HOME HEALTH ASSESSMENT VALIDATION AND ENTRY SYSTEM (JHAVEN) INSTALLATION GUIDE

In support of Software
Version 1.1.0

October 01, 2015
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Introduction

OASIS

The Outcome Assessment Information Set (OASIS) was developed by the Centers for Medicare & Medicaid Services (CMS) to set a standardized protocol for assessing the clinical characteristics of Home Health Agency (HHA) patients. This information is used to better support the regulatory process and policy-making by providing survey agencies with a mechanism for objectively measuring Agency performance and quality. It is also used to support a prospective payment system for HHAs. In addition, it provides researchers with a rich set of information to support the development of improved standards of care through the study of patient care outcomes.

The purpose of the OASIS National Automation Project is to provide computerized storage, access, and analysis of the OASIS data on HHA patients across the U.S. The OASIS System consists of several interrelated components, including data communications and an OASIS National Data Repository, and is intended to create a standard, nationwide system for connecting HHAs to their respective State agencies for the purpose of electronic interchange of data, reports, and other information.

For more detail, go to the CMS website: http://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/OASIS/Background.html

HAVEN/jHAVEN

To achieve their goals, CMS has sponsored the development of a data entry system known as the OASIS Home Assessment Validation and Entry (HAVEN) System. The new version will be jHAVEN, converted to use Java. HHAs can use jHAVEN for collecting OASIS data in a standardized format and electronically creating OASIS data records to be sent directly into the ASAP system.

Document Purpose

The installation process for User Tools has been standardized across the User Tools, with minor enhancements required for each tool. This guide will take the user through the installation process(es) required.

All the User Tool releases will consist of full “releases” and “upgrades”.

All the User Tools are developed into two (2) types of application software:

- Standalone Software Application
- Network Client/Server Application
This Guide will be used to install and set up both types of software. A User Guide will also be provided for each individual User Tool, which covers all the user functionality found in that individual User Tool, as well as the Help and Security features.

On-Line Help is provided within the application once a successful login is completed. The Help Desk is also available for assistance.

IMPORTANT: The Help Desk is available for technical support and assistance with problems or questions regarding the software. Contact information for the QIES Help Desk: 1-877-201-4721 or help@qtso.com

Vendor Information

The User should read the CMS disclaimer below, or on the QTSO website, https://www.qtso.com/vendor.html, before beginning the download process.

CMS Disclaimer

“CMS and its contractors/distributors make no representations about the suitability, for any purpose or use, of the software and documents. THE SOFTWARE AND DOCUMENTS ARE PROVIDED "AS IS" AND WITHOUT WARRANTY OF ANY KIND. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, CMS AND ITS CONTRACTORS/DISTRIBUTORS HEREBY DISCLAIM ANY AND ALL WARRANTIES, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR USE, TITLE, AND NON-INFRINGEMENT. Recipient shall not, in any event, be entitled to, and CMS or contractors/distributors shall not be liable for, indirect, special, incidental, or consequential damages of any nature, including, without being limited to, loss of use, data, or profit, irrespective of the nature of the claim, whether in contract, tort, warranty, or otherwise.”
Hardware/Software Specifications

The QTSO home page lists the CMS websites for the System Requirements:
https://www.qtso.com/index.php

"Minimum System Requirements for Home Health Agencies, Hospice Providers, Long term Care Facilities, Inpatient Rehabilitation Facilities and Long Term Care Hospitals"

QTSO website User Tool System Requirements. Links to the CMS website by effective date.

<table>
<thead>
<tr>
<th>Minimum System Requirements for Home Health Agencies, Hospice Providers, Long Term Care Facilities, Inpatient Rehabilitation Facilities and Long Term Care Hospitals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW: FY2016 System Requirements [PDF 23KB] Effective 10/01/2015 – No End Date</td>
</tr>
<tr>
<td>FY2015 System Requirements [PDF 22KB] Effective 10/01/2014 – 09/30/2016</td>
</tr>
</tbody>
</table>

Select the date range for this release of 10/01/2015 – 09/30/2016 (or “No End Date”).

