



MODULE 1: INTAKE

*BlueCare Tennessee Employment and
Community First EVV Program*

March, 2018

TOPICS

1. Overview
2. Staff Module
3. Client Module
 - Plan of Care Attestation
4. Scheduling Module



OVERVIEW

EVV stands for Electronic Visit Verification

EVV is defined as:

- ◆ A device, telephone and computer based system
- ◆ Electronically verifies when visits occur, documenting the precise time service begins and ends
- ◆ Collects the tasks performed for the client/member
- ◆ Visits are verified by the caregiver checking in or calling from a client's home telephone

EVV will be used to:

- ◆ Schedule visits based on authorized services
- ◆ Validate Home Care claims prior to submission

- **Client:** Member
- **Office Staff:** Users that will be logging into the system
- **Field Staff:** Caregivers that will provide services to the recipients and check-in/call-in for visits
- **Coordinator:** Office staff who will receive alerts when the caregiver assigned to them are late
- **Staff Manager:** Office staff that will receive higher level alerts.
***Above coordinators in the EVV hierarchy.*

Glossary (cont'd)

- **System Admin:** Individuals responsible for security, registering workers in voice recognition and confirming visits with exceptions
- **Visits:** Schedules
- **MVV (Mobile Visit Verification):** The preferred visit check-in method where the caregivers start and end visits using an app on their tablet device
- **EVV (Electronic Visit Verification):** A device, telephone and computer based system that electronically records time worked

Santrax® Payor Management

- ◆ Is a web-based application accessed using a web browser
- ◆ Support Internet Explorer 9, 10, 11, and Firefox
- ◆ Chrome and Safari are not supported

Windows 7 or Higher are Recommended

- ◆ Apple/Linux Operating System users can use an approved browser (see above) in a virtual PC environment to access the SPM System
- ◆ Santrax Payor Management requires the ability to right-click

System Requirements (Cont'd)

Acrobat Reader or other PDF Viewer to view reports

Hard Drive and Internet Requirements

- ◆ Internet connection – High Speed Broadband (T1, cable, FIOS)
- ◆ Display Resolution: 1024 x 768 or higher
- ◆ At least 2 GB RAM
- ◆ At least 1 GB free space on the hard drive

The Payor Management web system is designed for use on desktops and laptops

Log In

Your welcome package contains the URL for your database



If you do not have that, contact your agency's administrator

Each user should have a unique user name and password

To protect your information, Santrax® Payor Management will automatically log you out after a configured period of inactivity

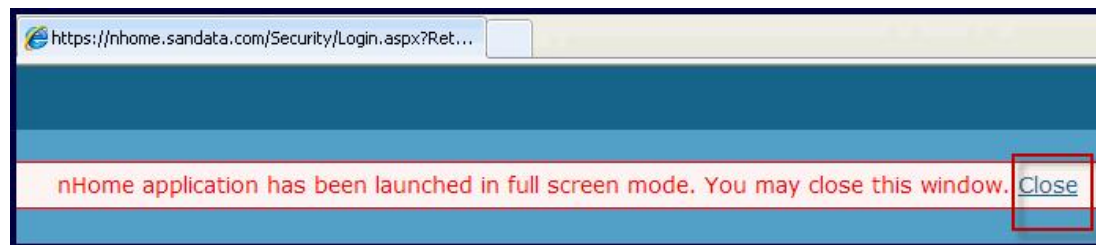


Once a user has logged in, two browser windows will appear in the task bar.

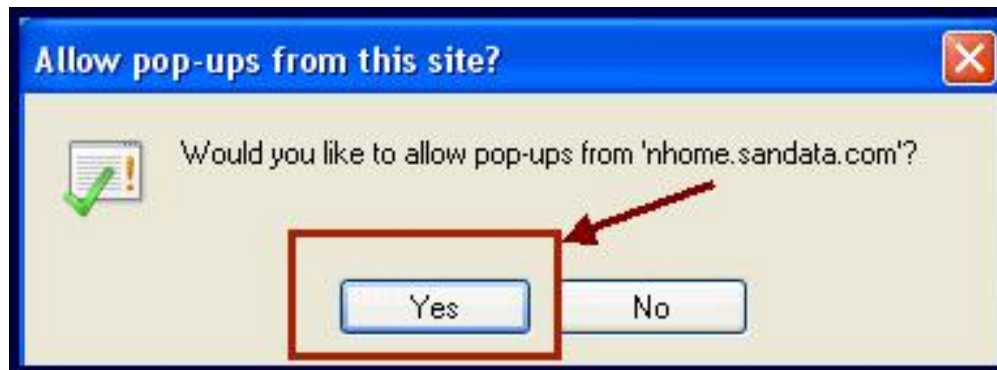
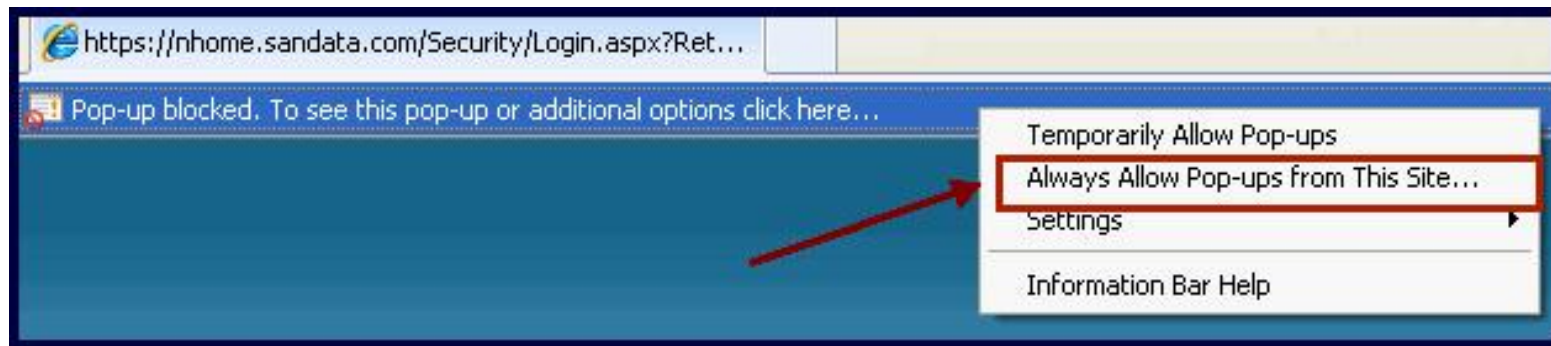
- ◆ One window is the URL used to launch the application, the second is the Santrax[®] Payor Management application.
- ◆ Use the launch window as the URL to set a Bookmark (Firefox) or Favorite (MSIE).



Once the application has been launched, the launch window can be closed.



Pop Up Blockers - IE



Pop Up Blockers - Firefox





Menu Bar

Santrax® Payor Management only displays functions that you have access to

Allows you to access the major system modules and are displayed throughout the application

To the far right the current time zone setting and the name of the current user will be displayed

Person Icon

- ◆ Click to view your user profile
- ◆ Reset your password



The Toolbar is the blue bar just under the Main Menu Bar

- Screen Title
- Actions available for that screen

Action bars include:

- Clear Filter
- Refresh very important concept
- Delete
- Save
- Print
- Close
- Other Actions relevant to that function, e.g., Update, Export, Create Invoices

“Breadcrumbs”



Appears at the bottom of every screen

Listing of all open screens accessed by user

Quick navigation to previously viewed information

Home screen always appears as the first item on the **Go To** bar as a shortcut back to the homepage





Slide 16 BCT ECF Module 1 – Intake

ACCESSING THE ONLINE DOCUMENTATION





Tennessee Documentation Library

Use this link to access Tennessee specific documentation:

<http://webtraining.sandata.com/tenncare/>

Click on any of the links to view the documentation available for each module.

Navigation Guide		
NAV04	Login Instructions Logging into the application	WBT References Manual
NAV05	Navigation Guide Describes all the common functions throughout the system.	WBT References Manual

BlueCare Documents (Formerly VSHP)
Refer to your welcome kit for the password required to access these documents.

- [Adult Day Care Instructions](#)
- [Santrax Agency Management & BlueCare Connect Program Pilot Training Materials](#)
- [September 2014 Webinar Video - Electronic Visit Verification: Updated Scheduling Process](#)
- [BlueCareConnect SPoC Training](#)
- [BlueCareConnect SPoC Device Quick Reference Guide](#)
- [Updated Process Workflow](#)
 - [Authorizations for Auto Generated Schedules](#)
 - [Editing Auto Generated Schedules](#)
 - [Mass Schedule Generation and Editing of Alternating Weekly](#)
 - [Provider Training WebEx Schedules](#)
 - [Scheduling From New Events](#)

Username: nhtraintn

Password: 3stars

BlueCare document password: design

Class Exercise

Login & Navigation

SEARCH

Search Functionality

Search is consistent throughout the application and is divided into 3 parts:

For Santrax[®] Payor Management screens:

- ◆ *Staff*
- ◆ *Client*
- ◆ *Scheduling*
- ◆ *Billing Review*
- ◆ *Invoice*
- ◆ *Billing Export*
- ◆ *Payroll Review*

Search Filters: Specify Criteria

Summary Bar: Count Items in the Results

Results List: Details of Items



Example – Client Search

Client Search

Clear Filter
Refresh
New Client
Print
Close

Search Filters

Company:
Location:
Admit Type:
Team:
Status: 02- Active
Reason:

First Name:
Last Name:
Language:
ID:
SSN:
MRN #:

Clinical Manager:
Staff Manager:
Marketer:
Coordinator:
Payor:
Payor No:

Address:
City:
State:
ZIP:

Non-Compliant Clients
Reassign Manager/Coordinator

Total Shown: 89

Summary

As Of: 03:21 AM

Name	ChartID	Status	As Of	SOC	EOC	Other ID	Compliant Through	Referrer
Jones, Edward	1-6854207-PP	02	02/24/2016	02/24/2016			12/31/2055	
Jones, George	1-6854127-PP	02	09/11/2013	08/01/2013		6854127	12/31/2055	
Jones, Janet	1-6854183-PP	02	06/15/2015	06/15/2015			12/31/2055	
Jones, Lucy	1-6854140-PP	02	12/12/2012	12/12/2012			12/31/2055	
Jones, Marjorie	489-6854175-UHC	02	01/01/2015	01/01/2015			12/31/2055	
Jones, Sandy	1-6854195-AET	02	11/15/2015	11/15/2015			12/31/2055	
Jones, Smitty	1-6854194-AET	02	11/19/2015	11/02/2015			12/31/2055	
Jones, William	671-6854156-AET	02	05/05/2014	05/05/2014			12/31/2055	
Joseph, Mary	1-0000002-PP	02	08/05/2013	08/05/2013			12/31/2055	


CALENDARS

Entering Dates

Enter the date directly into the **From** and **To** fields

- ◆ Format must be in mm/dd/yyyy

Use the calendar icon next to the Date field to choose the date



Date From: 03/23/2016

Date To: 03/23/2016

Use the larger Calendar to select a date or enter a date range

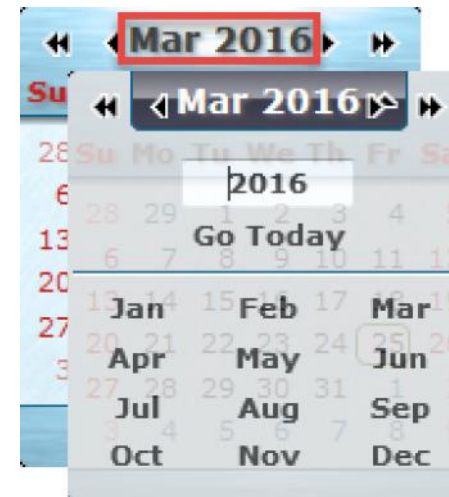
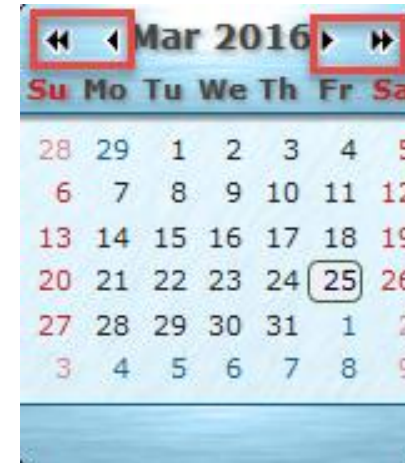
- ◆ Select the From Date
- ◆ Hold Shift Key + Click the To Date



March 2016						
S	M	T	W	T	F	S
28	29	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Calendar Controls

- On either side of the month are single and double arrows.
 - ◆ Single arrows advance one month at a time
 - ◆ Double arrows advance one year at a time
- Clicking the month name allows the user to type in the year and select the month

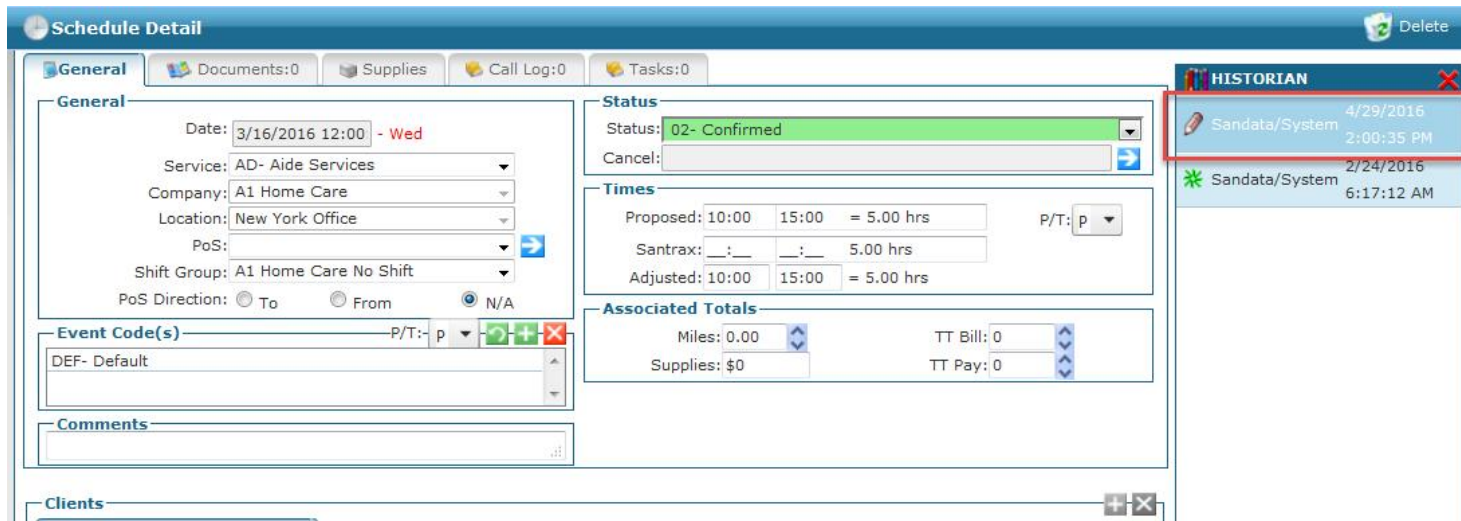


HISTORIAN & NOTES



“A short pencil is better than a long memory”

- Audit Trail of changes made by: user, date & timestamp
- Clicking a historian entry will highlight the values saved in that instance



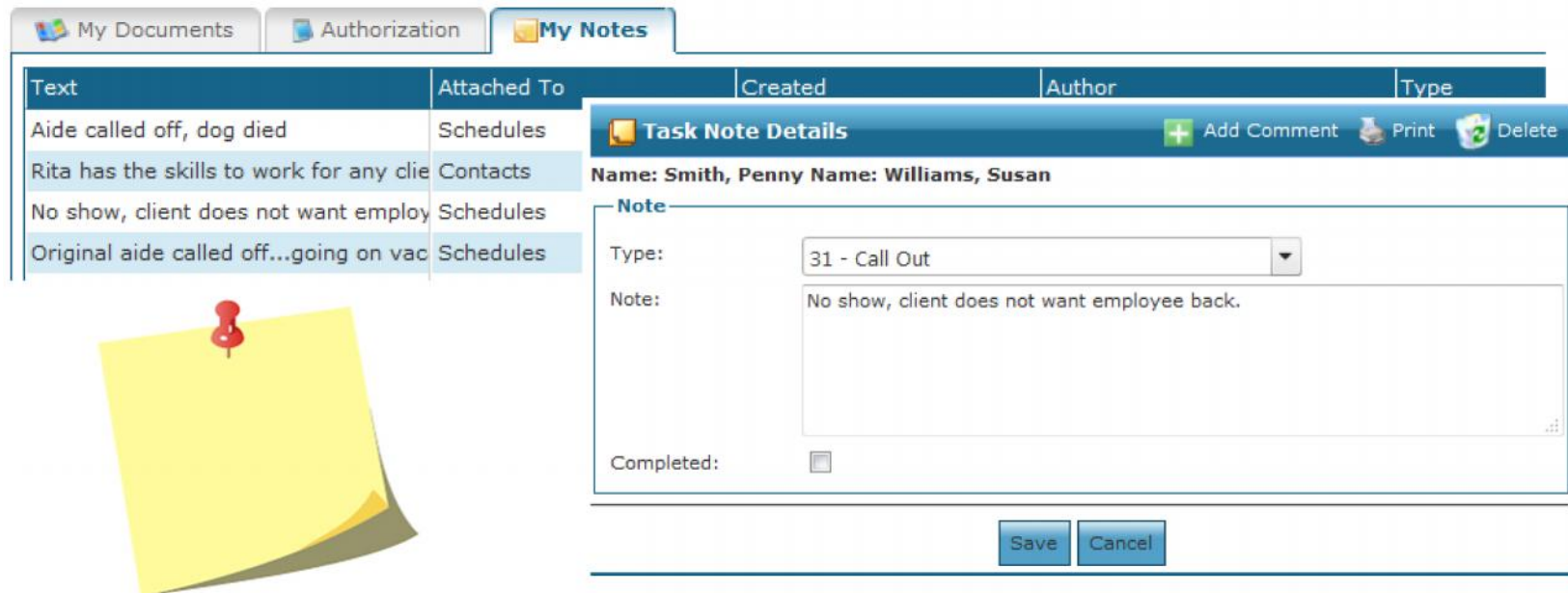
The screenshot displays the 'Schedule Detail' window in the Sandata system. The 'General' tab is active, showing fields for Date (3/16/2016 12:00 - Wed), Service (AD- Aide Services), Company (A1 Home Care), Location (New York Office), PoS, Shift Group (A1 Home Care No Shift), and PoS Direction (To, From, N/A). The 'Status' section shows '02- Confirmed'. The 'Times' section shows Proposed (10:00 - 15:00 = 5.00 hrs) and Adjusted (10:00 - 15:00 = 5.00 hrs) times. The 'Associated Totals' section shows Miles (0.00), TT Bill (0), Supplies (\$0), and TT Pay (0). The 'Historian' tab is open on the right, showing a list of changes. The first entry is highlighted in red, indicating the current state: Sandata/System, 4/29/2016, 2:00:35 PM. The second entry is Sandata/System, 2/24/2016, 6:17:12 AM.

HISTORIAN		
Sandata/System	4/29/2016	2:00:35 PM
Sandata/System	2/24/2016	6:17:12 AM

Notes can be created in Staff, Client and Schedule records

- ◆ Can be marked completed or left open for follow up

From the bottom panel on the **Home Screen > My Notes** tab, a user will see their 'open' notes



Text	Attached To	Created	Author	Type
Aide called off, dog died	Schedules			
Rita has the skills to work for any client	Contacts			
No show, client does not want employee	Schedules			
Original aide called off...going on vacation	Schedules			

Task Note Details + Add Comment Print Delete

Name: Smith, Penny Name: Williams, Susan

Note

Type: 31 - Call Out

Note:

No show, client does not want employee back.

