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 Functionality

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

Glossary

- **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** (**M**obile **V**isit **V**erification): The preferred visit check-in method where the caregivers start and end visits using an app on their tablet device
- **EVV** (**E**lectronic **V**isit **V**erification): A device, telephone and computer based system that electronically records time worked

System Requirements

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

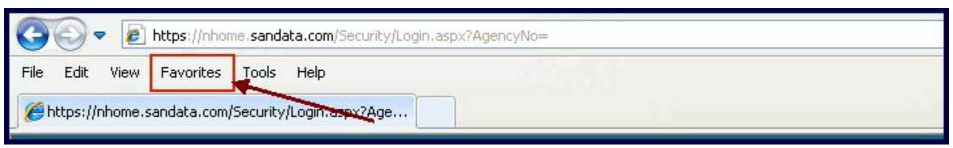
Each user should have a unique user name and password

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

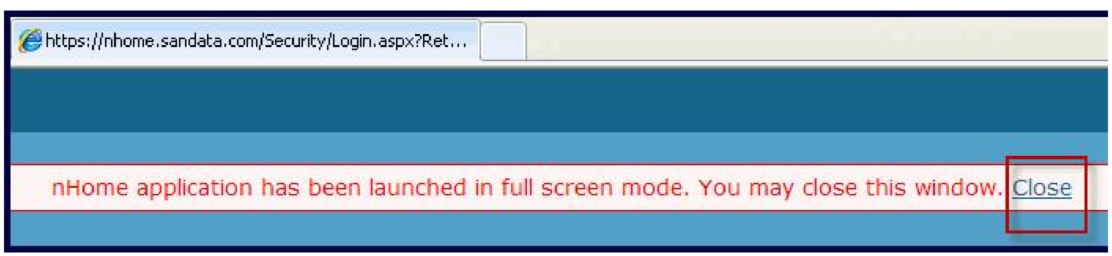
Browser Task Bars

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

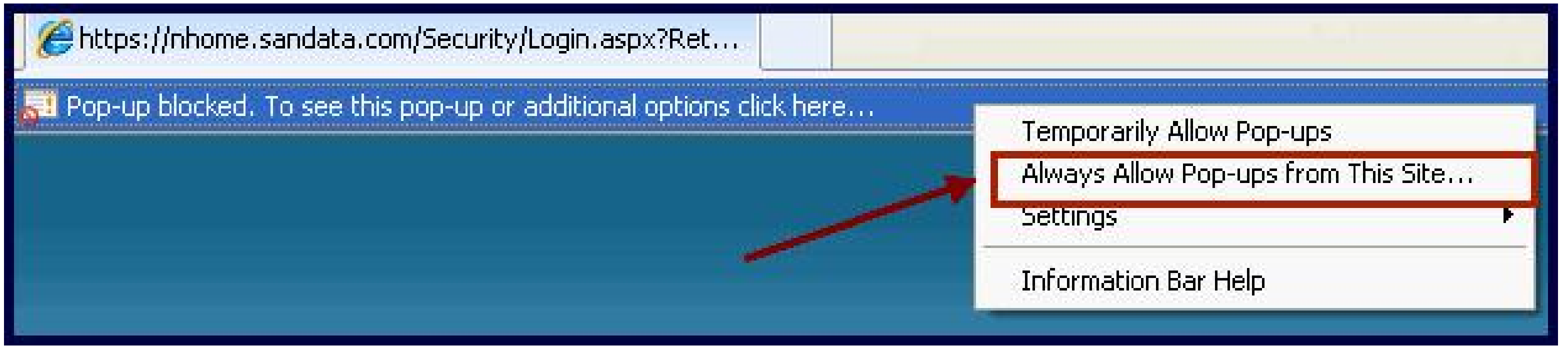
- One window is the URL used to launch the application, the second is the Santrax® Payor Management application.
- Use the launch window as the URL to set a Bookmark (Firefox) or Favorite (MSIE).



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



Pop Up Blockers - IE



Pop Up Blockers - Firefox

Main Navigation

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

Tool Bar

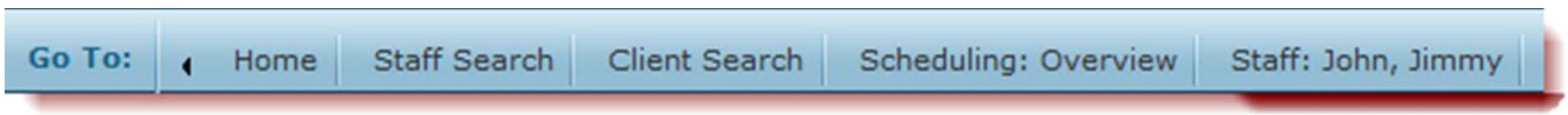
The Toolbar is the blue bar just under the Main Menu Bar

- 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”



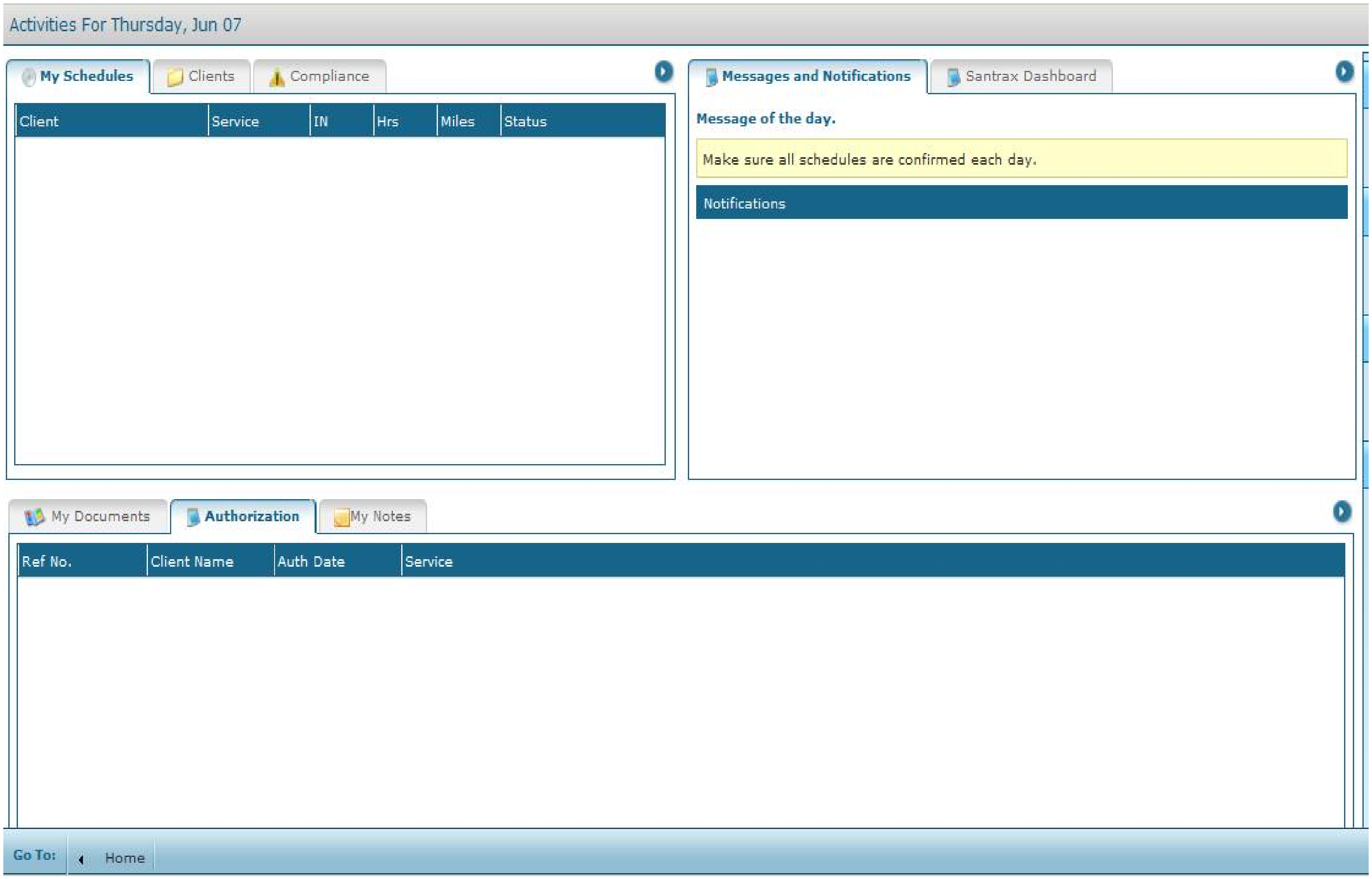
Appears at the bottom of every screen

Listing of all open screens accessed by user

Quick navigation to previously viewed information

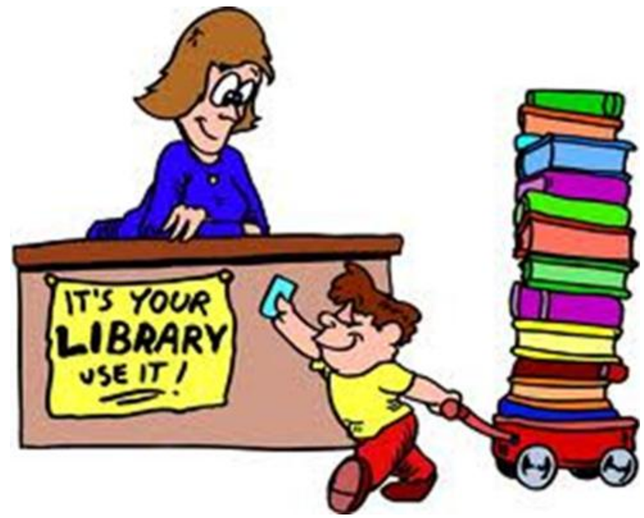
Home screen always appears as the first item on the **Go To** bar as a shortcut back to the homepage

Home Page



Activities For Thursday, Jun 07
My Schedules
Clients
Compliance
Client
Service
IN
Hrs
Miles
Status
Messages and Notifications
Santrax Dashboard
Message of the day.
Make sure all schedules are confirmed each day.
Notifications
My Documents
Authorization
My Notes
Ref No.
Client Name
Auth Date
Service
Go To:
Home

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
				Manual
				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
- NEW BlueCareConnect SPoC Training
- NEW 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:

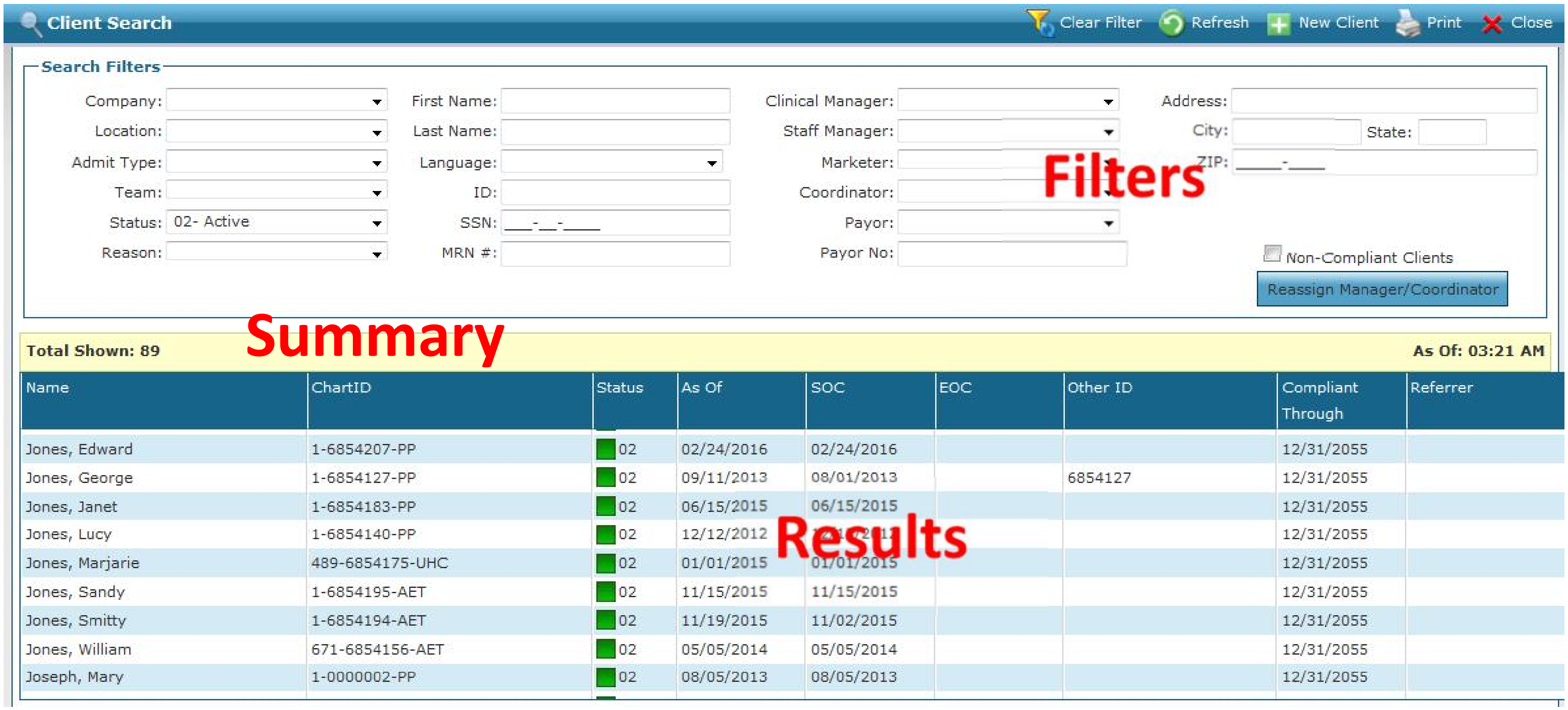
- *Staff*
- *Client*
- *Scheduling*
- *Billing Review*
- *Invoice*
- *Billing Export*
- *Payroll Review*

Search Filters: Specify Criteria

Summary Bar: Count Items in the Results

Results List: Details of Items

Example – Client Search



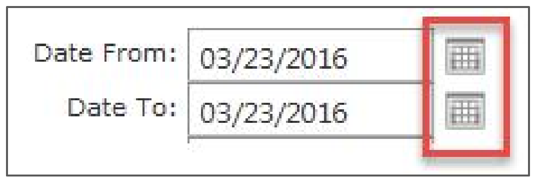
CALENDARS

Entering Dates

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

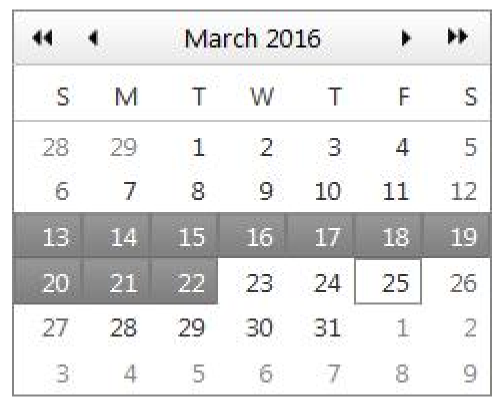
- Format must be in mm/dd/yyyy

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



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

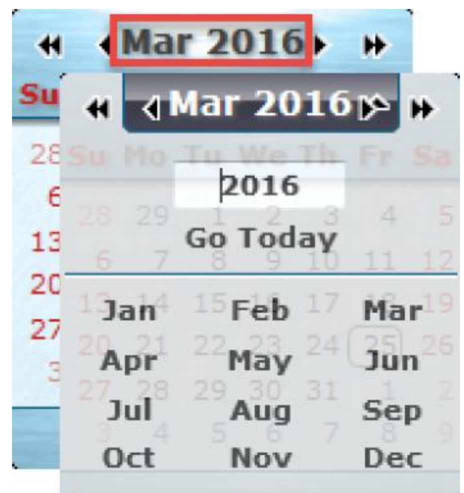
- Select the From Date
- Hold Shift Key + Click the To Date



