Website Navigation Guide

How to use **www.evirtualconsulting.com** to keep your agency survey ready: sign in, find your duties, open your forms already filled with your agency information, and send finished work to the office.

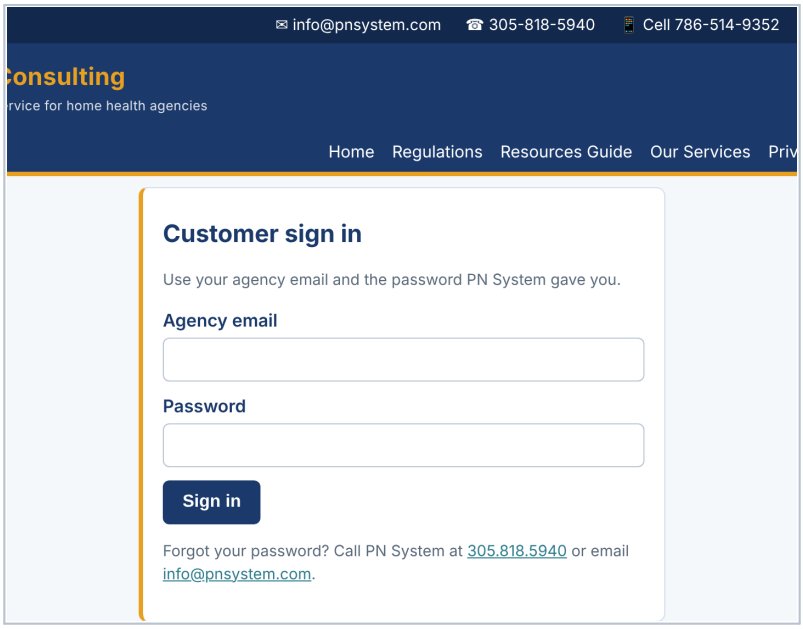
> **Before you start:** Use **Google Chrome** to browse the website and the free **Adobe Acrobat Reader** (get.adobe.com/reader) to fill in the forms. Section 10 shows how to set them up.

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1 Sign in Customer sign in

1. Open **www.evirtualconsulting.com** and click **Customer sign in** at the right of the top menu.
2. Type your **Agency email** and the **password** PN System gave you, then click **Sign in**.
3. If you forgot your password, call PN System at 305-818-5940 or email info@pnsystem.com. Your agency information and password are managed by PN System, so call us for any change (new address, logo, accreditation, etc.).



The sign-in page: use your agency email and password.

2 Your agency on every page

After you sign in, your agency name, address, phone, fax, email, agency logo and accreditation logo show under the top menu on every page. The same information is printed, already locked, on every form you open.