Completed: ☐

Save Cancel

Action Buttons



Clear Filters – removes previously entered filter criteria



Refresh – run search/refresh the screen



Add – add information to that area of the screen



Delete – delete selected information

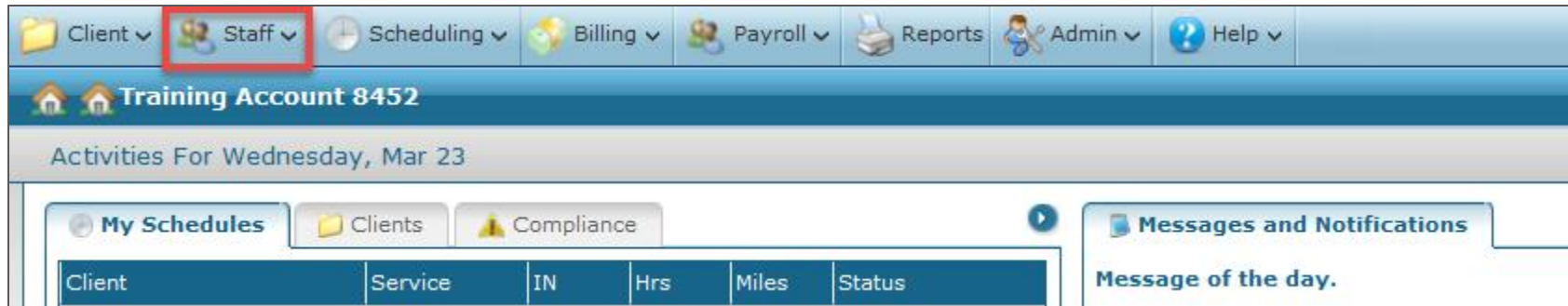


See All Options – view all choices for the field



STAFF MODULE

Accessing the Staff Module

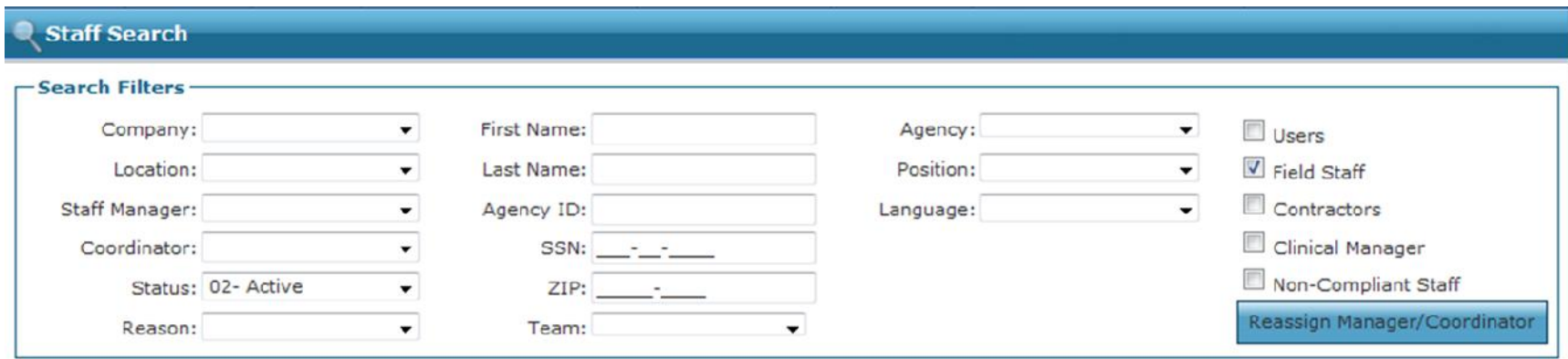


Clicking the Staff icon on the menu bar opens the search screen.

By default, search parameters will be set for Active Field Staff.
Additional search filters are available.

Staff Search Filters

- Caregivers are designated as Field staff
- Office staff are designated as Users
- Use appropriate filters to reduce the results list
- Use the Position filter to search by job role

A screenshot of the 'Staff Search' web application interface. The interface has a blue header bar with a magnifying glass icon and the text 'Staff Search'. Below the header is a 'Search Filters' section with a blue border. Inside this section, there are several input fields and checkboxes. On the left, there are dropdown menus for 'Company:', 'Location:', 'Staff Manager:', 'Coordinator:', 'Status:' (with '02- Active' selected), and 'Reason:'. In the middle, there are text input fields for 'First Name:', 'Last Name:', 'Agency ID:', 'SSN:' (with a dashed line for the first digit), 'ZIP:' (with a dashed line for the last digit), and a 'Team:' dropdown menu. On the right, there are dropdown menus for 'Agency:', 'Position:', and 'Language:'. To the right of these dropdowns are four checkboxes: 'Users', 'Field Staff' (which is checked), 'Contractors', and 'Clinical Manager'. Below these checkboxes is a checkbox for 'Non-Compliant Staff'. At the bottom right of the 'Search Filters' section is a blue button labeled 'Reassign Manager/Coordinator'.

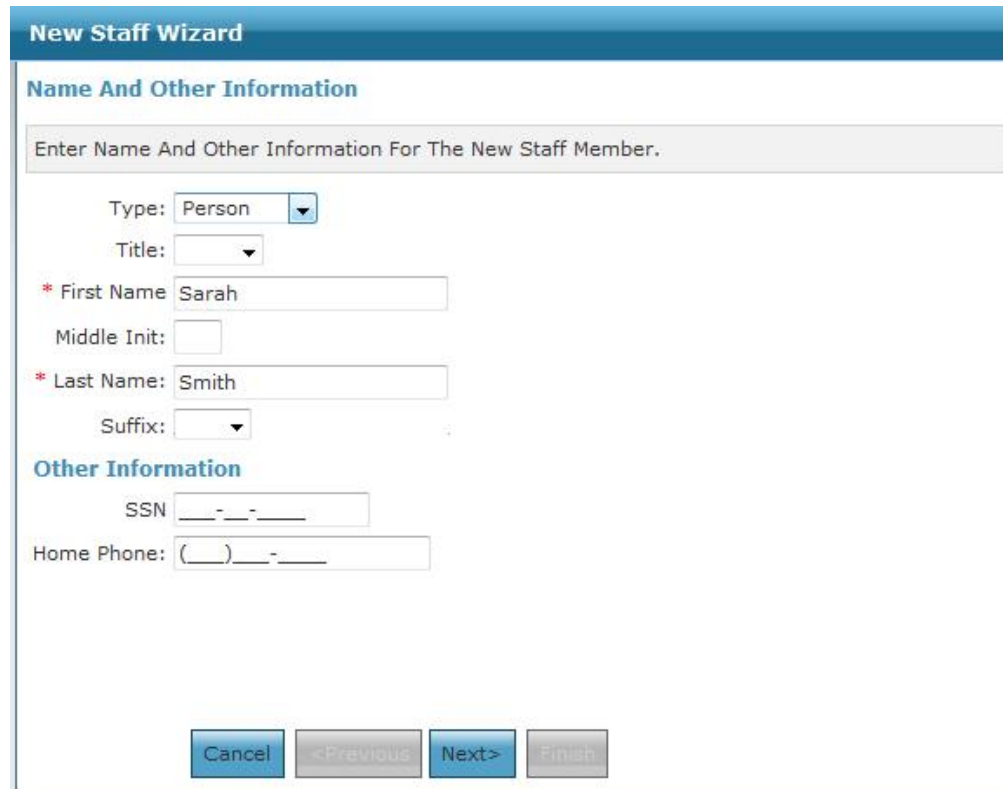
Adding New Staff

A screenshot of the Sandata software interface. The top navigation bar includes tabs for Client, Staff, Scheduling, Billing, Reports, Admin, and Help. The 'Staff' tab is active. Below the navigation bar is a 'Staff Search' section with a search bar and a 'Search Filters' panel. The 'Search Filters' panel contains dropdown menus for Company, Location, and Staff Manager, and text input fields for First Name, Last Name, and Agency ID. To the right of the search filters is a 'New Staff' button, which is highlighted with a red box. Other buttons in the top right include Clear Filter, Refresh, Print, and Close. The user's name 'E-I' and the Sandata logo are also visible in the top right corner.

To enter new staff, click the **New Staff** button on the Staff search screen...a New Staff Wizard will open

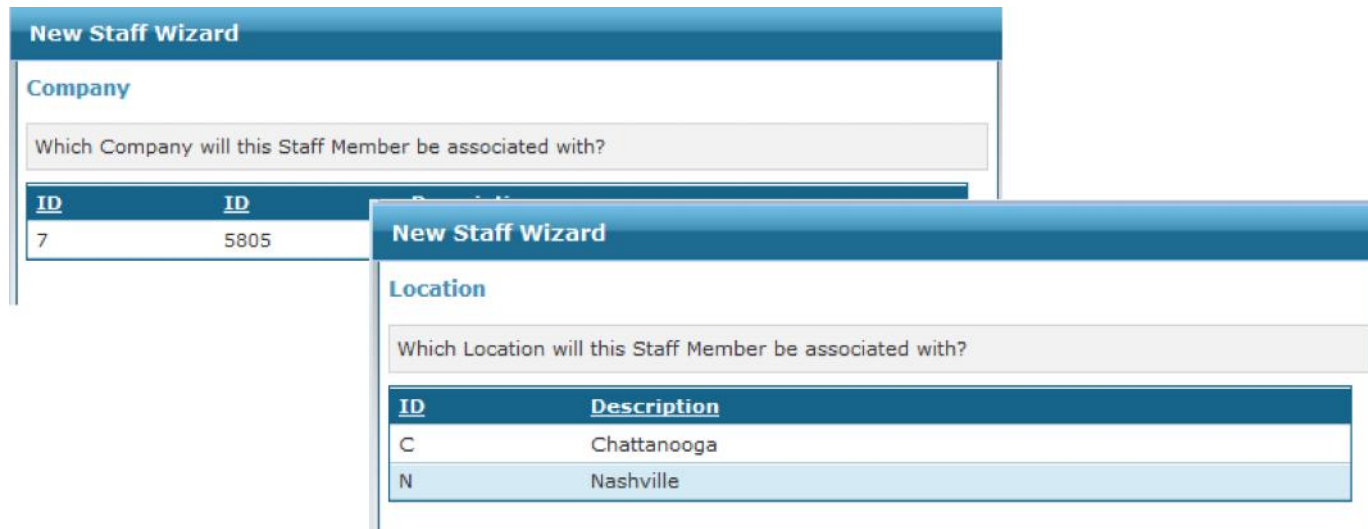
New Staff Wizard – Personal Information

Name is required. Phone number is recommended.

A screenshot of a web-based form titled 'New Staff Wizard'. The form has a blue header bar with the title. Below the header, the section is titled 'Name And Other Information' in blue. A light gray box contains the instruction 'Enter Name And Other Information For The New Staff Member.' The form includes several input fields: 'Type' (a dropdown menu set to 'Person'), 'Title' (a dropdown menu), '* First Name' (a text box with 'Sarah' entered), 'Middle Init' (a text box), '* Last Name' (a text box with 'Smith' entered), and 'Suffix' (a dropdown menu). Below these is a section titled 'Other Information' in blue, containing 'SSN' (a text box with a hyphen) and 'Home Phone' (a text box with a parenthesis and hyphen). At the bottom, there are four buttons: 'Cancel', '<Previous' (disabled), 'Next>' (active), and 'Finish' (disabled).

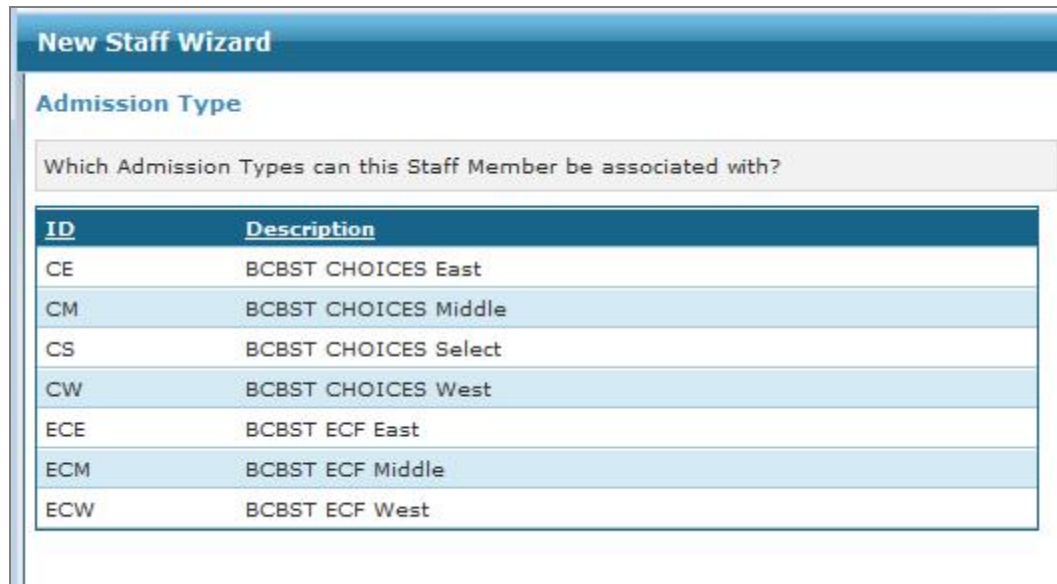
New Staff Wizard – Company & Location

- Selecting Company and/or Location is optional.
- If selections are made the staff will only be able to work in the selected company/location.
- For field staff, leave blank to allow the staff to work across all companies and locations.
- For Office staff, select the appropriate Location(s).

The image shows two overlapping screenshots of the 'New Staff Wizard' application. The background window is the 'Company' selection screen, and the foreground window is the 'Location' selection screen. Both windows have a blue header bar with the title 'New Staff Wizard'. The 'Company' window has a text input field with the prompt 'Which Company will this Staff Member be associated with?' and a table below it with two columns, both labeled 'ID'. The table contains one row with the values '7' and '5805'. The 'Location' window has a similar text input field with the prompt 'Which Location will this Staff Member be associated with?' and a table below it with two columns: 'ID' and 'Description'. The table contains two rows: 'C' for 'Chattanooga' and 'N' for 'Nashville'.

New Staff Wizard – Admission Types

- Selecting Admission Type will limit the staff to only working those types selected (*Best Practice: Leave blank to allow caregivers to work all types*).
- Existing Providers must add the new Admission Types or remove the old Admission Types in order for staff to be available to service all members.

A screenshot of a web application window titled 'New Staff Wizard'. Below the title bar is a section labeled 'Admission Type'. Inside this section is a text prompt: 'Which Admission Types can this Staff Member be associated with?'. Below the prompt is a table with two columns: 'ID' and 'Description'. The table contains eight rows of data, each representing a different admission type. The rows are: CE (BCBST CHOICES East), CM (BCBST CHOICES Middle), CS (BCBST CHOICES Select), CW (BCBST CHOICES West), ECE (BCBST ECF East), ECM (BCBST ECF Middle), and ECW (BCBST ECF West).

ID	Description
CE	BCBST CHOICES East
CM	BCBST CHOICES Middle
CS	BCBST CHOICES Select
CW	BCBST CHOICES West
ECE	BCBST ECF East
ECM	BCBST ECF Middle
ECW	BCBST ECF West

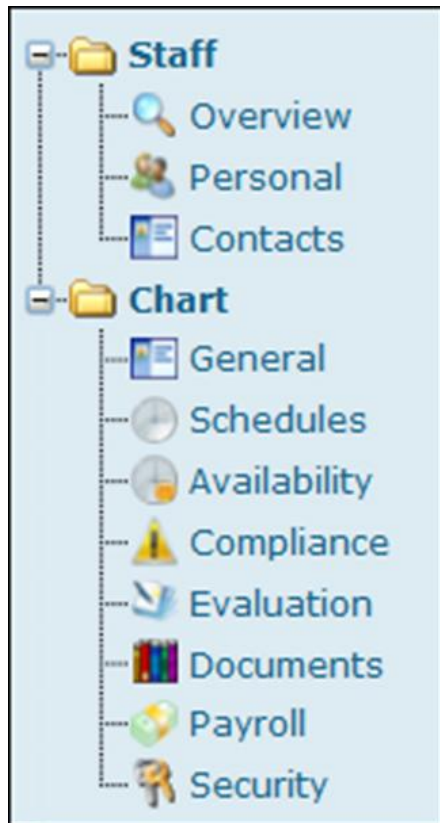
New Staff Wizard - Position

- Select the appropriate position for the staff (can only select one position).

A screenshot of a software window titled 'New Staff Wizard'. The window has a blue header bar with the title. Below the header, the word 'Position' is displayed in blue. A text box asks 'What Position will this Staff Member hold?'. Below this is a table with two columns: 'ID' and 'Description'. The table lists various job positions. At the bottom of the window are four buttons: 'Cancel', '<Previous', 'Next>', and 'Finish'. The 'Next>' button is highlighted with a dotted border.

ID	Description
ADC	Adult Day Care
BA_BS	Behavioral Analyst or Behavioral Specialist
CNA	Certified Health Aide
CWIC	Certified Work Incentives Counselor
DSP	Direct Support Professional
HHA	Home Health Attendant
HMD	Home Meals Delivery
JC	Job Coach
JD	Job Developer
LPN	LPN
N	Nutritionist
OFC	Office Staff
OT	OT

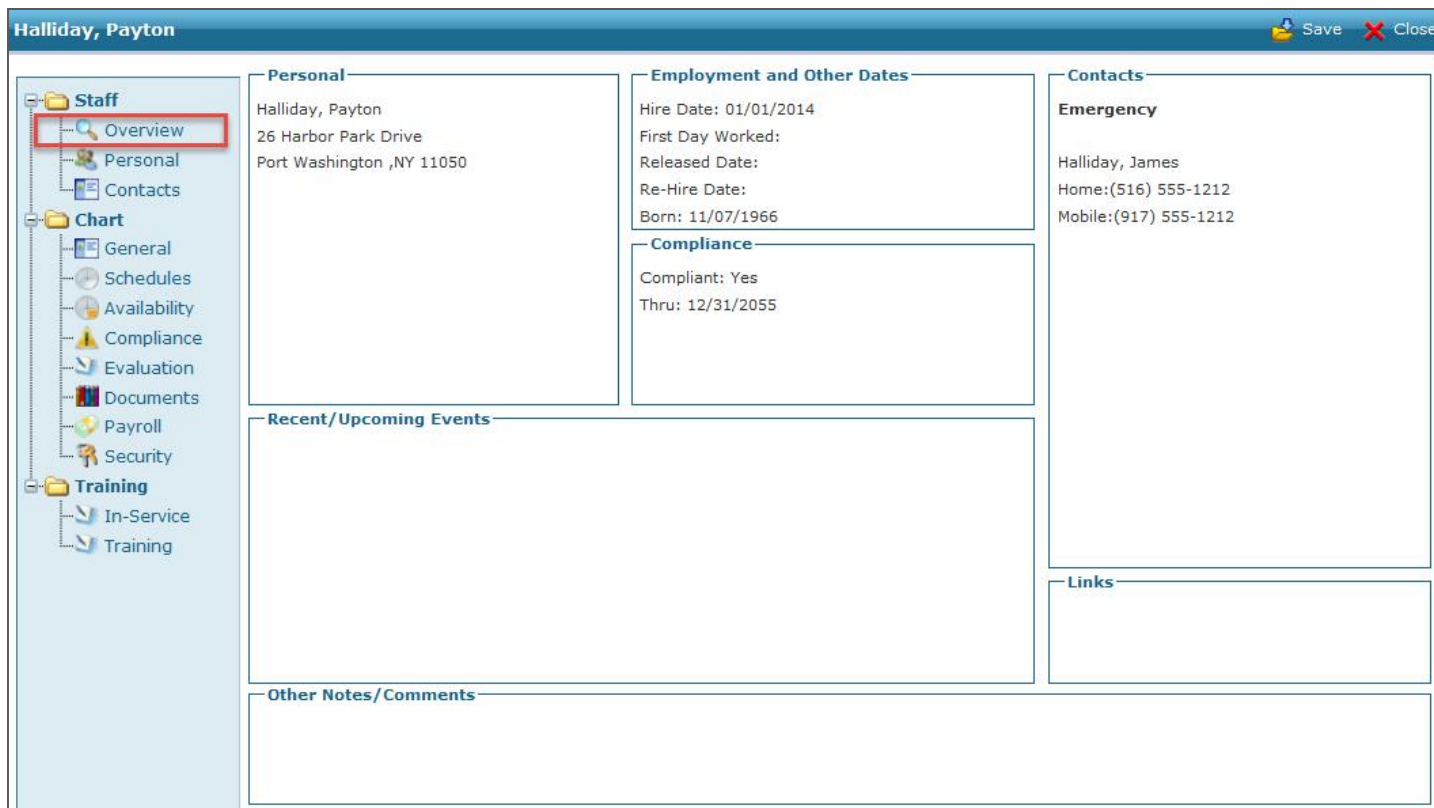
Staff Record Navigation



- Staff profile organizes information into folders for easy navigation
- Staff folder focuses on personal and demographic information
- Chart folder focuses on work related information

Staff Folder > Overview Screen

The Overview screen provides a summary of information from other screens in the staff record.

A screenshot of a web application interface for a staff record. The title bar at the top reads 'Halliday, Payton' and includes 'Save' and 'Close' buttons. On the left is a navigation pane with a tree structure: 'Staff' (selected), 'Overview' (highlighted with a red box), 'Personal', 'Contacts', 'Chart' (with sub-items: General, Schedules, Availability, Compliance, Evaluation, Documents, Payroll, Security), and 'Training' (with sub-items: In-Service, Training). The main content area is divided into several sections: 'Personal' (Halliday, Payton; 26 Harbor Park Drive; Port Washington, NY 11050), 'Employment and Other Dates' (Hire Date: 01/01/2014; First Day Worked; Released Date; Re-Hire Date; Born: 11/07/1966), 'Compliance' (Compliant: Yes; Thru: 12/31/2055), 'Contacts' (Emergency: Halliday, James; Home: (516) 555-1212; Mobile: (917) 555-1212), 'Recent/Upcoming Events' (empty), 'Links' (empty), and 'Other Notes/Comments' (empty).

Staff Folder > Personal Screen

- Staff address (can be used for proximity searches when scheduling)
- Language (can be matched to client needs when scheduling)
- Entering the ZIP code automatically fills in City, State and County

Halliday, Payton Save Close

Staff

- Overview
- Personal**
- Contacts

Chart

- General
- Schedules
- Availability
- Compliance
- Evaluation
- Documents
- Payroll
- Security

Training

- In-Service
- Training

Name

Title:

First Name:

Middle Init:

Last Name:

Suffix:

Other Information

Birthdate:

SSN:

Marital:

Gender:

Language:

Ethnicity:

Current Address

Name:

Address:

Apt.:

City:

State: Zip:

County:

Region:

Type:

Evacuation Zone:

Phone Numbers, Etc.

