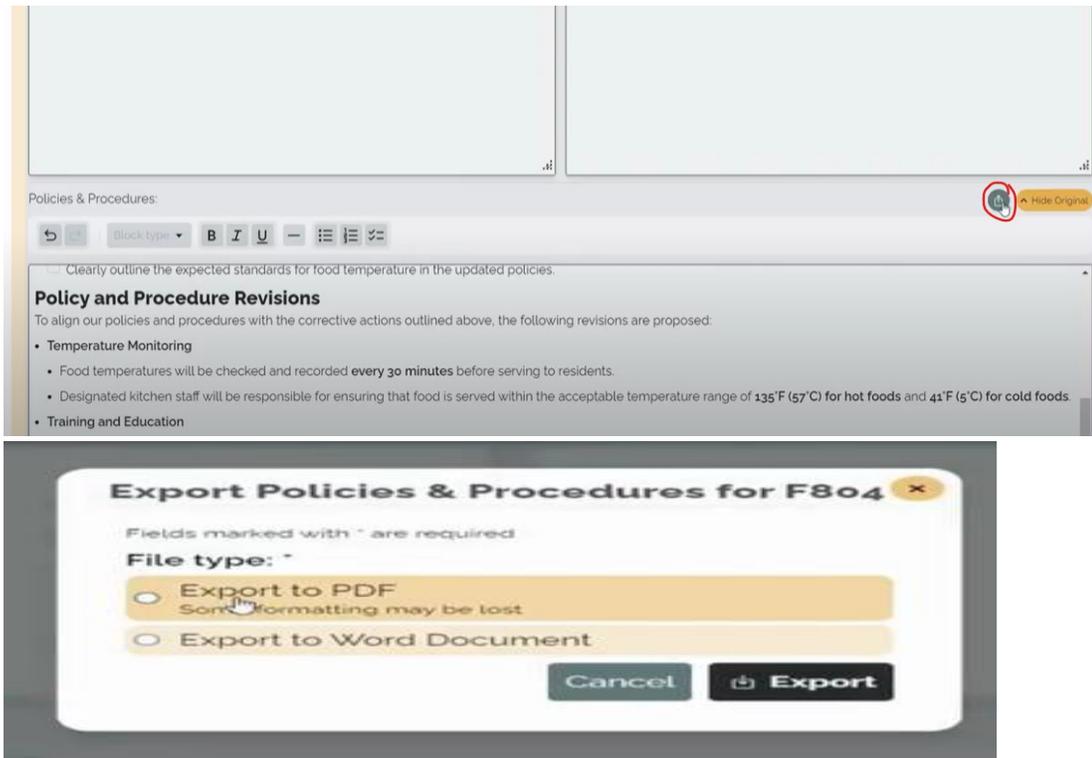


5. Editing and Exporting

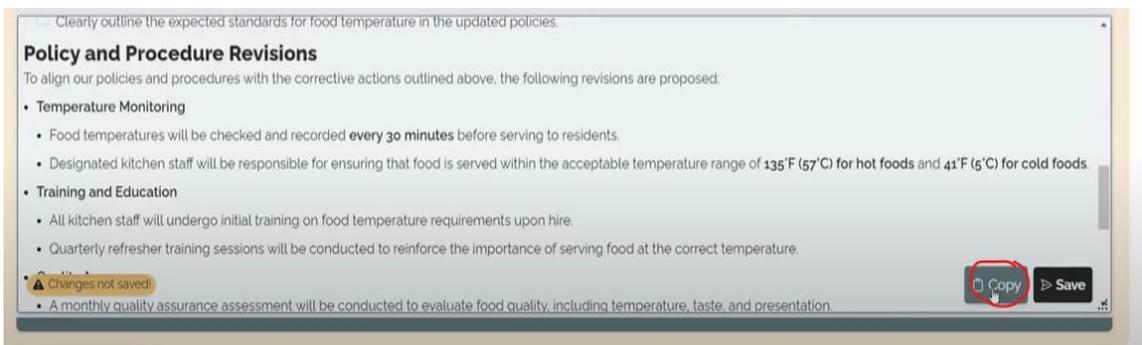
- **Step 10:** Edit the document as needed in the text box. Remember to click **Save** after editing.



