iMPROve Health IDR Portal
Attorney Instructions

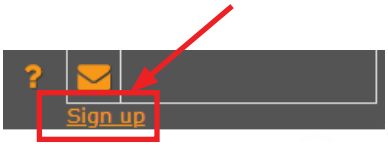
Section 1: Getting Started

Key

- Cancel
- Save
- Remove
- Add
- Upload
- Search
- Clear
- Home

1.1 Signing Up

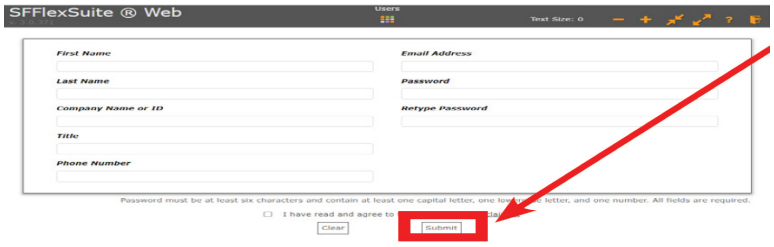
In order to use the SFFlexSuite® Web iMPROve Health IDR Portal, you need to create an account. To do so, click on the **sign up link** in the upper right corner of the portal page.



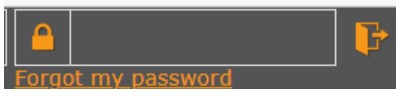
You will see a form to enter your required information:

- Enter your email address. This will be your login name.
- Create a password. It must be at least six characters long and contain one capital letter, one lowercase letter, and one number.

In order to complete the sign up, you must view and agree to the terms of the disclaimer. It can be viewed by clicking on the link.

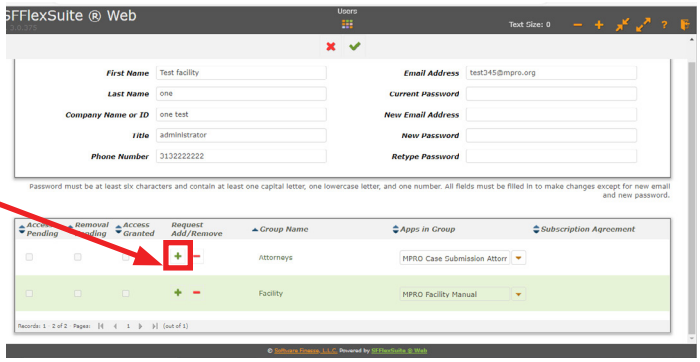


To reset your password, click on **Forgot My Password**, and enter your email address.



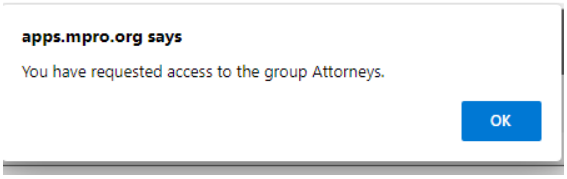
1.2 Requesting Access to an Attorney Group

To use the portal, you need to be in a user group. For an attorney user, you will be joining the iMPROve Health attorney group. To request access to this group, click on the **add button** in the iMPROve Health attorney group row.



1.3 Pop-up Window

The system may take a while to add you to the attorney group - don't close out of the window until you receive confirmation.

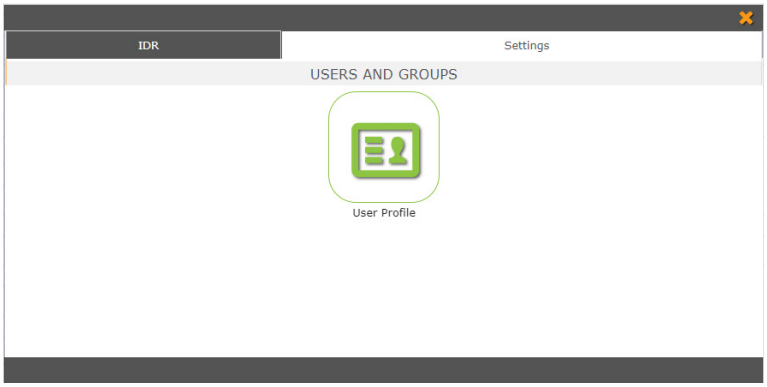


Once this pop-up window appears, click **OK** to log out of the system.