Home:


Mobile:

Work: Ext

Fax:

Email: Mobile: ☐

Images (0/0)

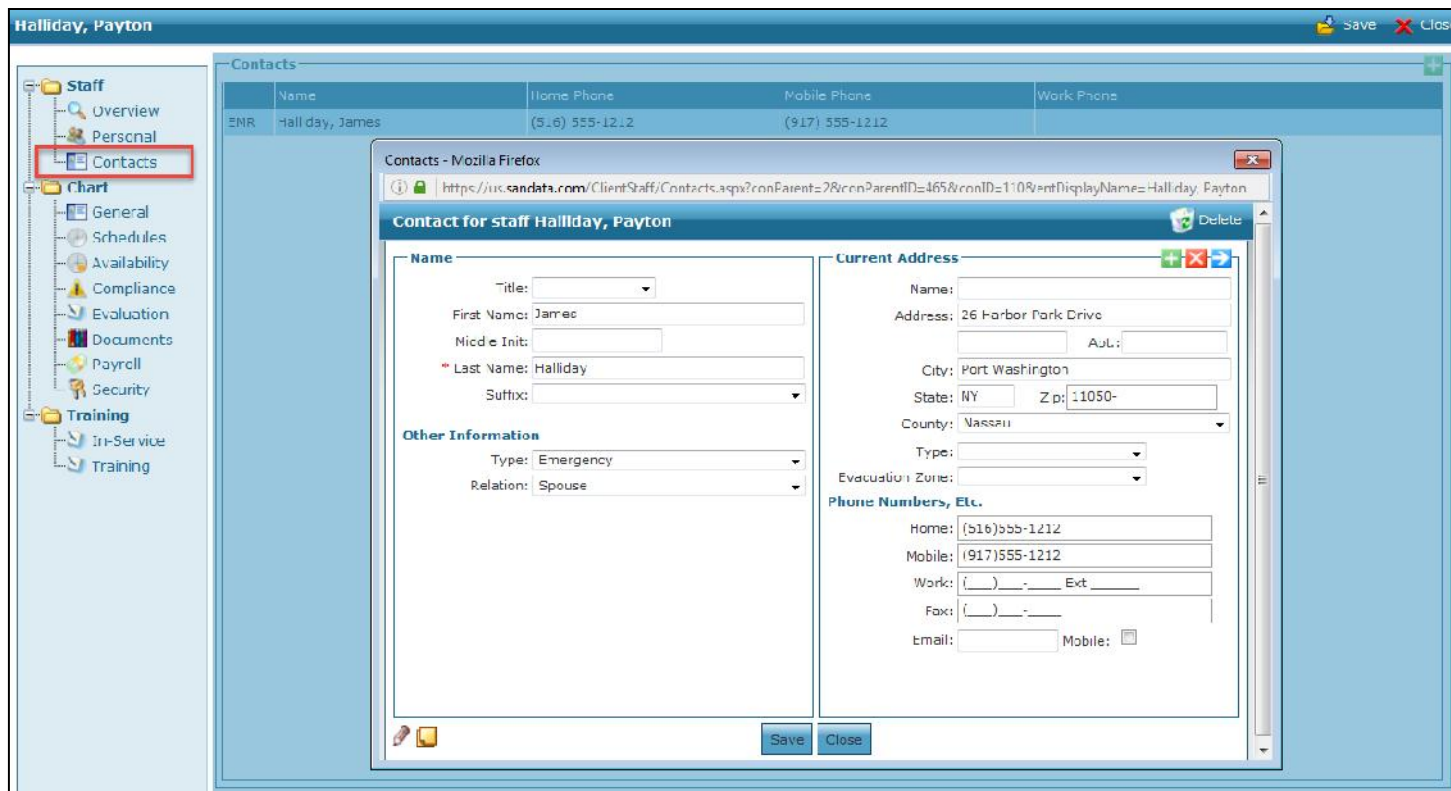


Clients Excluded from Staff

Client Name	Other ID	Exclusion Type	Reason for Exclusion

Staff Folder > Contacts Screen

Add as many contacts as available, designating type of contact, relation to staff and contact information.



The screenshot shows the 'Contacts' screen for staff member Halliday, Payton. The left sidebar lists various categories: Staff, Personal, Chart, General, Schedules, Availability, Compliance, Evaluation, Documents, Payroll, Security, Training, In-Service, and Training. The 'Contacts' category is selected. The main area displays a table of contacts for James Halliday, with columns for Name, Home Phone, Mobile Phone, and Work Phone. A contact form is open, showing details for James Halliday, including his title, first name, middle initial, last name, suffix, current address, city, state, zip, county, type, evaluation zone, and phone numbers. The form is titled 'Contact for staff Halliday, Payton' and includes a 'Delete' button. The URL in the browser address bar is https://us.sandata.com/ClientStaff/Contacts.aspx?conParent=2&conParentID=465&conID=110&entDisplayName=Halliday_Payton. The form has 'Save' and 'Close' buttons at the bottom.

Name	Home Phone	Mobile Phone	Work Phone
ENR Hall day, James	(516) 555-1212	(917) 555-1212	

Contacts - Mozilla Firefox
https://us.sandata.com/ClientStaff/Contacts.aspx?conParent=2&conParentID=465&conID=110&entDisplayName=Halliday_Payton

Contact for staff Halliday, Payton

Name
 Title:
 First Name: James
 Middle Initial:
 Last Name: Halliday
 Suffix:

Current Address
 Name:
 Address: 26 Harbor Park Drive
 City: Port Washington
 State: NY Zip: 11050-
 County: Nassau
 Type:
 Evaluation Zone:

Other Information
 Type: Emergency
 Relation: Spouse

Phone Numbers, Etc.
 Home: (516) 555-1212
 Mobile: (917) 555-1212
 Work: () - - Ext -
 Fax: () - -
 Email: Mobile: ☐

Save Close

Chart Folder > General Screen

- The General screen contains work related information.
- The Santrax ID is entered by the caregiver to identify themselves during the call process.
- The Hire Date is populated when the staff is made Active in the Employment Status panel.

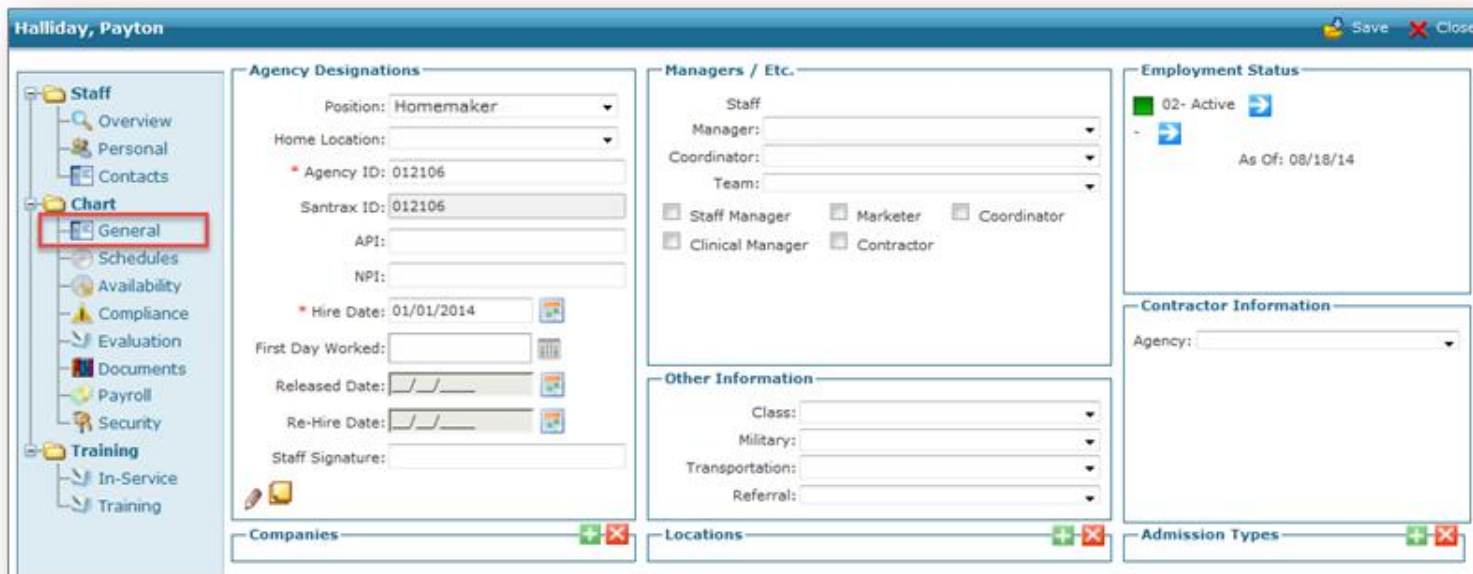
A screenshot of a software application window titled 'Halliday, Payton'. The window has a blue header bar with 'Save' and 'Close' buttons. On the left is a navigation tree with categories: Staff, Personal, Contacts, Chart, Schedules, Availability, Compliance, Evaluation, Documents, Payroll, Security, Training, In-Service, and Training. The 'Chart' category is expanded, and the 'General' sub-item is selected and highlighted with a red rectangle. The main content area is divided into several panels. The 'Agency Designations' panel contains fields for Position (Homemaker), Home Location, Agency ID (012106), Santrax ID (012106), API, NPI, Hire Date (01/01/2014), First Day Worked, Released Date, Re-Hire Date, and Staff Signature. The 'Managers / Etc.' panel has dropdowns for Staff, Manager, Coordinator, and Team, along with checkboxes for Staff Manager, Marketer, Coordinator, Clinical Manager, and Contractor. The 'Employment Status' panel shows '02- Active' with a green status icon and a refresh button, and 'As Of: 08/18/14'. The 'Contractor Information' panel has an Agency dropdown. The 'Other Information' panel has dropdowns for Class, Military, Transportation, and Referral. At the bottom are three expandable sections: Companies, Locations, and Admission Types, each with a green plus icon and a red minus icon.

Chart Folder > General Screen

Coordinators

- ◆ Office Staff assigned to receive email alerts for late visits
- ◆ Assigned to clients in the client record

Staff Managers

- ◆ Above Coordinators in the SPM (Santrax Payor Management)
- ◆ Receive higher level alerts
- ◆ Managers are linked to Coordinators in User Staff record

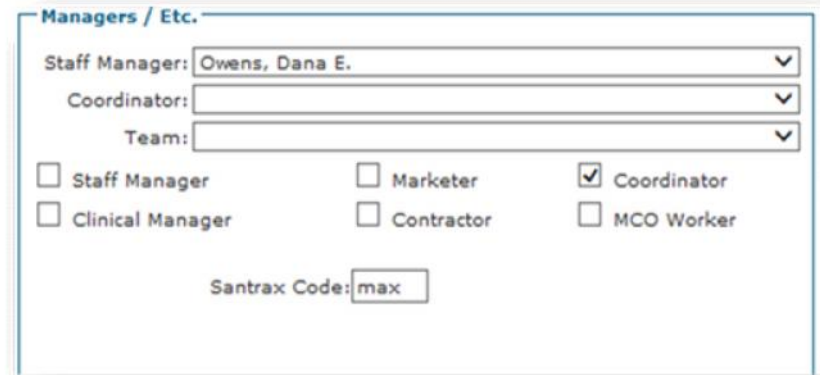

A screenshot of a software form titled 'Managers / Etc.'. It contains three dropdown menus: 'Staff Manager' with the value 'Owens, Dana E.', 'Coordinator' which is empty, and 'Team' which is empty. Below these are six checkboxes arranged in two columns: 'Staff Manager', 'Clinical Manager', 'Marketer', 'Contractor', 'Coordinator' (which is checked), and 'MCO Worker'. At the bottom, there is a text field labeled 'Santrax Code:' with the value 'max'.

Chart Folder > General Screen

- New staff will appear with a status of **01-Recruit**.
- Blue arrow next to status changes status.
- Hire Date is set when staff is made Active.
- Blue arrow below the status adjusts the effective date of a status change.



Halliday, Payton

Staff

- Overview
- Personal
- Contacts
- Chart**
- General
- Schedules
- Availability
- Compliance

Agency Designations

Position: Homemaker

Home Location:

* Agency ID: 012106

Santrax ID: 012106

API:

NPI:

* Hire Date: 01/01/2014

Employment Status

02- Active →

As Of: 08/18/14

Contractor Information

Chart Folder > Schedules Screen

- Staff's assigned schedules.
- Schedules can be filtered for a specified date range.
- Schedules can be edited from this screen.

Halliday, Payton Save Close

Staff Information

Address: 26 Harbor Park Drive City: Port Washington State: NY Zip: 11050
 Home: Mobile: Work:

Staff Schedules

Date From: 03/21/2016 Date To: 03/27/2016 ☒ Hide Cancelled Events

Page size: 20 6 items in 1 pages

Date	Client	Chart ID	P/1	Pos	Service	EC	P/1	INP	OUTP	P/1	TZ	HrsP	IN	OUT	Hrs	Supplies	Status	PRN	Comments
03/21/16-Mon	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1		1	0		01- Pending		
03/22/16-Tue	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1		1	0		01- Pending		
03/23/16-Wed	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1		1	0		01- Pending		

Chart Folder > Compliance

- Compliance requirements are populated based on the staff Position.
- Codes change from Red to Green the compliance is updated.
- The staff name on the Staff Search screen also changes from Red to Green once all compliance requirements have been satisfied.

Brown, Shawn Coord: 014- Largin, Deanna

Compliance Documentation

☐ Show History ☐ Show Non-Compliant Only







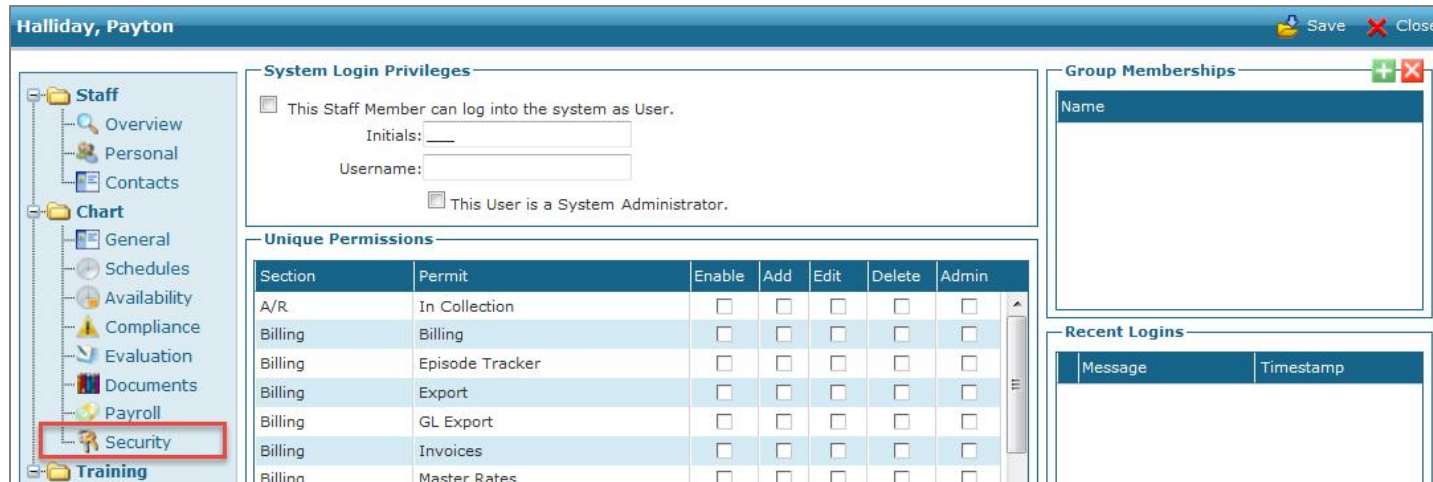
Name	Value	Effective	Renewal	Comment
 Application				
 CPR Card				
 Driver License				
 I-9				
 Santrax IVR Training				
 W-4				

Chart Folder > Security Screen

The Security screen is used to grant system access to office staff and device access to field staff.

To create the login credentials:

- ◆ User must have the 'User' checkbox selected, and have initials (3 character), username and password designated.
- ◆ A 'Set Password' button is displayed upon saving username



System Login Privileges

☐ This Staff Member can log into the system as User.

Initials:

Username:

☐ This User is a System Administrator.

Unique Permissions

Section	Permit	Enable	Add	Edit	Delete	Admin
A/R	In Collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing	Billing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing	Episode Tracker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing	Export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing	GL Export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing	Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing	Master Rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Memberships

Name

Recent Logins

Message	Timestamp

Chart Folder > Security Screen (Cont'd)

Requirements for Office Staff:

- ◆ Username is not case sensitive
- ◆ Password is case sensitive, must be at least 8 characters long and contain: a capital letter, number and special character.
- ◆ System privileges are determined by Group Membership assignment
- ◆ Choose Admin for Office Staff who do both scheduling and billing.
- ◆ Only System Administrators will be able to grant user access

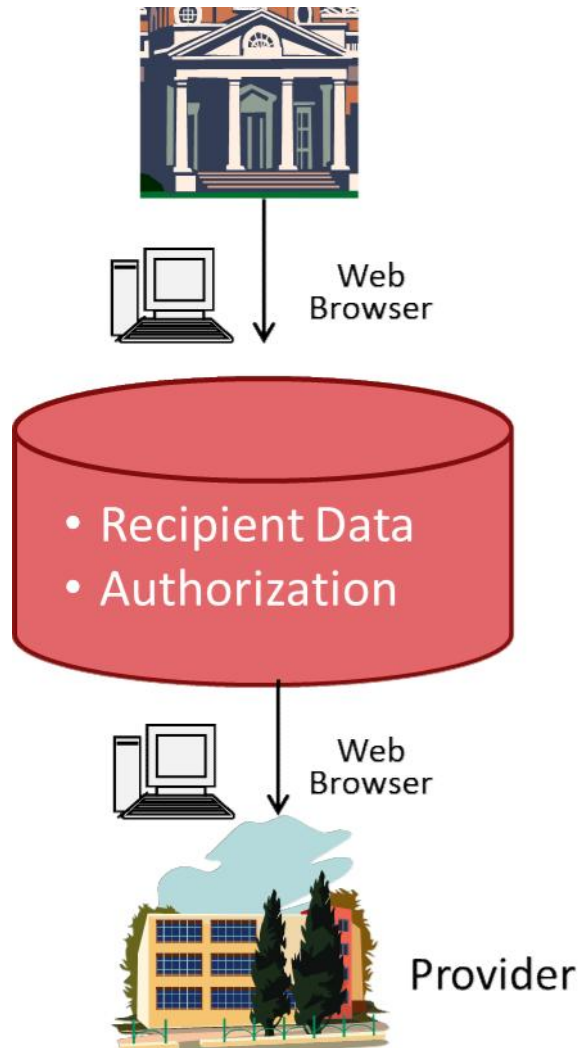
Requirements for Field Staff:

- ◆ Username is not case sensitive and must be alpha or alphanumeric
- ◆ Password is case sensitive, must be at least 8 characters long and contain: a capital letter, number and special character.
- ◆ No Group Membership assignment is needed as field staff do not log into the system, only the device.



CLIENT MODULE


Notification of a New Member



Provider Agencies will continue to receive notification from the MCO when they are assigned a new client.

Client and authorization information needed to schedule services is provided via the data feed.

Client Search Screen

A screenshot of the 'Client Search' web application interface. The title bar at the top says 'Client Search' with a magnifying glass icon. Below it is a section titled 'Search Filters' containing a grid of input fields and dropdown menus. The fields are organized into three columns: Company, Location, Admit Type, Team, Status, and Reason on the left; First Name, Last Name, Language, ID, SSN, and MRN # in the middle; and Clinical Manager, Staff Manager, Marketer, Coordinator, Payor, and Payor No. on the right. The 'Status' field is pre-filled with '02- Active'.

Search Filters		
Company:	<input type="text"/>	First Name: <input type="text"/>
Location:	<input type="text"/>	Last Name: <input type="text"/>
Admit Type:	<input type="text"/>	Language: <input type="text"/>
Team:	<input type="text"/>	ID: <input type="text"/>
Status:	02- Active	SSN: <input type="text"/>
Reason:	<input type="text"/>	MRN #: <input type="text"/>
		Clinical Manager: <input type="text"/>
		Staff Manager: <input type="text"/>
		Marketer: <input type="text"/>
		Coordinator: <input type="text"/>
		Payor: <input type="text"/>
		Payor No: <input type="text"/>


Clicking the Client button from the menu bar opens a client search screen.

Key Search Filters

- ◆ Name
- ◆ Coordinator or Manager
- ◆ Location (branch office)
- ◆ ID (BCT assigned M#)

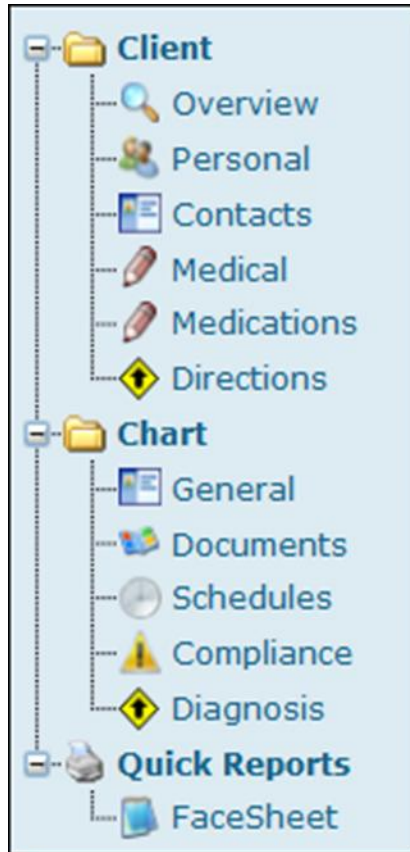
Locating New Clients

- New clients appear with a status of **01- Imported**
- Best Practice: Do a regular search for clients with an Imported status
- New Clients will need to be activated.

A screenshot of a web application titled 'Client Search'. It features a 'Search Filters' section with two columns of input fields. The left column includes 'Company', 'Location', 'Admit Type', 'Team', 'Status', and 'Reason', all as dropdown menus. The right column includes 'First Name', 'Last Name', 'Language', 'ID', 'SSN', and 'MRN #', with the first three as text inputs and the last three as text inputs with specific formatting (SSN has dashes). The 'Status' dropdown is highlighted with a red rectangle and shows '01- Imported' selected.