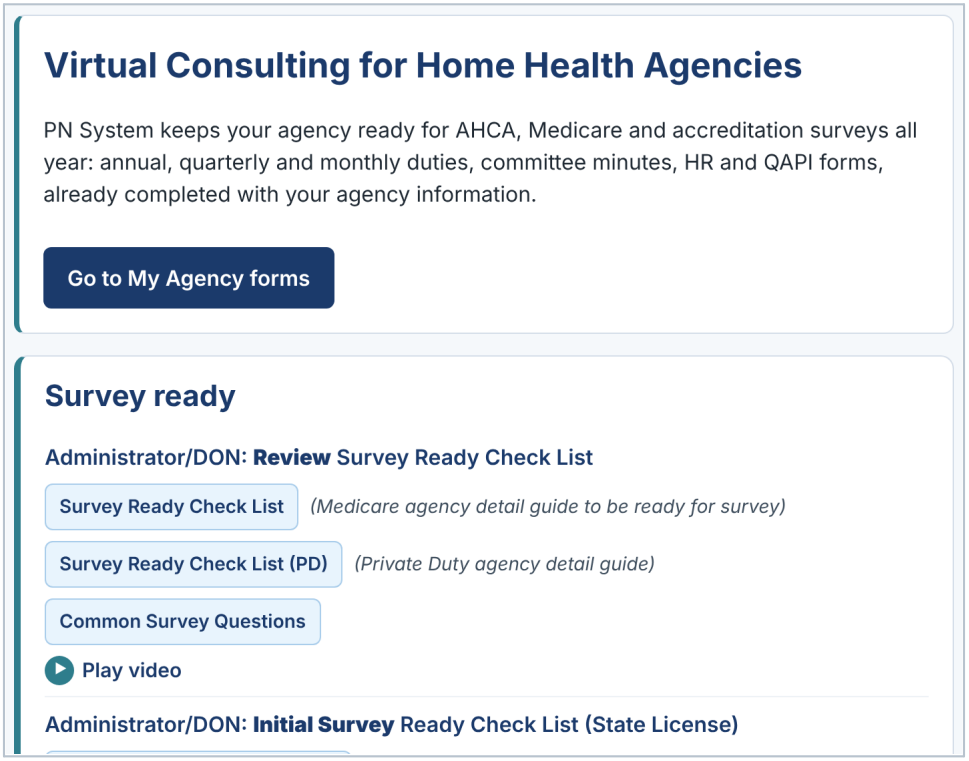


Top menu (navy) and your agency band (white).

3 Home page and top menu

Top menu	What you find there
Home	Welcome page: Survey Ready Check Lists, education and events, Industry News (keep your agency duties on cruise control).
Regulations	Medicare (Federal), Florida AHCA (State), practice acts, Medicaid, HHCAHPS and lookups (NPI, etc.).
Resources Guide	Contacts for insurance, accountants, QAPI staff, scanning services, lawyers, billing and more.

Top menu	What you find there
Our Services	Admission packages, handbooks, printing and PN System experience.
Privacy	Disclaimer, privacy and security notice.
My Agency forms	Your office duties: every form, organized by when it is due (see section 5).
Sign out	Always sign out when you finish, especially on a shared computer.