- **Step 11:** Export the finalized policy and procedure as a PDF or export to a Word document.



- **Step 12:** Use the **Copy** button to transfer content to your original policy and procedure document for further modifications.



Conclusion

You have completed the policy and procedure review process with each deficiency in POC-365. Utilize these tools to ensure compliance and maintain efficient documentation.

PART 6: MANAGE YOUR CORPORATION

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In this session, we will guide you through the process of managing your corporation's information within our system.

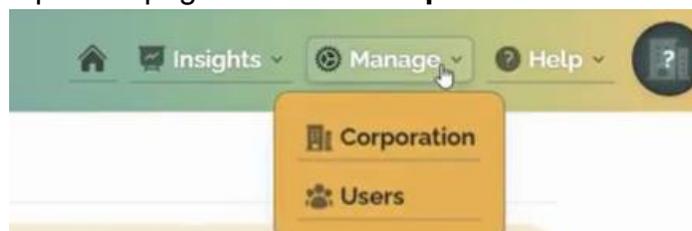
Step-by-Step Guide

1. Initial Setup

- **Step 1:** When you initially sign up, enter all community information under your corporate umbrella, as well as your corporate details.

2. Accessing Corporate Management

- **Step 2:** To manage your corporation, go to the **Manage** button at the top of the page and select **Corporations**.



3. Updating Corporate Information

- **Step 3:** You will see your corporation's information, including street address, city, state, and zip code.

Corporation A

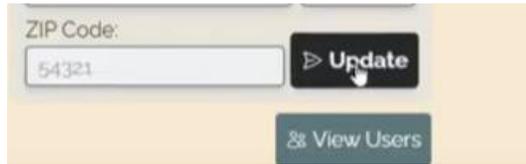
Administrator: Unknown User (njjust@rxpulsesolutions.com)

Phone Number: 3213214321 [Update]

Address:
Street: 1234 St
City: St. Paul State: MN
ZIP Code: 4321 [Update]

[View Users]

- **Step 4:** To update this information, edit the fields as needed and click **Update**.



4. Viewing and Managing Users

- **Step 5:** To view users, click **View Users**, which will take you to the users page.



- **Step 6:** Here, you can see a list of all users associated with your corporation.

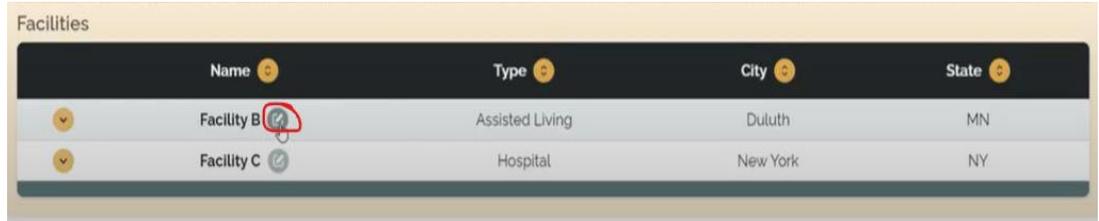


5. Managing Community Information

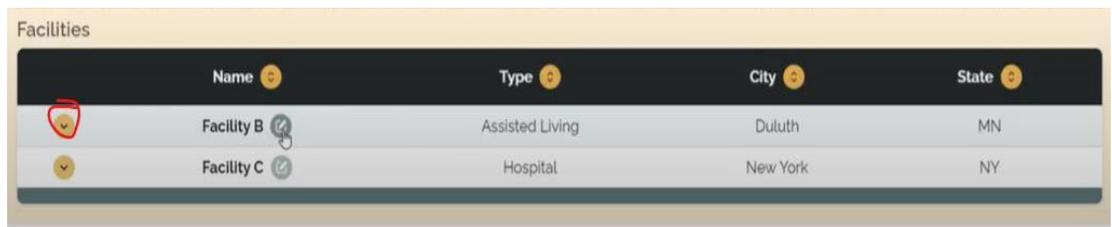
- **Step 7:** Each community type and community under your corporate umbrella will be listed here.

Facilities				
	Name	Type	City	State
▼	Facility B	Assisted Living	Duluth	MN
▼	Facility C	Hospital	New York	NY

- **Step 8:** To edit community details, click the edit icon next to the community name.