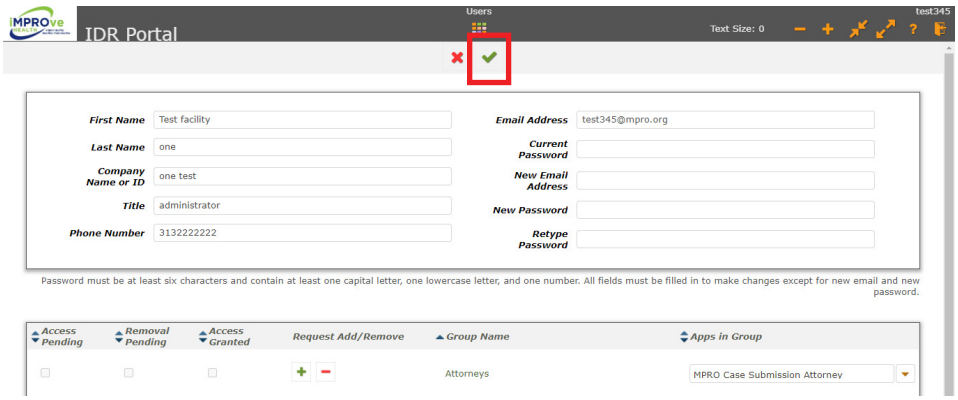
Check your email for notification that you have been added to the attorney group. If you do not receive an email within 24 hours, contact iMPROve Health IDR staff Aris Rhodes-Bond at 248-465-7405, or Bailey Brokmeyer at 248-465-1035.

1.4 User Profile

Your user profile, located on the settings tab, is where you will make changes to your basic contact information. You can also change your email address and password here.



To make any changes, you must fill in your current password before saving. To change your password, fill in the new password box and retype it in the field below. A password must contain at least one capital letter, one lower case letter, one number and be at least six characters long. Click on the **Save** button.

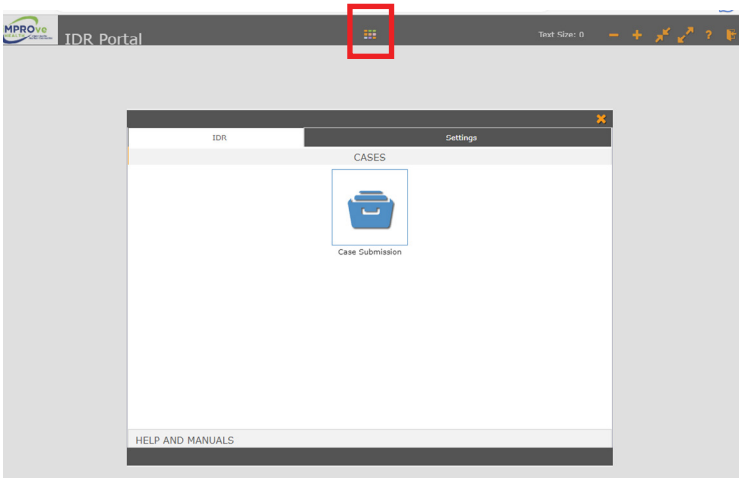


If you wish to change your email address, fill in the new email address box. Click the **Save** button. You will need to log out and log back in once you do this to continue using the portal.

NOTE: To navigate between tabs (IDR and setting) and applications, click the **Home** button at the top center of the screen to display the home screen.

Section 2: Case Submission

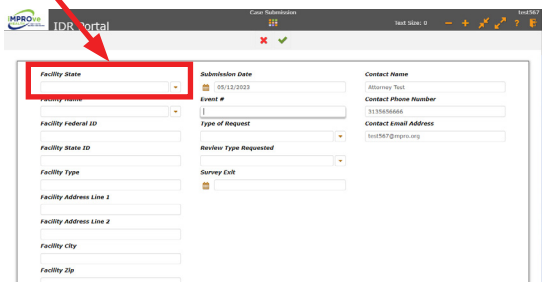
To create or modify a case, use the **case submission application** located under the IDR Tab. To switch between the setting tab and IDR tab, click the **Home** button at the top center of the screen.



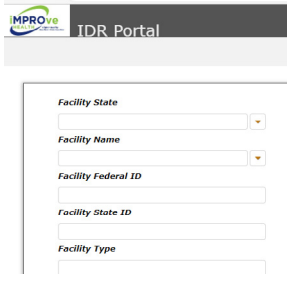
2.1 Creating a Case

To create a case, enter in all of the information in the form. Your contact information will automatically be entered for you. All fields must be entered in order to create the case.