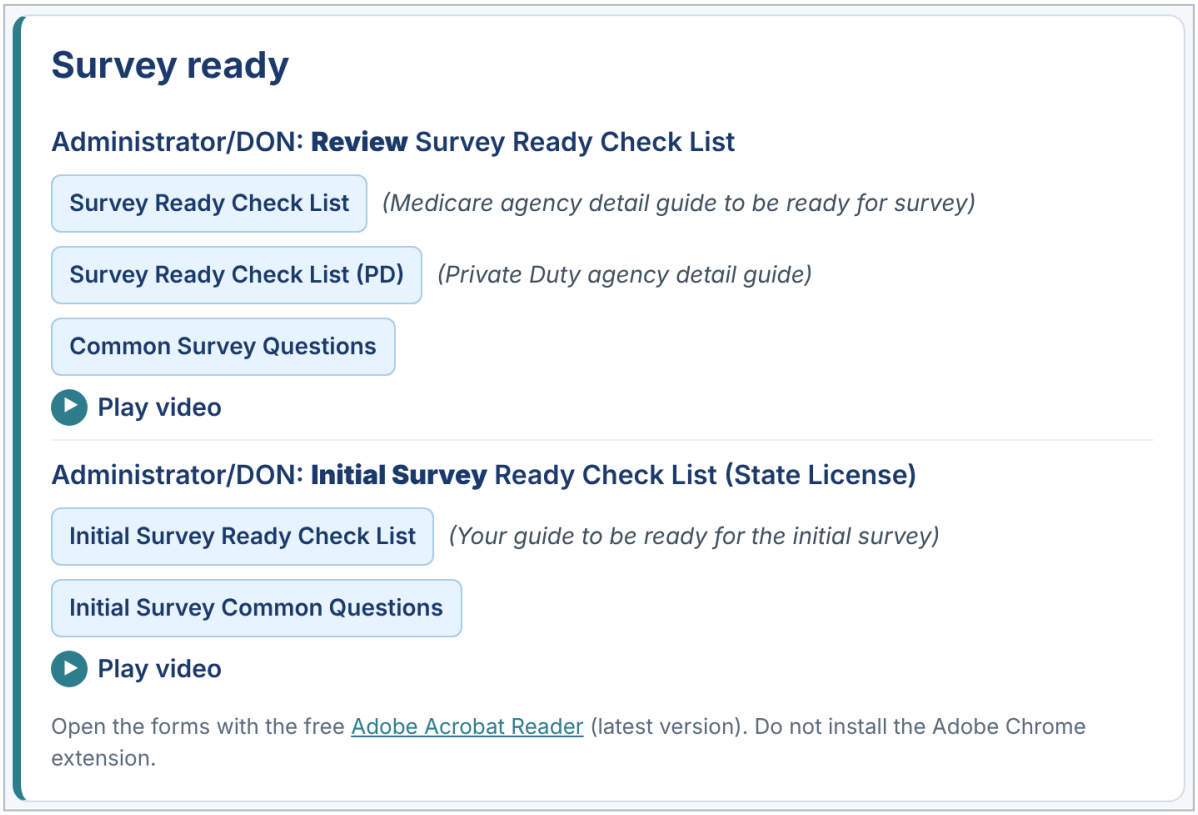


Home page after sign in: click Go to My Agency forms to see your duties.

4 Start with the Survey Ready Check List

The Survey Ready Check List is your guide to be ready for any survey. The Administrator and the DON should review it first, print it, and follow each section (Minutes, QAPI, Human Resources, etc.) using the duty menu.

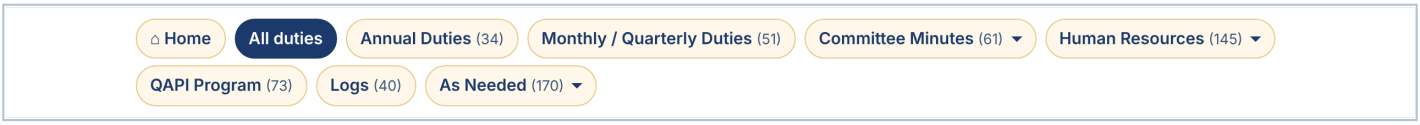
1. On the **Home** page, find **Survey ready**.
2. Click **Survey Ready Check List** (Medicare agencies) or **Survey Ready Check List (PD)** (Private Duty). New agencies use the **Initial Survey Ready Check List** for the state license survey.
3. Click **Play video** for a short explanation, and **Common Survey Questions** to prepare your staff.



Survey ready: check lists, common survey questions and videos.

5 My Agency forms: the duty menu All duties

Click **My Agency forms** in the top menu. The **duty menu** (the round buttons) stays at the top of every duty page, so you can move from one duty to another in one click. The number in brackets is how many forms each duty has.



Button	What it opens
Home	Back to the Home page.
All duties	Office duties overview: one button for every duty page.
Annual Duties	Plans and reports completed every year (Administrator / DON).
Monthly / Quarterly Duties	Reports due every month or every quarter.
Committee Minutes (drop-down)	Drop-down list: Board of Directors, Clinical Record Review (QAPI), Pandemic, Safety / Emergency, Ethics, Civil Rights, Compliance and Infection Control committees.
Human Resources (drop-down)	Drop-down list: Human Resources Duties, Staff Orientation, Staff Training / In-Services and Staff Evaluations.

Button	What it opens
QAPI Program	Quality Assessment and Performance Improvement forms, survey documents and VBP.
Logs	All agency logs (infection, incidents, complaints, hospitalizations, etc.).
As Needed (drop-down)	Drop-down list: LTC Program (Non-Skilled), Grow Your Business, Policy Updates, Plans & Manuals, Home Health Protocols and As Needed Forms.

Buttons with a small down arrow open a **drop-down list**. Click the button, then click a page in the list. Click anywhere else (or press Esc) to close it.