Search Filters	
Company: <input type="text"/>	First Name: <input type="text"/>
Location: <input type="text"/>	Last Name: <input type="text"/>
Admit Type: <input type="text"/>	Language: <input type="text"/>
Team: <input type="text"/>	ID: <input type="text"/>
Status: 01- Imported	SSN: <input type="text"/>
Reason: <input type="text"/>	MRN #: <input type="text"/>

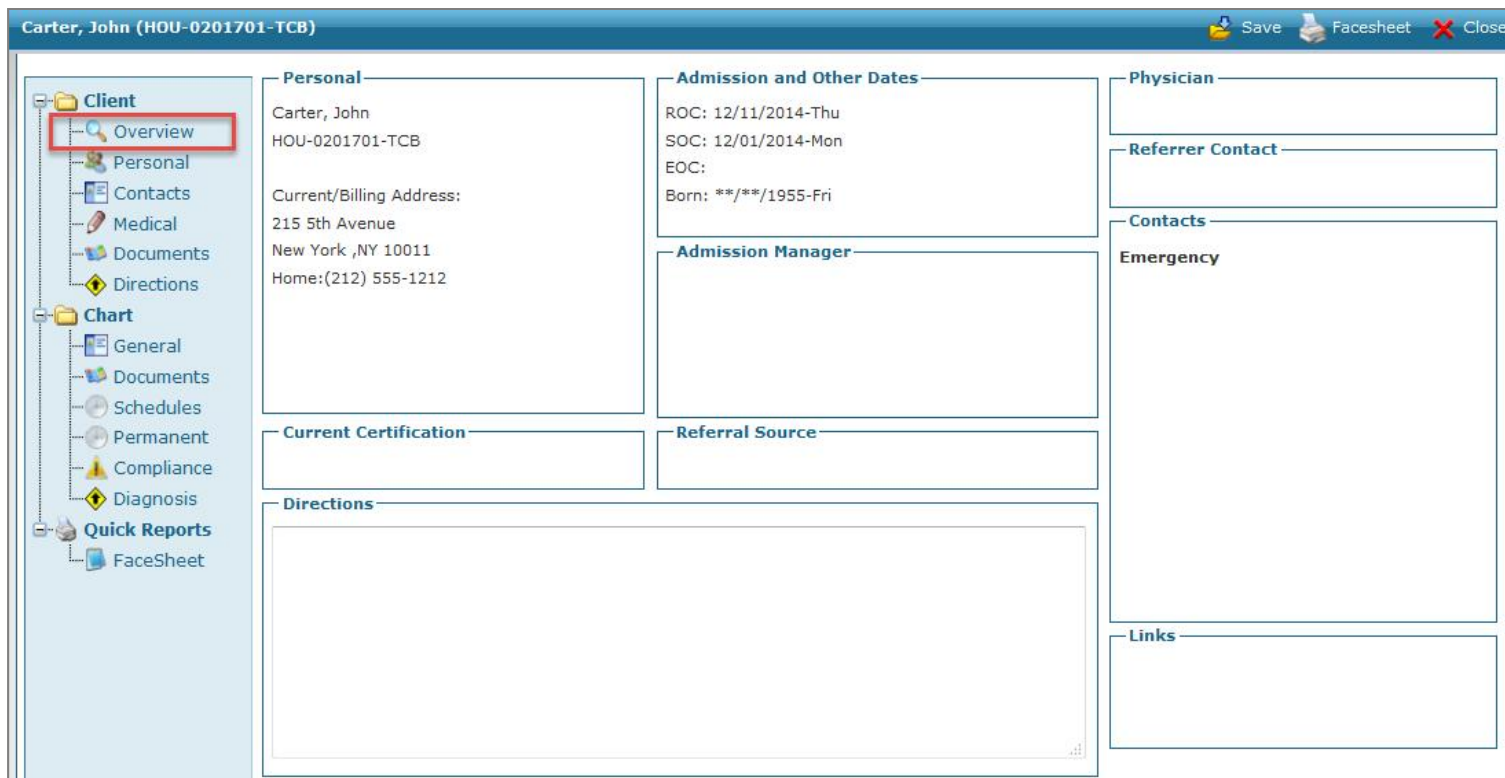
Client Record Navigation



- The Electronic Health Record (EHR) organizes information into folders for easy navigation
- The Client folder contains personal and demographic information
- The Chart folder contains information relating to the payer, services, authorizations, diagnosis, etc.

Client Folder > Overview Screen

The Overview screen provides a summary of information from other screens in the client record.

A screenshot of a web application window titled 'Carter, John (HOU-0201701-TCB)'. The window has a blue header bar with 'Save', 'Facesheet', and 'Close' buttons. On the left is a navigation pane with a tree view showing folders like 'Client' and 'Chart', and sub-items like 'Overview', 'Personal', 'Contacts', etc. The 'Overview' item is highlighted with a red rectangle. The main content area is divided into several sections: 'Personal' (with fields for name, ID, address, and phone), 'Admission and Other Dates' (with fields for ROC, SOC, EOC, and Born date), 'Physician', 'Referrer Contact', 'Admission Manager', 'Current Certification', 'Referral Source', 'Directions', 'Contacts' (with an 'Emergency' sub-section), and 'Links'.

Client Folder > Personal Screen

Information in the **Personal** screen will be read-only. Fields populated by data feed will be greyed-out.

Client: A, Sandra(M0000009057-HH) Save Facesheet Close

Client

- Overview
- Personal**
- Contacts
- Medical
- Directions

Chart

- General
- Schedules
- Diagnosis
- Documents

Quick Reports

- FaceSheet

Name

Title:

First Name: Sandra

Middle Init:

* Last Name: A

Suffix:

Other Information

Birthdate: 01/03/1920

SSN: 000-00-0580

Marital:

Gender: 2- Female

Language:

Ethnicity:

Religion:

Agency Designations

Disaster Lvl:

DNR:

Other ID: 0000049057

Misc

☐ CAHPS Opt Out ☐ Live in ☐ CAHPS Opt Out

Other Notes/Comments

Current/Billing Address

Name:

Address: 0000 Main Street

Apt.:

City: MIAMI

County:

State: FL Zip: 33193-1208

Phone Numbers, Etc.

Home: (305)555-9999

Mobile: () -

Work: () - Ext

Fax: () -

Email:

Mobile Email: ☐

Images (0/0)

Attributes

Name	Properties	Req?
<input type="text"/>		

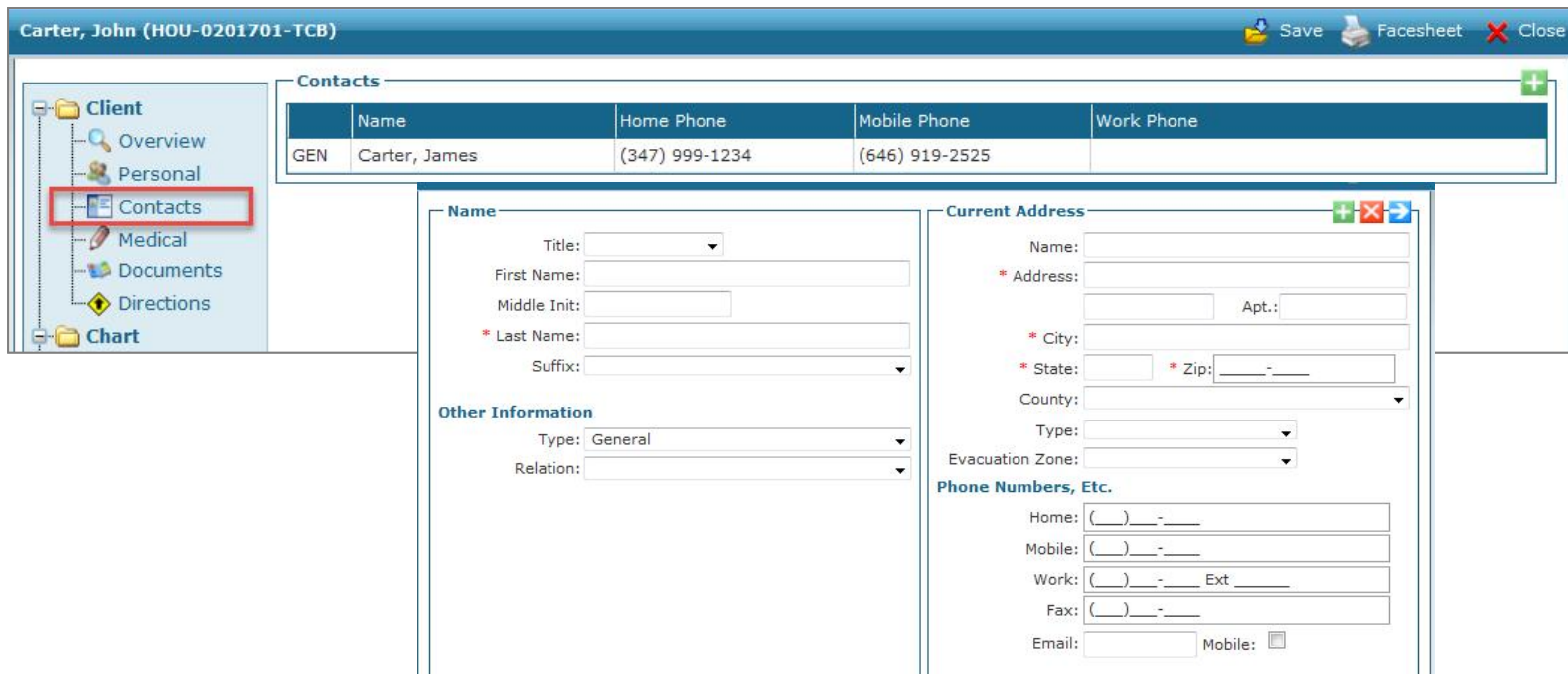
Client Folder > Contacts Screen

Multiple contacts can be entered for each client.

- ◆ Contacts can be family members, pharmacists, clergy etc.

Double-click on a contact listed to display the contact details

Click the green plus sign (+) to add new contacts.



Contacts

	Name	Home Phone	Mobile Phone	Work Phone
GEN	Carter, James	(347) 999-1234	(646) 919-2525	

Name

Title:

First Name:

Middle Init:

* Last Name:

Suffix:

Other Information

Type:

Relation:

Current Address

Name:

* Address: Apt.:

* City:

* State: * Zip:

County:

Type:

Evacuation Zone:

Phone Numbers, Etc.

Home:

Mobile:

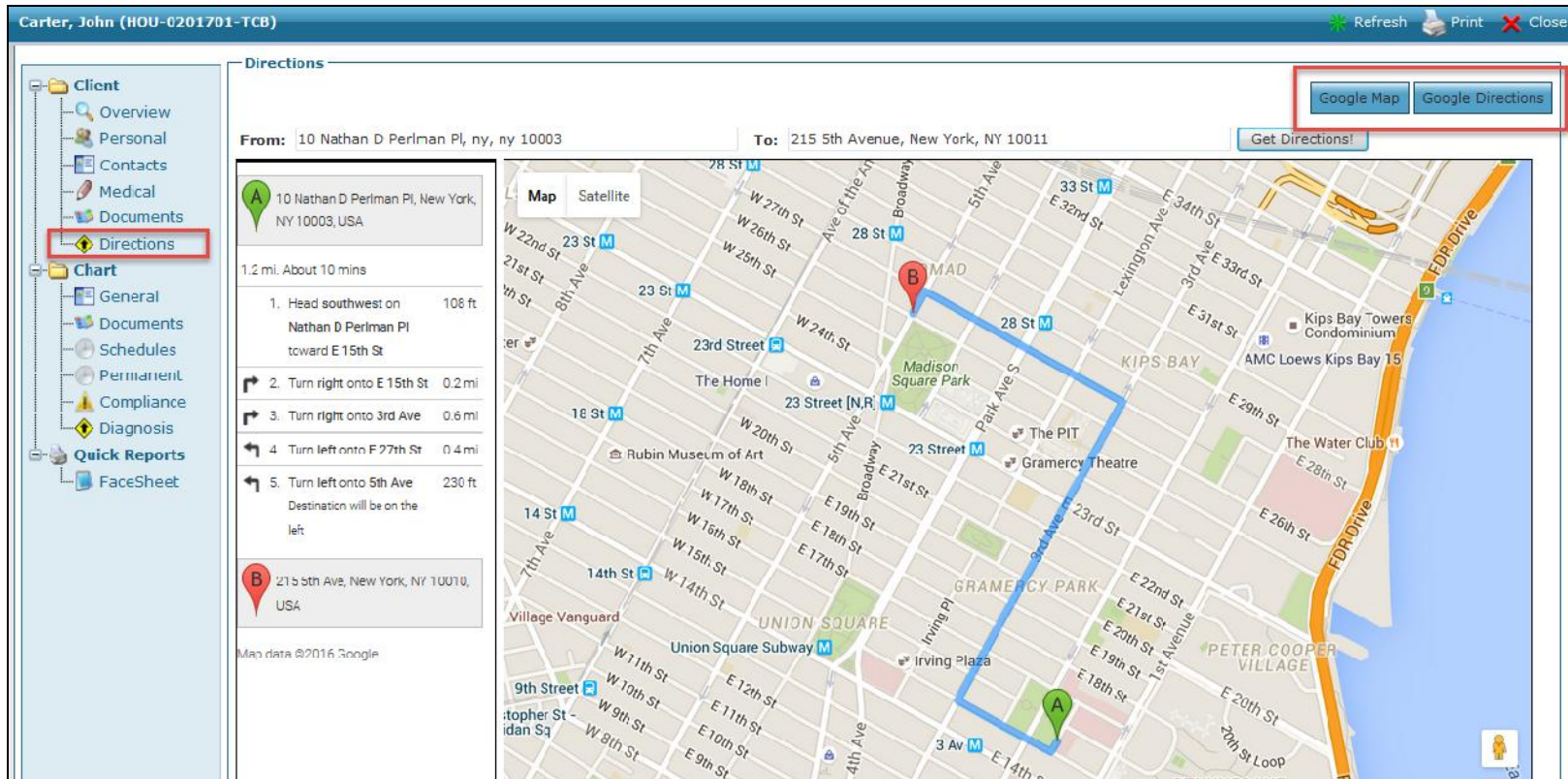
Work: Ext.

Fax:

Email: Mobile: ☐

Client Folder > Directions Screen

Built in Google Maps functionality



The screenshot displays the 'Directions' screen within the Sandata application. The interface includes a sidebar on the left with a tree view containing 'Client', 'Chart', and 'Quick Reports'. The 'Client' folder is expanded, showing sub-items like 'Overview', 'Personal', 'Contacts', 'Medical', 'Documents', and 'Directions' (which is highlighted with a red box). The main area shows a map of Manhattan with a blue route line. The route starts at point A (10 Nathan D Perlman Pl, New York, NY 10003, USA) and ends at point B (215 5th Avenue, New York, NY 10011, USA). The map shows streets, parks, and landmarks like Union Square and Gramercy Park. A 'Get Directions!' button is visible. In the top right corner, there are buttons for 'Google Map' and 'Google Directions' (both highlighted with a red box), and a 'Get Directions!' button. The top status bar shows 'Carter, John (HOU-0201701-TCB)' and icons for 'Refresh', 'Print', and 'Close'.

Client Folder > Directions Screen

From: 10 Nathan D Perlman Pl, ny, ny 10003

To: 215 5th Avenue, New York, NY 10011

1.2 mi. About 10 mins

1. Head southwest on Nathan D Perlman Pl toward E 15th St 106 ft
2. Turn right onto E 15th St 0.2 mi
3. Turn right onto 3rd Ave 0.6 mi
4. Turn left onto E 27th St 0.4 mi
5. Turn left onto 5th Ave 230 ft

Destination will be on the left

Map data ©2016 Google

Chart Folder > General Screen

The General screen contains admission details including:

- ◆ Approved Services
- ◆ Admission Status
- ◆ Payer and authorization information

Cartier, John (NY-0201701-MCD) Coord: 525-Brown, Fred Save Facesheet Close

Client

- Overview
- Personal
- Contacts
- Medical
- Documents
- Directions
- Chart**
 - General**
 - Documents
 - Schedules
 - Permanent
 - Compliance
 - Diagnosis
- Quick Reports
- FaceSheet

Admission Ties And Dates

Company: 1- NYC Care

Location: NY- New York City

ROC: 03/25/2016

SOC: 03/25/2016

EOC:

Managers/Etc.

Staff Manager:

Clinical Manager:

Coordinator: Brown, Fred

MRN #:

Marketer:

Team:

Admit Type: MCD- Medicaid

Admission Status

02-Active

No Secondary Status Selected

As Of: 03/25/2016

Admission Source

Pay Source

Referral Source

Physicians

Primary:

Secondary:

Certifying:

Misc

Services

Code	Description	Began	Ended	Case Seq #
PC	Personal Care		03/25/16	

Payors

Payor	Customer No.
1 Medicaid	988756

Activating New Clients

1. New clients can be found by running a search with the **Status** filtered for '**Imported**' on the Client Search screen
2. Open the client's record and go to the Admission Status section of the **General** screen.
3. Click the blue arrow next to the Admission Status.
4. Confirm the status as Active and set the Start of Care date.
5. Click **Save** in upper right corner.

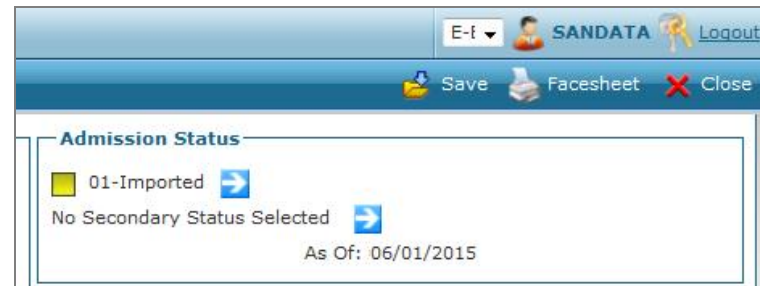
A screenshot of the Sandata software interface showing the 'Admission Status' section. The top bar includes a user dropdown 'E-I', the 'SANDATA' logo, and a 'Logout' link. Below this is a toolbar with 'Save', 'Facesheet', and 'Close' buttons. The main content area is titled 'Admission Status' and contains a yellow square icon next to the text '01-Imported', followed by a blue right-pointing arrow. Below this, it says 'No Secondary Status Selected' followed by another blue right-pointing arrow. At the bottom right of the section, it displays 'As Of: 06/01/2015'.

Chart Folder > General Screen (Cont'd)

Admission Ties and Dates

Located in the top left section of the General screen.

Can access Historian and Notes

Displays the Company, Location to which the client has been assigned, plus the ROC, SOC and EOC.

- ◆ Referral of Care
- ◆ Start of Care
- ◆ End of Care


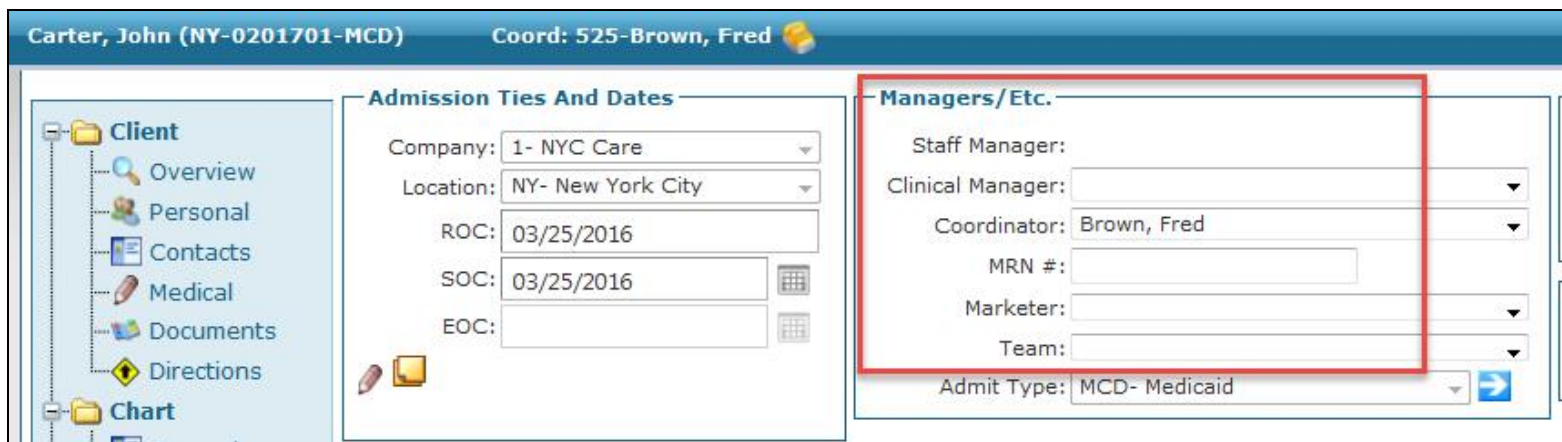
A screenshot of a software interface for a client named 'Carter, John (NY-0201701-MCD)' with a coordinator '525-Brown, Fred'. The interface shows a sidebar with a 'Client' folder containing 'Overview', 'Personal', 'Contacts', 'Medical', 'Documents', and 'Directions', and a 'Chart' folder. The main area is titled 'Admission Ties And Dates' and contains fields for 'Company' (set to '1- NYC Care'), 'Location' (set to 'NY- New York City'), 'ROC' (set to '03/25/2016'), 'SOC' (set to '03/25/2016'), and 'EOC' (empty). There are also icons for a pencil and a calendar.