- **Step 9:** Click the drop-down arrow to view detailed information about the community.



6. Editing Community Details

- **Step 10:** You can update any specific information about the community by editing the relevant fields and saving the changes.

The screenshot shows the detailed edit form for "Facility B". The form includes several sections:

- Administrator:** "No admin assigned!" with an edit icon.
- Phone Number:** A text input field containing "Unknown" and an "Update" button.
- Type:** A dropdown menu currently set to "Assisted Living" and an "Update" button.
- Bed Count:** A text input field containing "Unknown" and an "Update" button.
- Address:** A section with input fields for "Street" (1234 St), "City" (Duluth), "State" (MN), and "ZIP Code" (54321), each with an "Update" button.

Conclusion

You have now learned how to manage your corporation's information in POC-365. This includes updating corporate details, managing users, and editing community information to ensure your records are accurate and up-to-date.

PART 7: DEFICIENCY MODIFICATION AND BASIC FUNCTION

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This guide will walk you through the citation page and the functionalities available after uploading a PDF into the system.

Step-by-Step Guide

1. Uploading and Navigating to the Deficiency Page

- **Step 1:** Upload a PDF using the **New Citation Doc** button.

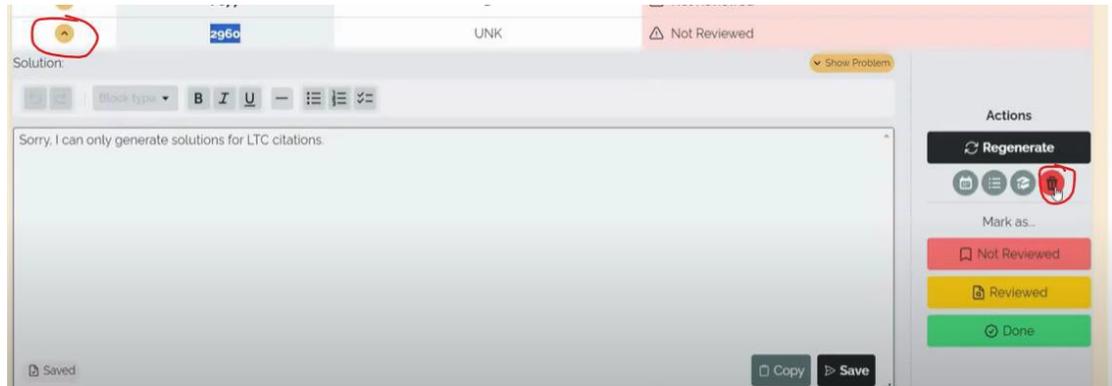


- **Step 2:** You will be redirected to the **Deficiency Page** where all tags and severities are parsed.

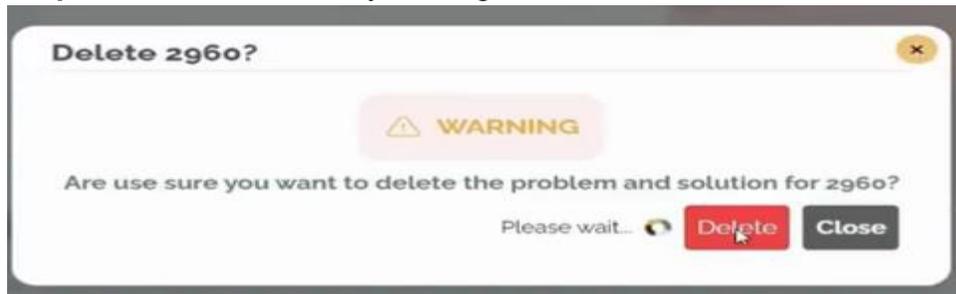
Tag	Severity	Solution Status
UNK	D	Error
F804	F	Not Reviewed
F677	D	Not Reviewed
2960	UNK	Not Reviewed
F881	D	Not Reviewed
F645	D	Not Reviewed
F732	F	Not Reviewed

2. Editing and Deleting Tags

- **Step 3:** Some tags may not be fully captured. Edit or delete tags by clicking the drop-down arrow and selecting the delete icon.