Software Downloads

To download the files required for installing the User Tool software, navigate to the Centers for Medicare & Medicaid Services website or the QIES Technical Support Office (QTSO) website.

The CMS Websites: https://www.qtso.com/cmslinks.html
The QTSO Website, https://www.qtso.com/, has all the hyperlinks to download each of the User Tools.

Complete the following steps to download software form the QTSO Website:
1. Enter QTSO Website: https://www.qtso.com/ into your URL and display the website.
   a. See the left-hand panel in detail below.
2. Select the appropriate User Tool from the left-hand panel; click on the user tool name.
3. The download page displays.

   NOTE: The following information is posted on the QTSO website. https://www.qtso.com/

4. The panel entitled “jHAVEN Downloads/Documentation”, on the left, includes the following information.
   a. The following enhancements have been made:
      i. 1. ICD-10 Implementation
      ii. 2. Data Spec Changes (v2.12.0)
      iii. 3. Item Set Changes (October 2015)
      iv. 4. Errata Changes (v2.12.0)
      v. 5. Updates to the Installation Guide v1.1.0 & User Guide v1.1.0

5. Review the description given and select the version required.
6. The panel entitled “File Name”, on the right, includes the information indicating what files are available for download depending upon which type of application you select to use in your organization.
7. Select and follow the appropriate readme.txt file and installation guide instructions.
   a. Standalone Install Files are used for individual workstations with the database on the same workstation, which does NOT need to access the same database from multiple computers.
      i. jHAVEN_ReadMe_Text.1.1.0.txt
      ii. jHAVENSetup_1.1.0.exe
   b. Network Client/Server Install Files are used for the network install only when it is needed to connect multiple computers to a centralized user tool database.
      i. New_jHAVEN_Client_Server_Users_ONLY_ReadMe_Text.txt
      1) jHAVENServerSetup-1.1.0.exe
      2) jHAVENSetup-1.1.0.exe

8. Click on the setup file required.
9. The File Download – Security Warning window displays, asking “Do you want to run or save this file?”
10. Click the Run button.
11. The Verify jHAVEN Setup window will provide a progress bar illustrating the progress of the install.

![Verify jHAVEN Setup window](image)

12. The Icons for the jHAVEN Application AND the jHAVEN User Guide will appear on the desktop.

**New Installation Guide – General Overview**

**Installers Access Rights**

To install a User Tool, the user must be logged into the PC as a Workstation Administrator. Users of the application must have read/write access to the location where the database is to be installed.

**Types of Installations**

There are two types of installations available for the User Tool.

- The Standalone install, which is self-contained on one workstation.
- The Network Client/Server install, which uses a server to support one or more individual workstations all accessing one database by multiple computers and users.
  - Servers hold the central database and must be installed using the Server Install first.
  - Clients are individual workstations that have access to the server. This is installed after the Server Installation has been successfully completed.

Examples are shown in the [Software Downloads](#) section of this document.

NOTE: The Client and the Standalone installs use the same installation. There is a point in the process where the user must select one or the other: Standalone or Client.

**Server Installation**

The database, which the clients will connect to, must be installed first, using the Server installation.
TIP: When selecting the Network Client/Server install, it is strongly recommended that the Server and the Client installations be performed on different workstations for ease of recovery.

**Client and Standalone Installation – The ‘Installer’**

**Window Settings**
In order to ensure the reliable operation of the software, it is imperative that the following Windows properties be set.

Using the Microsoft Windows Operating Systems, which are supported, the Windows Font Size property must be set to “Small Fonts”. This property can be found under the Settings tab of desktop properties: Control Panel\Appearance and Personalization\Display\.

**Server Installation**

On the database server, complete the following steps to install. To download the appropriate files, see the [Software Downloads](#) section.