Calendar Controls

1. 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

2. Clicking the month name allows the user to type in the year and select the month

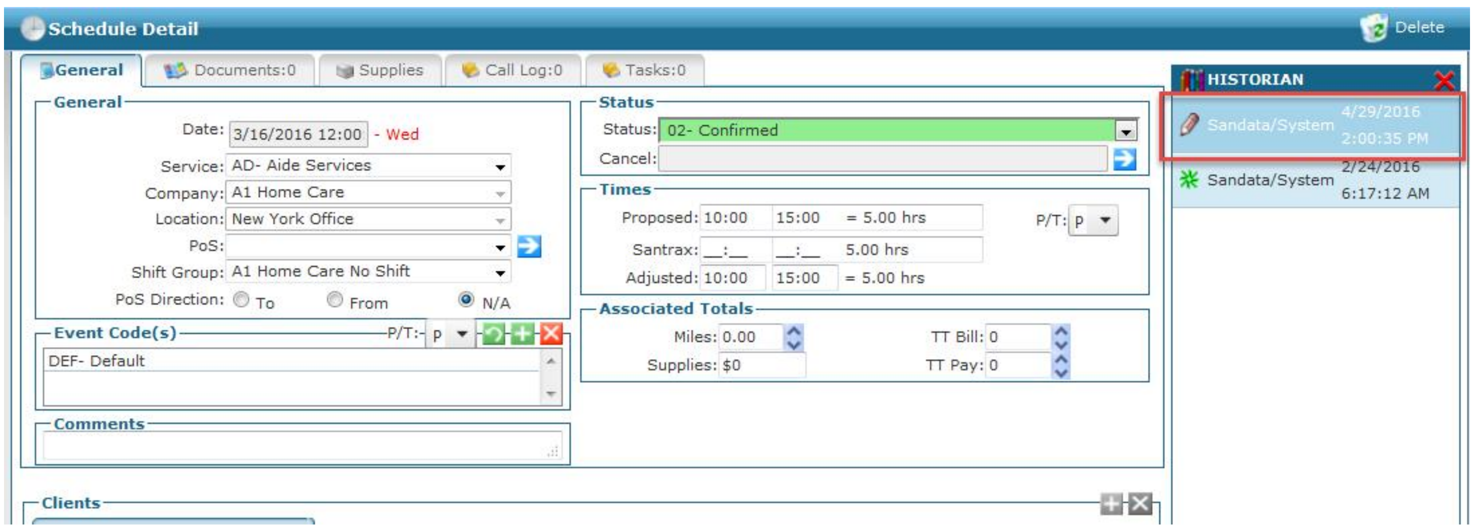


HISTORIAN & NOTES

Historian

“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

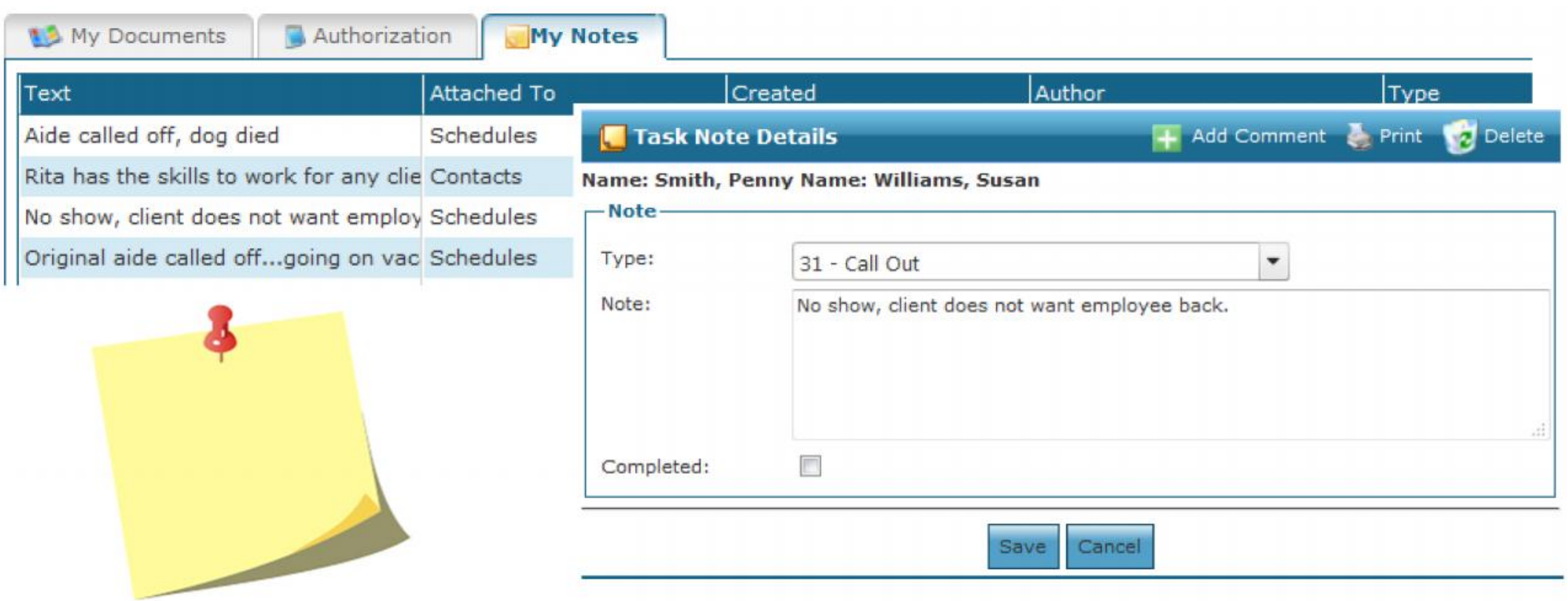


Notes

Notes can be created in Staff, Client and Schedule records

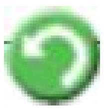
- Can be marked completed or left open for follow up

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



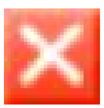
Action Buttons

Clear Filters – removes previously entered filter criteria

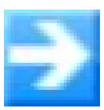


Refresh – run search/refresh the screen

Add – add information to that area of the screen



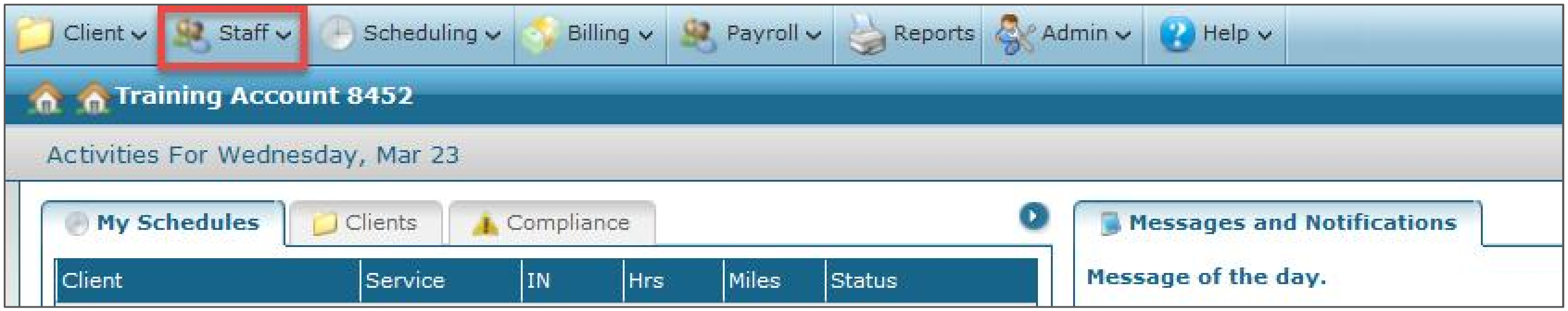
Delete – delete selected information



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

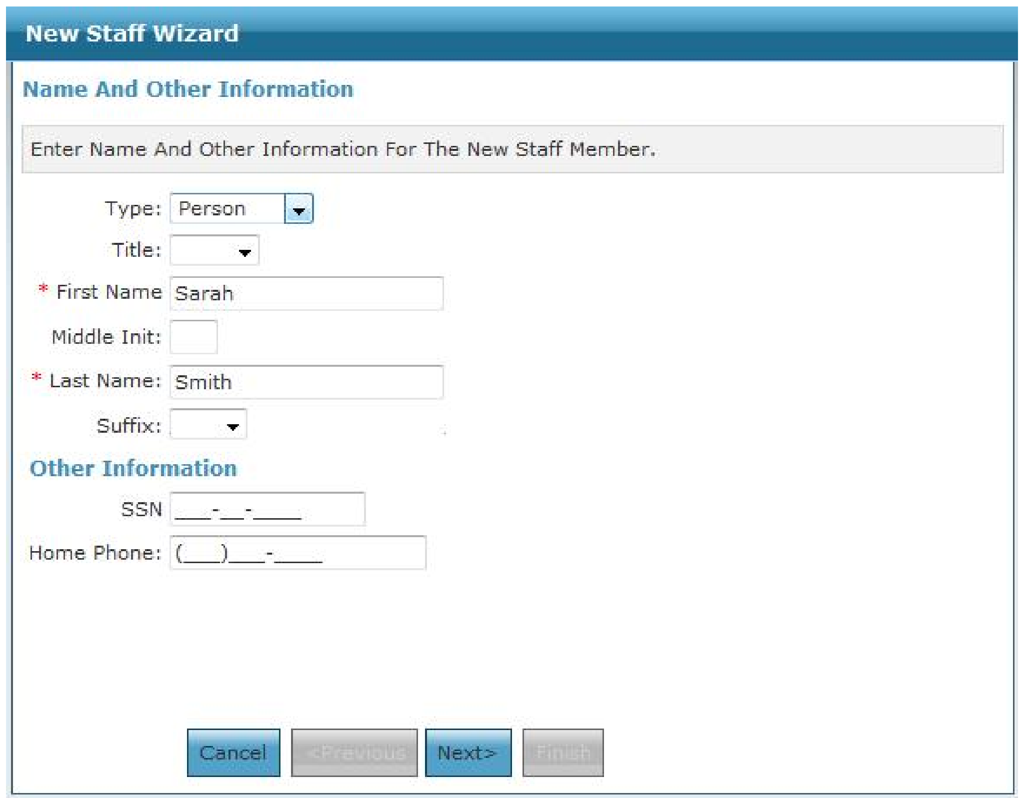
- Caregivers are designated as Field staff
- Office staff are designated as Users
- Use appropriate filters to reduce the results list
- Use the Position filter to search by job role

Adding New Staff

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

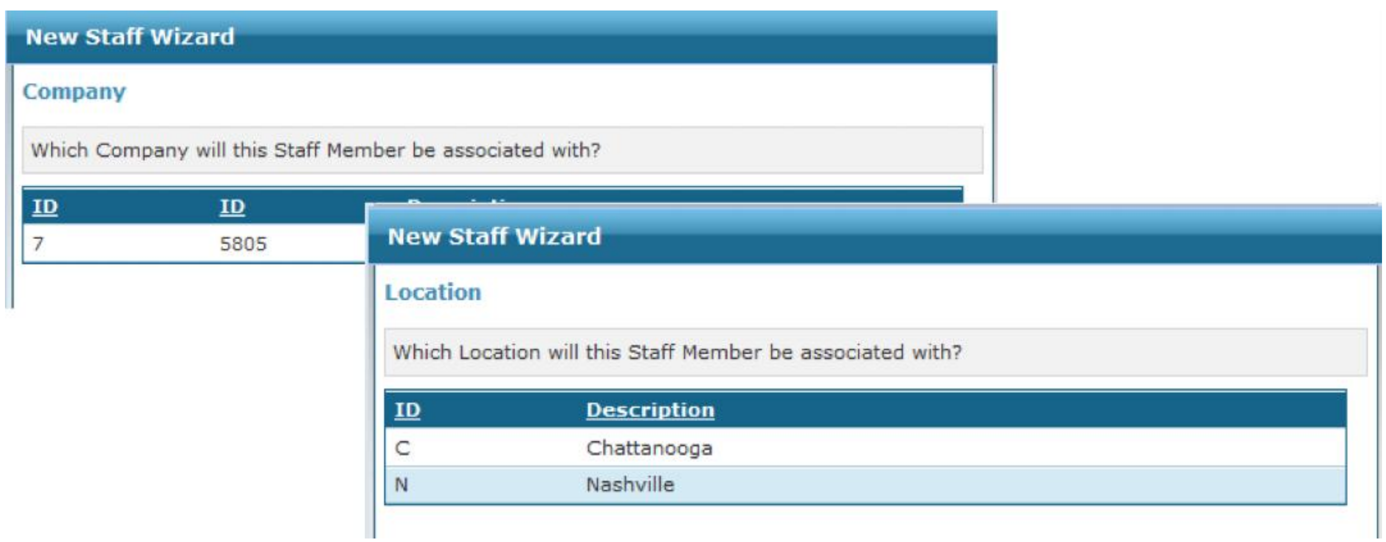
New Staff Wizard – Personal Information

Name is required. Phone number is recommended.



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).



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.

New Staff Wizard

Admission Type

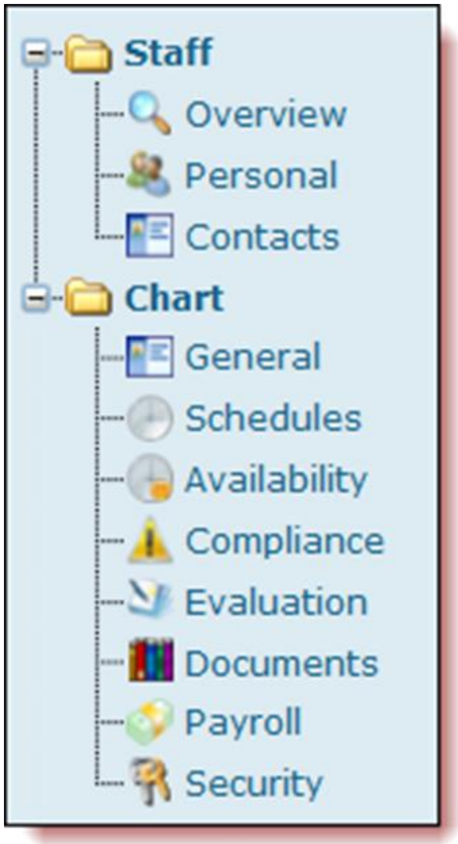
Which Admission Types can this Staff Member be associated with?

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).