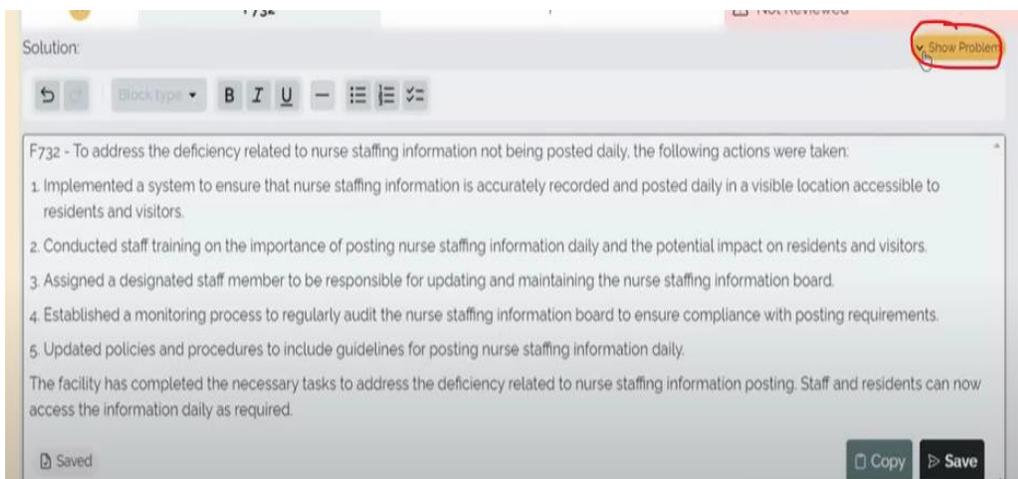


- **Step 4:** Confirm deletion by clicking the delete button.

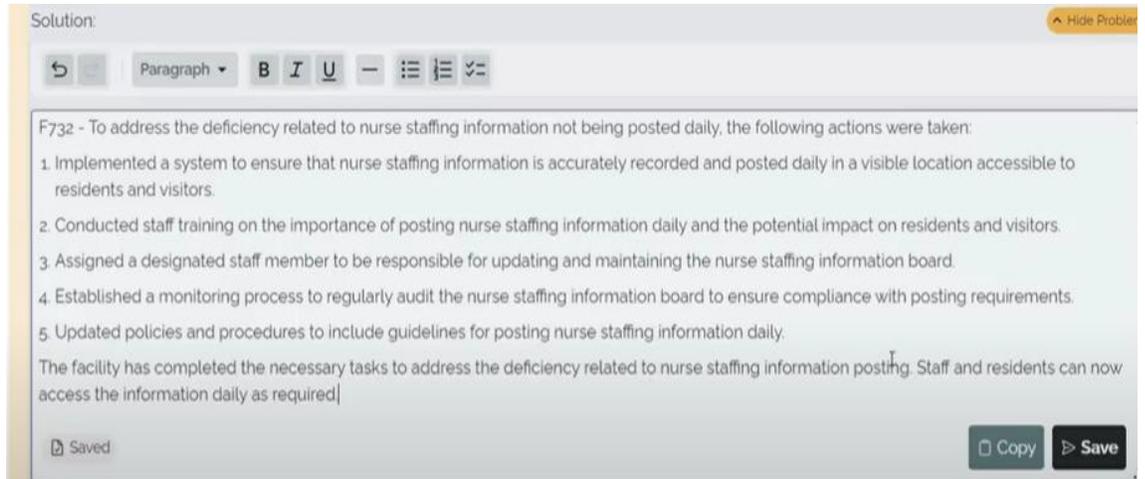


3. Viewing and Editing Plan of Correction

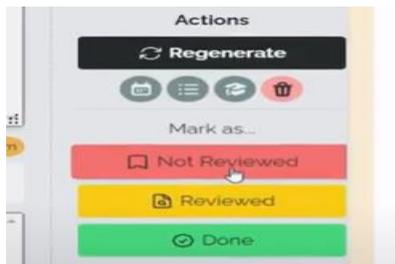
- **Step 5:** To view the AI-generated plan of correction and the problem, click **Show Problem**.



- **Step 6:** Edit or delete content within the text box as needed.

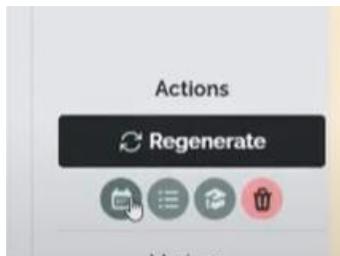


- **Step 7:** Confirm the status of each citation by selecting **Done**, **Reviewed**, or **Not Reviewed**.