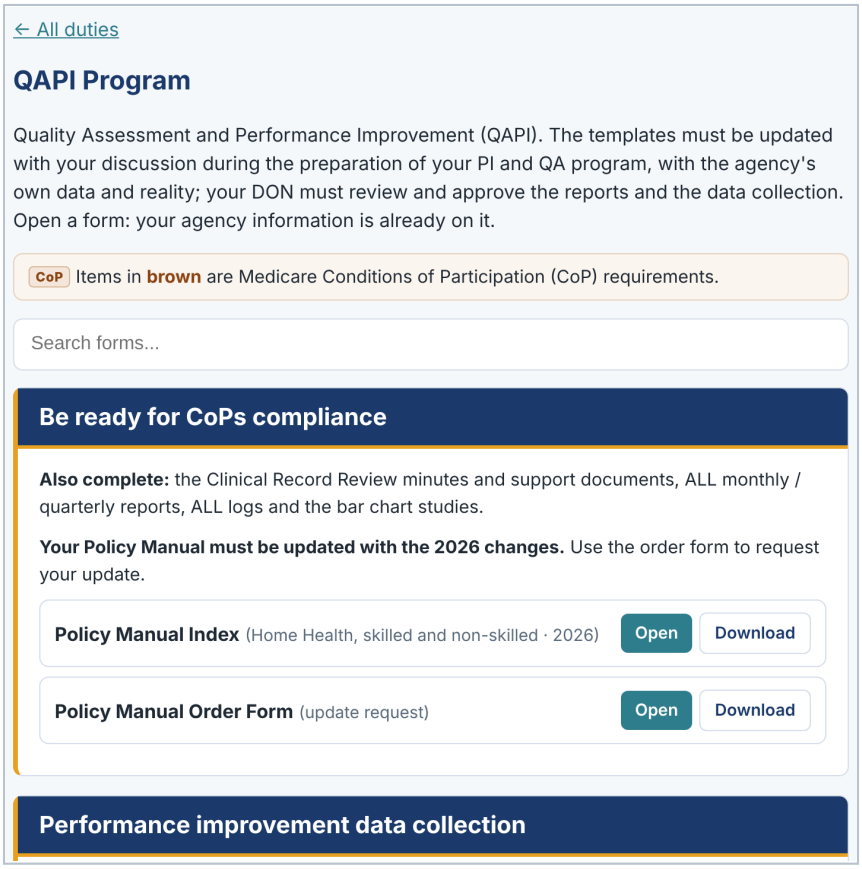
The As Needed drop-down list.



All duties: the same pages as buttons, grouped by Committee Minutes, Human Resources and As Needed.

6 Inside a duty page

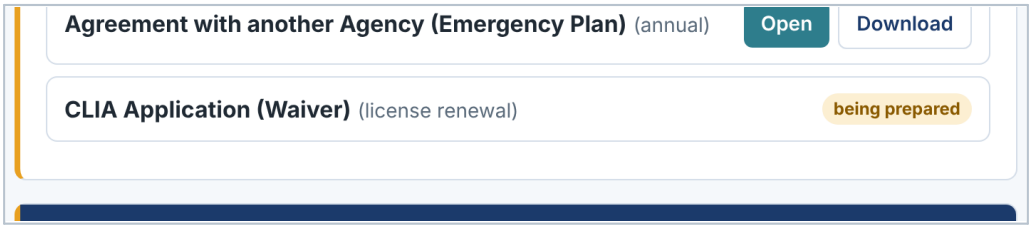
On the page	How to use it
Title and instructions	What the duty is, who is responsible, and when it is due. Read it first.
CoP items in brown	Items in **brown** are Medicare Conditions of Participation (CoP) requirements: the most important duties.
Search forms…	Type a word (for example *survey* or *fire*) to show only the matching forms. Click × to clear it.
Navy group bars	Forms are grouped by topic or month. Notes under a bar explain how and when to complete them.
Open	Opens the form in a new tab, with your agency information already on it.
Download	Saves the form to your computer (Downloads folder). Then open it with Adobe Reader to fill it in.
being prepared	The form is being updated by PN System. It will show Open and Download when it is ready.



A duty page: title, instructions, CoP legend, search box and the first group of forms.