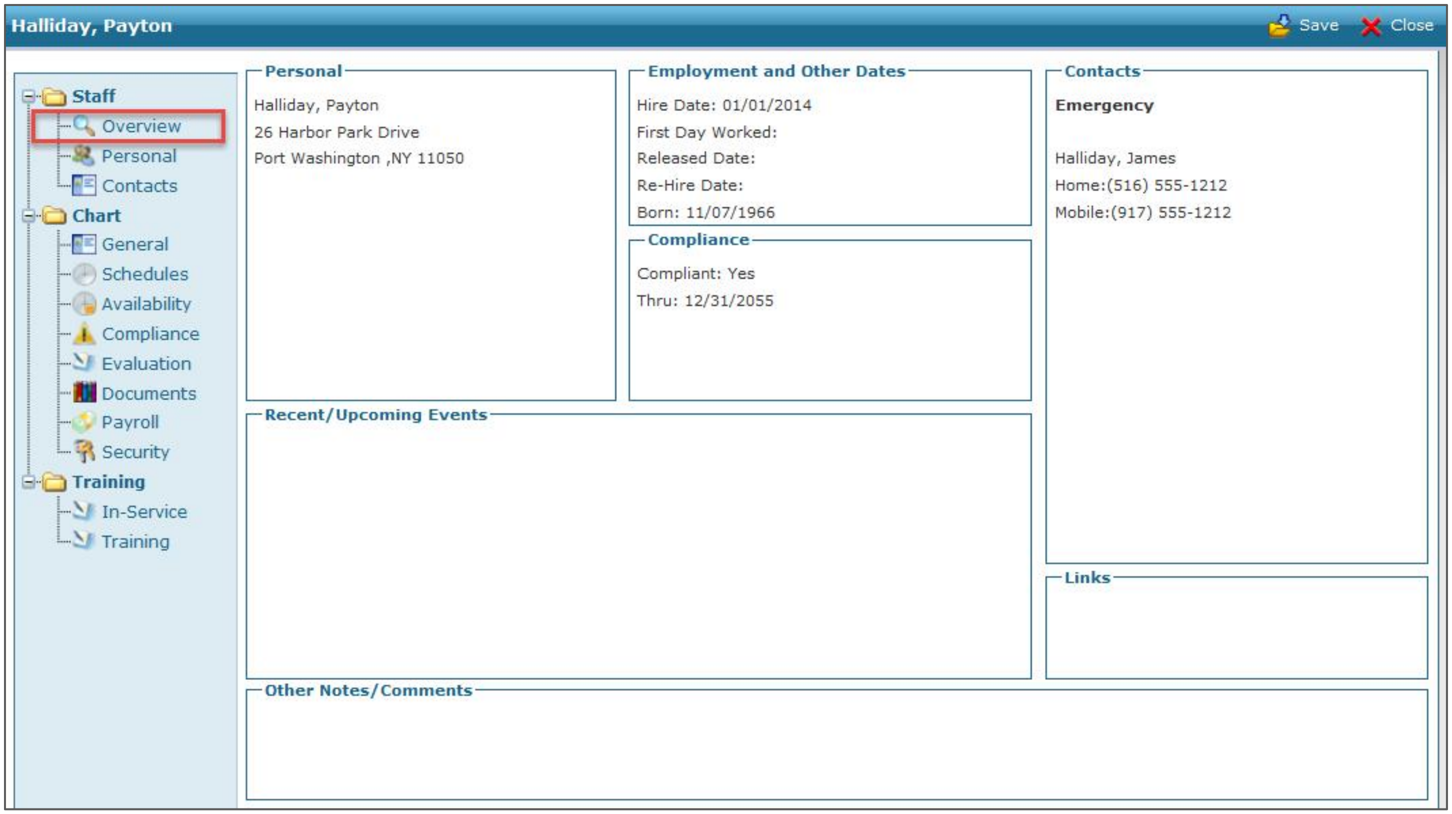
Staff Record Navigation



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

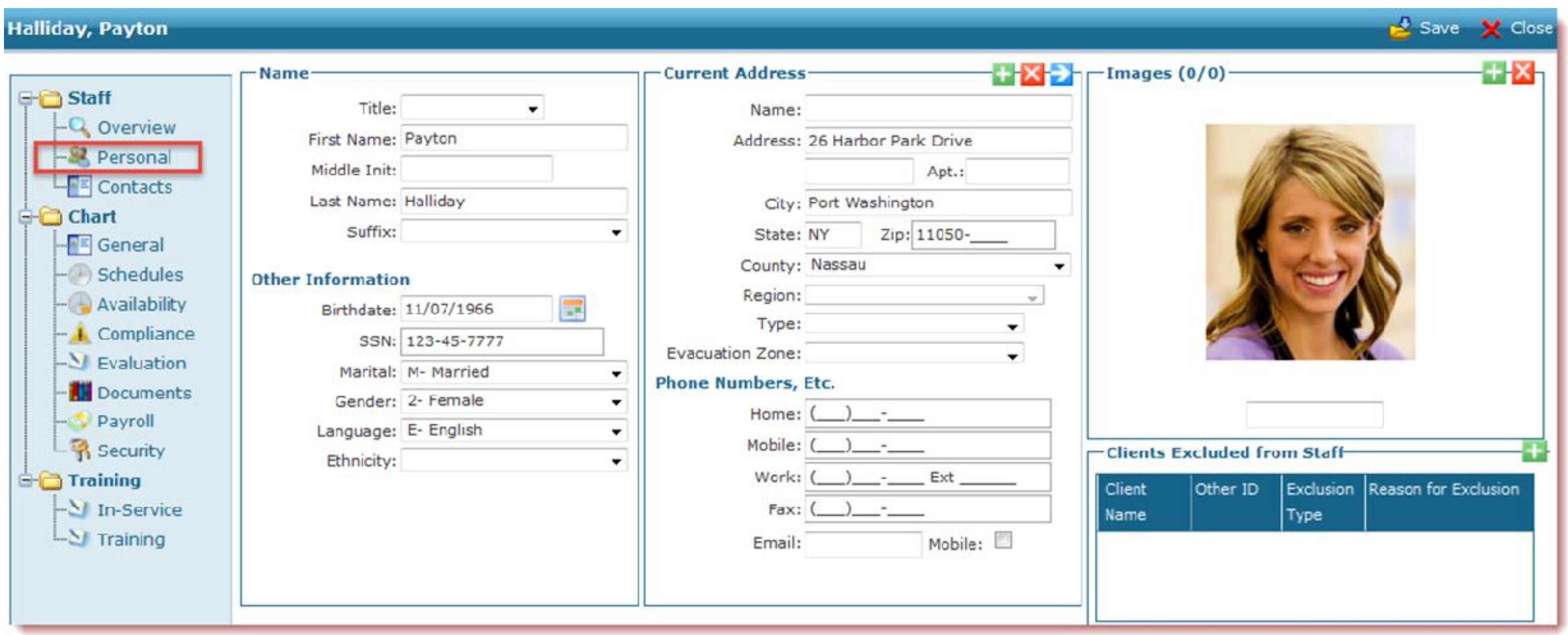
Staff Folder > Overview Screen

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



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



Staff Folder > Contacts Screen

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

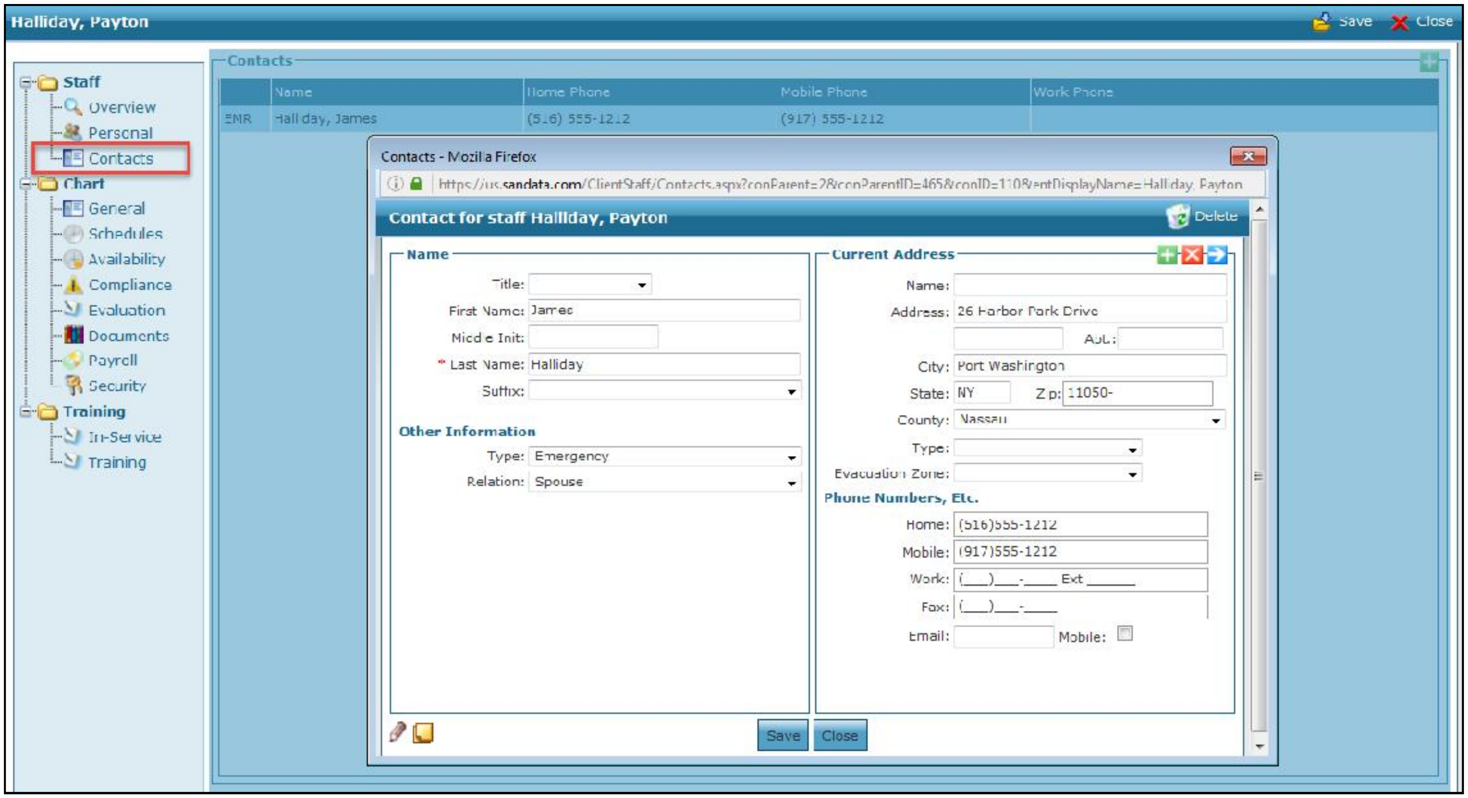


Chart Folder > General Screen

- 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.

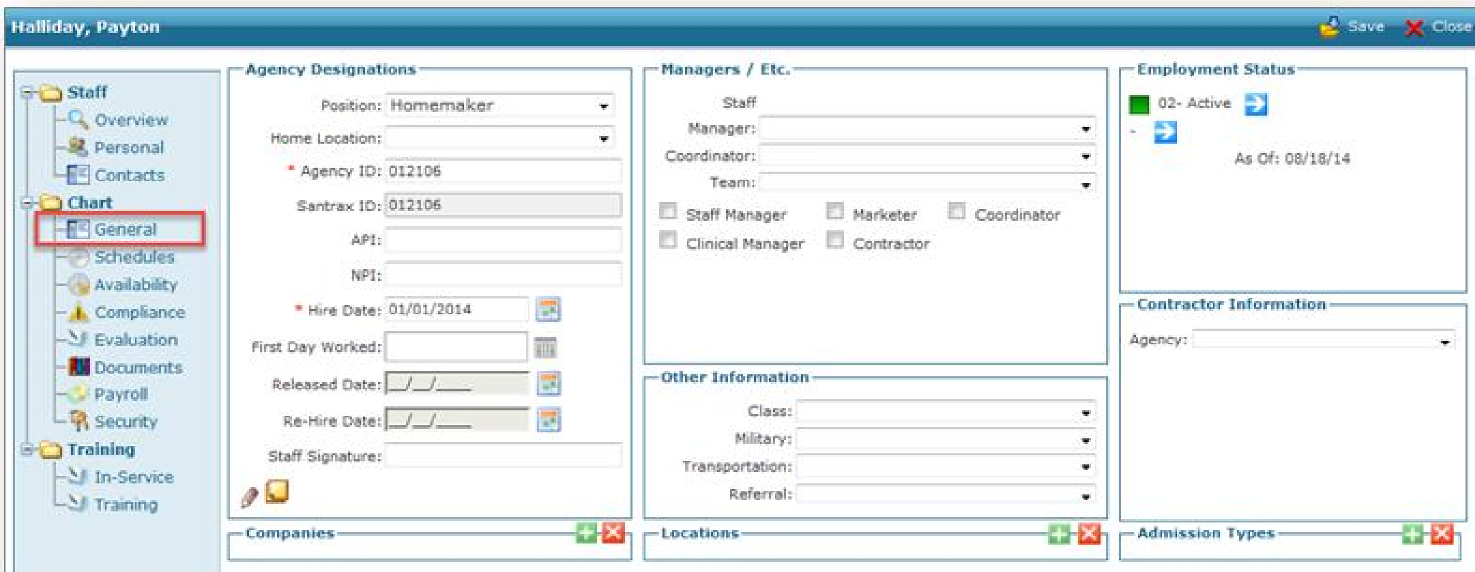


Chart Folder > General Screen

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

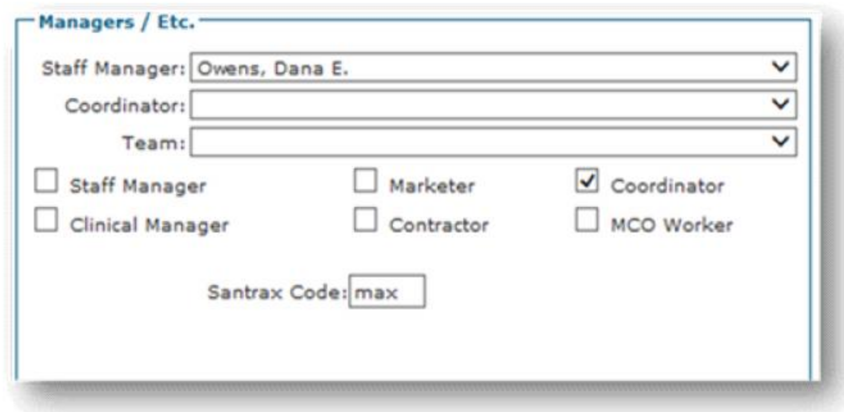


Chart Folder > General Screen

- 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.

Chart Folder > Schedules Screen

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

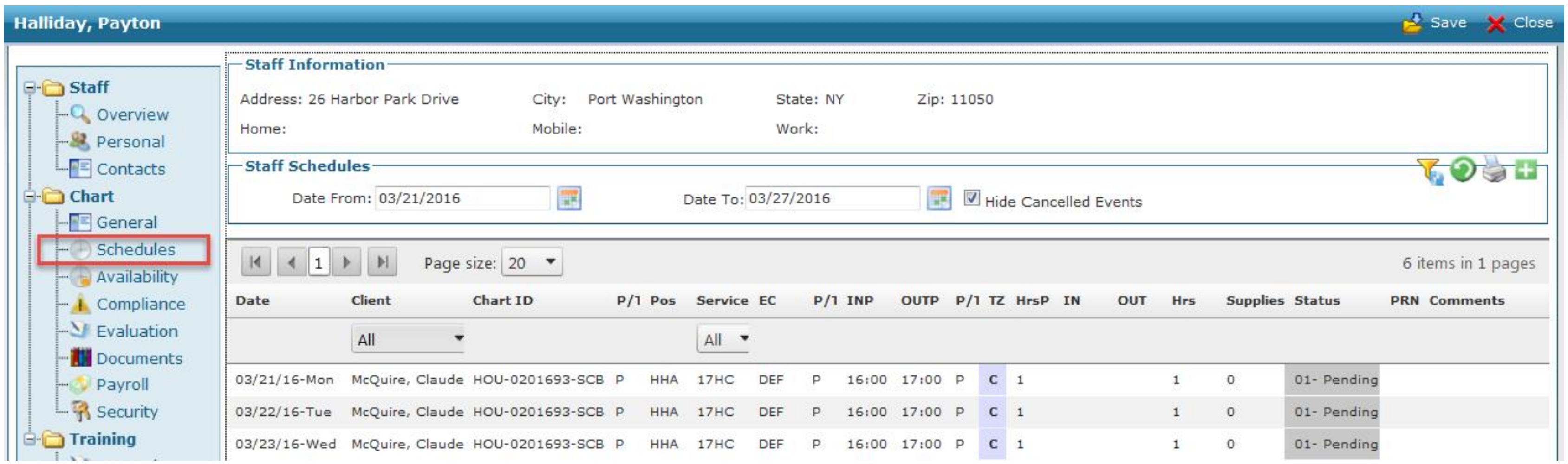


Chart Folder > Compliance

- 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.

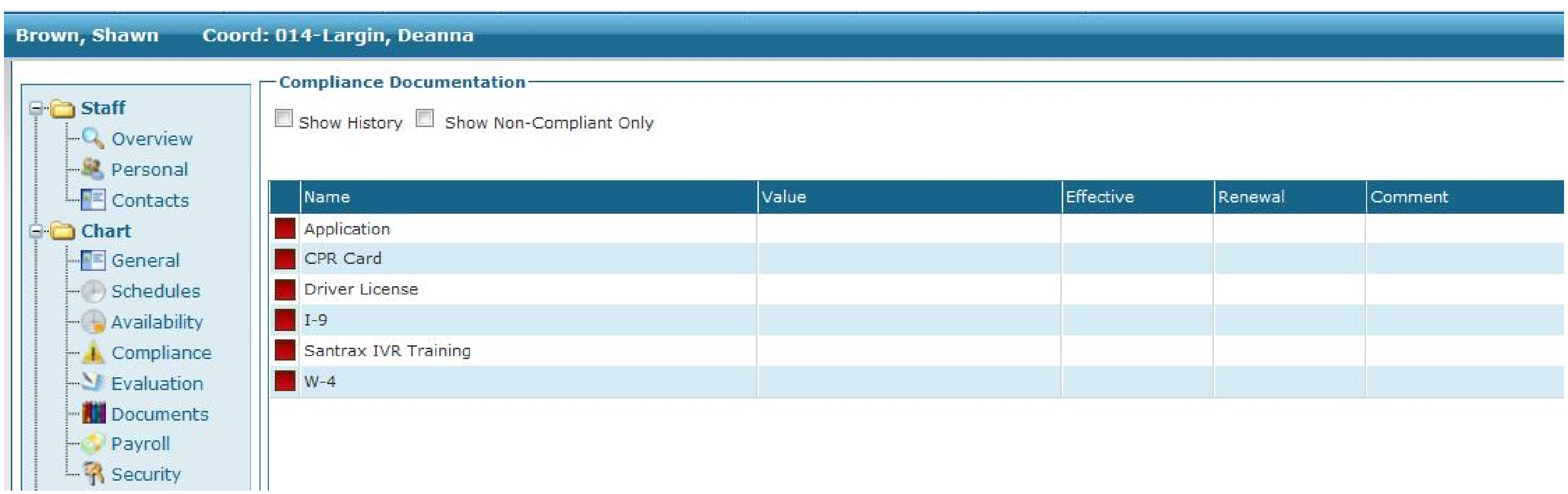


Chart Folder > Security Screen

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

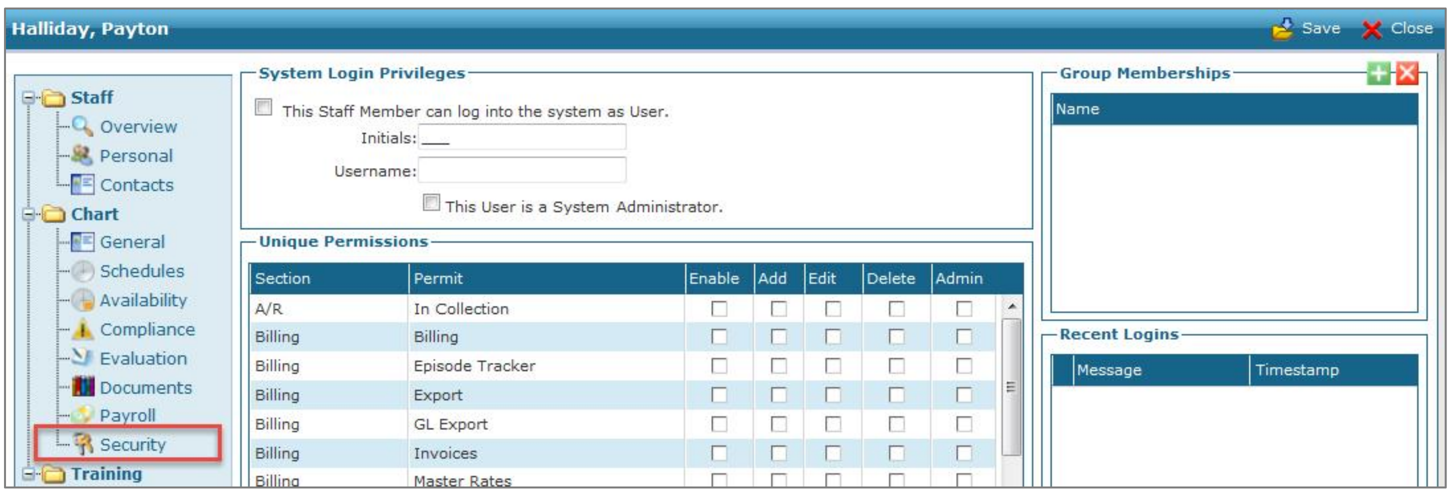


Chart Folder > Security Screen (Cont'd)

Requirements for Office Staff:

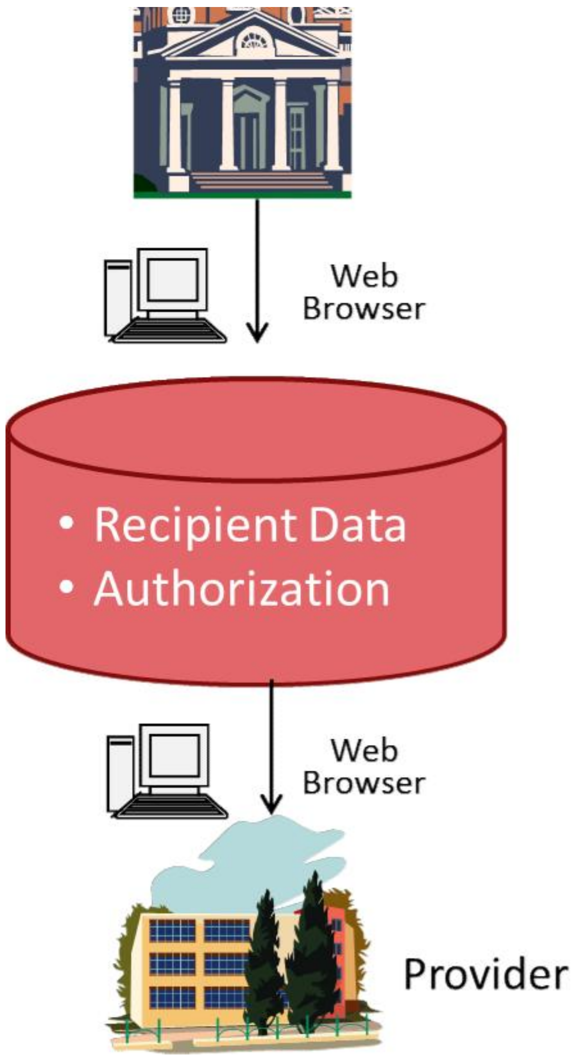
- Username is not case sensitive
- Password is case sensitive, must be at least 8 characters long and contain: a capital letter, number and special character.
- System privileges are determined by Group Membership assignment
- Choose Admin for Office Staff who do both scheduling and billing.
- Only System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

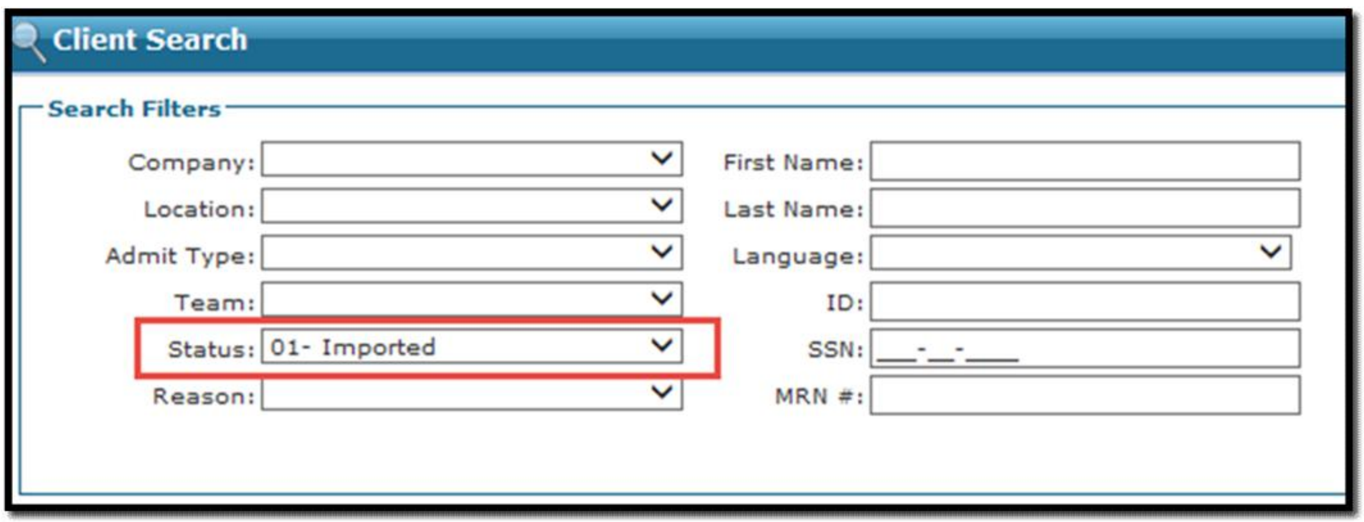
Clicking the Client button from the menu bar opens a client search screen.