1. Click on the Server Setup. File name ServerSetup-1.1.0.exe.

   ![File Download - Security Warning](image)

   **Do you want to run or save this file?**

   - **Name:** <<User Tool>> ServerSetup_X.xx.exe
   - **Type:** Application, 6.06MB
   - **From:** www.qto.com

   - [Run](#)
   - [Save](#)
   - [Cancel](#)

   While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. [What’s the risk?](#)

2. The File Download – Security Warning screen displays, asking “Do you want to run or save this file?”.

3. Click Run to start the installation.

   **NOTE:** Click Save to save the installation file to the workstation for installation at a later time. If installation files are saved to the workstation, double click the installation icon to start the installation.
4. The ‘Setup Loading’ message displays.

NOTE: This is a generic installation document. Therefore, there are generic references throughout. Example: **1.1.0** will indicate the version of the software being installed.

5. The ‘Welcome to the **jHAVEN MySQL Server 1.1.0** Setup Wizard’ displays when the load is finished.
   a. The Welcome Screen. "This wizard will guide you through the installation of this **jHAVEN MySQL Server 1.1.0**. It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer."

6. “Click Next to continue” [with the setup].

7. **jHAVEN MySQL Server 1.1.0 Setup: License Agreement** screen displays.
a. "Please review the license terms before installing jHAVEN MySQL Server. If you accept the terms of the agreement, click Agree to continue. You must accept the agreement to install jHAVEN MySQL Server 1.1.0."

b. “CMS and its contractors/distributors make no representations about the suitability, for any purpose or use, of the software and documents. THE SOFTWARE AND DOCUMENTS ARE PROVIDED "AS IS" AND WITHOUT WARRANTY OF ANY KIND. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, CMS AND ITS CONTRACTORS/DISTRIBUTORS HEREBY DISCLAIM ANY AND ALL WARRANTIES, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR USE, TITLE, AND NON-INFRINGEMENT. Recipient shall not, in any event, be entitled to, and CMS or contractors/distributors shall not be liable for, indirect, special, incidental, or consequential damages of any nature, including, without being limited to, loss of use, data, or profit, irrespective of the nature of the claim, whether in contract, tort, warranty, or otherwise.”

8. Click ‘I Agree’ to continue with the setup.

9. The ‘jHAVEN MySQL Server 1.1.0 Setup, Choose Port’ screen displays.
c. “Enter the Port for use for this install of jHAVEN MySQL Server 1.1.0.”
d. The system will input the default port of 3630 for jHAVEN automatically.

10. Enter the port number, if not using the default port.
11. Click the Next button to continue.
12. The ‘jHAVEN MySQL Server 1.1.0 Setup, Choose Install Location’ screen displays.
e. “Choose the folder in which to install jHAVEN MySQL Server 1.1.0. Setup will install jHAVEN MySQL 1.1.0 in the following folder.”
f. “To install in a different folder, click Browse and select another folder (Not recommended).”

NOTE: The default location for the installation destination folder is “C:\jHAVENServer”. To install in a different location, use the Browse button.

13. Click the Install button begin the installation.

Note: The application will determine if this is an installation or an upgrade and will provide the correct option button.

14. The ‘jHAVEN MySQL Server 1.1.0 Setup, Installing’ screen displays. A progress bar on the Installing screen allows the user to monitor the progress. Wait while the jHAVEN MySQL Server 1.1.0 is being installed.
15. The Windows application will display a command window briefly. It will be closed by the system.

![Command window](image.png)

16. When install is complete, Click the ‘Next’ button on the ‘Installing screen.
17. The Completing the jHAVEN MySQL Server 1.1.0 Setup Wizard’ displays.
   g. “jHAVEN MySQL Server 1.1.0 has been installed on your computer.”

![Setup Wizard](image2.png)

18. Click Finish to complete this portion of the installation process.

   NOTE: There are no Desktop icons for the Server or the User Guide at the end of the Server Installation. The Client Installation must be run before your entire Installation process is complete. Go to the next step below.

19. Go to the [Standalone & Client Installation](#) section.
NOTE: Firewall Settings: If the User Tool client is unable to connect to the database server please contact your IT System Administrator. It is likely that a firewall setting is blocking the connection. If connection problems continue please contact the QIES Help Desk.

