SDS Harmony Glossary

Term	Definition
3rd Party Review	The 3rd Party Review tab in the Consumers chapter is used to track communication via notes between SDS and Qualis Health when outside review is needed to complete a consumer's level of care determination. This is part of the Material Improvement Review Process (MIRP).
Actions	The Actions tab in the Providers chapter is used to track and monitor disciplinary actions taken by SDS or DHCS Residential Licensing on a provider resulting from negative outcomes of a compliance review or an investigation, a provider's failure to renew certification or licensing, or a referral for an action by an outside entity. Actions may lead to formal enforcement actions, sanctions, or fines, as well as appeals from the provider subject to the action.
Advanced Search	A search page is used to select an entity. Advanced Search pages allow the user to search using multiple filters and display the contents with default filters for the most common search scenario. Like a list page, a search page has filters at the top, a search button in the middle, and search results below.
	The Advanced Search page is the gateway to loading a chapter. Users click to select a record from the search results to open it and load that record as the entity for the chapter.
	Examples include Consumer Advanced Search, Provider Advanced Search, and Inquiry Queue Advanced Search.
Alert Note	A Harmony feature to highlight critical information on a consumer or provider by displaying a note immediately in a pop up window every time a user selects that entity. A note displays as an alert if the note status = 'Alert'.
Appeals	The Appeals tab in the Providers chapter is used to document when a provider appeals a decision, ruling, or notice that they are out of compliance. A provider has the right to appeal the finding(s). SDS staff can add and update appeals, associate them to actions, and monitor the status.
Appointments	The Appointments tab in the Consumers chapter is used to track consumer assessment appointments. Provider users can be invited to appointments, and invitation responses can be tracked.
Attachment	A file attached to a note on a consumer, provider, or inquiry record. A note can contain up to five attachments. Users can designate an attachment file name and select an attachment category.
Authorizations (Auth)	The Authorizations (Auths) tab allows a user to pre-authorize a consumer to receive specific services from specific providers. Each authorization is associated with a specific provider and date range. The service(s) that provider is authorized to deliver are entered under the Auth through the Auth Service subpage.
Case Relations	The Case Relations tab in the Consumers chapter is used to track family members, advocates, emergency contacts, and other contact people for a consumer.
Categories	The Categories tab in the Providers chapter is a tool to classify the various kinds of provider records in Harmony. Categories can be used to automatically assign relevant services to the provider as part the certification approval process.
Chapter	Chapters are the core workspace areas in Harmony. Examples include Inquiry, Consumers, Providers, Inquiry, and Reports.
	The Consumers and Providers chapters are organized into tabs. The Inquiry chapter omits the tabs and navigates directly to the Inquiry page and subpages. The My Harmony chapter is organized by columns of widgets that navigate to targeted list pages and queues. The Reports chapter displays a list of all summary reports available for the current role.