Chart Folder > General Screen (Cont'd)

Manager/Etc.

Coordinators need to be assigned to each client in order for the office to receive alerts if the caregiver does not call in at the scheduled start time.

A screenshot of the Sandata software interface showing the 'General' screen for a client. The client's name and ID are 'Carter, John (NY-0201701-MCD)' and the coordinator is '525-Brown, Fred'. The interface is divided into three main sections: a left sidebar with a 'Client' folder containing 'Overview', 'Personal', 'Contacts', 'Medical', 'Documents', 'Directions', and 'Chart'; a central 'Admission Ties And Dates' section with fields for Company (1- NYC Care), Location (NY- New York City), ROC (03/25/2016), SOC (03/25/2016), and EOC; and a right 'Managers/Etc.' section highlighted with a red box. This section includes fields for Staff Manager, Clinical Manager, Coordinator (Brown, Fred), MRN #, Marketer, Team, and Admit Type (MCD- Medicaid).

Carter, John (NY-0201701-MCD) Coord: 525-Brown, Fred

Client

- Overview
- Personal
- Contacts
- Medical
- Documents
- Directions
- Chart

Admission Ties And Dates

Company: 1- NYC Care

Location: NY- New York City

ROC: 03/25/2016

SOC: 03/25/2016

EOC:

Managers/Etc.

Staff Manager:

Clinical Manager:

Coordinator: Brown, Fred

MRN #:

Marketer:

Team:

Admit Type: MCD- Medicaid

Chart Folder > General Screen (Cont'd)

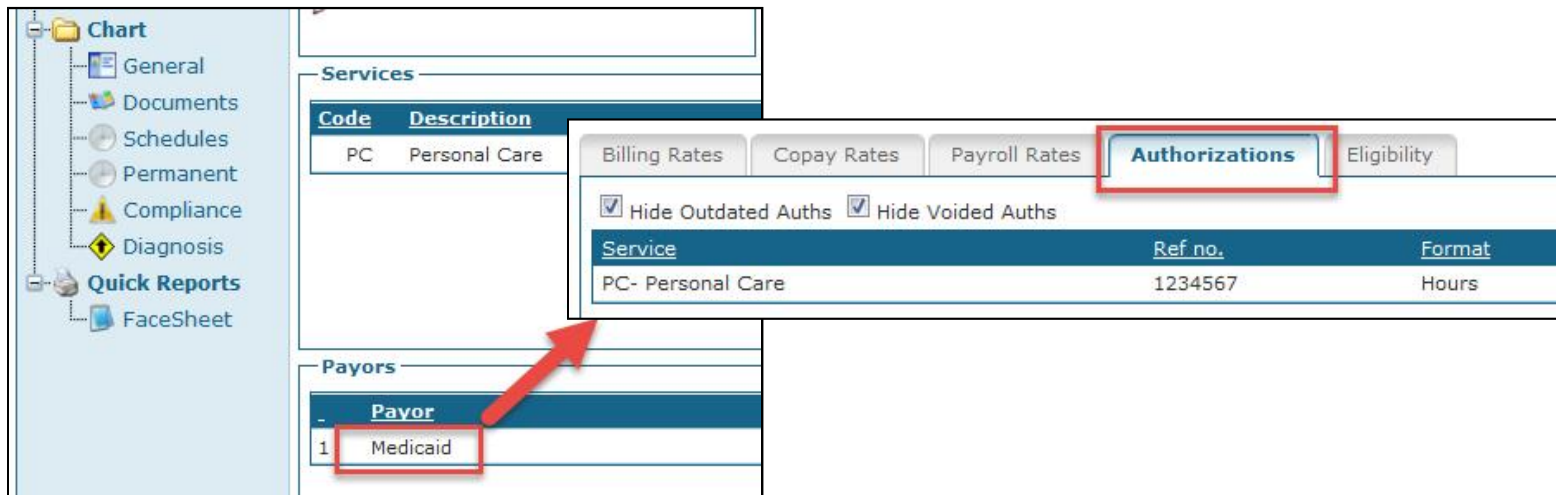
Payors and Authorizations

Authorizations are accessed via the Payor panel on the **General** screen.

Double-click the name of the payor to open the details

Go to the **Authorizations** tab to see current authorization information

Double-click on the Authorization line to open the details



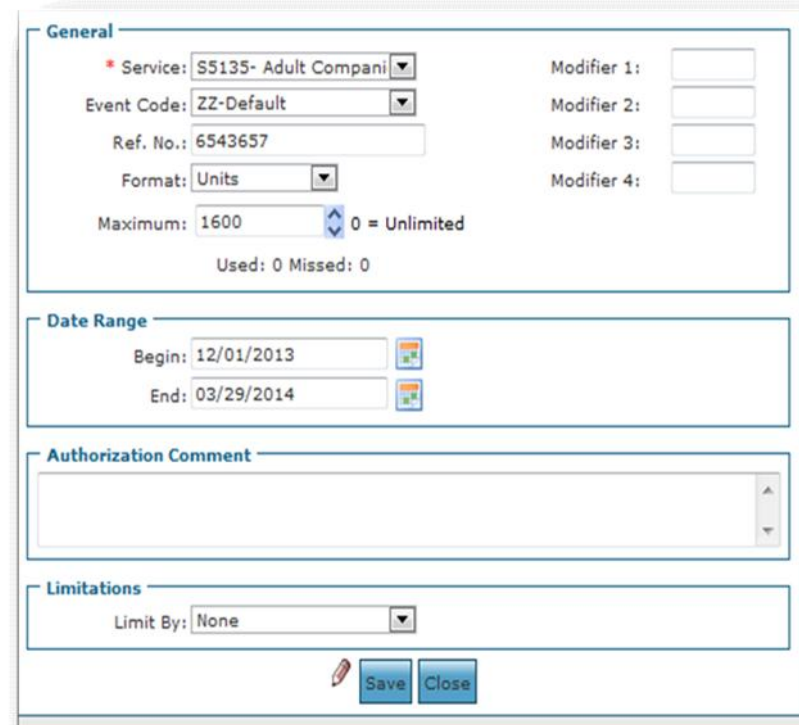
Code	Description
PC	Personal Care

Service	Ref no.	Format
PC- Personal Care	1234567	Hours

Chart Folder > Viewing an Authorization

An authorization specifies limits established by the payor on the services a client may receive:

- ◆ Service: type of encounters
- ◆ Date Range of encounters
- ◆ Limitations – Maximum number of encounters per day/week/month

A screenshot of a software interface for viewing an authorization. The form is divided into several sections: 'General' with fields for Service (S5135- Adult Compani), Event Code (ZZ-Default), Ref. No. (6543657), Format (Units), Maximum (1600), and Modifier 1-4; 'Date Range' with Begin (12/01/2013) and End (03/29/2014) dates; 'Authorization Comment' with a text area; and 'Limitations' with a Limit By (None) dropdown. At the bottom are 'Save' and 'Close' buttons.

General

* Service: S5135- Adult Compani
Event Code: ZZ-Default
Ref. No.: 6543657
Format: Units
Maximum: 1600 0 = Unlimited
Used: 0 Missed: 0
Modifier 1:
Modifier 2:
Modifier 3:
Modifier 4:

Date Range

Begin: 12/01/2013
End: 03/29/2014

Authorization Comment

Limitations

Limit By: None

Save Close

Chart Folder > Schedule Screen

- Client's scheduled visits
- Schedules can be filtered for a specified date range
- Schedules can be edited from this screen

Carter, John (NY-0201701-MCD) Coord: 525-Brown, Fred

Save Facesheet Close

Client

- Overview
- Personal
- Contacts
- Medical
- Documents
- Directions

Chart

- General
- Documents
- Schedules**
- Permanent
- Compliance
- Diagnosis

Quick Reports FaceSheet

Client/Admission Information

Addr: 215 5th Avenue New York, NY 10011
 Home: (212) 555-1212 Mobile: Work:
 MRN #:

Client Schedules

Date From: 03/25/2016 Date To: 04/08/2016 ☒ Hide Cancelled Events ☐ Show All Admissions

Page size: 20 9 items in 1 pages

Date	Staff	P/T	Pos	Service	EC	P/T	INP	OUTP	P/T	TZ	HrsP	IN	OUT	Hrs	Auth	Supplies	Status	PRN	Comments
03/25/16-Fri	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		
03/28/16-Mon	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		
03/30/16-Wed	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		
03/31/16-Thu	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		



PROVIDER SUPPORT PLAN

(CURRENTLY REFERRED TO IN SYSTEM
AS PLAN OF CARE ATTESTATION)

Attestation Process

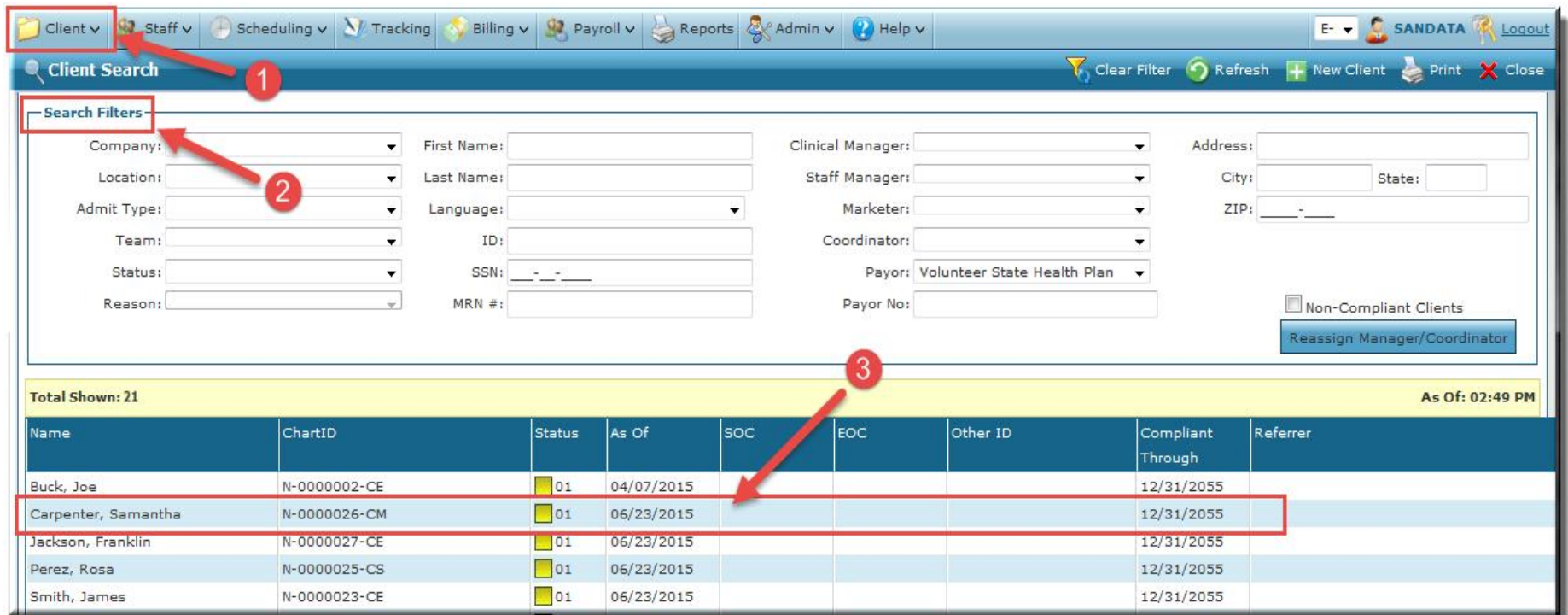
- BCT will send an indicator to Santrax Agency Management (SAM) on the authorization file that a member has a PSP which requires review and attestation by the provider
- SAM will prompt the provider agency when they navigate to a Client record that has one or more services with the indicator sent by BCT.
- Provider will navigate to and open the service(s) to select **Yes** or **No**, attesting if they have or have not received the PSP from BCT
- If the PSP contains multiple services for a member the provider is required to acknowledge each service separately (each service will be highlighted in red)

Attestation Process (Cont'd)

- Once the provider has indicated “Yes”, the field cannot be changed
- If a provider selects “No”, that response will be saved and the service will remain highlighted in red, until the user selects “Yes”
- A non-response will be treated as “No” for reporting purposes
- SAM will store the user response, the date of the response and the ID of the user who responded for reporting purposes

Attestation Process (Cont'd)

- Provider will locate the client record via the Client Search screen using any applicable filters
- Double-clicking on the client line in the search results will open the client record



The screenshot shows the Sandata Client Search interface. A red box labeled '1' highlights the 'Client' menu item in the top navigation bar. A red box labeled '2' highlights the 'Search Filters' section, which includes fields for Company, Location, Admit Type, Team, Status, Reason, First Name, Last Name, Language, ID, SSN, MRN, Clinical Manager, Staff Manager, Marketer, Coordinator, Payor, and Address. A red box labeled '3' highlights the 'Carpenter, Samantha' client line in the search results table.

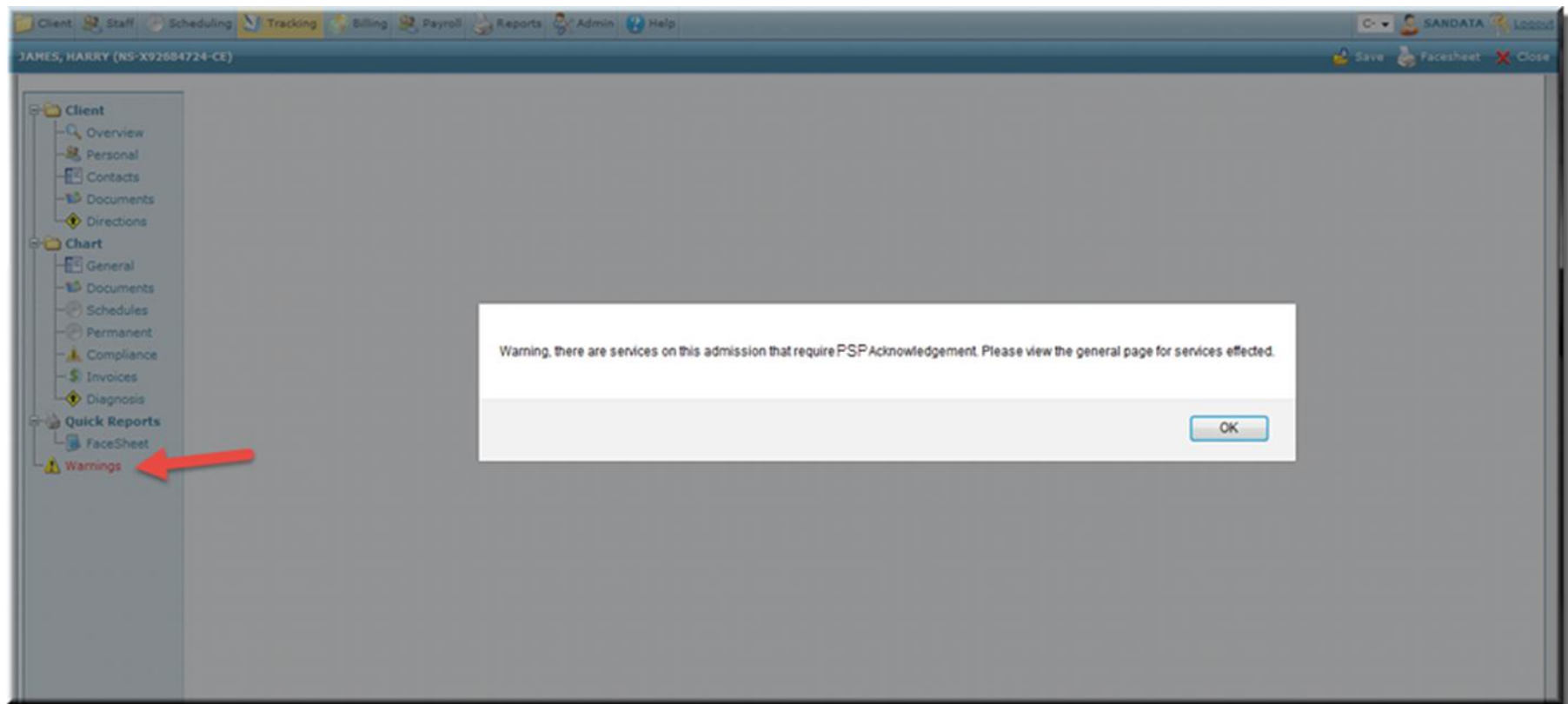
Name	ChartID	Status	As Of	SOC	EOC	Other ID	Compliant Through	Referrer
Buck, Joe	N-0000002-CE	01	04/07/2015				12/31/2055	
Carpenter, Samantha	N-0000026-CM	01	06/23/2015				12/31/2055	
Jackson, Franklin	N-0000027-CE	01	06/23/2015				12/31/2055	
Perez, Rosa	N-0000025-CS	01	06/23/2015				12/31/2055	
Smith, James	N-0000023-CE	01	06/23/2015				12/31/2055	

Attestation Process (Cont'd)

- When a user navigates to the client record, and an attestation is required, the following indicators will be present:
 - A pop-up box indicating PSP acknowledgement is required
 - A warning link in **red** on the client navigation panel
 - Service line will be highlighted in **red**
 - A pop-up box indicating attestations are required when attempting to save the client record
- If there are multiple services requiring attestations, user will be prompted to respond to each one requiring an attestation
- The warning pop-up will be presented each time the client record is opened, until all attestations are completed

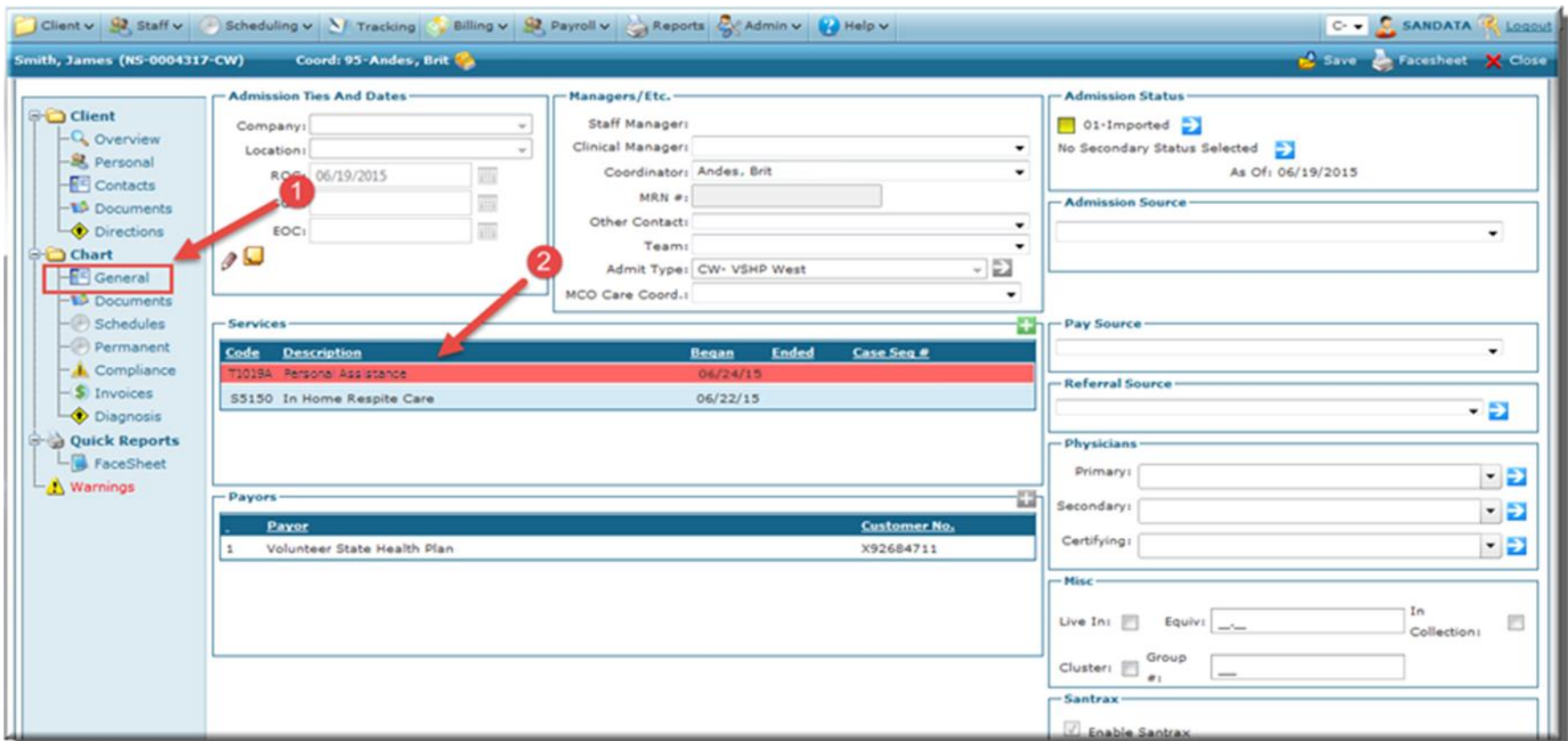
Attestation Process (Cont'd)

Upon opening the client's record, a warning pop-up box will appear prompting that services on this admission require acknowledgment



Attestation Process (Cont'd)

User will navigate to *General screen* > *Services* and respond to the attestation question for all required services by double-clicking on the highlighted service line



Smith, James (NS-0004317-CW) Coord: 95-Andes, Brit

Client Overview Personal Contacts Documents Directions Chart General Documents Schedules Permanent Compliance Invoices Diagnosis Quick Reports FaceSheet Warnings