Standalone & Client Installation

Using the User Tool ‘Installer’

New to the User Tools, is the use of one process to install both the standalone and the client version of the application on a workstation. This process will be referred to as the ‘Installer’. To download the files required for the installation, see Software Downloads section.

Download the Software

Complete the following steps to install.

1. Double click on the appropriate Setup executable (filename extension = .exe):
   jHAVENSetup-1.1.0.exe

2. The ‘File Download – Security Warning’ screen displays, asking “Do you want to run or save this file?”
   a. Also listed are:
      i. File Name of the .exe file
      ii. From where it was being downloaded. In this case from the QTSO website.
3. Click on Run.
4. The ‘Verifying jHAVEN Setup 1.1.0’ window displays and will continuously update with the progress of the download.

![Verifying jHAVEN Setup 1.1.0](image)

5. When the setup process has completed, the jHAVEN 1.1.0 Setup ‘Welcome to the jHAVEN 1.1.0 Setup Wizard’ screen displays.

**Install the Downloaded Software**

A. The jHAVEN 1.1.0 Setup “Welcome to the jHAVEN 1.1.0 Setup Wizard” Screen.

![Welcome to the jHAVEN 1.1.0 Setup Wizard](image)
1. “This wizard will guide you through the installation of jHAVEN 1.1.0. It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.”
   a. This message is the same regardless of whether the Standalone or the Client is being installed.
2. Click Next to continue.
3. The ‘jHAVEN 1.1.0 Setup, License Agreement’ screen displays.
   a. "Please review the license terms before installing jHAVEN MySQL Server. If you accept the terms of the agreement, click Agree to continue. You must accept the agreement to install jHAVEN MySQL Server 1.1.0."
   b. The disclaimer is the same regardless of whether the Standalone or Client is being Installed:

   “CMS and its contractors/distributors make no representations about the suitability, for any purpose or use, of the software and documents. THE SOFTWARE AND DOCUMENTS ARE PROVIDED "AS IS" AND WITHOUT WARRANTY OF ANY KIND. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, CMS AND ITS CONTRACTORS/DISTRIBUTORS HEREBY DISCLAIM ANY AND ALL WARRANTIES, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR USE, TITLE, AND NON-INFRINGEMENT. Recipient shall not, in any event, be entitled to, and CMS or contractors/distributors shall not be liable for, indirect, special, incidental, or consequential damages of any nature, including, without being limited to, loss of use, data, or profit, irrespective of the nature of the claim, whether in contract, tort, warranty, or otherwise.
Recipient shall not, in any event, be entitled to, and CMS or contractors/distributors shall not be liable for, indirect, special, incidental, or consequential damages of any nature, including, without being limited to, loss of use, data, or profit, irrespective of the nature of the claim, whether in contract, tort, warranty, or otherwise.”

4. Click ‘I Agree’ to continue with the setup.
5. The ‘jHAVEN 1.1.0 Setup, Installation Type’ screen displays.
6. Select the type of installation required:
   a. Use the Standalone if:
      i. “This is the first time installing the application and more than one user does not require access to the data from different or multiple PC’s/access points.”
      ii. “A previous standalone build was installed and you wish to apply the upgrade.”
b. Use the Client if:

![Installation Type dialog box](image)

i. “This is the first time installing the application and more than one user requires access to the data from different or multiple PC’s/access points.”

ii. “A previous client build was installed and you wish to apply the upgrade.”

7. Click Next.

8. Based on the version already installed on the machine, one of the following pop-up decision messages will be displayed.

   a. Confirm the installation type selected is correct.

      i. “You currently have the Client version installed on your computer. Are you sure you would like to proceed with the Standalone install?”

      ii. “You currently have the Standalone version installed on your computer. Are you sure you would like to proceed with the Client install?”

9. Action button Options:

   b. To continue with the selection stated in the message, click ‘OK’ button. The application continues on to display the ‘jHaven 1.1.0 Setup.

      i. Choose Installation Location’ screen, Step 14 which follows.
c. If the selection made, needs to be changed, click the ‘Cancel’ button. The Application returns to the ‘jHAVEN 1.1.0 Setup, Installation Type’ screen in Step 9 above.