Term	Definition
Check Out/Check In	Check Out/Check In is a Harmony feature used on Inquiries to limit edits to an Inquiry record to one user at a time. To edit an Inquiry, a user must check out the record. When the user is finished, they should check in the Inquiry.
Close	A file menu option to close the current window without saving any changes. The Close menu option will bring the user back to the previous window and refresh that window.
Consumer	An entity record for a person who is an applicant for or recipient of services. In the Consumers chapter, users work with one Consumer record at a time.
Consumer Module	The Consumer Module tab in the Consumers chapter is used to grant the consumer and authorized contacts access to log in to that Consumer's record in the Consumer Module application. A representative for each consumer on the DD Registry is required to log in to the Consumer Module and complete an annual *DD Registration and Review* form.
Credentials	The Credentials tab in the Providers chapter is used by SDS to manage provider certifications and by DHCS Residential Licensing to track Assisted Living Home licenses. Certification credentials are distinct by certification service and indicate the applicable programs.
DD Registry	The DD Registry in Harmony is a wait list feature used to track consumers on the DD Registry waiting for IDD Waiver or ISW programs. The entire DD Registry is accessible from My Harmony > Tasks. If a Consumer is on the DD Registry, their Registry record is accessible from their Consumer record in the Consumers chapter > DD Registry tab.
Detail Page	A basic type of screen in Harmony used to add or edit a record. Most detail pages contain a single vertical column of data entry fields with the field label on the left and the data entry field to the right. After a record is initially saved, the detail page displays a subpage menu to the left, if applicable. The Detail Page is also referred to as an Edit Page.
Directory Info	The Directory Info tab in the Providers chapter contains settings that control whether a Provider record is published to or excluded from the Access Point online directory.
Division	Divisions in Harmony represent major lines of business; for example, "SDS" is a distinct Division from "ALL" (Assisted Living Licensing). The system requires that Consumers and Providers be active in at least one Division to be considered active in the system. Consumers must be active in the SDS Division before they can be associated with a Program. The Division is also known as Fund Code.
Edit	User account permissions to update/modify to the data in a record.
Entity	A core record in Harmony that functions as the centerpiece of a chapter. Examples include Consumer, Provider, and Inquiry.
Experience	The Experience tab in the Providers chapter is used by agencies to manage their provider network. Critical information about important background and experience is tracked, which establishes whether a provider (or a worker associated with a provider) is qualified to render services.
Fair Hearings	The Fair Hearings tab in the Consumers chapter is used to track appeals and fair hearing process information.
File Menu	A list of options for user actions on a List Page or Detail Page. Options vary by page; examples include: Add New, Save, and Close. The File Menu bar can include other menus such as Tools, Reports, and Word Merges.
Forms	Forms in Harmony are data entry screens specific to Alaska SDS. Examples include the CAT Assessment and Level of Care Determination. The Forms tab is available in both the Consumers chapter and Providers chapter and displays records entered for the current Consumer or Provider through a Harmony form.

Term	Definition
Inquiry	The Inquiry chapter is used for tracking system "front door" interactions including requests for information from an ADRC, prescreening, program referrals, and requests from Providers to access to a Consumer record in order to submit an application. The Inquiry Advanced Search page can be filtered by work queues based on program. Inquiry records identify a Person Seeking Supports that can be copied to create a new Consumer or link to an existing Consumer to facilitate Provider access. Once access is granted, the Provider can apply for and coordinate services in the system.
Linked Providers	The Linked Providers tab is used to track formal relationships between Providers. Examples include Care Coordinators associated with Care Coordination Agencies and rendering Group Homes and Family Habilitation Homes operated by or contracted with Certified Billing Providers.
List Page	A basic type of screen in Harmony used to display a list of records in a particular information area. A list page functions like a search page with preset filters that display the results automatically. Most list pages allow the user to modify the filters and refresh the lists. When a user clicks on a record in the list, that record opens in a detail page in a separate window. Also referred to as a List View or Grid.
Monitor	The assignment of a State Staff Worker to a specific Provider record for certain responsibilities related to certification, licensing, or compliance.
My Harmony	The system home page that presents panels and queues of records in the system that are relevant to the current user, including assigned Tickler tasks, Notes to be read, and Consumer caseloads.
Note	A note is used to communicate with other agencies and/or workers or for moving a process to the next step. Notes can be tracked in several areas in the system, including Inquiries, Consumers, Consumer Plans, and Providers.
Note Recipient	Notes functionality that allows a user to route a Note to one or more workers to prompt them to read and review the Note. Note Recipients will see Notes routed to them on My Harmony, and the system tracks if the Recipient has read the Note.
Note Type and Sub-Type	Notes are used to track a wide variety of information, and Note Types and Sub-Types are the categories for classifying Notes.
Open	To load a page in Harmony. Usually refers to loading a Detail Page to view or edit a record by clicking on the row for that record in the results of List Page or Search Page.
Panels	Widgets on the My Harmony home page that contain a header and a breakout of line items by type or status with a count of related items. My Harmony panels provide at-a-glance counts of key information like assigned Ticklers, Notes to be read, and Consumers on a caseload. Panels are also links to access lists of records that are included in the counts.
Participant	A record for a person associated with an Inquiry. Examples include a Person Seeking Supports, an Involved Person in a Central Intake report, a Reporter, and other Contacts.
Plans	The Plans tab in the Consumers chapter is used to track Plans of Care and Service Plans. Plans are specific to a program and a service period date range. Consumers have a separate Plan record for each renewal cycle or plan amendment. Plans can include Planned Services, Needs and Goals, Forms, and Notes.
Primary Worker	A Worker assigned to a Consumer on a Division or Program record. Primary Workers can receive tickler tasks and reminders for their assigned Consumers.
Professional Relations	The Professional Relations tab is used to track Consumer case contacts who are workers in the system.
Programs	The Programs tab in the Consumers chapter is used to track a Consumer's involvement in a formal Program. The Program Status field is the key indicator of the Consumer's current status in the stages of the program life cycle across processes for application, assessment, planning, active service engagement, renewal, and closure.