4. Creating an Audit Template

- **Step 8:** Click **Generate Audit Template** for the specific citation.



- **Step 9:** Input the assigned personnel, start date, duration in weeks, and audit days.

Generate Audit Template for F732

Fields marked with * are required

Assignee: * Start Date: * Duration: *

Who will be auditing? mm/dd/yyyy Duration in weeks..

Day(s): *

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Cancel Generate

- **Step 10:** Click **Generate**. The template will be housed on the **Audit Page**.

Generate Audit Template for F732

Fields marked with * are required

Assignee: * Start Date: * Duration: *

Matt 06/10/2024 6

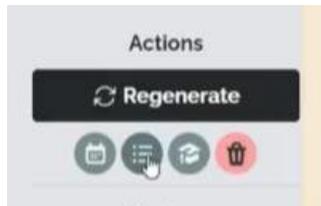
Day(s): *

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Generating audit template... Cancel **Generate**

5. Reviewing Policies and Procedures

- **Step 11:** Click to review policies and procedures related to the citation.



- **Step 12:** Copy and paste the relevant policies and procedures, then click **Generate**.

Generate Policies & Procedures for F732

Paste policies & procedures document here...

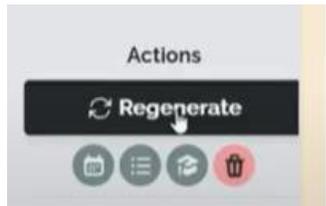
Cancel **Generate**

- **Step 13:** The AI will cross-reference and rewrite policies and procedures to address the citation. Find the updated documents on the **Audit or Policy Procedure Page**.