Admission Ties And Dates
Company: Location: ROC: 06/19/2015 EOC:

Managers/Etc.
Staff Manager: Clinical Manager: Coordinators: Andes, Brit MRN #: Other Contact: Team: Admit Type: CW- VSHP West MCO Care Coord.:

Admission Status
01-Imported No Secondary Status Selected As Of: 06/19/2015

Admission Source

Pay Source

Referral Source

Physicians
Primary: Secondary: Certifying:

Misc
Live In: Equiv: In Collection: Cluster: Group #:

Santrax
Enable Santrax

Services

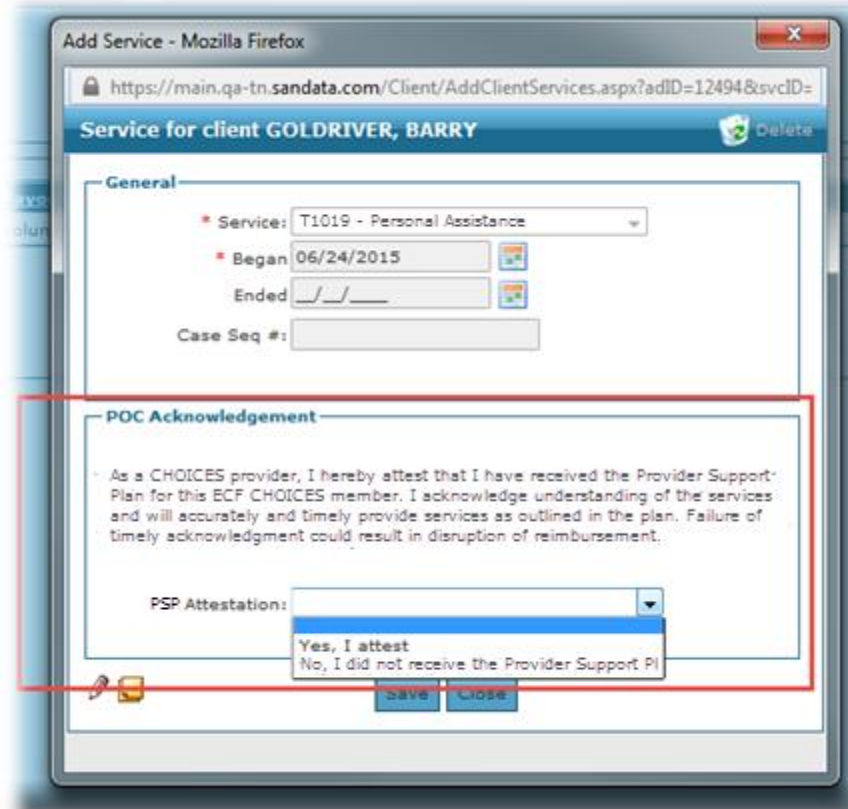
Code	Description	Began	Ended	Case Seq #
T1013A	Personal Assistance	06/24/15		
S5150	In Home Respite Care	06/22/15		

Payors

Payer	Customer No.
1 Volunteer State Health Plan	X92684711

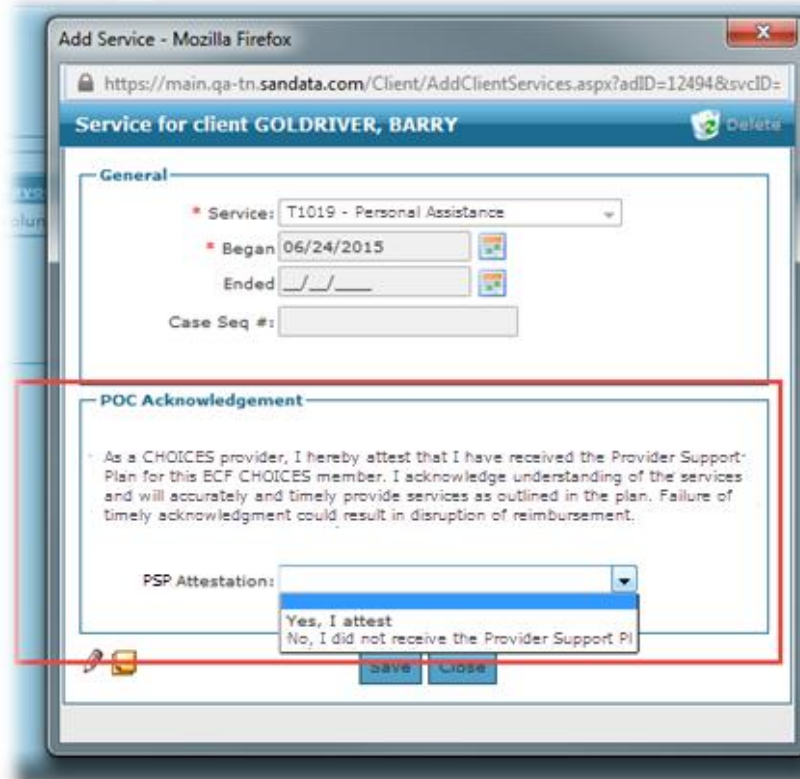
Attestation Acknowledgement Screen

- Upon opening the service, the user will see the acknowledgement message and attestation drop-down

A screenshot of a web browser window titled 'Add Service - Mozilla Firefox'. The address bar shows the URL 'https://main.qa-tn.sandata.com/Client/AddClientServices.aspx?adID=12494&svclD=...'. The page header indicates 'Service for client GOLDRIVER, BARRY'. The form is divided into two main sections: 'General' and 'POC Acknowledgement'. The 'General' section includes a dropdown for 'Service' (set to 'T1019 - Personal Assistance'), a 'Began' date field (06/24/2015), an 'Ended' date field, and a 'Case Seq #' field. The 'POC Acknowledgement' section contains a paragraph of text stating that as a CHOICES provider, the user attests to having received the Provider Support Plan and to providing services as outlined. Below this text is a 'PSP Attestation:' dropdown menu, which is currently open, showing two options: 'Yes, I attest' and 'No, I did not receive the Provider Support Pl'. At the bottom of the form are 'Save' and 'Close' buttons. A red rectangular box highlights the 'POC Acknowledgement' section and the 'PSP Attestation' dropdown.

Attestation Process (Cont'd)

- User will choose from the following in the attestation drop-down and click Save:
 - Yes, I attest
 - No, I did not receive the Provider Support Plan

A screenshot of a web browser window titled 'Add Service - Mozilla Firefox'. The address bar shows the URL 'https://main.qa-tn.sandata.com/Client/AddClientServices.aspx?adID=12494&svcdID=...'. The page header indicates 'Service for client GOLDRIVER, BARRY' with a 'Delete' link. The form is divided into two sections: 'General' and 'POC Acknowledgement'. The 'General' section includes a 'Services' dropdown menu (selected: 'T1019 - Personal Assistance'), 'Began' and 'Ended' date pickers (with 'Began' set to '06/24/2015'), and a 'Case Seq #' field. The 'POC Acknowledgement' section contains a paragraph of text stating that as a CHOICES provider, the user attests to having received the Provider Support Plan and to providing services as outlined. Below this text is a 'PSP Attestation:' dropdown menu. A red rectangular box highlights the 'POC Acknowledgement' section and the 'PSP Attestation' dropdown. The dropdown menu is open, showing two options: 'Yes, I attest' and 'No, I did not receive the Provider Support PI'. At the bottom of the form are 'Save' and 'Close' buttons.

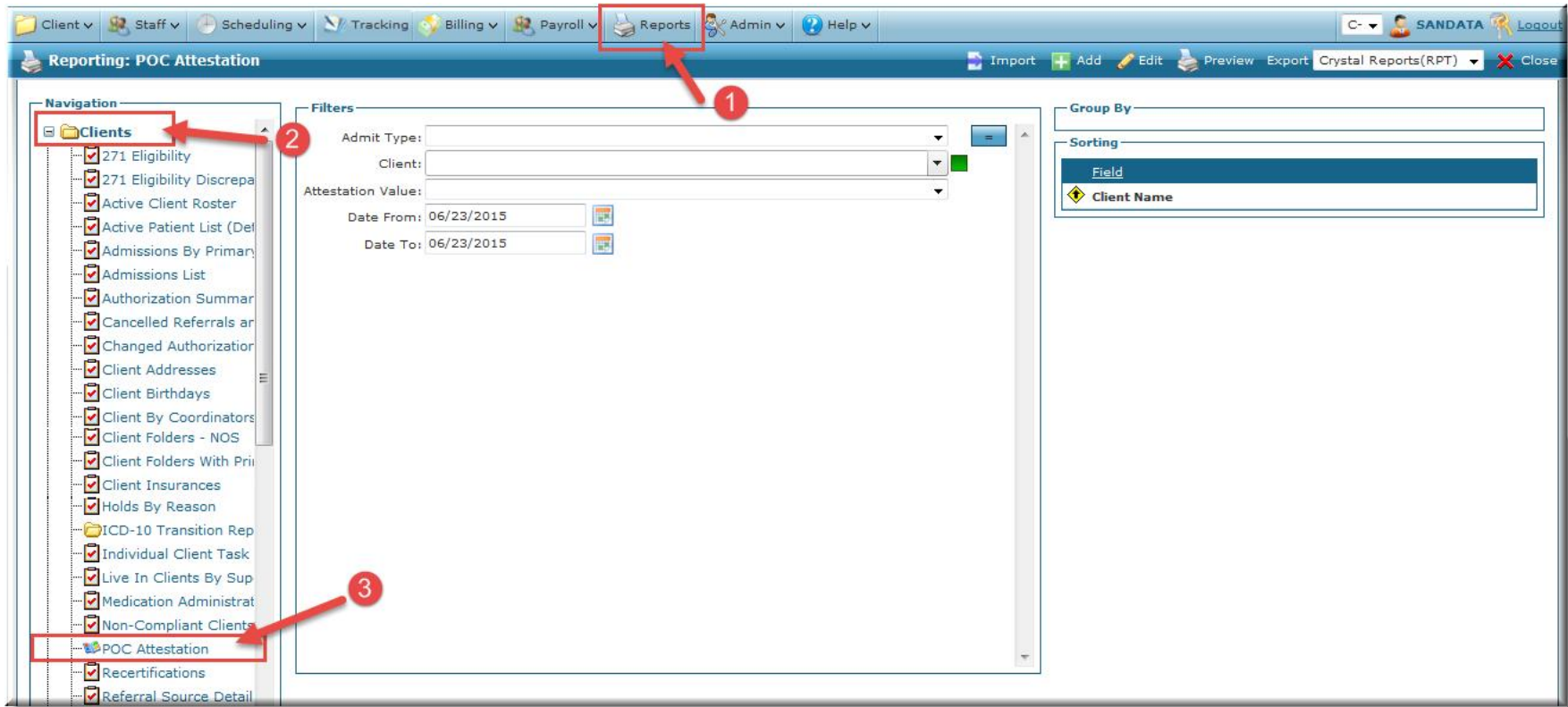
Provider Support Plan Reporting

- A report titled: **PSP Attestation**, is available
- Data regarding each attestation shall be captured as follows:
 - Authorization Data:
 - ❖ Date authorization was received in EVV system
 - ❖ Authorization number
 - ❖ Authorization Start Date
 - ❖ Service(s)
 - Client Data:
 - ❖ Member Name
 - ❖ Member ID
 - Provider Data:
 - ❖ Date attestation was completed
 - ❖ Login ID of user who marked attestation complete
 - ❖ Provider Name
 - ❖ Provider Number

Provider Support Plan Reporting (Cont'd)

Available filters on the PSP Attestation Report are:

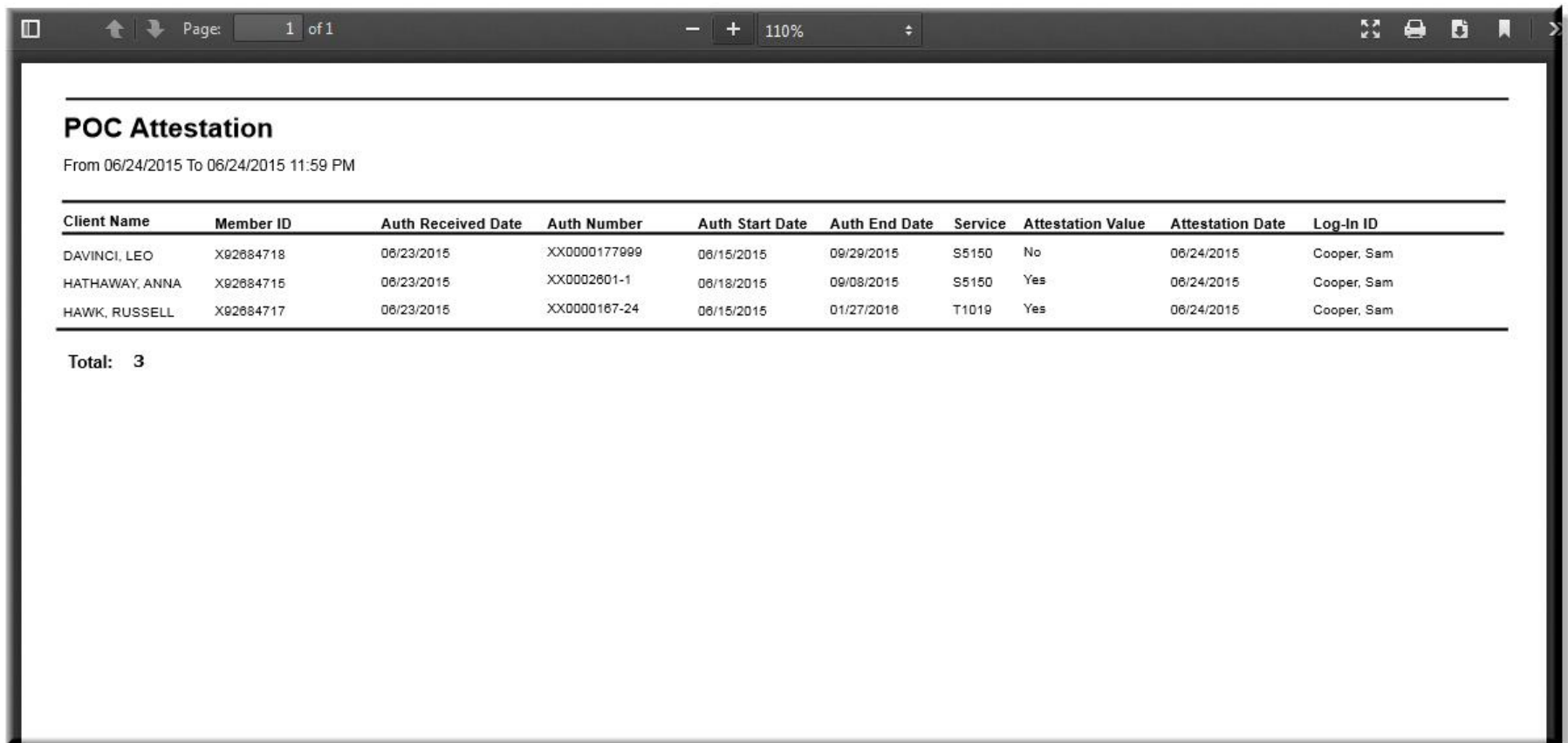
- Admit Type
- Member (Client)
- Attestation Value



The screenshot displays the Sandata Reporting: POC Attestation interface. The top toolbar includes menu items: Client, Staff, Scheduling, Tracking, Billing, Payroll, Reports (highlighted with a red arrow and number 1), Admin, and Help. The main window title is "Reporting: POC Attestation". The left navigation pane shows a list of reports, with "Clients" (highlighted with a red arrow and number 2) and "POC Attestation" (highlighted with a red arrow and number 3) visible. The central filters section includes fields for Admit Type, Client, Attestation Value, Date From (06/23/2015), and Date To (06/23/2015). The right pane shows "Group By" and "Sorting" options, with "Client Name" selected under "Field".

Provider Support Plan Reporting (Cont'd)

The Report can be previewed and saved as a PDF document or exported in various formats (Word, Excel, Excel data only)

A screenshot of a web application interface. At the top, there's a header bar with navigation icons, a page indicator 'Page: 1 of 1', zoom controls set to '110%', and other utility icons. Below the header, the main content area displays a report titled 'POC Attestation' with a subtitle 'From 06/24/2015 To 06/24/2015 11:59 PM'. The report contains a table with 10 columns: Client Name, Member ID, Auth Received Date, Auth Number, Auth Start Date, Auth End Date, Service, Attestation Value, Attestation Date, and Log-In ID. There are three data rows. Below the table, it says 'Total: 3'.

Client Name	Member ID	Auth Received Date	Auth Number	Auth Start Date	Auth End Date	Service	Attestation Value	Attestation Date	Log-In ID
DAVINCI, LEO	X92684718	06/23/2015	XX0000177999	06/16/2015	09/29/2015	S5150	No	06/24/2015	Cooper, Sam
HATHAWAY, ANNA	X92684716	06/23/2015	XX0002601-1	06/18/2015	09/08/2015	S5150	Yes	06/24/2015	Cooper, Sam
HAWK, RUSSELL	X92684717	06/23/2015	XX0000167-24	06/16/2015	01/27/2016	T1019	Yes	06/24/2015	Cooper, Sam

Total: 3

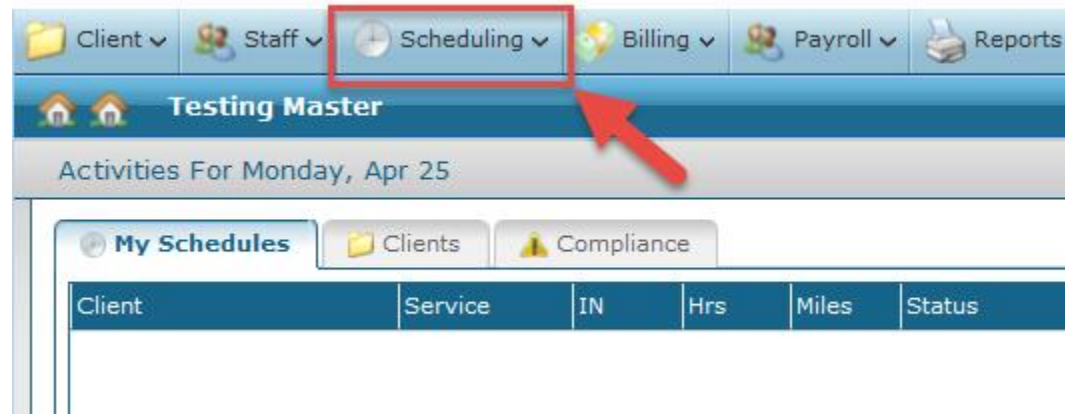


SCHEDULING MODULE

SCHEDULING OVERVIEW

Scheduling Overview

- Click the **Scheduling** button in the menu bar to open the **Scheduling Overview** screen.
- The **Scheduling Overview** screen is used to view or edit an existing schedule.



Search Filters

- Client or Staff
- Branch Location
- Coordinator, Managers
- Status
- Service or Position
- Date Range
- Day of the Week
- Unassigned (no staff)

Scheduling: Overview ClearFilter Refresh Add Print Close

Search Filters:

Client: → ×

Admission: ↓ ■

Staff: ↓ ■

Company: ↓ Position: ↓

Location: ↓ Agency: ↓

Admit Type: ↓ Service: ↓

Coordinator: ↓ Event: ↓

Region: ↓ Team: ↓

Status: ↓ MRN #:

Primary Payor: ↓ Payor #:

Clinical Manager: ↓

Staff Manager: ↓

Date From: 03/21/2016 ⌘

Date To: 03/21/2016 ⌘

Time In: ⌚

Time Out: ⌚

☐ Mo ☐ Tu ☐ We ☐ Th ☐ Fr ☐ Sa ☐ Su

☐ Santrax Calls ☐ Show Selected

☐ Unassigned

☒ Hide Cancelled Events

☐ Filter For Client *or* Staff

March 2016

S	M	T	W	T	F	S
28	29	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Sorting Results

- Clicking any column header sorts the results by that column.
- Clicking a second time reverses the sort order

Date	Client ▲	Chart ID
07/02/13-Tue	Adams, Abigail	BR-0000058-R07
07/02/13-Tue	Adams, Abigail	BR-0000058-R07
07/03/13-Wed	Adams, Abigail	BR-0000058-R07
07/03/13-Wed	Adams, Abigail	BR-0000058-R07
07/02/13-Tue	Boyd, Manny	BR-0000001-R07
07/02/13-Tue	Boyd, Manny	BR-0000001-R07
07/03/13-Wed	Boyd, Manny	BR-0000001-R07

Schedule Status Colors

In the results list, the Status column will be highlighted with a status color.

1

2

Page size: 100

160 items in 2 pages

Date	Coordinator	Client	Chart ID	Staff	P/1	Pos	Service	EC	P/1	INP	OUTP	P/1	TZ	HrsP	IN	OUT	Hrs	Supplies	Status
03/01/16-Tue		Martin, Christ	HOU-0201603-TCB	Coleman, Bill	P	HHA	17HC	DEF	P	07:00	08:00	P	C	1			1	0	10- Cancelled
03/01/16-Tue		Castalano, Mi	HOU-0201607-TCB	Campbell, An	P	HHA	17C	DEF	P	07:30	08:30	P	C	1	07:30	08:30	1	0	02- Confirmed
03/01/16-Tue		Matin, Gloria	HOU-0201608-TCB	Edwards, Este	P	HHA	17HC	DEF	P	07:30	08:30	P	C	1			1	0	09- Hold
03/01/16-Tue		Cain, Madelin	HOU-0201626-TCB	Pearce, Erica	P	HHA	17C	DEF	P	07:30	10:00	P	C	2.5			2.5	0	01- Pending
03/01/16-Tue		Brill, Joyce	HOU-0201610-TCB	Rivera, Olivia	P	HHA	HHA	DEF	P	08:00	09:00	P	C	1	07:45	08:45	1	0	02- Confirmed

Status	Color
Pending	Grey
Confirmed	Green
Hold	Orange
In Progress	Pink
Cancelled	Red

Opening the Schedule Detail

To open the Schedule Detail:

- Double-click the schedule line item in the **Results** –OR–
- Right-click on a schedule line and choose **Open**.