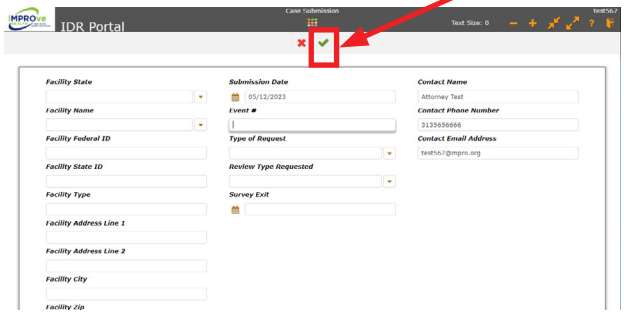
To select a facility, first select which state you are submitting from in the **facility state drop-down** menu. Only those states you are authorized to represent may be selected.



After selecting a state, the facility state drop-down menu will populate with all of the facilities in that state. Selecting one will fill in the rest of the facility information.



When you have finished entering the information, click the **Save** button to create a case.



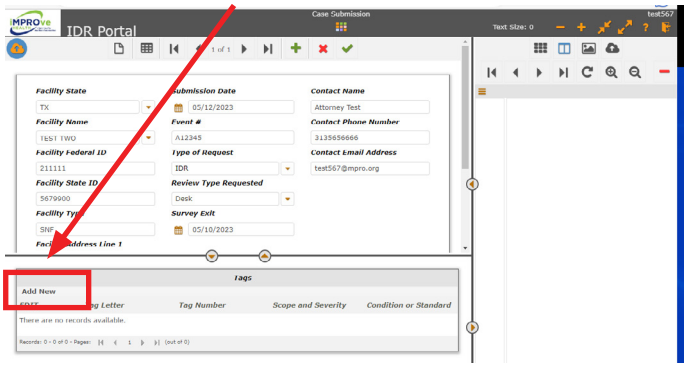
HELPFUL HINTS!

The Event # is in the footer of each page of the 2567.

If a pop-up message appears saying the Event # has already been created, see Section 2.3.

2.2 Adding to a Case

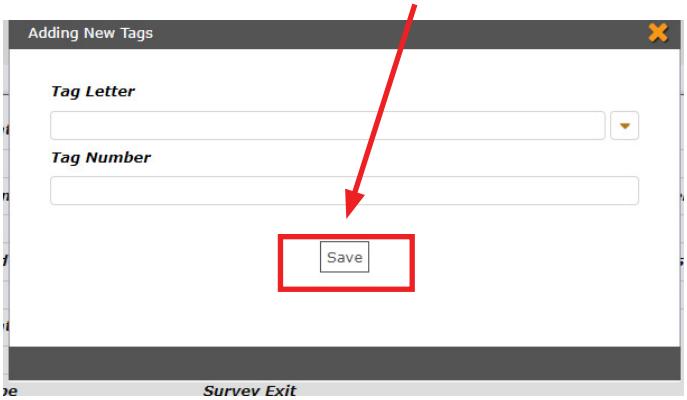
Once the case is created, you can add tags and documents to the case. To add a tag, click **add new** in the upper left corner of the "tags" grid on the lower half of the screen.



HELPFUL HINT!

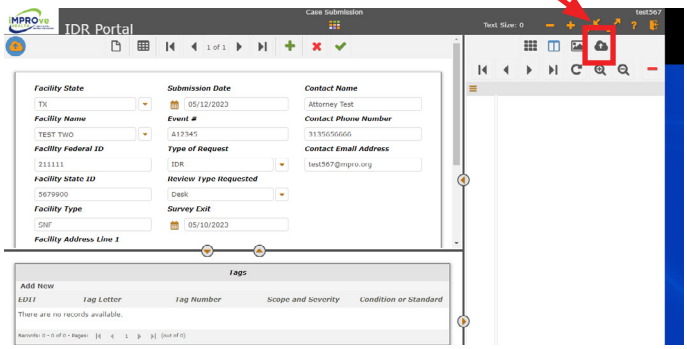
If you have many files, you can create and upload zip files for efficiency.

A pop-up window will appear asking which tag should be added, along with additional information about the tag including scope and severity. When you have finished submitting the tag information click **Save**.