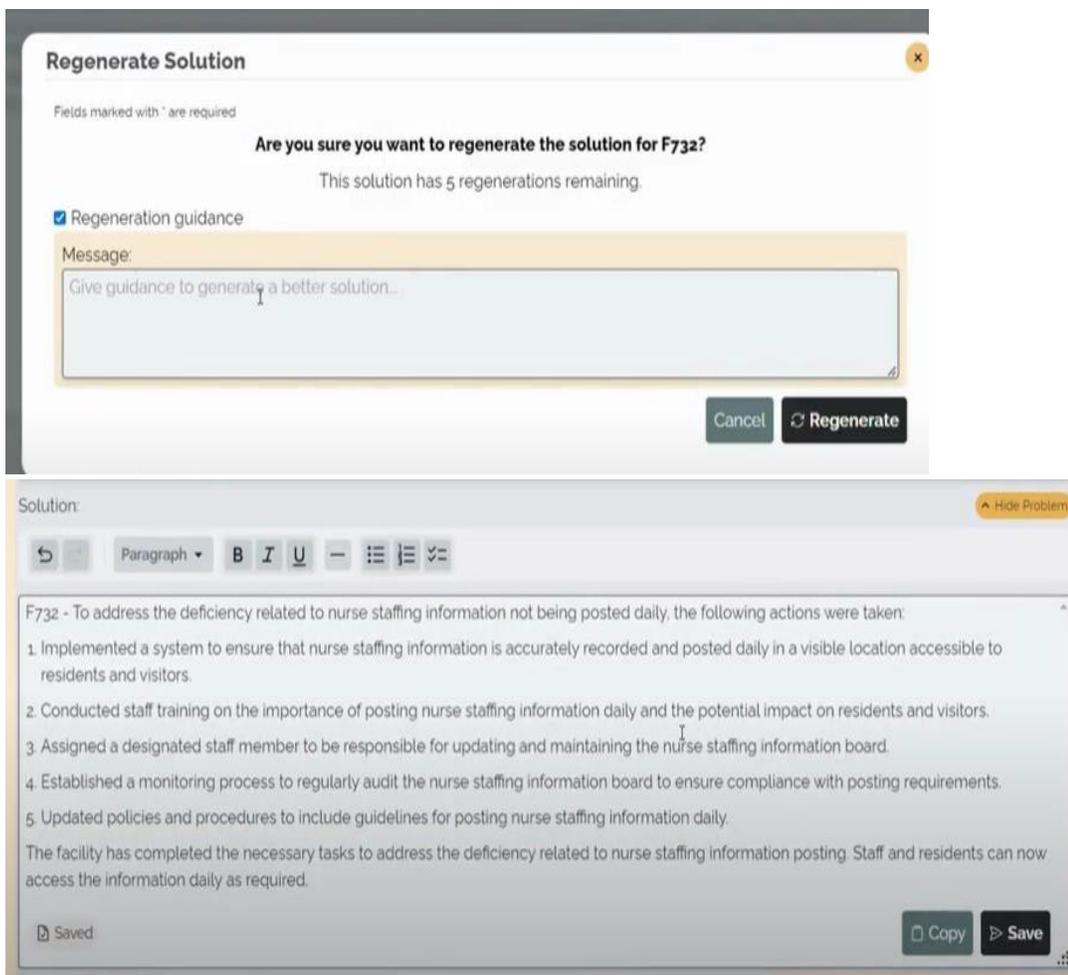


6. Regenerating the Plan of Correction

- **Step 14:** To add more information or regenerate the plan of correction, click **Regenerate**.

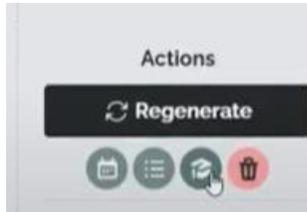


- **Step 15:** Provide guidance to the AI and regenerate the plan. The updated solution will appear on the solution option.

A screenshot of a 'Regenerate Solution' dialog box. The dialog box has a title bar with 'Regenerate Solution' and a close button. Below the title bar, it says 'Fields marked with * are required'. The main text asks 'Are you sure you want to regenerate the solution for F732?' and notes 'This solution has 5 regenerations remaining.' There is a checkbox for 'Regeneration guidance' which is checked. Below this is a text area labeled 'Message:' with the placeholder text 'Give guidance to generate a better solution...'. At the bottom right of the dialog are 'Cancel' and 'Regenerate' buttons. Below the dialog is a 'Solution:' window with a rich text editor. The editor shows the following text: 'F732 - To address the deficiency related to nurse staffing information not being posted daily, the following actions were taken: 1. Implemented a system to ensure that nurse staffing information is accurately recorded and posted daily in a visible location accessible to residents and visitors. 2. Conducted staff training on the importance of posting nurse staffing information daily and the potential impact on residents and visitors. 3. Assigned a designated staff member to be responsible for updating and maintaining the nurse staffing information board. 4. Established a monitoring process to regularly audit the nurse staffing information board to ensure compliance with posting requirements. 5. Updated policies and procedures to include guidelines for posting nurse staffing information daily. The facility has completed the necessary tasks to address the deficiency related to nurse staffing information posting. Staff and residents can now access the information daily as required.' At the bottom of the solution window are 'Saved', 'Copy', and 'Save' buttons.

7. Creating a Training Plan or Educational Document

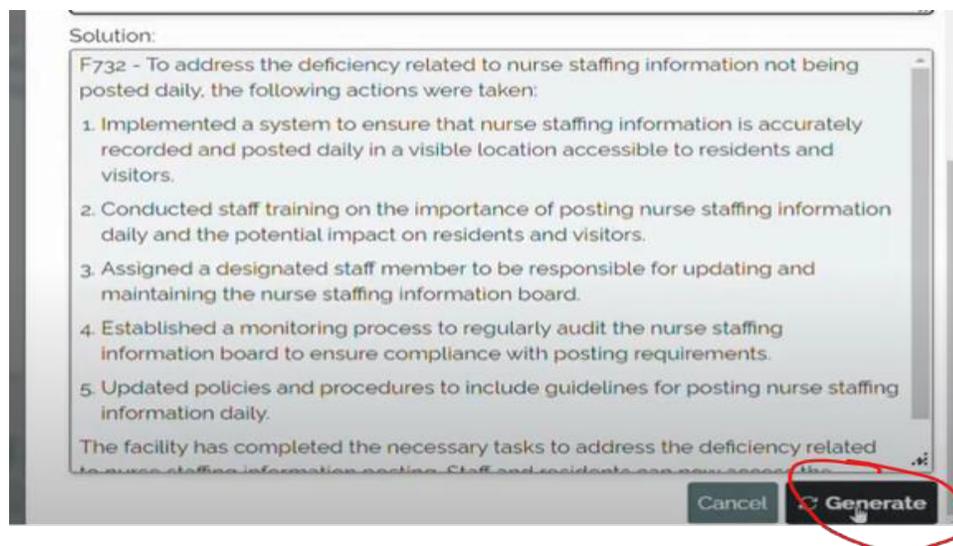
- **Step 16:** Click the **Training** tab to create a training plan.