Key Search Filters

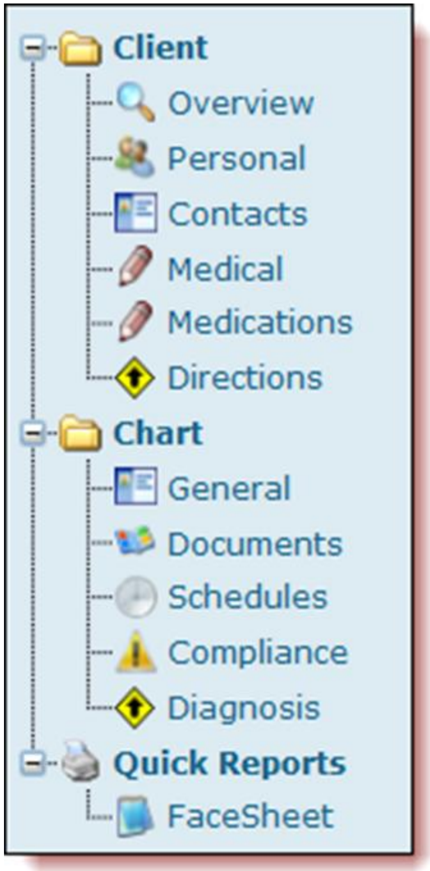
- Name
- Coordinator or Manager
- Location (branch office)
- ID (BCT assigned M#)

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.



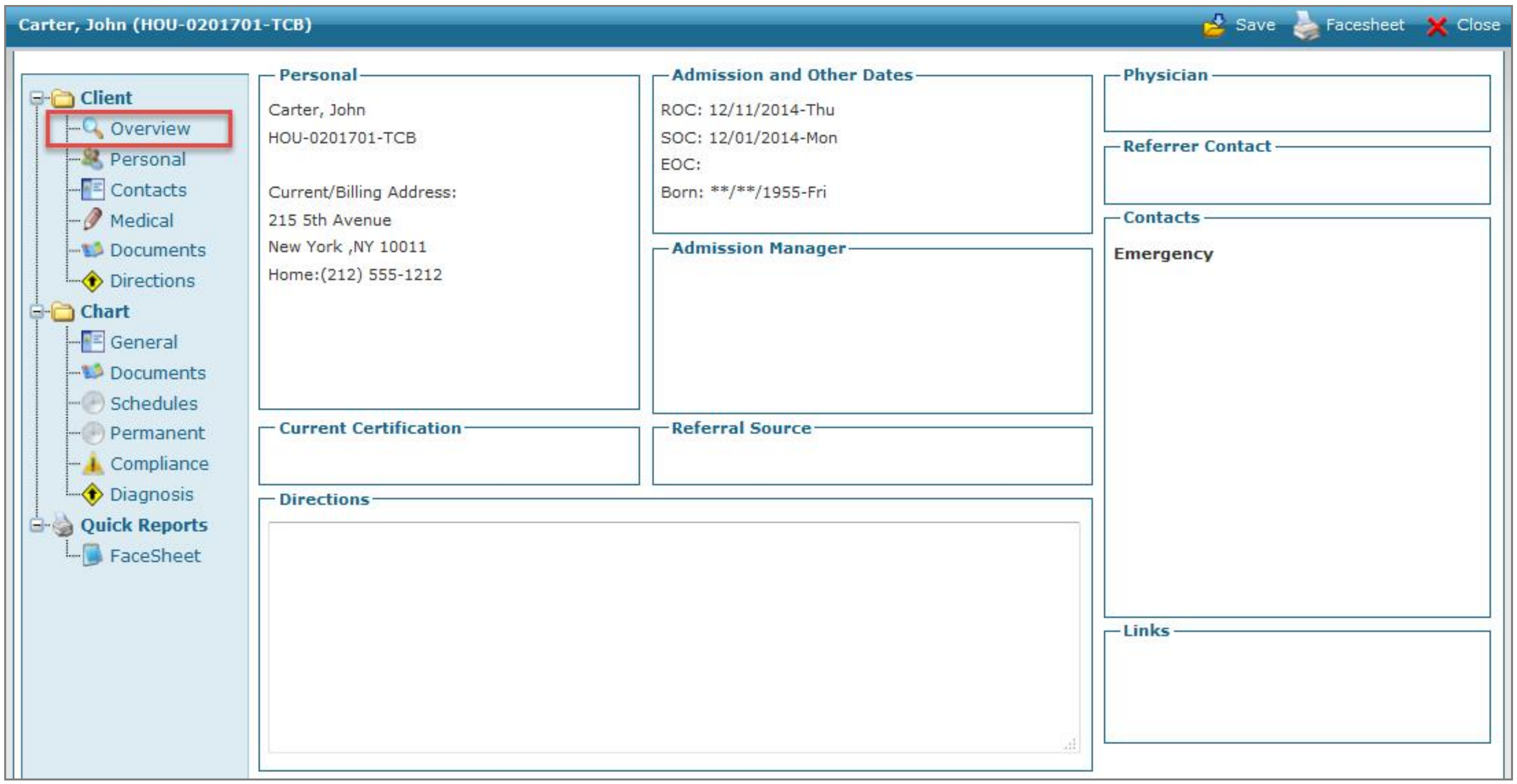
Client Record Navigation



- 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.

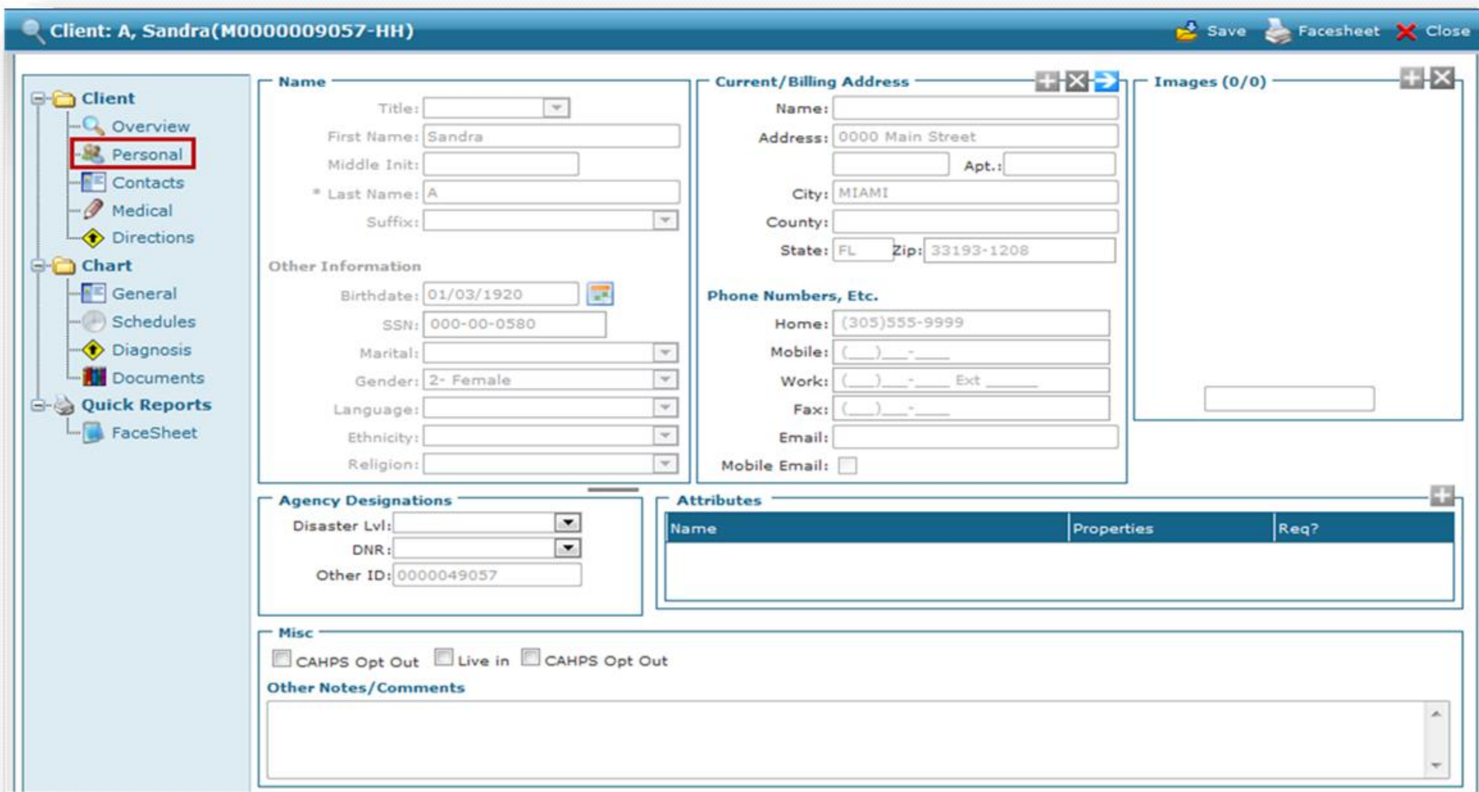
Client Folder > Overview Screen

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



Client Folder > Personal Screen

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



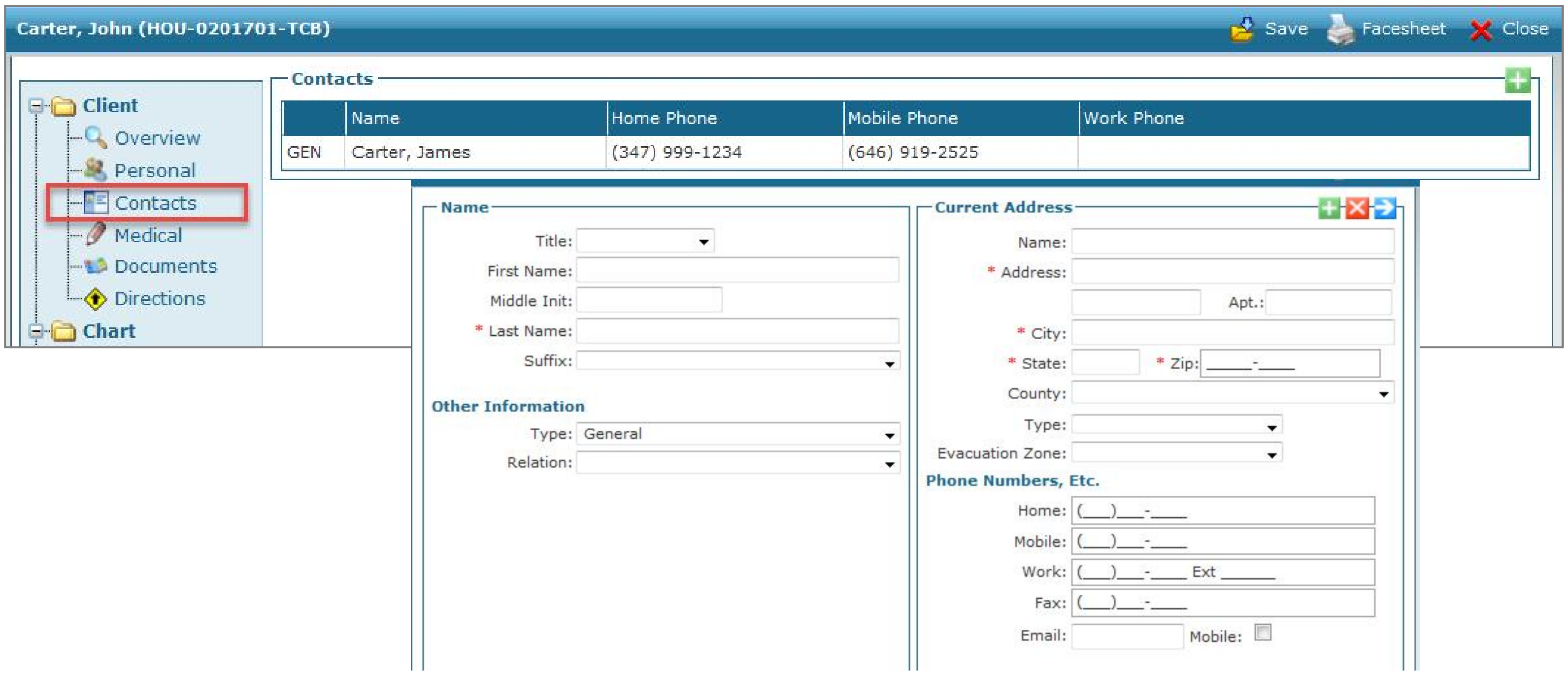
Client Folder > Contacts Screen

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.



Client Folder > Directions Screen

Built in Google Maps functionality

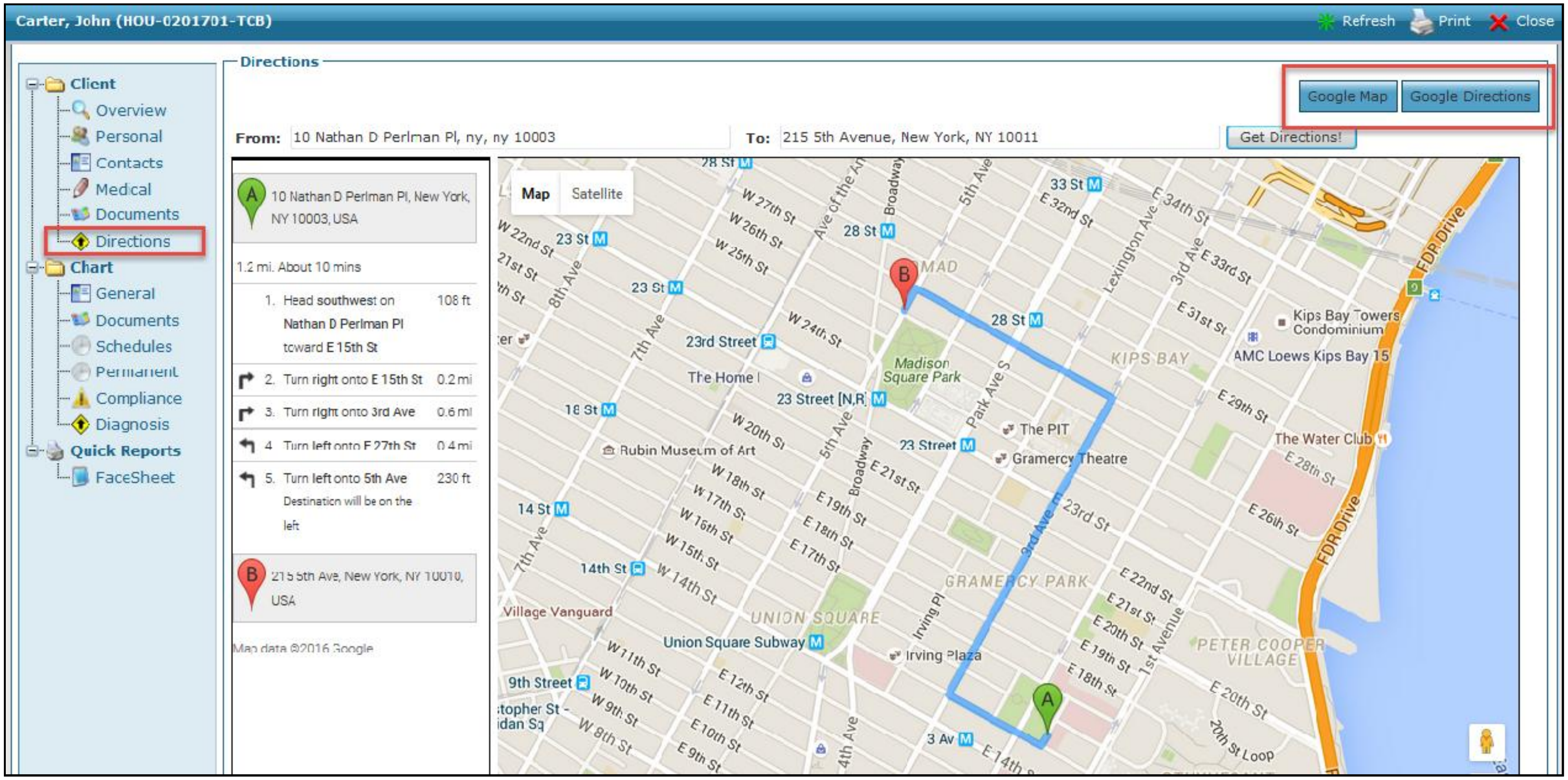


Chart Folder > General Screen

The General screen contains admission details including:

- Approved Services
- Admission Status
- Payer and authorization information

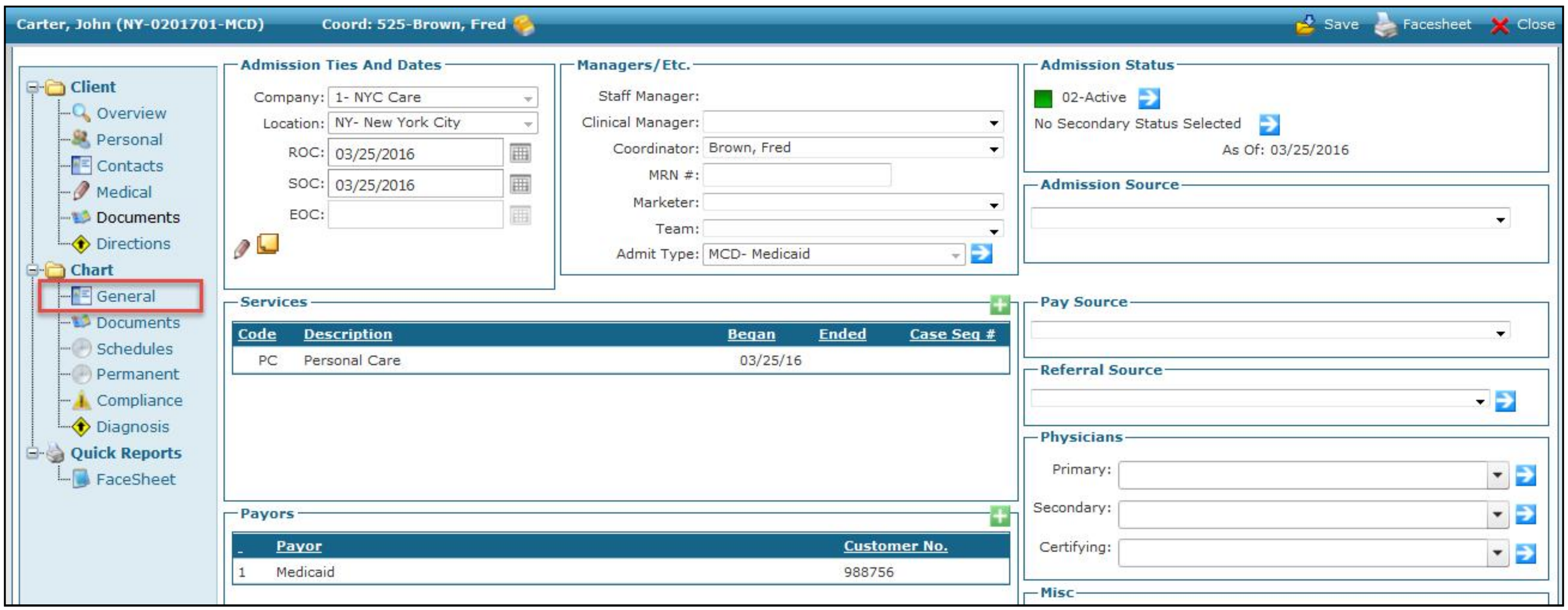
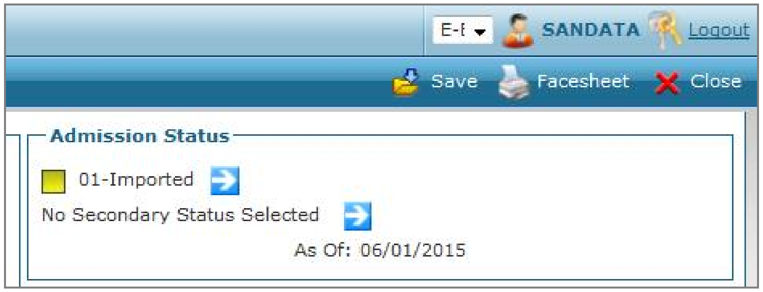


Chart Folder > General Screen

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.



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

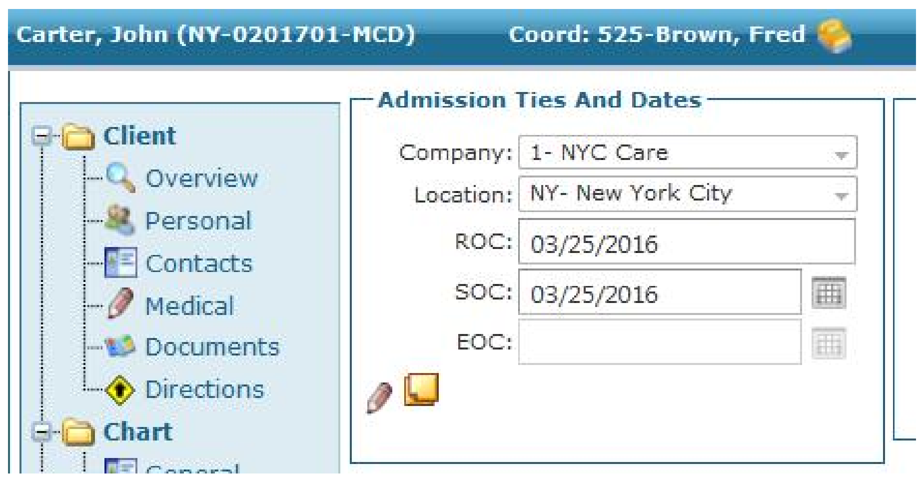


Chart Folder > General Screen (Cont'd)

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.

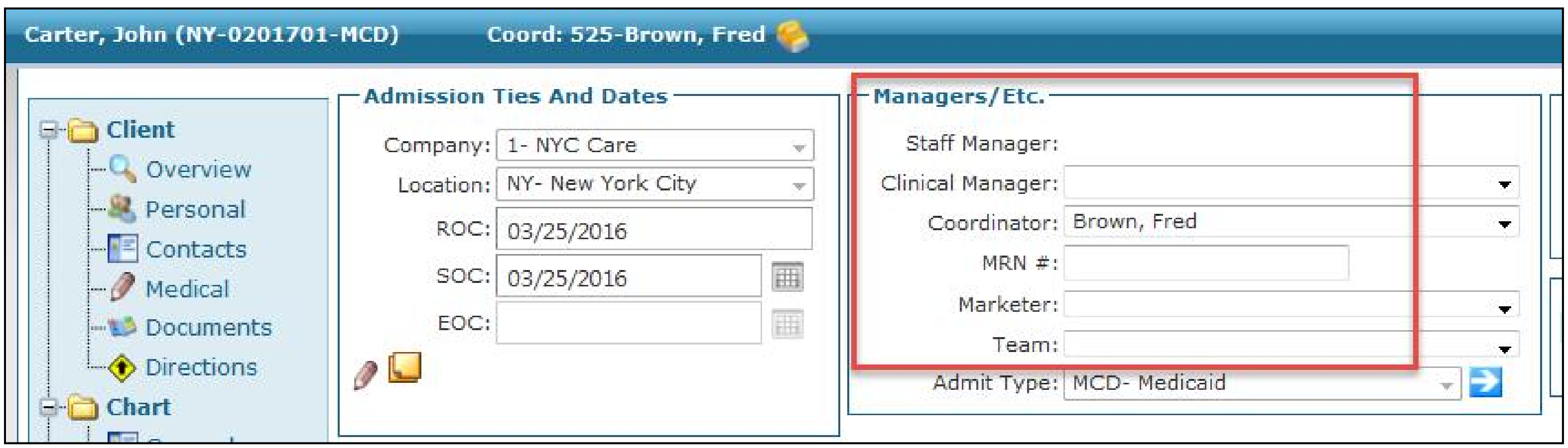


Chart Folder > General Screen (Cont'd)

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

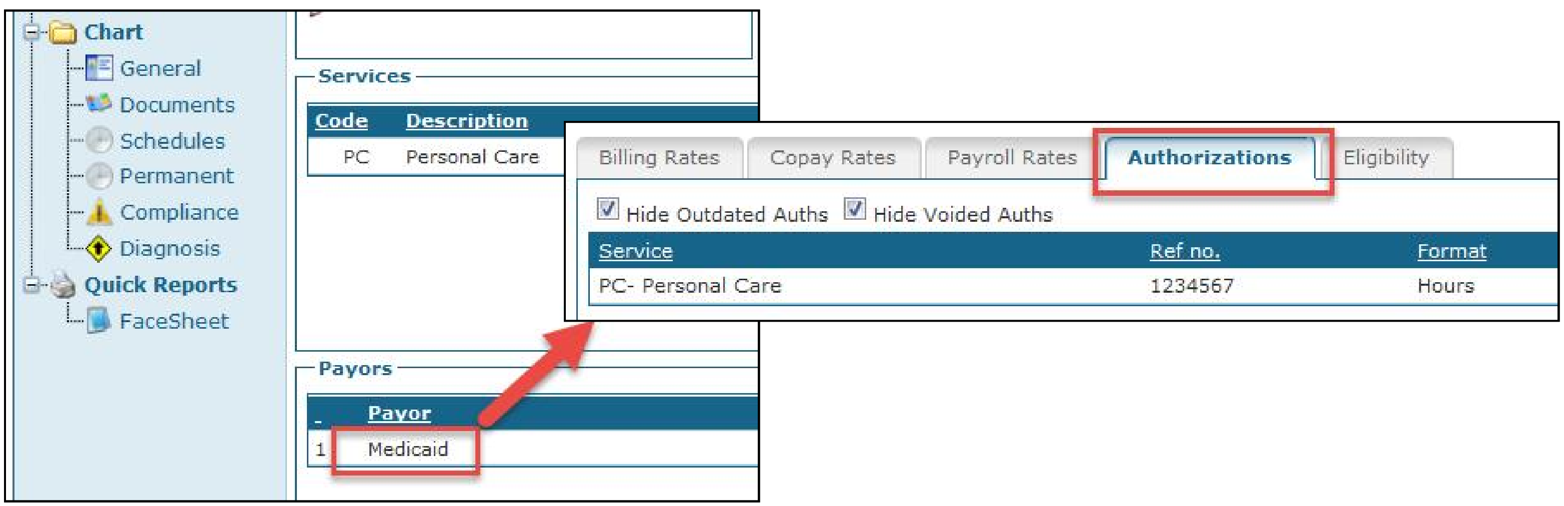


Chart Folder > Viewing an Authorization

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

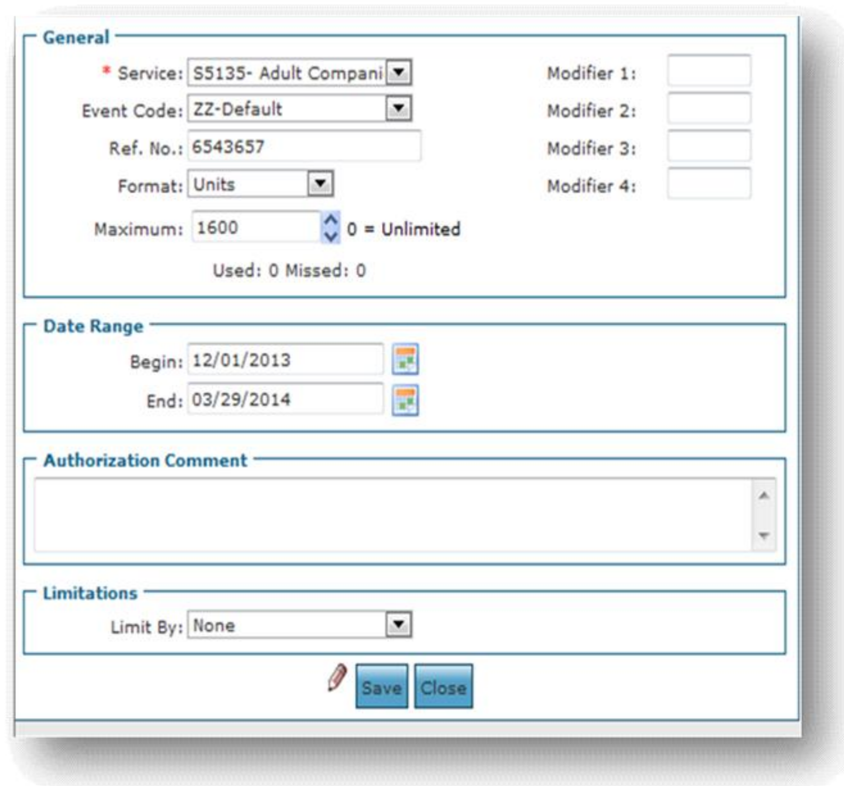
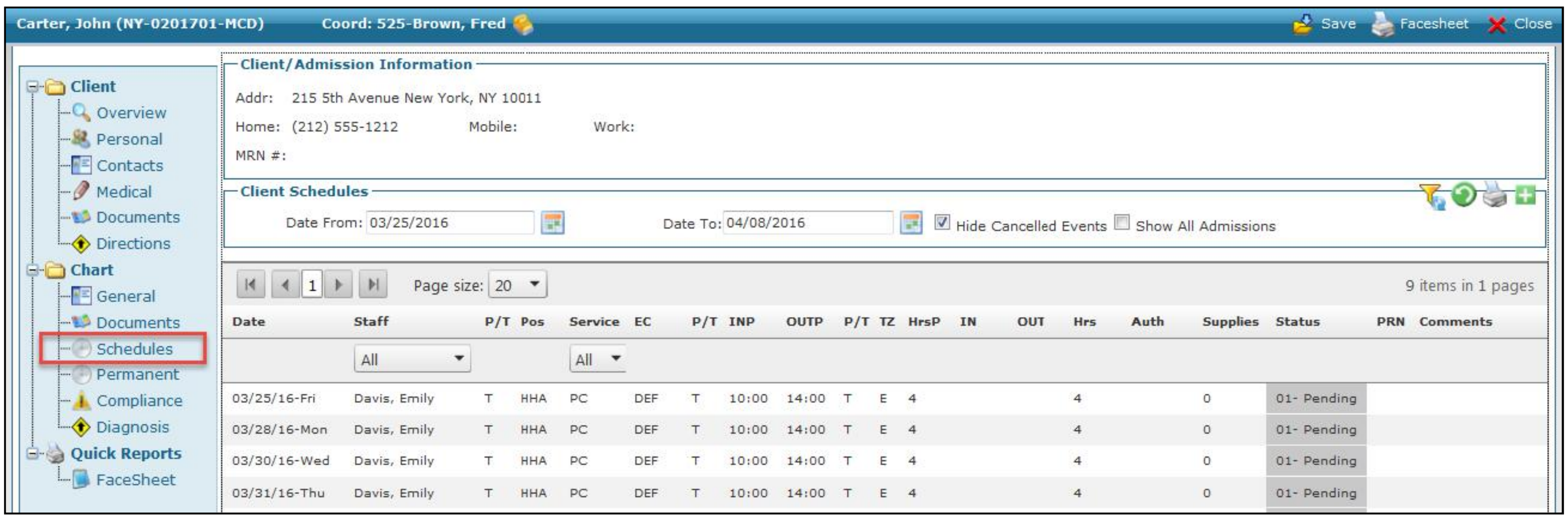


Chart Folder > Schedule Screen

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



PROVIDER SUPPORT PLAN

(CURRENTLY REFERRED TO IN SYSTEM

AS PLAN OF CARE ATTESTATION)

Attestation Process

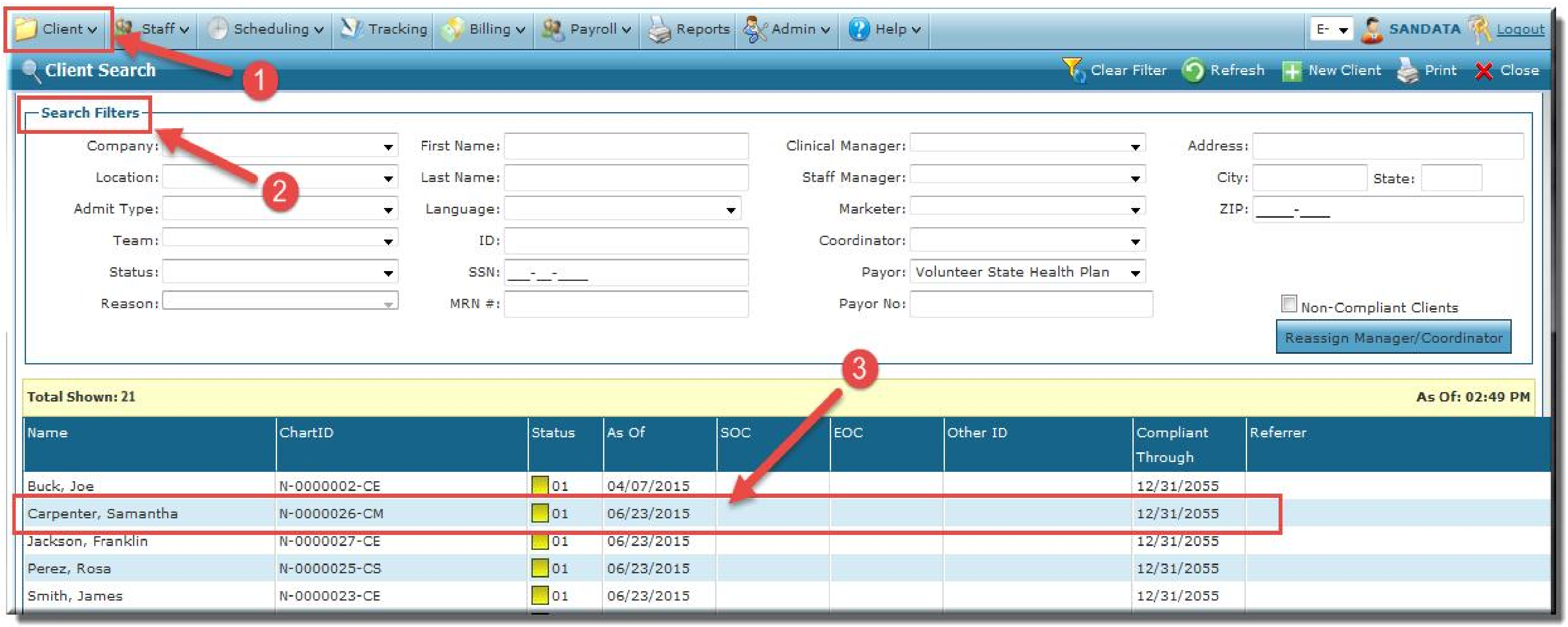
- BCT will send an indicator to Santrax Agency Management (SAM) on the authorization file that a member has a PSP which requires review and attestation by the provider
- SAM will prompt the provider agency when they navigate to a Client record that has one or more services with the indicator sent by 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