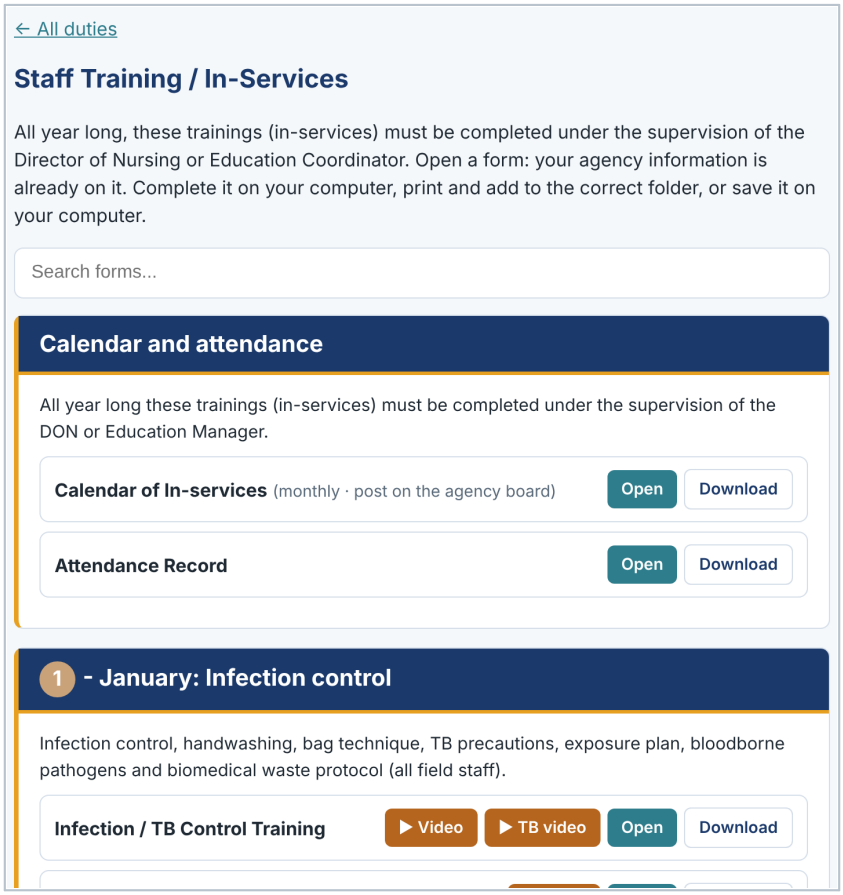
Search: typing "survey" shows only the survey forms.



A form that is ready (Open / Download) and one that is being prepared.

7 Staff Training videos Human Resources > Staff Training

Trainings are organized by month: the month number is in a light-brown circle (**1 - January**, **2 - February**, …). Many trainings have a **Video** button. Click it to play the training video right on the page (with sound), then open the training form, test and certificate.