- **Step 17:** Enter the target audience, learning objectives, and formatting specifics.

A screenshot of a web form titled 'Generate a Training Plan for F732'. The form has a white background and a grey border. At the top right is a yellow close button with an 'x'. Below the title, it says 'Fields marked with * are required'. There are three main input areas: 'Target Audience: *' with a text box containing 'Nurse'; 'Key Learning Objectives:' with a large empty text area; and 'Formatting:' with another large empty text area. A 'Solution:' label is partially visible at the bottom left.

- **Step 18:** Click **Generate** to create the training plan, which will be housed on the **Training and Education Page**.

A screenshot of the 'Solution' section of the form. It shows a text box containing a generated training plan for deficiency F732. The text describes actions taken to address the deficiency, such as implementing a staffing system, conducting staff training, assigning a staff member, and updating policies. At the bottom of the text box, there are two buttons: 'Cancel' and 'Generate'. The 'Generate' button is circled in red, indicating it should be clicked.

8. Reviewing Created Documents

- **Step 19:** Access audit templates, policy and procedure reviews, and training plans on the **Citation Page**.



- **Step 20:** Click the appropriate icon next to the deficiency to view related documents.

Conclusion

This concludes the training on managing citations in POC-365. You now have the knowledge to effectively upload, edit, and utilize citation documents within the system.

PART 8: CITATION PAGE OVERVIEW

Automated Plan of Corrections Written for you in minutes

AI Powered for accurate
POC creation

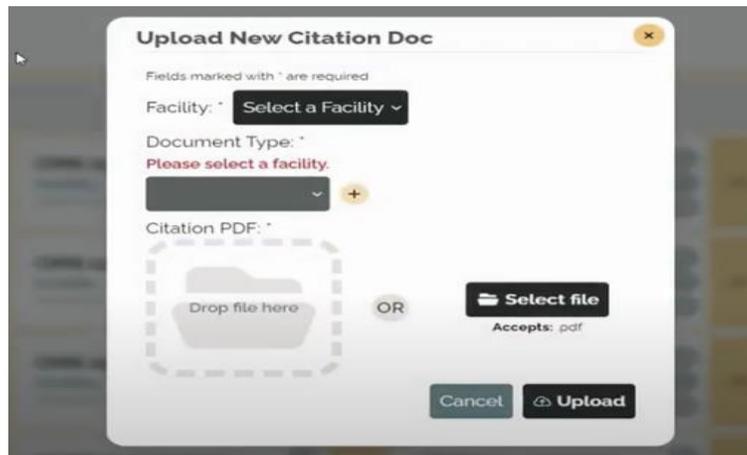


In this training, we will explore the citation page and its functionalities.

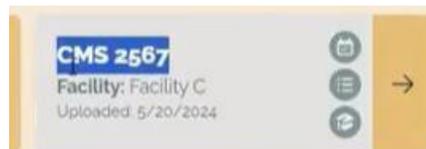
Overview of the Citation Page

1. Uploading Documents

- Whenever you upload a document to POC-365, it automatically appears on the **Citation Page**.



- You can easily identify the category of each citation and review associated details like audit schedules, reviewed policies and procedures, and created training plans.

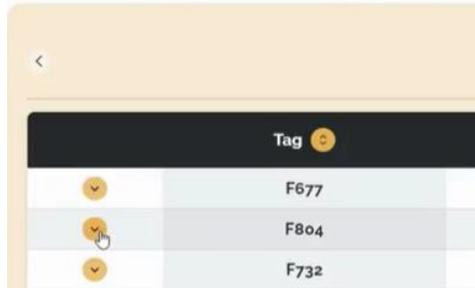


2. Viewing Citations

- Click the arrow next to a citation to expand and view all parsed citations from the uploaded PDF document.