Date	Client	Chart ID	Staff	Pos	Service	EC
07/02/13-Tue	Boyd, Manny	BR-0000001-R07	Gay, Tasha	HHA	T1004	ZZ
07/02/13-Tue	Webb, Charlene	BR-0000003-R07	Ca			ZZ
07/02/13-Tue	Adams, Abigail	BR-0000058-R07	Ca			ZZ
07/02/13-Tue	McKinley, Hamiltc	MAR-0000002-R07	Cl			ZZ
07/02/13-Tue	Adams, Abigail	BR-0000058-R07	Ca			ZZ
07/02/13-Tue	McKinley, Hamiltc	MAR-0000002-R07	Cl			ZZ
07/02/13-Tue	Webb, Charlene	BR-0000003-R07	Ca			ZZ

Open
Select all
Unselect all
View
Edit
Copy forward
Refresh rates

Viewing Schedule Detail

Schedule Detail [Delete]

General Documents:0 Supplies Call Log:1 Tasks:0 Late/Missed Visit Handling

General

Date: 07/06/2011 - Wed
 Service: T1021- Home Health Aide
 Company: Company 7
 Location: Location M
 PoS:
 PoS Direction: ☐ To ☐ From ☐ N/A

Event Code(s)
 GY- Dual Eligible

Comments

Status
 Status: 03- In Process

Times
 Proposed: 11:56 12:50 = 0.9 hrs
 Santrax: 11:56 = 1 hrs
 Adjusted: 11:56 12:50 = 1 hrs

Associated Totals
 Proposed Miles: 0.00 Actual Miles: 0.00
 Miles: 0.00 TT Bill: 0
 Supplies: \$0.00 TT Pay: 0

Calls (points to Date)
Service (points to Service)

Client

Staff

Clients

A, Sandra - M0000009057-HH
 A, Sandra. M152484905 Bill As: 02- Visit Override

Event	Type	Quantity	Rate	Bill Amt	Copay	Status
GY	02 - Visit	1.00	\$17.46	\$17.46		04 - Billed

Staff

D, Elizabeth - 00026-HHA
 D, Elizabeth. 00026. H Pay As: 02- Visit Override

Event	Type	Quantity	Rate	Pay Amt	Status
GY	02 - Visit	1.00	\$0.00	\$0.00	02 - Confirmed

Save Close

UNDERSTANDING AUTHORIZATIONS

Understanding MPS Authorizations

MPS = Member Preferred Schedules

MPS authorizations generally fall into two categories:

- ◆ Specified Start Times
- ◆ Windowed Start Times

Except in specialized circumstances, authorizations will have daily limits.

- ◆ Schedules can only be built for days with available units.

Specified Start Time

Authorization Schedule

General

* Service: S5125- Attendant Care
 Event Code: DEF- Any (Default)
 Ref. No.: D00195094
 Format: Units
 Maximum: 240 0 = Unlimited
 Used: 80 Missed: 0

Date Range

Begin: 11/14/2010
 End: 12/31/2010

Authorization Comment

Limitations E All Times Shown Are Eastern Time

Limit By: Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
0	16	16	16	16	16	0

Begin Ranges

Sun	Mon	Tue	Wed	Thu	Fri	Sat
00:00	08:00	08:00	08:00	08:00	08:00	00:00
23:59	08:00	08:00	08:00	08:00	08:00	23:59

Save Close

Begin range shows start and end at same hour.

In this example, the schedule can only begin at the start time of 08:00 a.m. as indicated in the authorization.

Service at any other time (or day) requires a change request be submitted to the MCO.

Windowed Start Time

The Begin Range shows the earliest and latest times a scheduled service can start.

The number of units determines the maximum billable length of a service.

Provider has flexibility to schedule within the window.

Authorization

Schedule

Delete

General

* Service: T1019- Personal Care Vis

Event Code: DEF- Any (Default)

Ref. No.: 848406509

Format: Units

Maximum: 840 0 = Unlimited

Used: 0 Missed: 0

Date Range

Begin: 08/28/2011

End: 03/03/2012

Authorization Comment

Limitations

Limit By: Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
0	16	16	16	16	16	0

Begin Ranges

Sun	Mon	Tue	Wed	Thu	Fri	Sat
00:00	08:00	08:00	08:00	08:00	08:00	00:00
23:59	12:00	12:00	12:00	12:00	12:00	23:59

Save Close

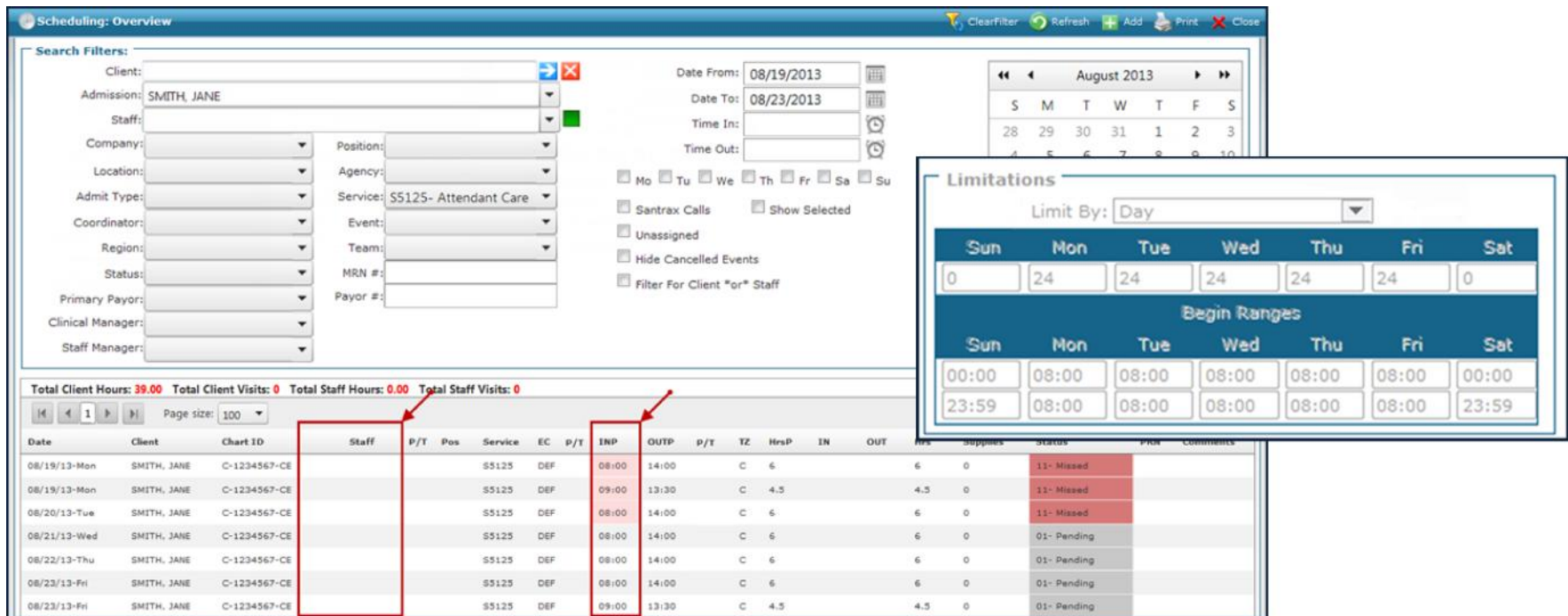
The application will auto-generate schedules for authorizations with a daily limitation and one of the following services:

- Attendant Care (CHOICES)
- In Home Respite Care (CHOICES & ECF)
- Respite 8-16 hours (ECF)
- Respite Over 16 hours (ECF)
- Personal Care Services (CHOICES)
- Personal Assistance (ECF)
- Supportive Homecare (ECF)

CREATING SCHEDULES FROM AUTHORIZATIONS

Auto-Generated Schedules: Current Authorizations

- Up to 2 weeks worth of upcoming schedules are auto-generated.
- Each schedule is created without a staff.
- The schedule's start time will reflect the start time in the **Limitations** section of the Authorization.



Scheduling: Overview

Search Filters:

Client: Admission: SMITH, JANE Staff: Company: Positions: Locations: Agency: Admit Type: Service: S5125- Attendant Care Event: Coordinator: Team: Region: MRN #: Status: Primary Payor: Payor #: Clinical Manager: Staff Manager:

Date From: 08/19/2013 Date To: 08/23/2013 Time In: Time Out:

☐ Mo ☐ Tu ☐ We ☐ Th ☐ Fr ☐ Sa ☐ Su ☐ Santrax Calls ☐ Show Selected ☐ Unassigned ☐ Hide Cancelled Events ☐ Filter For Client "or" Staff

Limitations

Limit By: Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
0	24	24	24	24	24	0
Begin Ranges						
00:00	08:00	08:00	08:00	08:00	08:00	00:00
23:59	08:00	08:00	08:00	08:00	08:00	23:59

Total Client Hours: 39.00 Total Client Visits: 0 Total Staff Hours: 0.00 Total Staff Visits: 0

Date	Client	Chart ID	Staff	P/T	Pos	Service	EC	P/T	INP	OUTP	P/T	TZ	HrsP	IN	OUT	Hrs	Supplies	Status	Pror	Comments
08/19/13-Mon	SMITH, JANE	C-1234567-CE				S5125	DEF		08:00	14:00		C	6			6	0	11- Missed		
08/19/13-Mon	SMITH, JANE	C-1234567-CE				S5125	DEF		09:00	13:30		C	4.5			4.5	0	11- Missed		
08/20/13-Tue	SMITH, JANE	C-1234567-CE				S5125	DEF		08:00	14:00		C	6			6	0	11- Missed		
08/21/13-Wed	SMITH, JANE	C-1234567-CE				S5125	DEF		08:00	14:00		C	6			6	0	01- Pending		
08/22/13-Thu	SMITH, JANE	C-1234567-CE				S5125	DEF		08:00	14:00		C	6			6	0	01- Pending		
08/23/13-Fri	SMITH, JANE	C-1234567-CE				S5125	DEF		08:00	14:00		C	6			6	0	01- Pending		
08/23/13-Fri	SMITH, JANE	C-1234567-CE				S5125	DEF		09:00	13:30		C	4.5			4.5	0	01- Pending		

Auto-Generated Schedules: Current Authorizations

Example: Schedule Generation

Delete

Authorization

General

* Service: S5125- Attendant Care
Event Code: DEF- Any (Default)
Ref. No.: 1036416930
Format: Units
Maximum: 1416 0 = Unlimited
Used: 192 Missed: 528

Modifier 1:
Modifier 2: UC
Modifier 3:
Modifier 4:

Date Range

Begin: 08/20/2013
End: 11/21/2013

Authorization Comment

Limitations

Limit By: Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
0	24	24	24	24	24	0

Begin Ranges

Sun	Mon	Tue	Wed	Thu	Fri	Sat
00:00	08:00	08:00	08:00	08:00	08:00	00:00
23:59	08:00	08:00	08:00	08:00	08:00	23:59

Save Close

AUGUST 2013						
SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Auto-Generated Schedules: Member Eligibility

If the authorization's **Date Range** is outside the eligibility period, the application will only auto-generate the schedules for those dates within the approved eligibility period.

The duration of the client's approved eligibility is represented by the '**Begin**' and '**End**' dates in the **Numbers, Etc.** section of the client's Payor Information screen.

Payor Information for Client : SMITH, JANE

General

* Payor:

* Rate Plan:

Rank:

Send Bill To:

Percent:

Numbers, Etc.

* Cust. No.:

Group No.:

Referral No.:

Begin:

End:

Options

☐ Capped Rates Transition to Next Payor

☐ Copay Plan

MSP Type:

Billing Rates Copay Rates Payroll Rates **Authorizations** Eligibility

☒ Hide Outdated Auths ☒ Hide Voided Auths

Service	Ref.no.	Format	Max	Begin	End
T1019- Personal Care Visits	1036365510	Units	204	07/29/2013	11/29/2013
SS125- Attendant Care	1036391190	Units	630	07/22/2013	11/29/2013
SS125- Attendant Care	1036416930	Units	1416	07/19/2013	11/21/2013

Save Close

Auto-Generated Schedules: Mass Editing

A staff member must be added to each schedule.

From the **Scheduling Overview** screen:

1. Search for and highlight the schedules to update
2. Right-click on a highlighted schedule
3. Use the **Mass Edit** functionality to edit multiple schedules simultaneously.
Times may also be adjusted, if allowed.

Date	Client	Chart ID	Staff	P/T	Pos	Service	EC	P/T	INP	OUTP	P/T	TZ	HrsP	IN	OUT	Hrs	Supplies	Status	PRN	Comments
08/19/13-Mon	SMITH, JANE	C-1234567-CE							08:00	14:00		C	6			6	0	11- Missed		
08/19/13-Mon	SMITH, JANE	C-1234567-CE							09:00	13:30		C	4.5			4.5	0	11- Missed		
08/20/13-Tue	SMITH, JANE	C-1234567-CE							08:00	14:00		C	6			6	0	11- Missed		
08/21/13-Wed	SMITH, JANE	C-1234567-CE							08:00	14:00		C	6			6	0	01- Pending		
08/22/13-Thu	SMITH, JANE	C-1234567-CE										C	6			6	0	01- Pending		
08/23/13-Fri	SMITH, JANE	C-1234567-CE										C	6			6	0	01- Pending		
08/23/13-Fri	SMITH, JANE	C-1234567-CE										C	4.5			4.5	0	01- Pending		

Times

Please enter the applicable times below.

Proposed: : = 0.00 hrs P/T:

Actual: : = 0.00 hrs

Staff

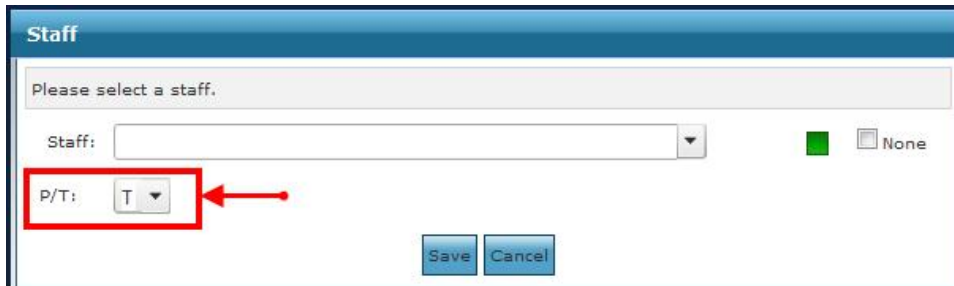
Please select a staff.

Staff:

P/T:

Permanent Schedules Functionality

- Selecting **P** (Permanent) for an item applies the update to the permanent schedule template and as a result, all future auto-generated schedules for that authorization and day of the week.
- Selecting **T** (Temporary) only applies the update to the selected schedule(s).

A screenshot of a 'Staff' selection form. It has a title bar 'Staff' and a subtitle 'Please select a staff.'. Below the subtitle is a text input field labeled 'Staff:' followed by a dropdown arrow. To the right of the dropdown is a green square icon and a 'None' checkbox. Below these is a 'P/T:' label followed by a dropdown menu currently showing 'T'. A red box highlights the 'P/T:' dropdown, and a red arrow points to it from the right. At the bottom are 'Save' and 'Cancel' buttons.

Staff

Please select a staff.

Staff:

P/T:

A screenshot of a 'Times' entry form. It has a title bar 'Times' and a subtitle 'Please enter the applicable times below.'. Below the subtitle are two rows of time input fields. The first row is labeled 'Proposed:' and the second 'Actual:'. Each row has two time input fields (hour and minute) followed by '= 0.00 hrs'. To the right of these is a 'P/T:' label followed by a dropdown menu currently showing 'T'. A red box highlights the 'P/T:' dropdown, and a red arrow points to it from the right. At the bottom are 'Save' and 'Cancel' buttons.

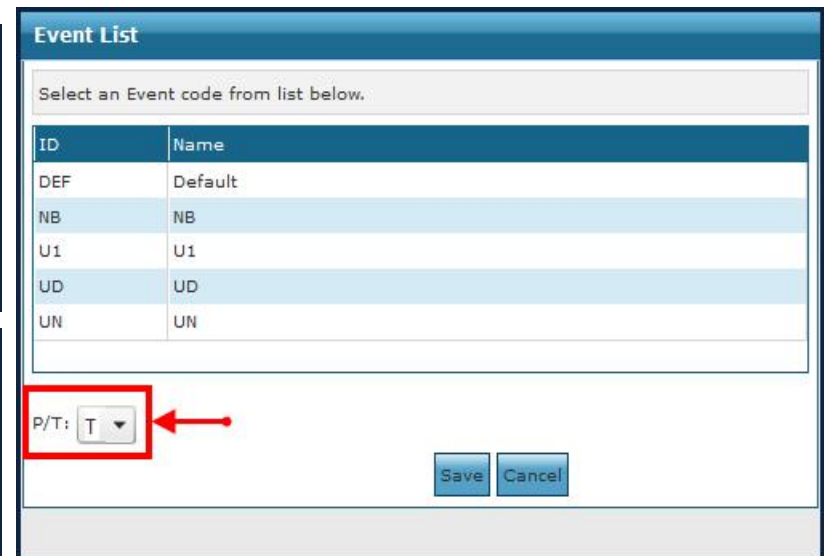
Times

Please enter the applicable times below.

Proposed: = 0.00 hrs

Actual: = 0.00 hrs

P/T:

A screenshot of an 'Event List' form. It has a title bar 'Event List' and a subtitle 'Select an Event code from list below.'. Below the subtitle is a table with two columns: 'ID' and 'Name'. The table contains five rows: 'DEF' (Default), 'NB' (NB), 'U1' (U1), 'UD' (UD), and 'UN' (UN). Below the table is a 'P/T:' label followed by a dropdown menu currently showing 'T'. A red box highlights the 'P/T:' dropdown, and a red arrow points to it from the right. At the bottom are 'Save' and 'Cancel' buttons.

Event List

Select an Event code from list below.

ID	Name
DEF	Default
NB	NB
U1	U1
UD	UD
UN	UN

P/T:

Client: SMITH, JANE (C-1234567-CE) Save Facesheet Close

Schedules - Generated Through: 09/07/2013 Generate 09/07/2013 Through: (mm/dd/yyyy)

☐ Hide Inactive

Week	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		SS100: 08:30 - 16:30 SS125: 09:00 - 13:30 SS125: 14:00 - 20:00 Member Staff,	SS125: 08:00 - 14:00	SS100: 08:30 - 16:30	SS125: 08:00 - 14:00	SS125: 08:00 - 14:00	

Details

Service:

Event Code: + x

Shift Group:

Time In: Miles:

Time Out: Supplies:

Bill Type: Pay Type:

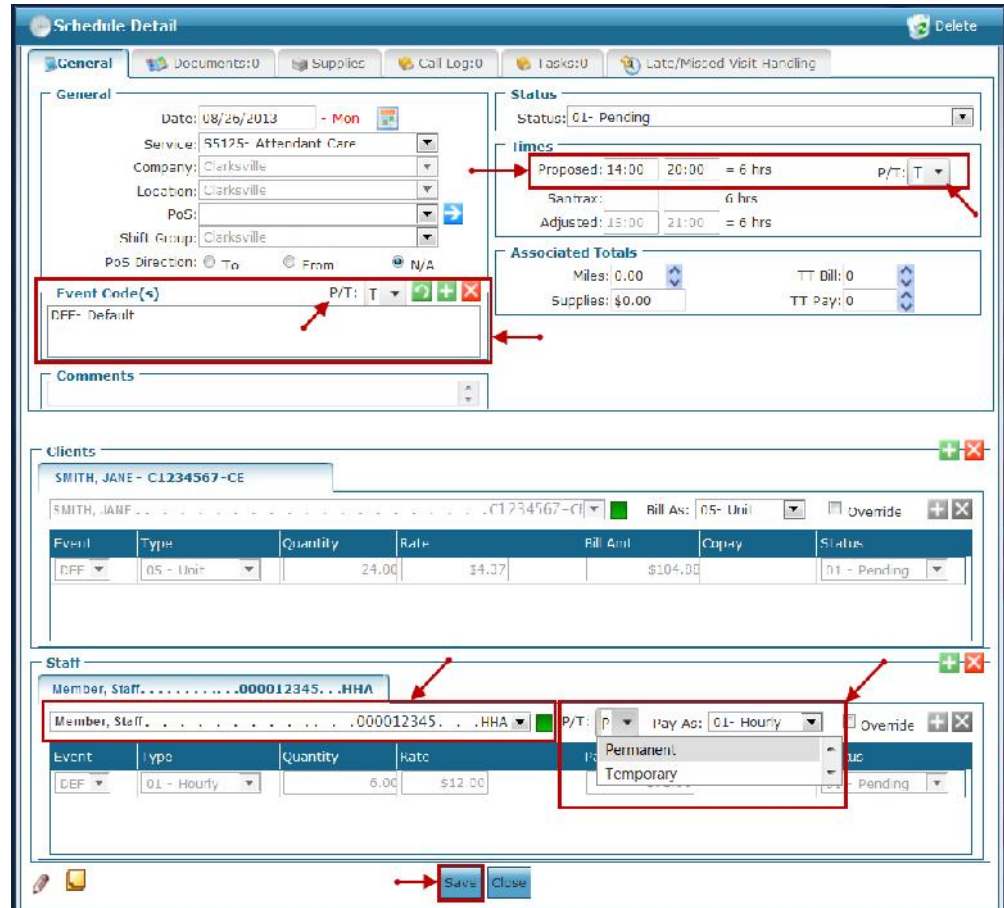
Staff:

Comments:

☐ Active

Individual Schedule Changes

1. Open the **Schedule Detail** screen
 - Adjust/Confirm **Proposed** times
 - Adjust/Confirm **Event Code**
 - Add/Confirm **Staff**
2. Select the **P/T** (Permanent / Temporary) setting for each item
3. Click **Save**



The screenshot shows the 'Schedule Detail' window with several sections highlighted by red boxes and arrows:

- General Section:**
 - Date:** 08/26/2013 - Mon
 - Service:** S5125- Attendant Care
 - Company:** Clarksville
 - Location:** Clarksville
 - PoS:** Clarksville
 - Shift Group:** Clarksville
 - PoS Direction:** To, From, N/A
- Status:** 01- Pending
- Times Section:**
 - Proposed:** 14:00 - 20:00 = 6 hrs
 - Sanmax:** 6 hrs
 - Adjusted:** 15:00 - 21:00 = 6 hrs
 - P/T:** T (Temporary)
- Associated Totals:**
 - Miles: 0.00
 - Supplies: \$0.00
 - TT Bill: 0
 - TT Pay: 0
- Event Code(s):** DFF- Default
- Comments:**
- Clients:** SMITH, JANE - C1234567-CE
- Staff Section:**
 - Member, Staff:** 000012345...HHA
 - P/T:** p (Permanent)
 - Pay As:** 01- Hourly
- Event Table:**

Event	Type	Quantity	Rate	Bill Amt	Copy	Status
DFF	05- Unit	24.00	\$4.37	\$104.88		01 - Pending
- Staff Table:**

Event	Type	Quantity	Rate
DEF	01- Hourly	6.00	\$12.00
- Buttons:** Save, Close

New Schedule Generation

- New schedules will be available on Friday mornings if the authorization is valid.
- The application will auto-generate these schedules based on the permanent schedules template.