10. The ‘jHAVEN 1.1.0 Setup, Choose Installation Location’ screen displays.

a. “Setup will install jHAVEN 1.1.0 in the following folder. To install in a different folder, click Browse and select another folder.”

b. Message is the same for Standalone and for Client installs. The paths for the default destination folders will be different.

b. Standalone default will be: C:\jHAVEN

d. Client default will be C:\<<User Tool Client>>

11. Click ‘Install’ or ‘Upgrade’ to start the installation.
NOTE: The install process itself determines whether this is a full install or an upgrade to the software that is already on the workstation. This is seen in the action buttons.

12. The ‘jHAVEN 1.1.0 Setup, Installing’ screen displays. A progress bar on this screen allows the user to monitor the progress.
a. Back screen: “Please wait while jHAVEN Client 1.1.0 is being installed”
b. Front screen: “Please wait while jHAVEN 1.1.0, is being installed”
c. The Installer will not allow installation of the same version and build that is already installed on the computer. If this is attempted, the following message will be displayed.

![Message](image)

d. If this message displays, Click the OK button.
e. Then click the ‘Cancel’ button on the Installing screen to halt the installation process.

![Installation](image)

13. When the install is complete, the ‘jHAVEN 1.1.0 Setup’:
   a. “Completing the jHAVEN Client 1.1.0 Setup Wizard”
      a. “jHAVEN Client 1.1.0 has been installed on your computer. Click Finish to close the wizard.”
b. “Completing the “jHAVEN 1.1.0 has been installed on your computer. Click Finish to close the wizard.”

14. Click Finish to complete the installation process.

**Desktop ICONS**

The Installation will place the appropriate application icon on the Desktop.

![Desktop ICONS](image)

The User Tool User Guide icons will also be placed on the Desktop.

**Opening the Application**

When the installation process is complete, the appropriate ICON(s) will be available on the Desktop, depending upon which installation was performed. For a detailed explanation of icons on the desktop, see above.

The application may be opened by double-clicking on the appropriate ICON. The jHAVEN splash screen displays momentarily.

![Opening the Application](image)

**Initial Setup of the User Tool**

The initial user signing into the software, for the Initial Setup, will be referred to as the “default user”. They will be required to set up at least one Agency and one System Administrator within the software before any other processing is allowed.
NOTE: If a migration from HAVEN to jHAVEN has previously been processed, the Initial Setup will have already been completed. It will NOT need to be done again.

For Network Client/Server Version ONLY

The Network Client/Server version has an additional pop-up window, “Confirm Database Configuration”.

![Confirm Database Configuration Window]

The ‘Server Name’ will be pre-populated with the IP address of the server indicated during the installation. However, the user will need to re-enter the Server Port. For jHAVEN, if using the default, enter the number ‘3630.’ Click the ‘Confirm’ button.

Default Password

The default jHAVEN User ID/Password will be the User Tool’s lower-case acronym. These are case sensitive: jHAVEN User ID/password will be ‘jhaven’/’jhaven.

NOTE: The default User ID and the initial Password are the same AND are case sensitive.

The following steps are required to initialize the software. The “default user” must complete these initial setups.

1. The Welcome screen displays while the program is loading. This may take a few minutes and requires no response from the user.
2. The Login pop-up window is displayed.
3. Enter the default User ID and Password: “jhaven”/”jhaven”.
4. Click the ‘Login’ button.

![jHAVEN - 1.1.0 Login Window]

5. The Change Password screen displays.
6. Enter a new password in the New Password and Confirm New Password fields. The password is case sensitive and must match in both fields.

7. Click Continue to complete the login process.

   NOTE: When the ‘Cancel’ button is clicked, then another Change Password pop-up comes up with the following message: “You must change your password before accessing the system. If you do not change password, you will be logged off the system”.

8. The Security Questions screen displays. Response to at least six of the ten listed security questions is required.

9. Complete the answers to at least six (6) questions of your choice. Then tab forward.
10. Click OK.
11. The initial application screen displays for the default user role. The password for the default user account has now been changed.
12. The Home tab will be displayed for jHAVEN.