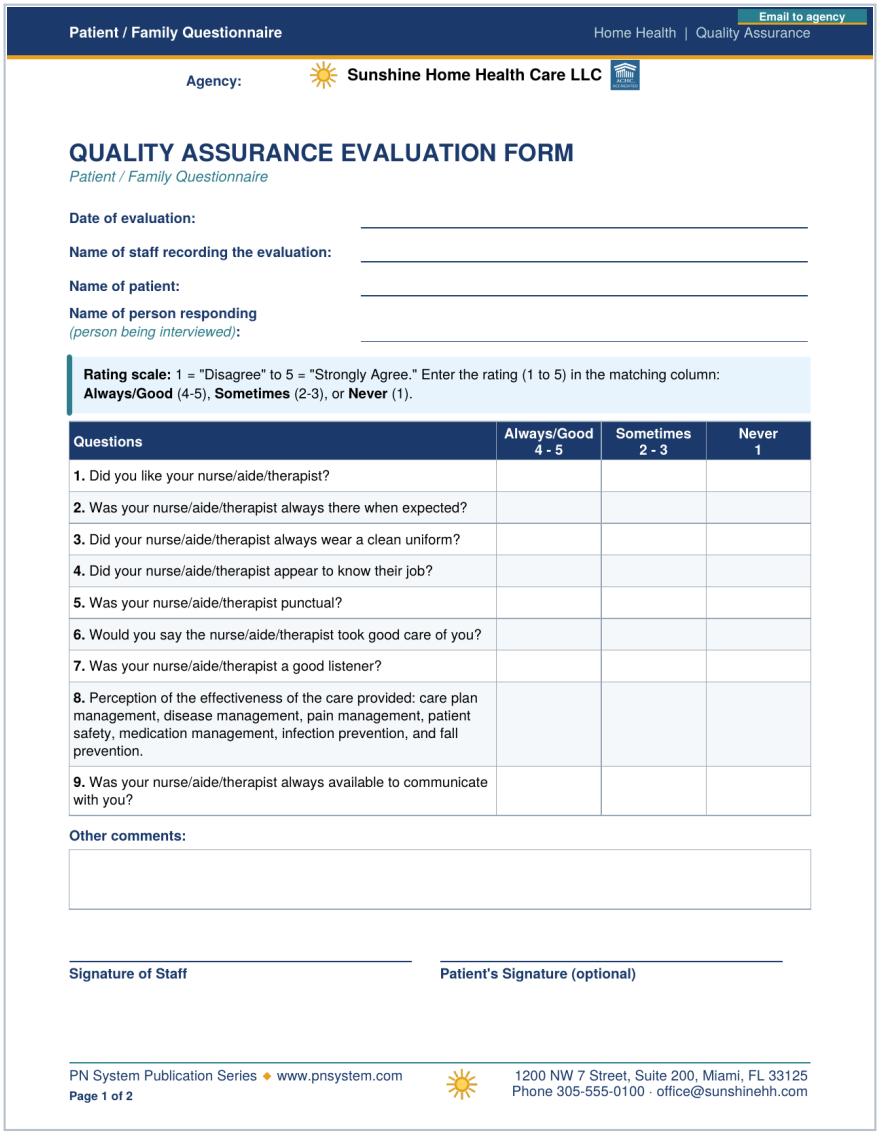
Staff Training: monthly groups, Video buttons, and Open / Download.

Tip: Show the video to your staff during the in-service, then have each person complete the test and sign the attendance record.

8 Your forms: fill, save, print, email

Every form opens with your agency name, logos, address, phone and email already on it. This information is locked, so it cannot be changed by mistake. You only type your own data in the blue fields.

1. Click **Download** and open the file with **Adobe Acrobat Reader**.
2. Type your agency's own data and information in the fields. Use proper capitalization.
3. Save the completed form on your computer (File > Save As), then **print** it and file it in the correct folder.
4. Staff working from home: click the teal **Email to agency** button at the top-right of the page. Your email program opens a new message to your agency email with the completed form attached. The button shows on screen only; it does not print.



Patient / Family Questionnaire — Email to agency — Home Health | Quality Assurance

Agency: Sunshine Home Health Care LLC

QUALITY ASSURANCE EVALUATION FORM

Patient / Family Questionnaire

Date of evaluation: _____

Name of staff recording the evaluation: _____

Name of patient: _____

Name of person responding *(person being interviewed)*: _____

Rating scale: 1 = "Disagree" to 5 = "Strongly Agree." Enter the rating (1 to 5) in the matching column: **Always/Good** (4-5), **Sometimes** (2-3), or **Never** (1).

Questions	Always/Good 4 - 5	Sometimes 2 - 3	Never 1
1. Did you like your nurse/aide/therapist?			
2. Was your nurse/aide/therapist always there when expected?			
3. Did your nurse/aide/therapist always wear a clean uniform?			
4. Did your nurse/aide/therapist appear to know their job?			
5. Was your nurse/aide/therapist punctual?			
6. Would you say the nurse/aide/therapist took good care of you?			
7. Was your nurse/aide/therapist a good listener?			
8. Perception of the effectiveness of the care provided: care plan management, disease management, pain management, patient safety, medication management, infection prevention, and fall prevention.			
9. Was your nurse/aide/therapist always available to communicate with you?			