Authorization Changes/Updates

- When an authorization's '**Maximum**' units decrease or the daily duration / time range changes, applicable '**Pending**' schedules are cancelled and new schedules are created to replace anything within the current two week period.
- The newly created schedules and permanent templates must be adjusted accordingly.
- If the schedule still falls within the authorization's time range, with no other changes, the schedule will remain as is.

Eligibility/Authorization Changes

- Voided: If an authorization is voided, the application will automatically cancel '**Pending**' auto-generated schedules and detach the authorization from '**Confirmed**' or '**On Hold**' auto-generated schedules.
- End Dated: If the client's eligibility or an authorization is end dated, the application will automatically cancel '**Pending**' auto-generated schedules and detach the authorization from '**Confirmed**' or '**On Hold**' auto-generated schedules that extend beyond an authorization's new (shortened) end date.

Eligibility/Authorization Changes (Cont'd)

NOTE: Changes to an Authorization may prevent you from invoicing auto-generated schedules with a status of '**Confirmed**' or '**On Hold**' prior to the change. This will occur because the visit falls outside the constraints of the new auth. Please contact BlueCare Tennessee for assistance.

Auto-Generated Schedules: Retro Authorizations

- The application will auto-generate up to 30 days worth of past schedules for any authorizations that have an effective date in the past. These visits will be placed with the appropriate status, for exception handling, based on existing late and missed visit rules.
- If an authorization's effective date is greater than 30 days in the past, the provider will need to manually create schedules for the visits outside the 30 day window.

Example: Scheduling Retro Authorizations

New Events

Clear Filter +

Frequency

☐ PRN Visits

☐ Single Event

☐ Ordered Frequency

☐ Recurring Every...

0 ▲▼

Days ▼

☒ By Weekday

☐ Mon ☒ Fri
☒ Tue ☐ Sat
☐ Wed ☐ Sun
☒ Thu

Date(s)

Begin: 07/19/2013 ▲▼

End: 08/20/2013 ▲▼

Service

* Service: S5125- Attendant Care ▼

* Bill Type: 05- Unit ▼

* Pay Type: 01- Hourly ▼

Times

Times: 08:00 ▲▼ 12:00 ▲▼

Event Code(s) + ×

DEF-Default

Status, Company, Etc.

Status: 01- Pending ▼

* Location: Clarksville ▼

* Company: Clarksville ▼

PoS: ▼ ▶

* Shift Group: Clarksville ▼

PoS Direction: ☐ To ☒ From ☐ N/A

*** Client(s)**

SMITH, JANE (C1234567-CE)

*** Staff**

Member, Staff (HHA)

Authorizations

Auth Ref No	Service	Max	Remaining	Beg	End
1036416930	S5125	1416	816	7/19/2013	11/21/2013

Date Range

Begin: 07/19/2013 ▲▼

End: 11/21/2013 ▲▼

Authorization Comment

Limitations

Limit By: Day ▼

Sun	Mon	Tue	Wed	Thu	Fri	Sat
0	24	24	24	24	24	0

Begin Ranges

Sun	Mon	Tue	Wed	Thu	Fri	Sat
00:00	12:00	08:00	12:00	08:00	08:00	00:00
23:59	14:00	08:00	14:00	08:00	08:00	23:59

Save
Close

14 Events added.

	Date	Client	Staff	Service	EC	IN	OUT	TZ	Duration	Status	Makes Up	Missed Visit Status	PRN	Comments
	7/19/2013-Fri	SMITH, JANE	Member, Staff	S5125	DEF-Defau	08:00	12:00		4	01- Pending				
	7/23/2013-Tue	SMITH, JANE	Member, Staff	S5125	DEF-Defau	08:00	12:00		4	01- Pending				
	7/25/2013-Thu	SMITH, JANE	Member, Staff	S5125	DEF-Defau	08:00	12:00		4	01- Pending				

Example of Retro Authorizations

Scheduling Overview Screen

REMINDER: *Uncheck the 'Hide Cancelled Events' checkbox to view missed and cancelled visits.*

Total Client Hours: 371.50 Total Client Visits: 0 Total Staff Hours: 0.00 Total Staff Visits: 0														As Of: 8/21/2013 10:51:07 AM			
<div> <div> <div>◀</div> <div>1</div> <div>▶</div> </div> <div>Page size: 100</div> </div>														58 items in 1 pages			
Date	Client	Chart ID	Staff	Pos	Service	EC	INP	OUTP	TZ	HrsP	IN	OUT	Hrs	Supplies	Status	PRN	Comments
07/22/13-Mon	SMITH, JANE	C-1234567-CE		S5125	DEF		08:00	14:00	C	6			6	0	11- Missed		
07/22/13-Mon	SMITH, JANE	C-1234567-CE		S5100	DEF		08:30	16:30	C	8			8	0	01- Pending		
07/22/13-Mon	SMITH, JANE	C-1234567-CE		S5125	DEF		09:00	13:30	C	4.5			4.5	0	11- Missed		
07/23/13-Tue	SMITH, JANE	C-1234567-CE		S5125	DEF		08:00	14:00	C	6			6	0	11- Missed		
07/23/13-Tue	SMITH, JANE	C-1234567-CE		S5100	DEF		08:30	16:30	C	8			8	0	01- Pending		
07/24/13-Wed	SMITH, JANE	C-1234567-CE		S5125	DEF		08:00	14:00	C	6			6	0	11- Missed		
07/24/13-Wed	SMITH, JANE	C-1234567-CE		S5100	DEF		08:30	16:30	C	8			8	0	01- Pending		



Example of Retro Authorizations Cont'd

Santrax Maintenance Screen

Total Shown: 58																					As Of: 10:51 AM	
O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	Memo	Exceptions	IsFVV Enabled	MCOStatus	
	07/22/2013 - Mon	SMITH, JANE	S5125			08:00	14:00		6.00	<div></div>			-	-	0		<input type="checkbox"/>		No Show Exception		<div></div>	
	07/22/2013 - Mon	SMITH, JANE	S5100			08:30	16:30		8.00				-	-	0		<input type="checkbox"/>		No Show Exception			
	07/22/2013 - Mon	SMITH, JANE	S5125			09:00	13:30		4.50				-	-	0		<input type="checkbox"/>		No Show Exception			
	07/23/2013 - Tue	SMITH, JANE	S5125			08:00	14:00		6.00				-	-	0		<input type="checkbox"/>		No Show Exception			
	07/23/2013 - Tue	SMITH, JANE	S5100			08:30	16:30		8.00				-	-	0		<input type="checkbox"/>		No Show Exception			
	07/24/2013 - Wed	SMITH, JANE	S5125			08:00	14:00		6.00				-	-	0		<input type="checkbox"/>		No Show Exception			
	07/24/2013 - Wed	SMITH, JANE	S5100			08:30	16:30		8.00				-	-	0		<input type="checkbox"/>		No Show Exception			

CREATING SCHEDULES FROM NEW EVENTS

Scheduling from New Events should only be used in situations such as:

- Services which do not require caregiver check-in/check-out.
- One-off single schedules.
- Retro Schedules/Missed Visits which need to be rescheduled.
 - When rescheduling a missed visit, the schedule must be created with a confirmed status so that it does not become automatically missed again when saved.

New Events (Cont'd)

New Events Clear Filter Add

Frequency

☐ PRN Visits

☒ Single Event

☐ Ordered Frequency

☐ Recurring Every...

0

Days

☐ By Weekday

☐ Mon ☐ Fri

☐ Tue ☐ Sat

☐ Wed ☐ Sun

☐ Thu

Date(s)

Date: 03/20/2018

Service

* Service: T2025A- Health Ins Couns

* Bill Type: 01- Hourly

* Pay Type: 01- Hourly

Times

Times:

*** Client(s)**

Pitcher, Molly

*** Staff**

Payor

BCBST ECF

*** Event Code(s)**

SE-SE

Comments

Status, Company, Etc.

Status: 01- Pending

* Location: Nashville

* Company: ABC Homecare

PoS:

* Shift Group: Nashville No Shift

PoS Direction: ☐ To ☐ From ☒ N/A

Authorizations

Auth Ref No	Service	EC	Max	Remaining	Begin Date	End Date	Lin By
88888888	T2025A	SE-SE	15	14	1/1/2018	6/1/2018	Ye
77777777	T2025F	U2-U2	100	99	1/1/2018	6/1/2018	Ye

When scheduling from the New Events screen, once a Date, Client and Service are selected, the Authorizations panel displays the member's relevant authorizations. Double-click an authorization to review the details.

For services which do not require caregiver check-in/check-out:

- Schedules are created with a status of '**Confirmed**' or '**Hold**' based on whether the service is defined as Auto-Bill or Manual Confirmation.
- Auto-Bill or Manual Confirmation requirement details can be found on the service expansion list.
- Auto-Bill visits are immediately ready to bill.
- Manual Confirmation visits require MCO Approval and visit documentation upload to the member record.

New Events (Cont'd)

Common New Events Errors

- Days/Times of service: Under MPS, you will not be able to confirm schedules outside the authorization.
- Staff Conflicts: Staff cannot be scheduled with more than one client at a time. Staff must be HHA and approved for the client's location and admit type.

UPLOADING DOCUMENTS TO MEMBER RECORD

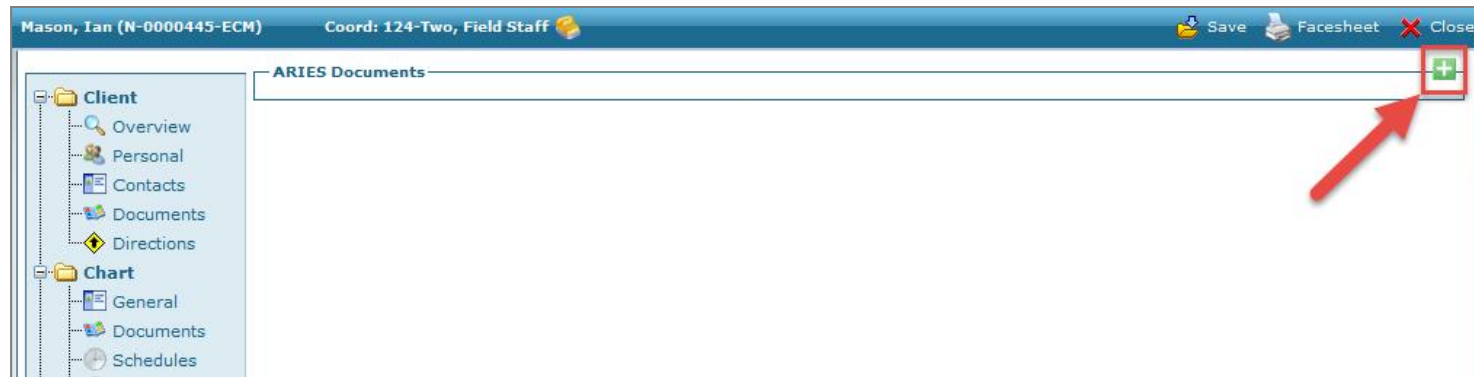
Uploading Documents

- Visit Documents must be scanned to your local computer.
- Navigate to Member/Client you will be uploading the document for.
- Click on the **Documents** link under the Chart folder in the navigation panel.

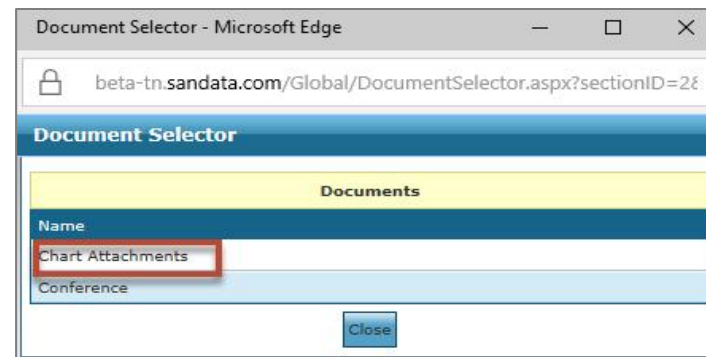
A screenshot of a web application interface for a client record. The top header bar is blue and contains the text 'Mason, Ian (N-0000445-ECM)' and 'Coord: 124-Two, Field Staff' with a small icon. To the right of the header are buttons for 'Save', 'Facesheet', and 'Close'. The main content area is divided into several sections. On the left is a navigation panel with a tree structure. Under the 'Chart' folder, the 'Documents' link is highlighted with a red rectangle. The main content area has several tabs: 'Personal' (showing name, ID, address, and phone), 'Admission and Other Dates' (showing ROC, SOC, EOC, and birth date), 'Physician', 'Referrer Contact', 'Contacts', 'Admission Manager', 'Current Certification', 'Referral Source', and 'Directions'. The 'Documents' link in the navigation panel is the focus of the slide.

Uploading Documents

- Select the Green + symbol at the top right of the page.

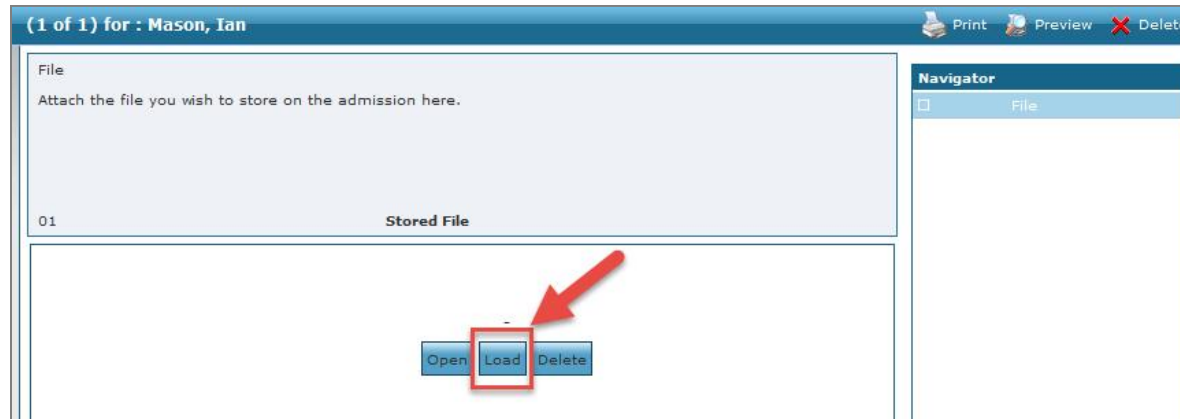


- Select the Chart attachments from the dialog window by double clicking on the line.

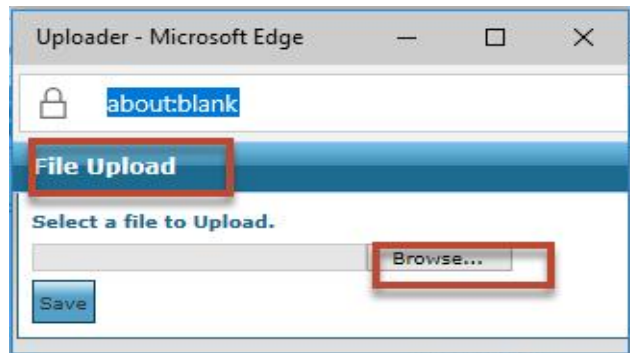


Uploading Documents

- Select Load from the next dialog window.

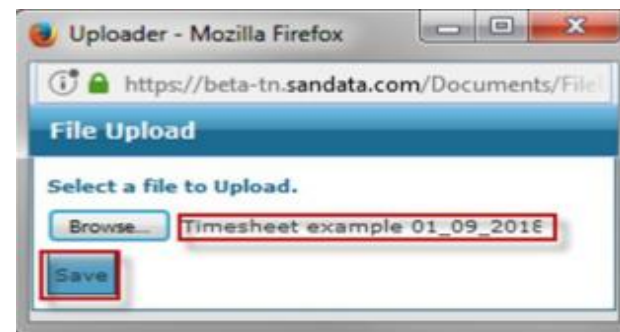
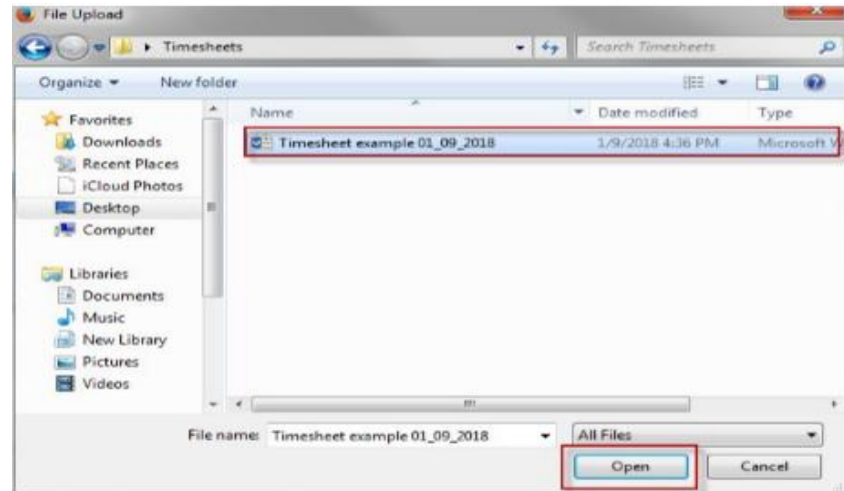


- From the File Upload select the Browse option in the dialog window.



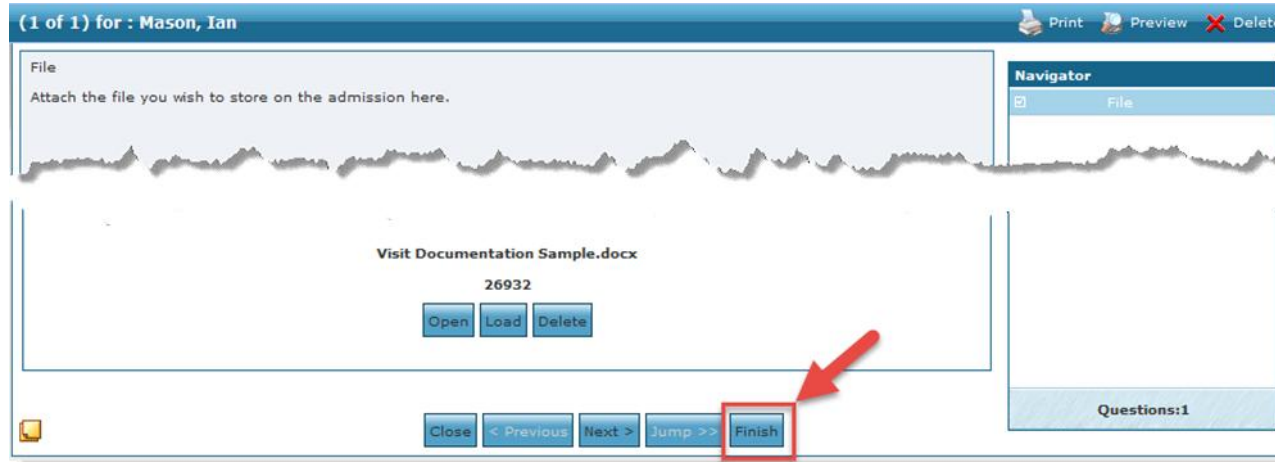
Uploading Documents

- Located the Document you have saved to your local computer, select that document and click open.
- Confirm you have the correct document and select save.



Uploading Documents

- Select **Finish** at the bottom of the page.



- Confirm that the document was uploaded by double clicking to open and view.



- All uploaded files can be viewed from the **Documents** screen.

THANK YOU FOR YOUR TIME!