![Image of jHAVEN Home Tab]

**Initial Setup of the Database – First Data Created**

Detailed instructions for adding Agency data and System Administrator data are found in the User Guide.

The User Guides are loaded to the computer at the time of installation. The guide may be accessed using the ‘Go to User Guide’ button on the Home Tab or from the desktop using the User Guide Icon.

If the icon for the jHAVEN User Guide cannot be found on the desktop, they are also on the QTSO website: [https://www.qtso.com/](https://www.qtso.com/). Locate the jHAVEN application in the blue panel on the left, double click and find the User Guide on the download site.

The following sections provide only the most basic steps, with no screen shots. For detailed instructions, see the jHAVEN User Guide Sections:

- Agency Screen – Add & Maintain an Agency
- User Screen – Add and Maintain a User
Add an Agency

During the initial setup, an Agency must be the first data record added. The default user must create at least one Agency. Complete the following steps to create a new Agency.

1. Select the Agency option from the Administration drop down on the Menu Bar.
   OR
2. Use the ‘Go to Agency’ button from the Home tab.
3. The Agency Information screen displays.
4. Enter Agency data in the fields listed on the right side of the screen
5. After agency information has been entered, click the Save icon. Saved agency information will display in the Agency Summary section on the left side of the screen.

Add a System Administrator User

TIP: It is highly recommended to set up more than one System Administrator account as a back-up in the event that one of the System Administrator accounts becomes locked.

Complete the following steps to create a new System Administrator User.

1. Select the User option from the Administration drop down on the Menu Bar.
   OR
2. Click on the ‘Go to User’ button on the Home tab.
3. The User Information screen displays.
4. Enter user data in the column on the right side of the screen. Required fields display on the screen in bold type with an asterisk.
5. After user information has been entered, click the Save icon. Saved user information will display in the User Summary section on the left side of the screen.
6. After successfully adding at least one System Administrator role and at least one Agency, the user must log out of the application and log back in with the newly created System Administrator User ID.
   a. Select the ‘Logout’ from the Security drop down on the menu bar.
   b. The login pop-up window displays.
c. Enter the new System Administrator User ID, which was just added to the User Tool, into the User ID field.
d. Enter the same User ID in the Password field.

TIP: Both the User ID and Password MUST be exactly the same. They are case sensitive.

Uninstalling the Software

Windows ‘All Programs’

The user will find the following list under ‘Start’ - ‘All Programs’.

Complete the following steps to uninstall from the ‘Start’ - ‘All Programs’ drop down.

1. Close the HAVEN application.
   a. If left open the following message displays.
      i. “jHAVEN is currently open. To avoid future installation issues, please close jHAVEN before proceeding.”

2. Click on ‘Uninstall’.

3. The question pop-up will ask if you are sure you wish to uninstall.
   a. “Are you sure you want to completely remove jHAVEN 1.1.0 and all of its components? The database backup file(s) will NOT be removed.”
4. Click on ‘Yes’.
5. The Uninstall will remove the application.
6. When the Uninstall is complete, the final message will be displayed.
   a. “JHAVEN 1.1.0 was successfully removed from your computer.”

7. Click OK.

**Windows Control Panel**

Uninstalling the application may also be accomplished by using Windows ‘Control Panel’.
1. Locate the application.
2. Double-click on the appropriate jHAVEN name.
3. Follow the standard Windows© instructions to complete the uninstall.

**Uninstall Where Both Versions have been Installed**

Complete the following steps if the computer being used has had BOTH versions, Standalone AND Network Client/Server, installed AND you wish to remove both versions.
1. Identify which version has a desktop icon on the computer.
2. Locate that version in the ‘Start – All programs list and Uninstall, performing the steps in **Windows ‘All Programs’** above.
3. This version should uninstall.
4. Go to the Windows Control Panel and Uninstall, perform the steps in **Windows Control Panel** above.
5. This version should uninstall.
End of jHAVEN Installation Guide