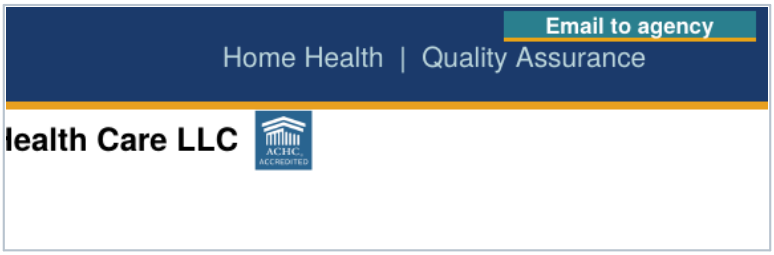
Other comments:

Signature of Staff **Patient's Signature (optional)**

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1200 NW 7 Street, Suite 200, Miami, FL 33125
Phone 305-555-0100 · office@sunshinehh.com

A form opened in Adobe Reader: agency name and logos at the top, agency address in the footer.

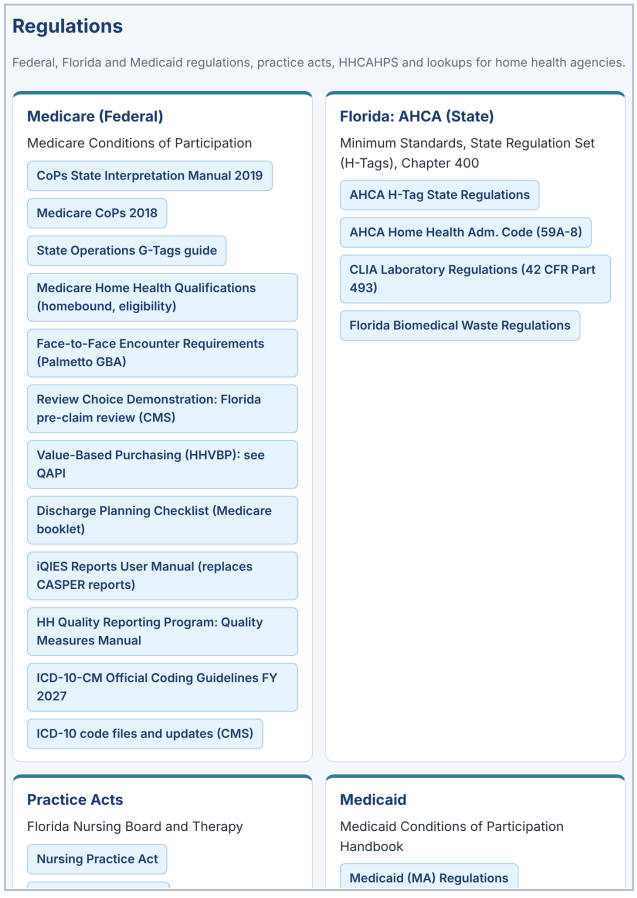


The Email to agency button (on screen only, never printed).

Note: The Email to agency button works in Adobe Acrobat Reader on a computer with an email program (Outlook, Mail, etc.). Browsers and phone PDF viewers do not run it: in that case save the form and attach it to an email yourself. Human Resources, Staff Training and Orientation forms do not have this button.

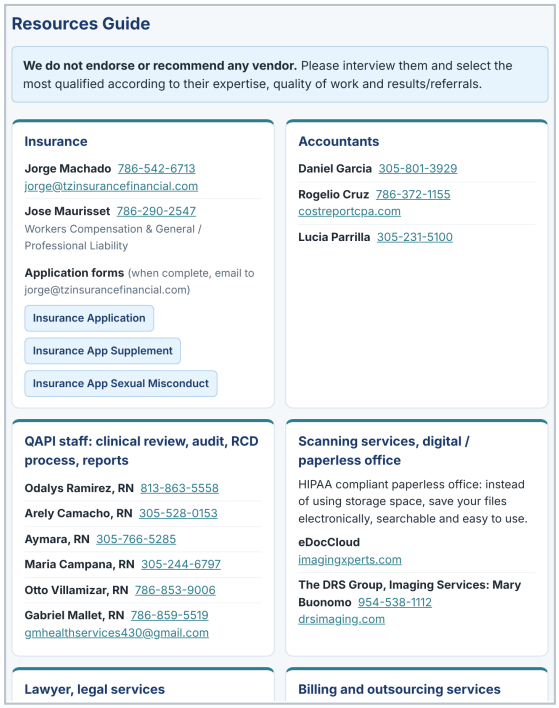
9 Regulations, Resources Guide and services