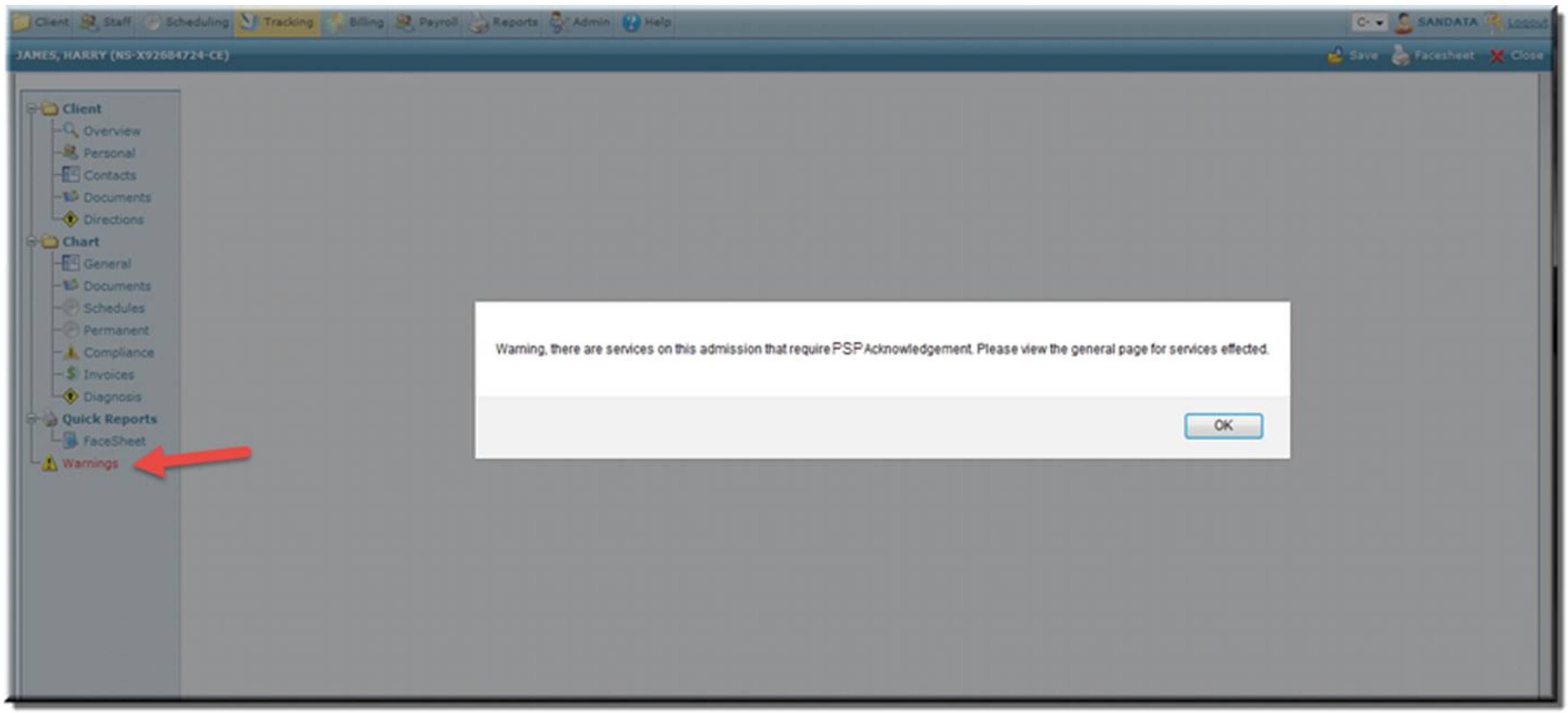


Attestation Process (Cont'd)

- 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

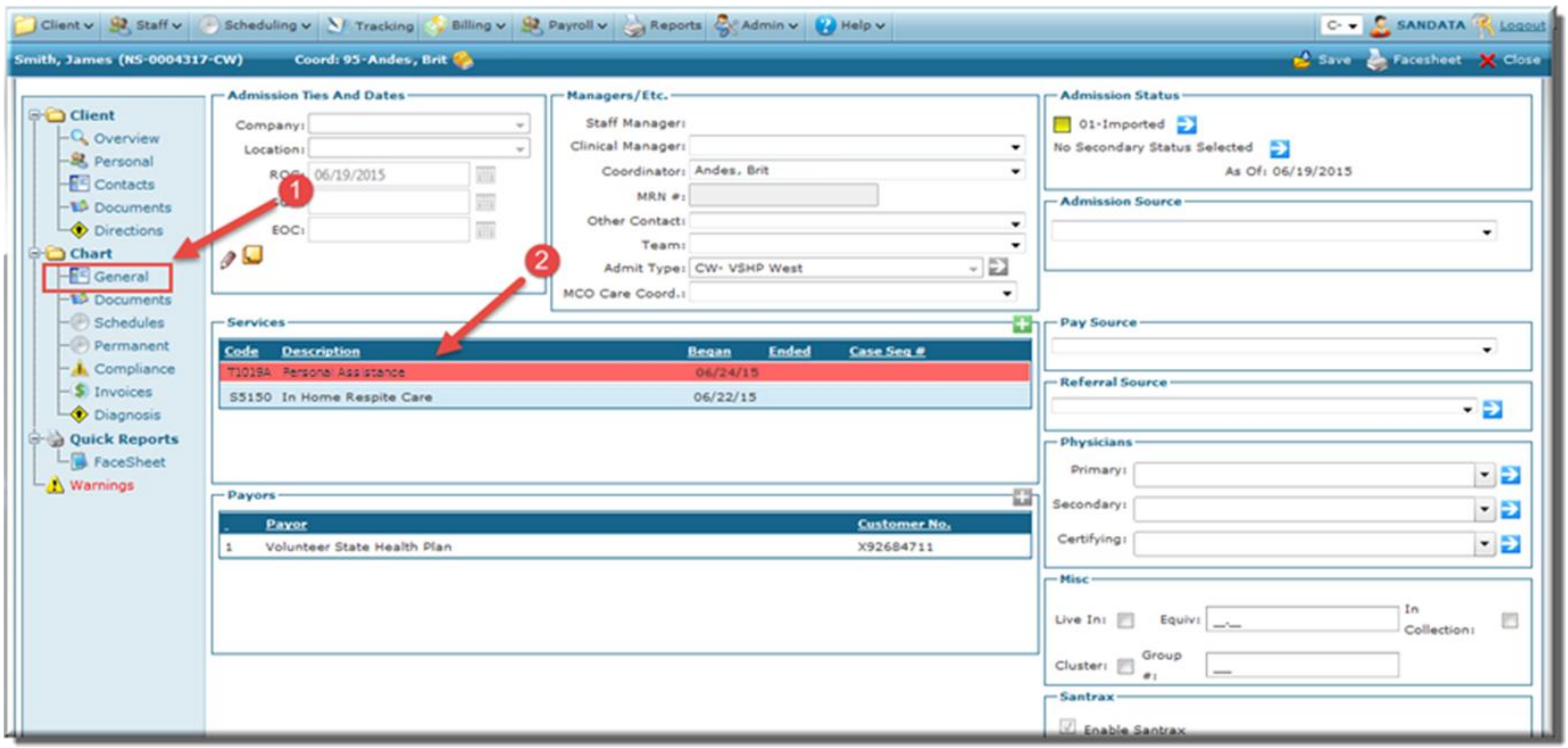
Attestation Process (Cont'd)

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



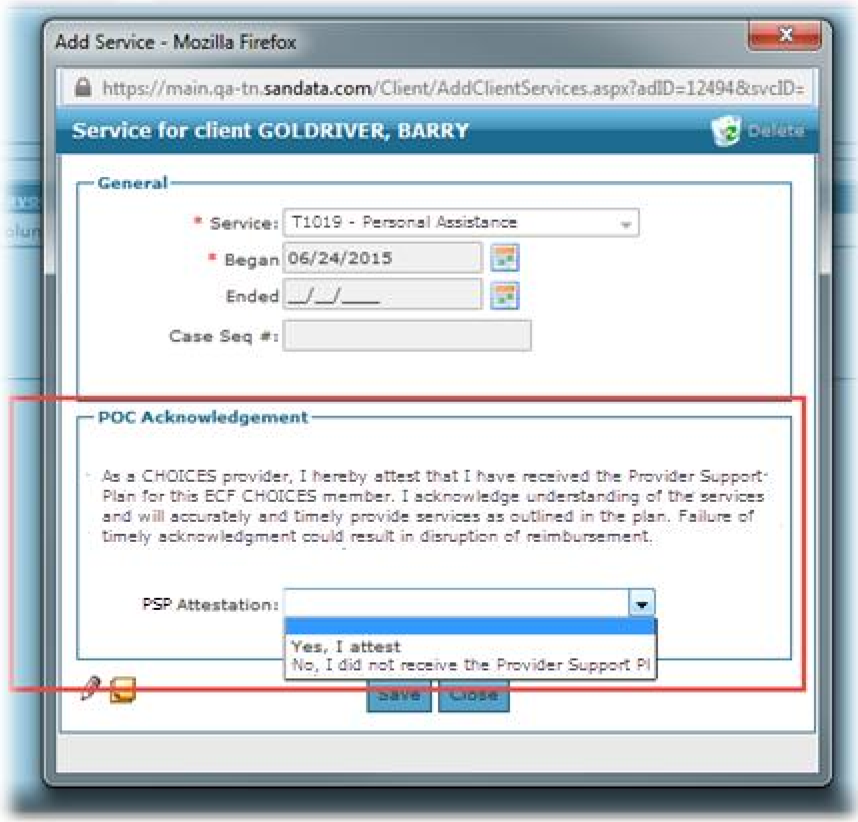
Attestation Process (Cont'd)

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



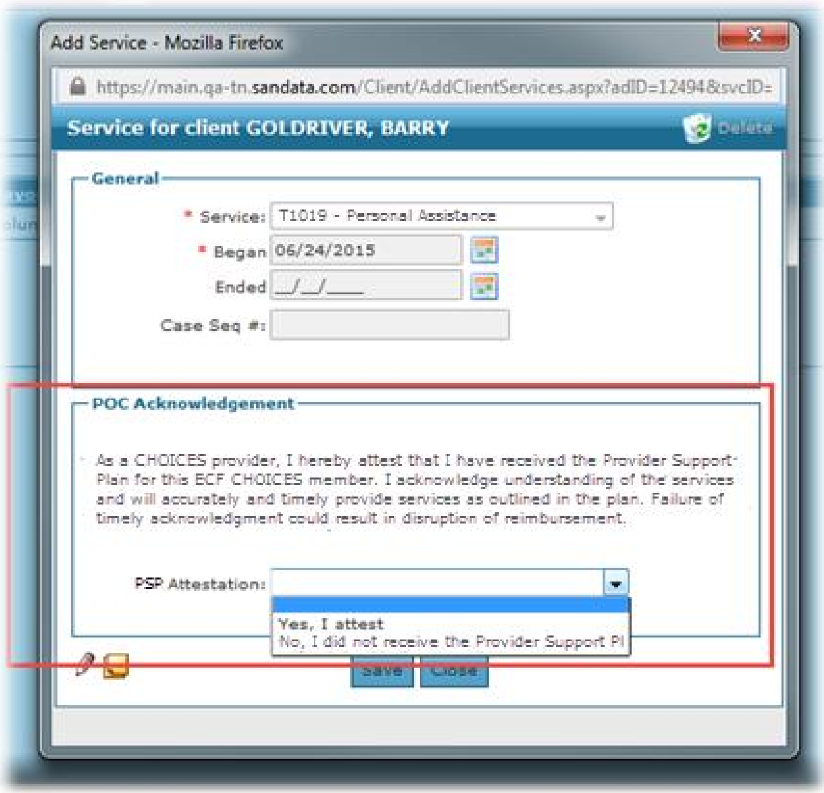
Attestation Acknowledgement Screen

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



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



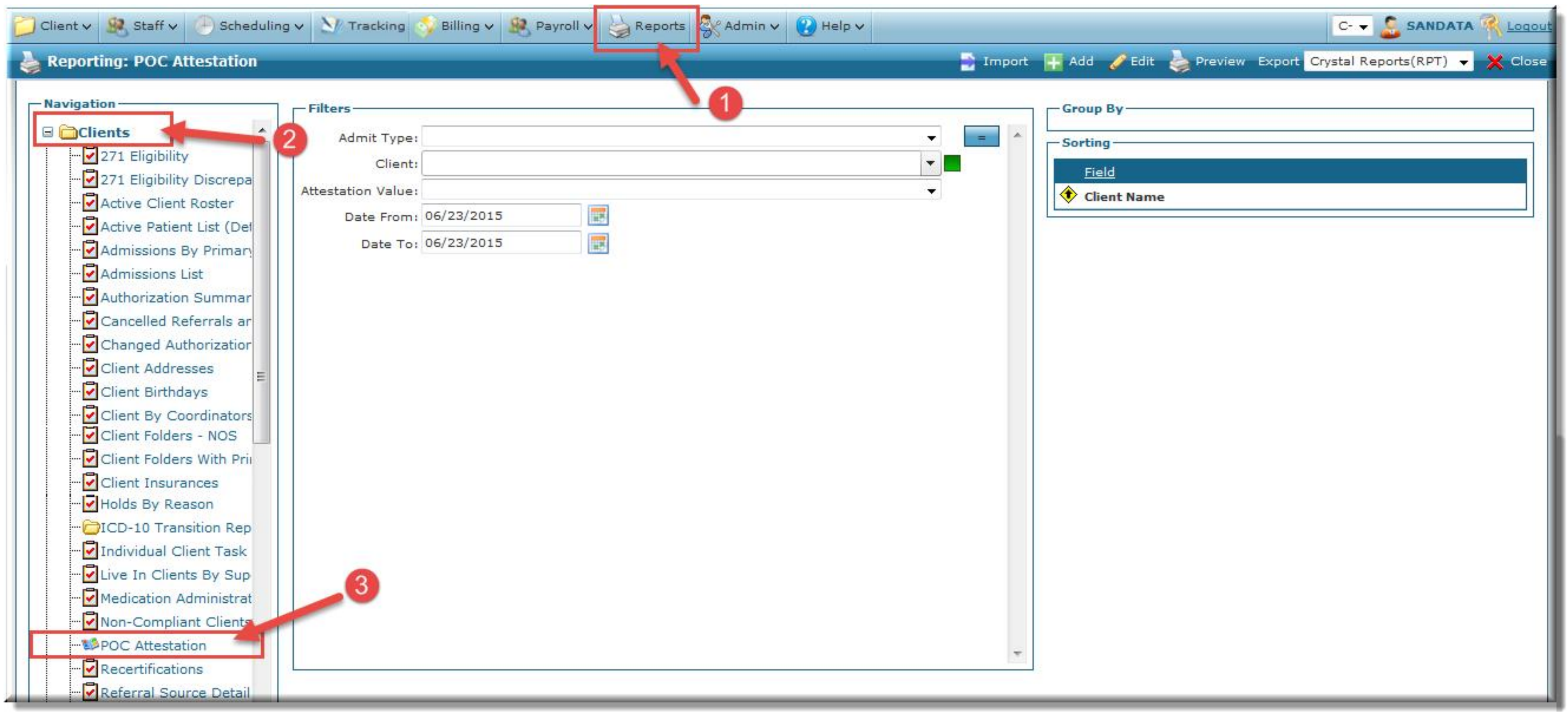
Provider Support Plan Reporting

- 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



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)

POC Attestation

From 06/24/2015 To 06/24/2015 11:59 PM

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	06/15/2015	09/29/2015	S5150	No	06/24/2015	Cooper, Sam
HATHAWAY, ANNA	X92684715	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	06/15/2015	01/27/2016	T1019	Yes	06/24/2015	Cooper, Sam