After saving, the window will clear allowing you to add additional tags. When you have finished adding tags, you may close the window by clicking "**X**" in the upper right corner.

To add documents, click the **Upload** button on the right side of the screen.

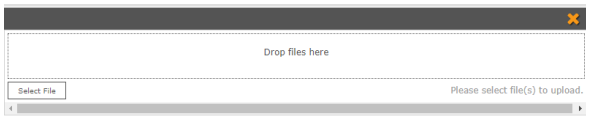


HELPFUL HINT!

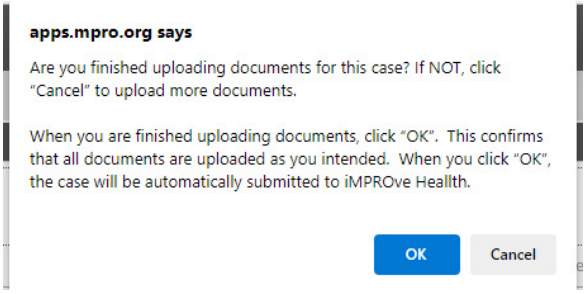
The tag letter is the type of survey:
F - Federal
K - Life safety code
P - Assisted living, etc.

The tag number is the deficiency. Ex.: 600, 775

A window will appear allowing you to select your files. Either drag the files into the space at the top of the window, or browse for files to upload. Once you have selected your documents to upload, click **Upload File** to upload them.

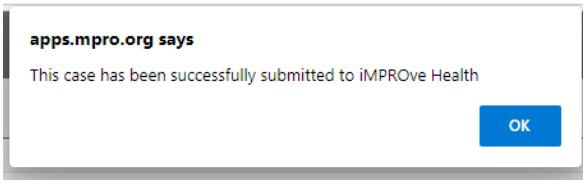


After uploading your document, a pop-up message will appear asking if you're finished with the case:



If you have changes to make to the case after uploading your documents, click "**cancel**" to make the necessary changes.

If you have uploaded all documents relating to the case and have added all of the tags, click "**OK**" to submit the case to iMPROve Health for review. After submitting, another pop-up window will appear indicating your case has been successfully submitted.



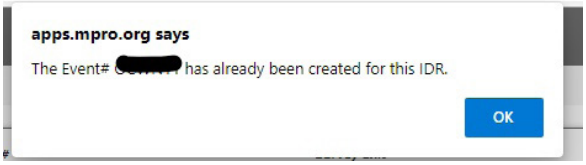
The case may also be submitted by clicking the **Submit Case** button in the top left corner of the page.

Once you have submitted the case to iMPROve Health, you can no longer upload documents.

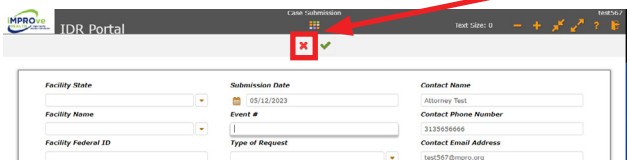
2.3 Adding to a Case Already Started

To modify a case that has already been started or if you are creating a new case and the following message appears.

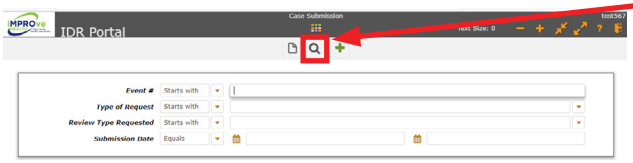
If this message appears, double check the event number and request type you are trying to submit. If they are correct, then it is likely that this case has already been created.



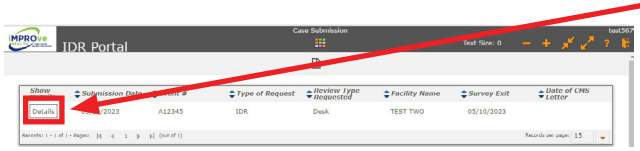
To access the case, enter the case submission application and click the **Cancel** button on the toolbar to be taken to the **Search Form**.



On the search form, enter the event number you are looking for and click the **Search** button.



If the case has already been created, you should see a grid containing the case. Click **Details** on the left side of the page to open the case.



You are now ready to add to this case. Go back to **Section 2.2** for instructions on adding to a case.

If you have any questions, contact iMPROve Health IDR staff:

- Aris Rhodes-Bond, 248-465-7405
- Bailey Brokmeyer, 248-465-1035