Regulations (top menu) has the rules your agency must follow, organized in cards: Medicare (Federal), Florida AHCA (State), Practice Acts, Medicaid, HHCAHPS and lookups. Click a blue button to open the document.



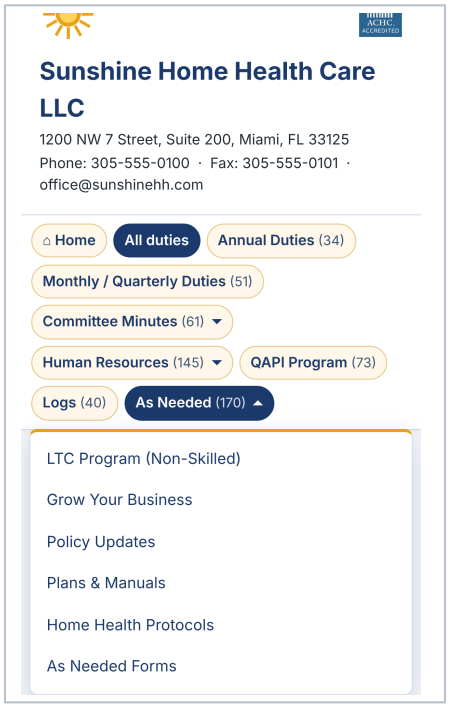
Regulations page.

Resources Guide lists professionals and companies agencies work with (insurance, accountants, QAPI nurses, scanning, lawyers, billing). PN System does not endorse any vendor: interview them and choose the best for your agency. **Our Services** shows admission packages, handbooks and printing you can order.



Resources Guide.

10 Phone, Chrome and Adobe Reader settings



On a phone

The website works on any phone. The duty menu buttons wrap onto several lines. Tap a button with a small down arrow to open its list right under the menu, then tap a page.

Forms can be viewed on a phone, but use a computer with Adobe Reader to fill in, save and email them.

Open PDF files in Adobe Reader (Google Chrome)

Chrome opens PDF files in its own window, where the fillable fields and the Email button do not work well. Set Chrome to download PDF files so they open in Adobe Reader:

1. Make sure Adobe Acrobat Reader is installed (free at get.adobe.com/reader).
2. In Chrome, click the **Menu** (three dots) > **Settings** > **Privacy and security** > **Site settings**.
3. Scroll down to **Additional content settings** (or *Additional permissions*) > **PDF documents**.
4. Choose **Download PDFs**. Open the downloaded file, choose **Open**, and select **Always open files of this type**.

Make Adobe Reader your default PDF program

1. Open Adobe Reader > **Menu** (or Edit) > **Preferences** > **General**.
2. Click **Select As Default PDF Handler**, then **Continue** and follow the steps. Restart the computer.
3. Windows 10/11 also: **Settings** > **Apps** > **Default apps**, search ".pdf" and choose Adobe Acrobat Reader.

Tip: Do not install the Adobe extension for Chrome. Use the free Adobe Acrobat Reader program (latest version).

11 Responsibilities and help

1. Complete all templates with your agency's own information and data, then review, print and file them in their folders.
2. The **Administrator** and the **DON / Clinical Manager** are responsible for accurate data and for the reports completed on the website, with the help of qualified staff. Your DON must review and approve the policies, procedures and forms.
3. Keep up with **Industry News** on the Home page: it lists new requirements and changes (for example the yearly Policy Manual update).

Questions? We are here to help.
PN System | ACHC & CHAP Certified Consultant | over 30 years serving Florida home health agencies
Phone **305-818-5940** • Cell **786-514-9352** • **info@pnsystem.com**
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