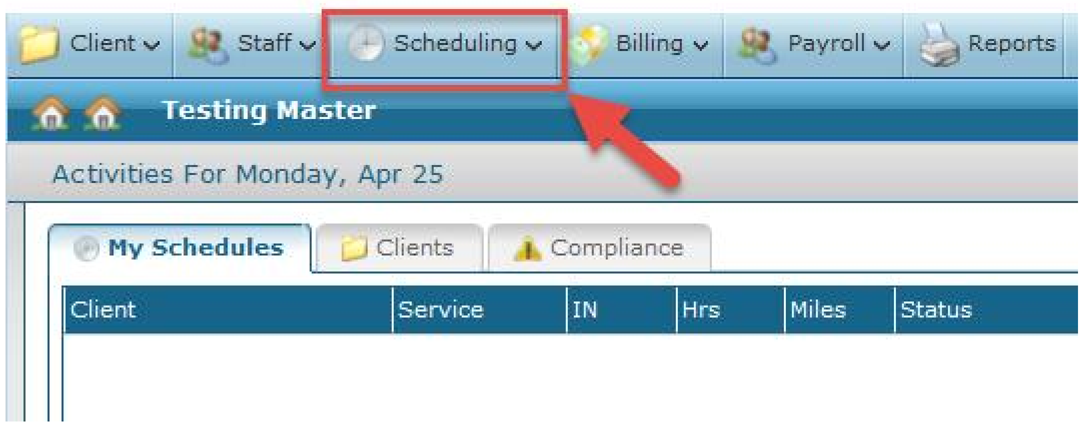
Total: 3

SCHEDULING MODULE

SCHEDULING OVERVIEW

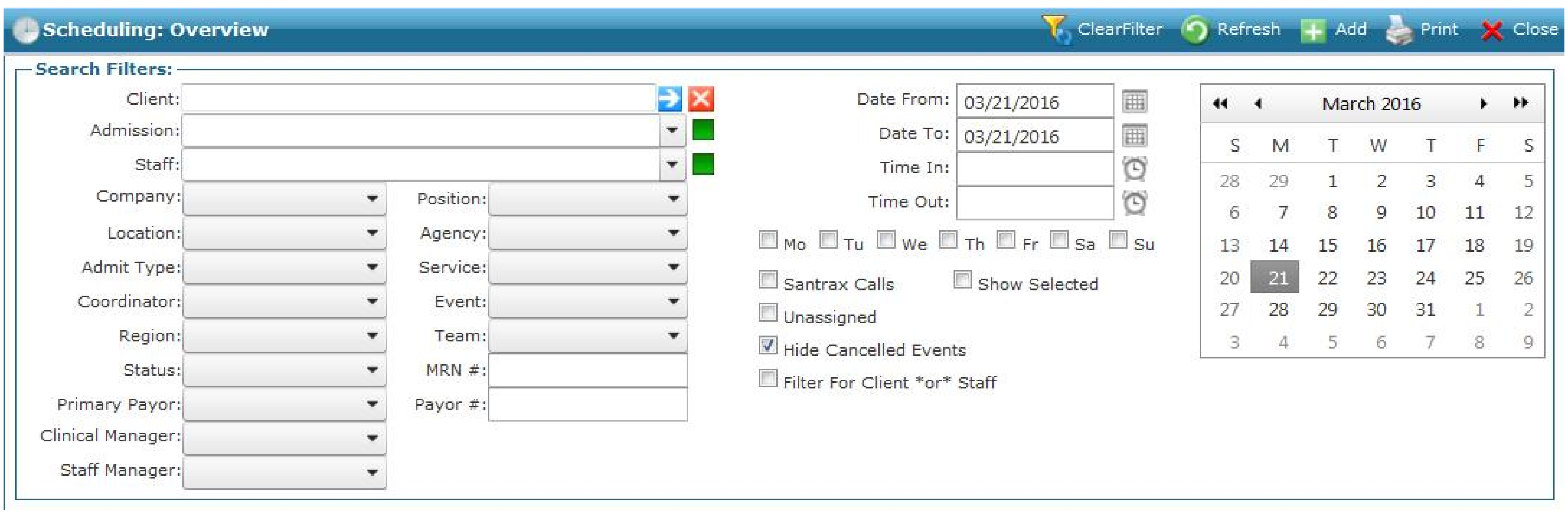
Scheduling Overview

- 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)



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 pag

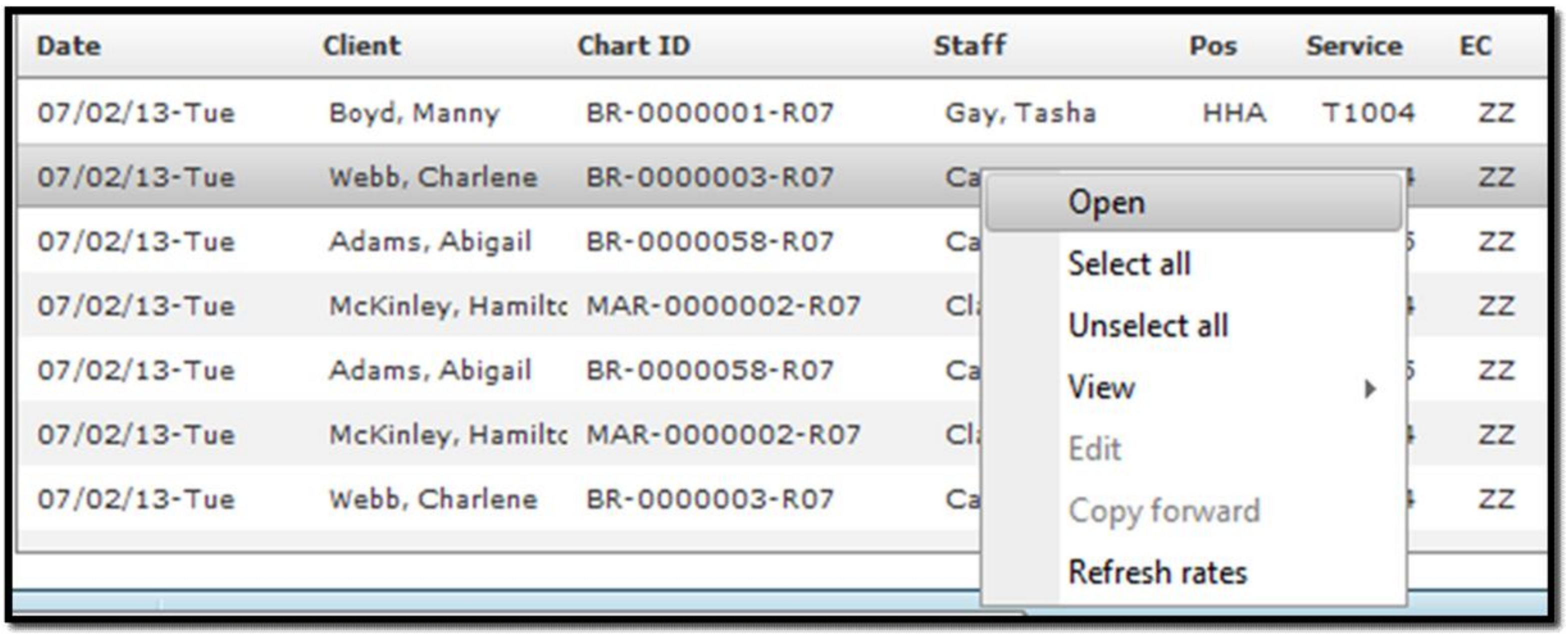
Date	Coordinator	Client	Chart ID	Staff	P/1	Pos	Service	EC	P/1	INP	OUTP	P/1	TZ	HrsP	IN	OUT	Hrs	Supplies	Status
03/01/16-Tue		Martin, Christ	HOU-0201603-TCB	Coleman, Bill	P	HHA	17HC	DEF	P	07:00	08:00	P	C	1			1	0	10- Cancelled
03/01/16-Tue		Castalano, M:	HOU-0201607-TCB	Campbell, An	P	HHA	17C	DEF	P	07:30	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

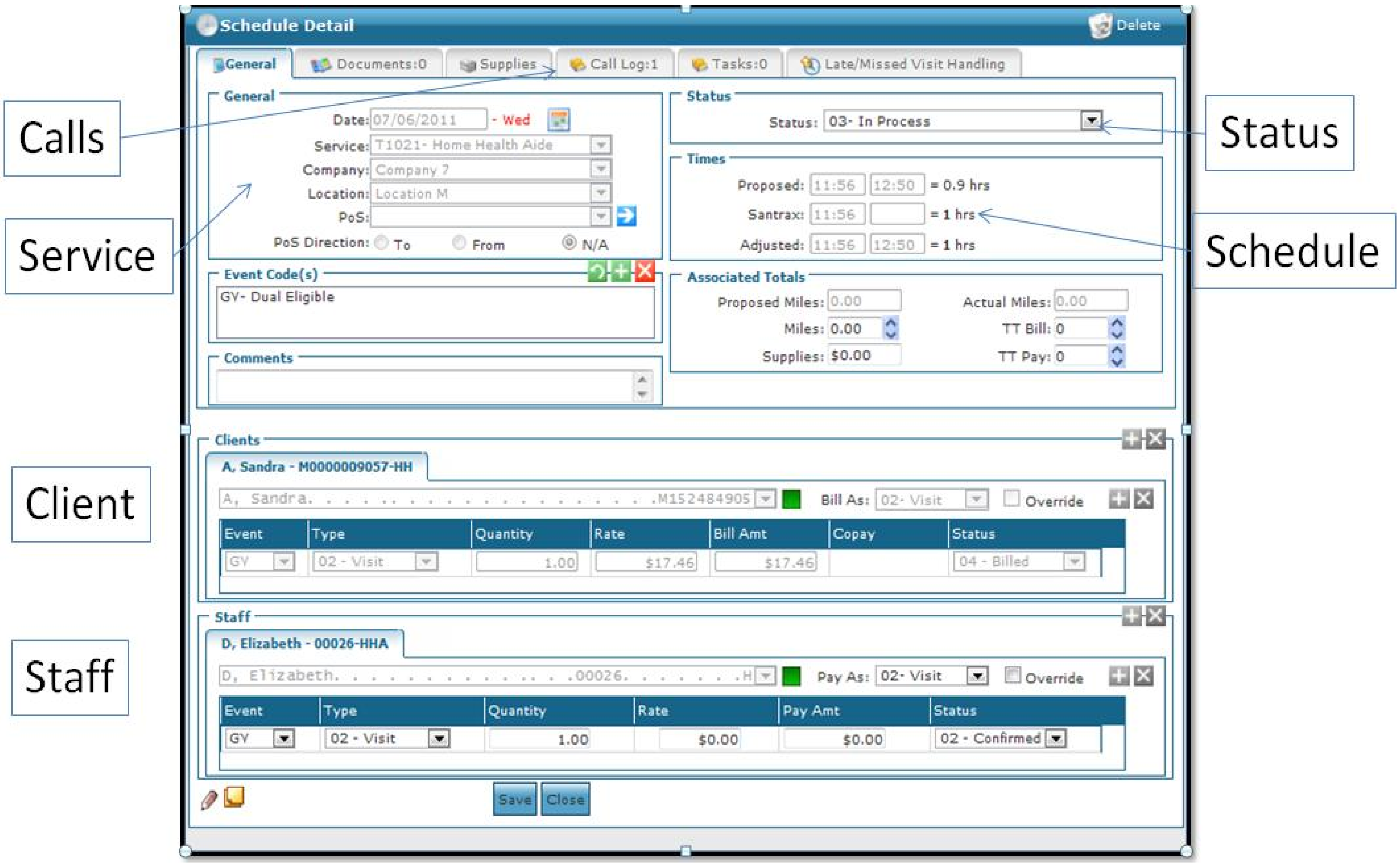
Opening the Schedule Detail

To open the Schedule Detail:

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



Viewing Schedule Detail



UNDERSTANDING AUTHORIZATIONS

Understanding MPS Authorizations

MPS = Member Preferred Schedules

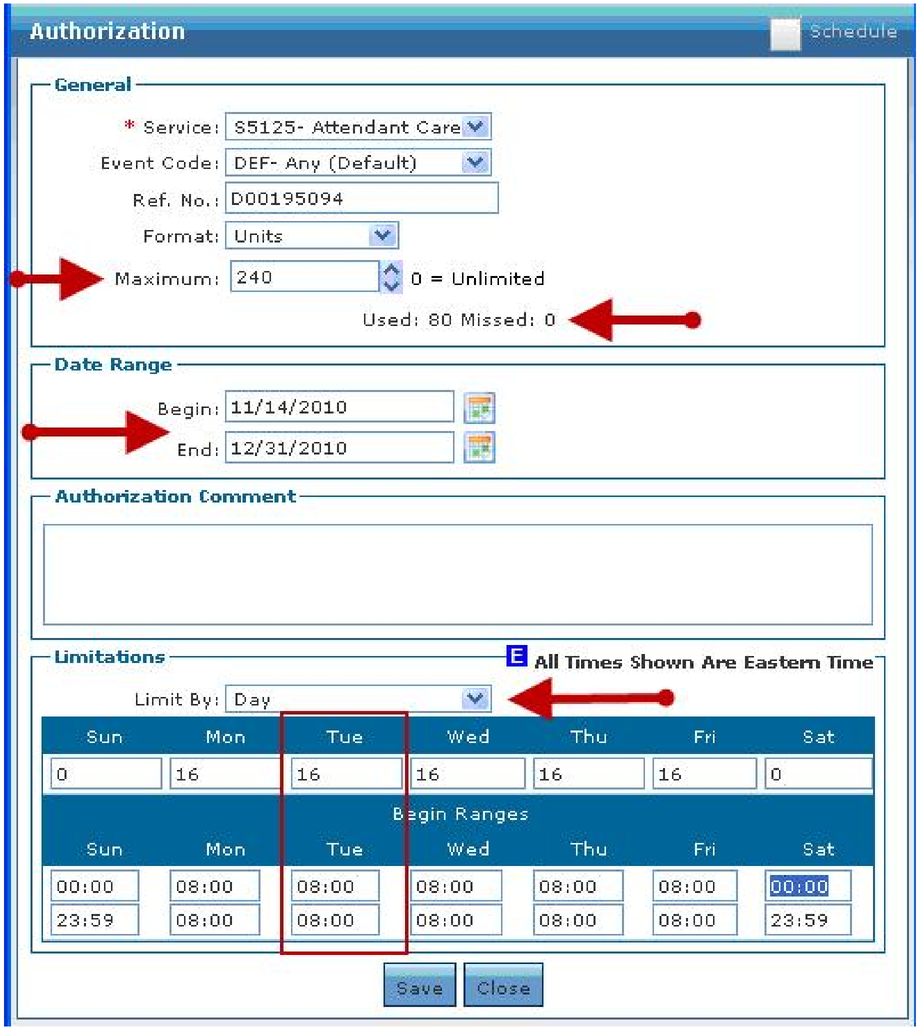
MPS authorizations generally fall into two categories:

- 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



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.

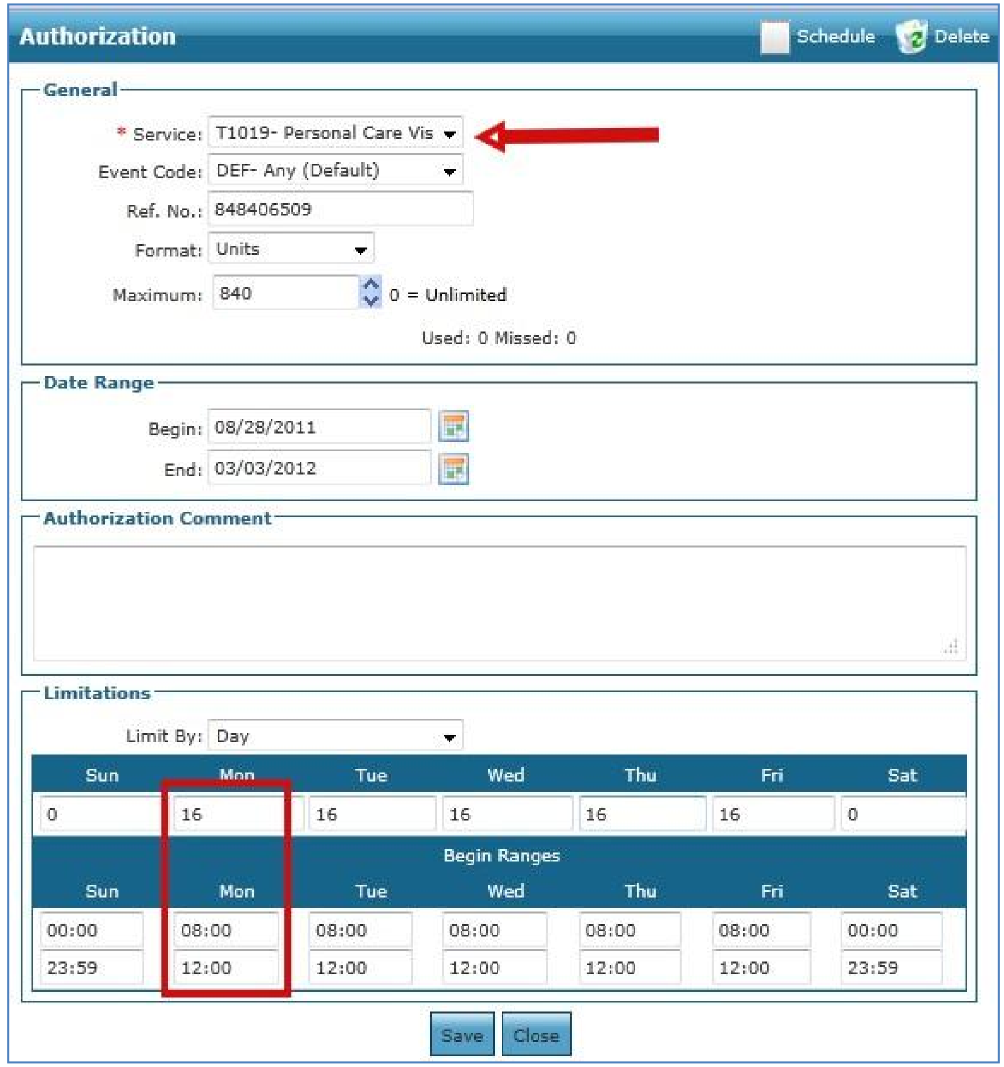
Service at any other time (or day) requires a change request be submitted to the MCO.

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.