- Use the drop-down arrow to show specific details and the initial plan of correction written by our AI.



3. Filtering Options

- Utilize the filter options to sort citations by facility, document type, date, and status for easy access and management.



4. Additional Functionalities

- For more detailed functionalities about this page in upcoming training sessions (part 9).

Conclusion

This training covers the basics of navigating the Citation Page in POC-365. It serves as a centralized hub for managing and reviewing all uploaded citation documents.

PART 9: AUDIT FUNCTIONALITY

Automated Plan of Corrections Written for you in minutes

AI Powered for accurate
POC creation



Introduction

In this training guide, we'll explore the Audit Template functionality and how to effectively manage audit schedules for your organization.

Overview of Audit Templates

1. Accessing Audit Templates

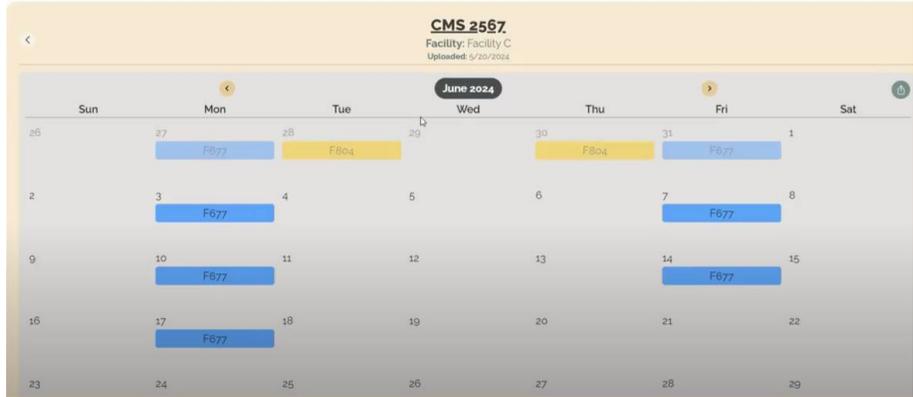
- To view Audit Templates created within your citation or deficiency documents, click on the **View Audit Schedule**



button located here.

2. Audit Schedule Interface

- The Audit Schedule provides a clear calendar view of all scheduled audits related to deficiencies obtained.



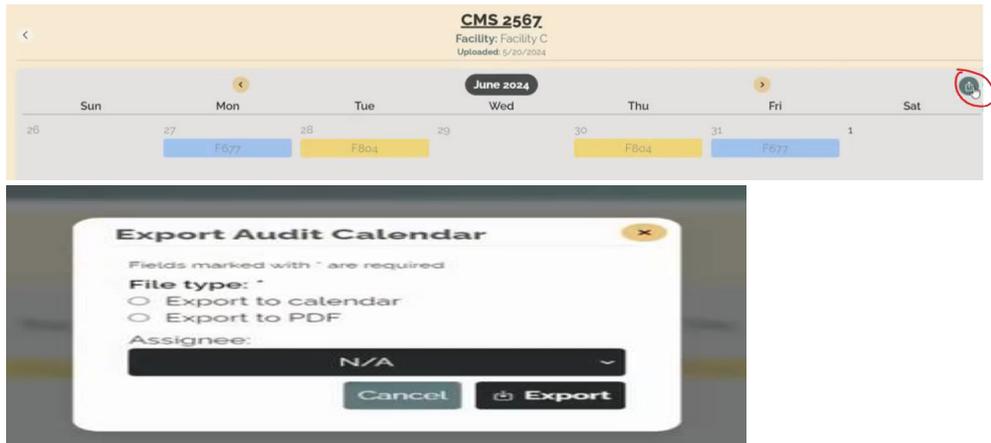
- Deficiencies are listed with detailed information for easy reference.

3. Interacting with Deficiency Specifics

- Hover over each tag to view specific details related to each deficiency.

4. Export Options

- Unique capabilities include exporting the Audit Schedule to a calendar file or PDF format.



- Exported calendar files can be uploaded to Microsoft 365 or Google Calendar for team-wide visibility and tracking.



- Select the appropriate options for printing and exporting signed schedules.



Conclusion

This concludes our training guide for the Audit Template functionality. It's designed to streamline audit management and ensure compliance across your organization.