Term	Definition
Provider	A Provider is a core record in Harmony that represents an organization. The Providers chapter includes functionality to track certification and licensing credentials, ID numbers, workers, services offered, service areas, and other types of provider information. In the Consumers chapter, Providers associated with Consumers they serve and identified on specific services in plans and authorizations.
Provider Associations	The Provider Associations tab in the Consumers chapter is used to connect a Consumer to any Providers involved in their case, such as Care Coordination Agencies, PCA Agencies, and placement facilities. An active Provider Association is used to grant external Provider agency workers access to a Consumer's record to submit applications and coordinate care.
Provider ID Numbers	The Provider ID Numbers tab in the Providers chapter tracks official identification numbers for the current Provider, such as Medicaid IDs by Provider Type, NPI, and PVN.
Quick Search	A shortcut search tool alternative to Advanced Search designed to find a record using a single key search filter such as Consumer CaseNo or Inquiry ID.
Record	An entry in a table in the Harmony system database. Harmony List Pages and Search Pages display lists of multiple records, whereas Detail Pages display the fields within a single record for viewing or editing.
Reports	Reports are tools for getting data out of the system. Harmony includes standard reports as well specific reports built for Alaska SDS. Reports may display data from a single record, such as a form, for the purpose distribution or signature, or combine information across records.
Required Fields	A field on a page must be completed before the page can be saved. Required fields are designated with a red asterisk.
Reverse Status	A File menu option to reverse the status of a record that has been saved with a status of "Complete" or "Approved," which locks the record as read-only. Reverse Status is used when a record needs to be modified after it has been completed or approved. Permissions to reverse status are limited to select roles, including supervisors. Also referred to as Reverse Disposition.
Role	A Role is a system profile in Harmony that defines a user's security permissions and available functionality necessary to perform job duties.
Save	A File menu option to save changes on the current page but keep the page open.
Save and Close	A File menu option to save changes on the current page and also close the page. Upon close, the system will navigate the user back to the previous screen.
Service Area	The Service Areas tab in the Providers chapter is identifies the geographic locations served by a Provider.
Services	The Services tab in the Providers chapter identifies the specific services or procedure codes that a provider is eligible to deliver to recipients, as well as any specific service rates for that provider. Services in the Consumers chapter can be added to plans.
Subpage	An information area under a primary record. Subpages are displayed in a page menu on the left side of a Harmony screen with the primary record as the top page in the menu. Clicking on a subpage typically displays a list page of the records that are associated under that primary record. Examples include Planned Services under a Plan, Inquiry Participants under an Inquiry, and Consumer addresses under Consumer Demographics.
Tab	An information area with a chapter. Tabs are displayed in rows across the top of a chapter screen, above the list page area. Clicking on a tab brings the user to a list page of the records in that area for the current, selected entity in the chapter.

Term	Definition
Tickler	A Tickler is a system-generated to-do task or message reminder. Ticklers can be scheduled based on process timelines such as a prompt to submit a renewal application or plan, or triggered by data entry events such as the submission of an application or plan for review.
Unlock Record	See Reverse Status.
User	A user account authorized to log into Harmony. Every user must be linked to a Provider Worker.
Word Merge	A Harmony feature to generate an output form populated with system data via merge fields within a template. Word Merge is typically used to generate notices or letters. Word Merge templates are pre-configured to merge specific data points and are generated via the Word Merge File menu and via Workflow Wizard tasks. After Word Merges have been generated, they can edited in Microsoft Word, printed, and saved as note attachments in Harmony in PDF or Word format. Word Merge also refers to the resulting output.
Worker	The Workers tab in the Providers chapter tracks the individual staff members at a Provider or State organization. Workers may or may not also be system users.
Workflow Wizard	An automated feature in Harmony to prompt the user with a set of tasks or reminders that pop up in a separate window when triggered by a specific data entry event. Each task in a Workflow Wizard is a tickler and remains on the user's tickler list on My Harmony, until it is completed.