Auto-Generated Schedules

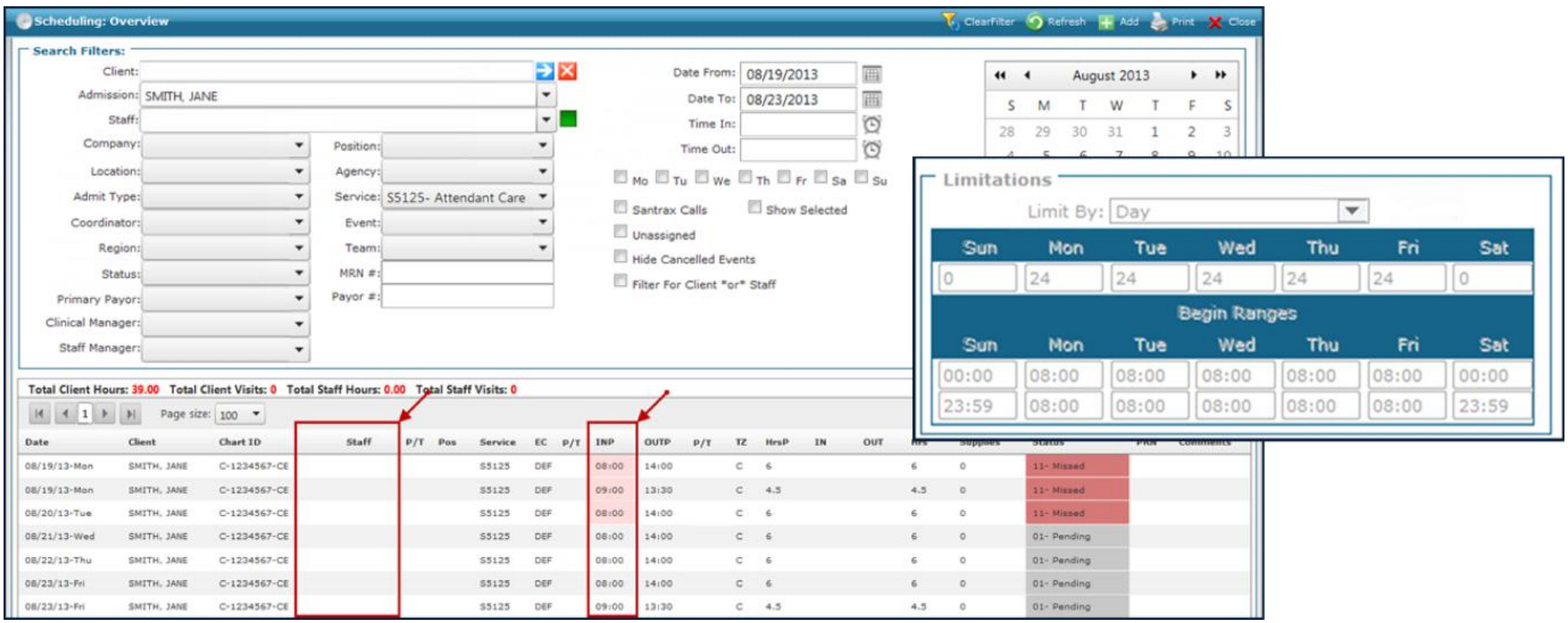
The application will auto-generate schedules for authorizations with a daily limitation and one of the following services:

- 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

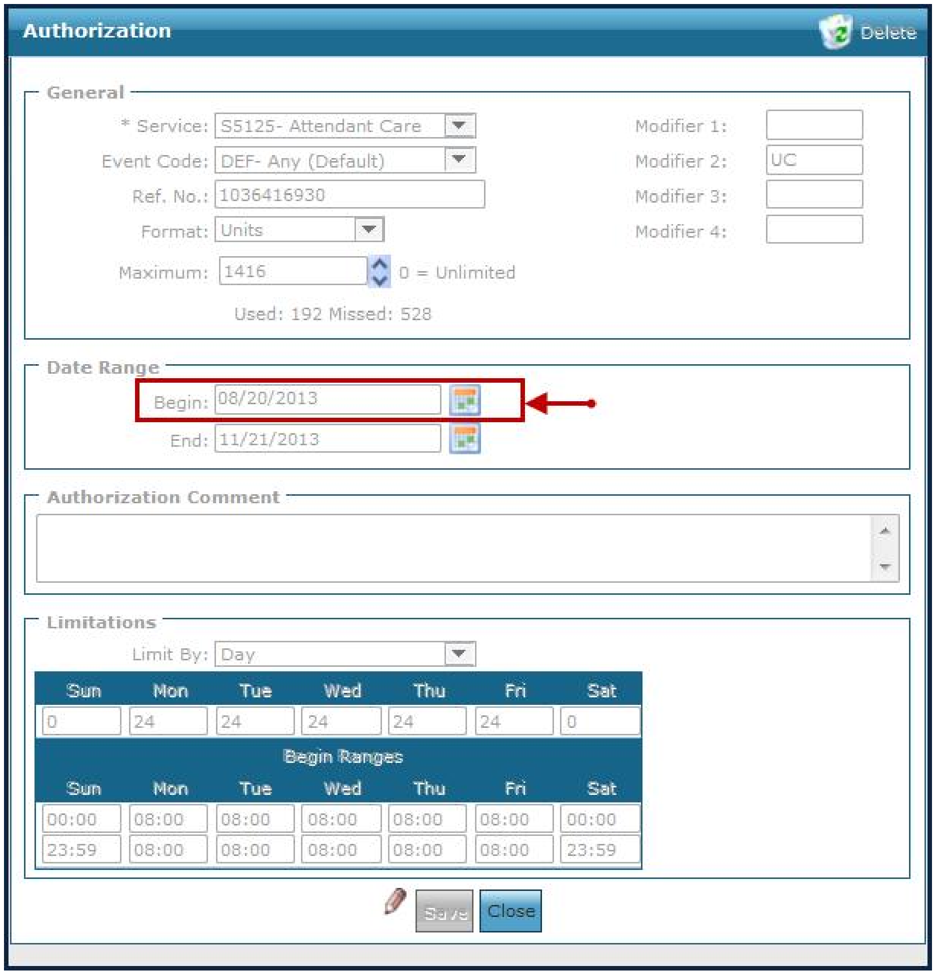
Auto-Generated Schedules: Current Authorizations

- 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.



Auto-Generated Schedules: Current Authorizations

Example: Schedule Generation



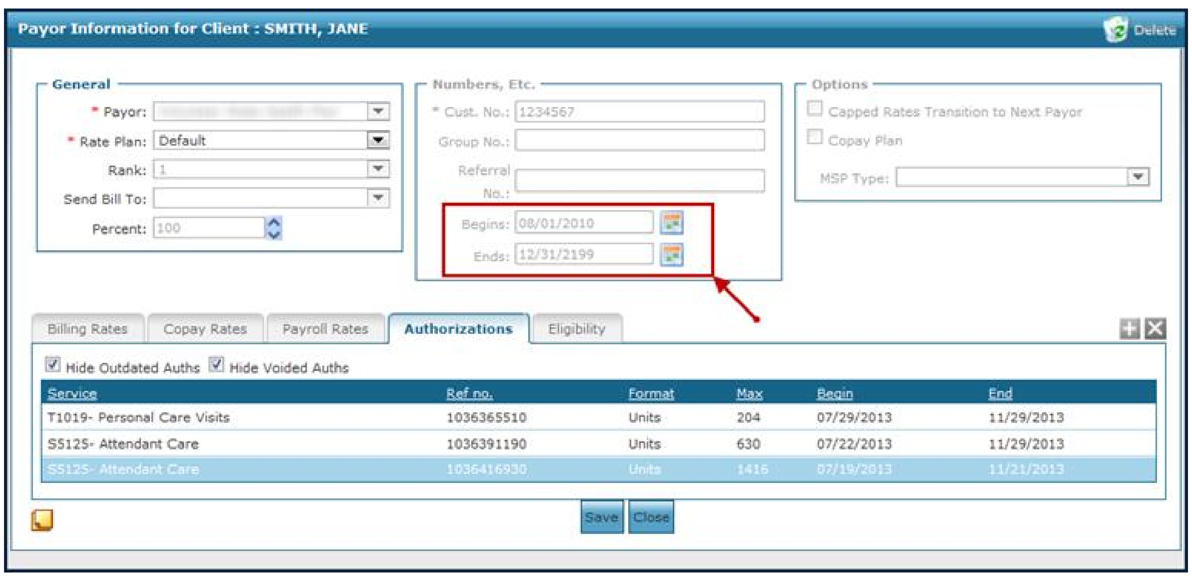
AUGUST 2013

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 Week 1	23	24
25	26	27	28 Week 2	29	30	31

Auto-Generated Schedules: Member Eligibility

If the authorization's **Date Range** is outside the eligibility period, the application <u>will only</u> 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.

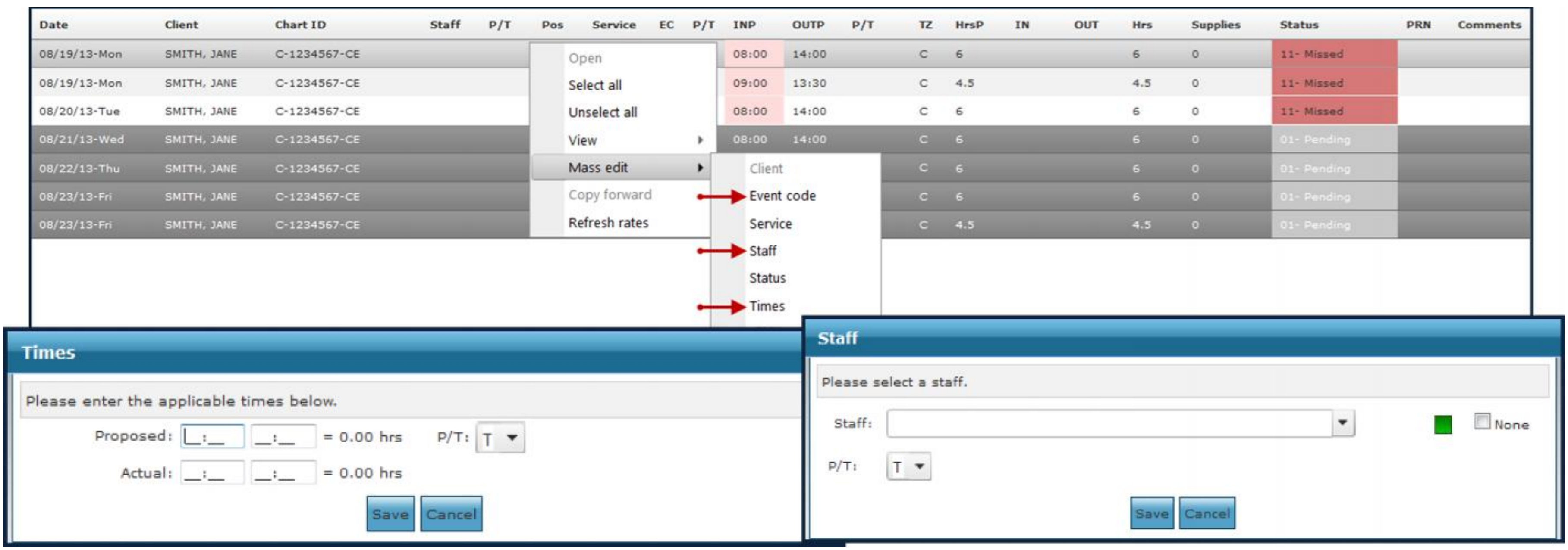


Auto-Generated Schedules: Mass Editing

A staff member must be added to each schedule.

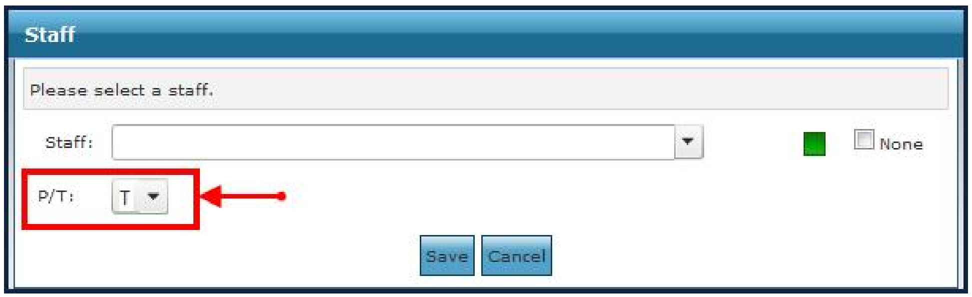
From the **Scheduling Overview** screen:

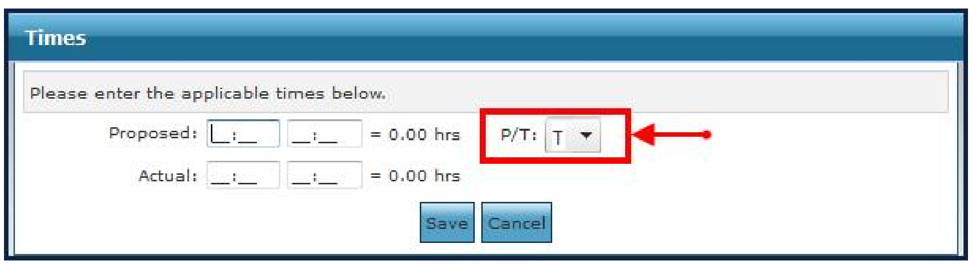
1. Search for and highlight the schedules to update
2. Right-click on a highlighted a schedule
3. Use the **Mass Edit** functionality to edit multiple schedules simultaneously. Times may also be adjusted, if allowed.

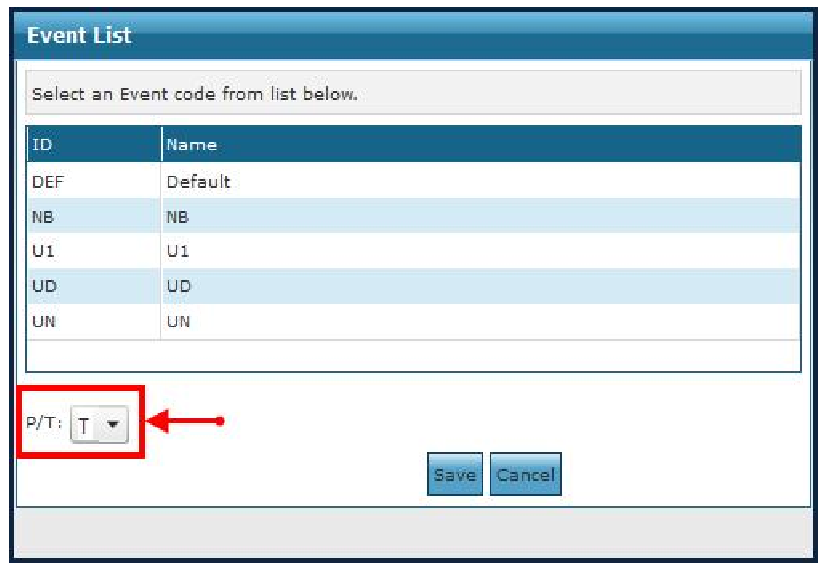


Permanent Schedules Functionality

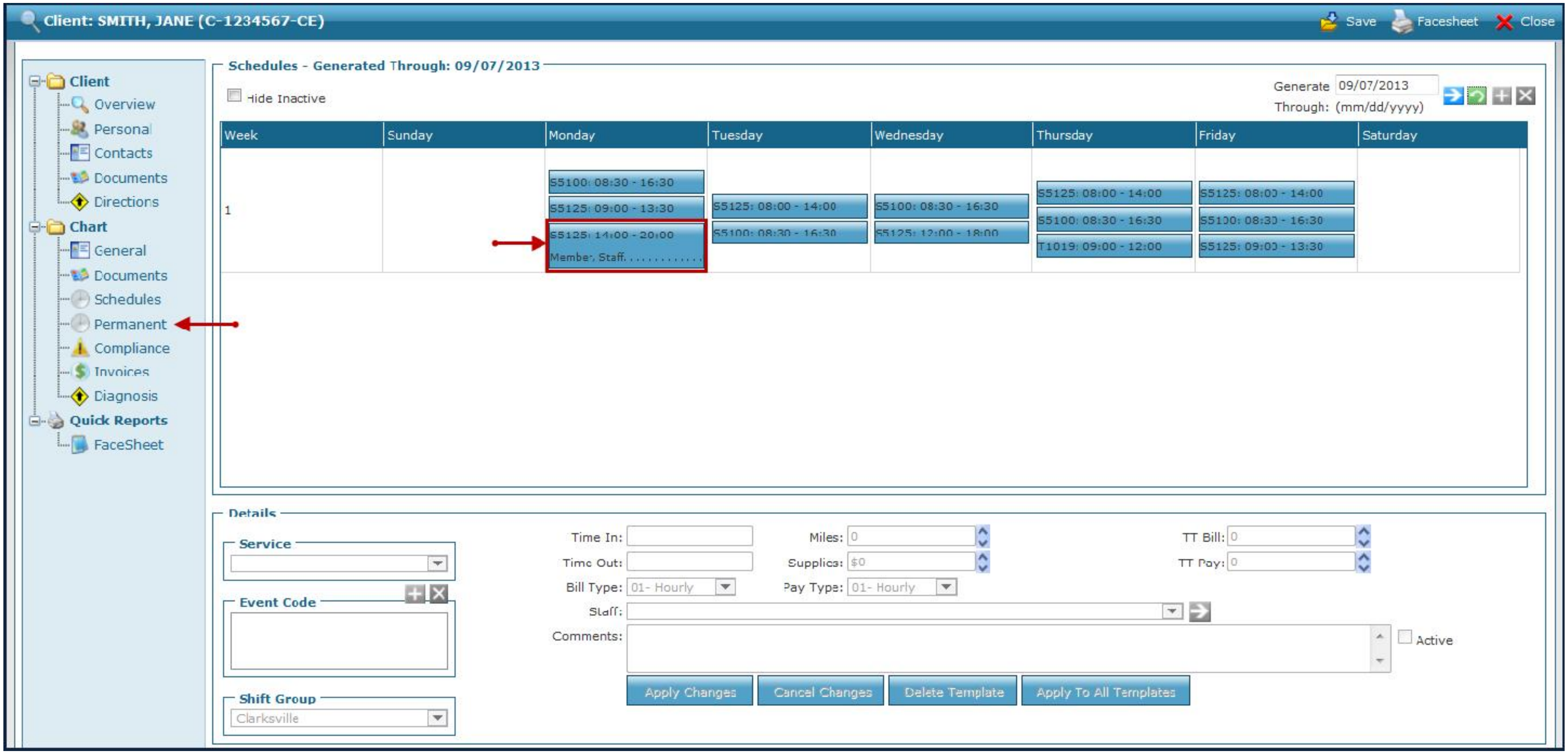
- Selecting **P** (Permanent) for an item applies the update to the permanent schedule template and as a result, all future auto-generated schedules for that authorization and day of the week.
- Selecting **T** (Temporary) only applies the update to the selected schedule(s).





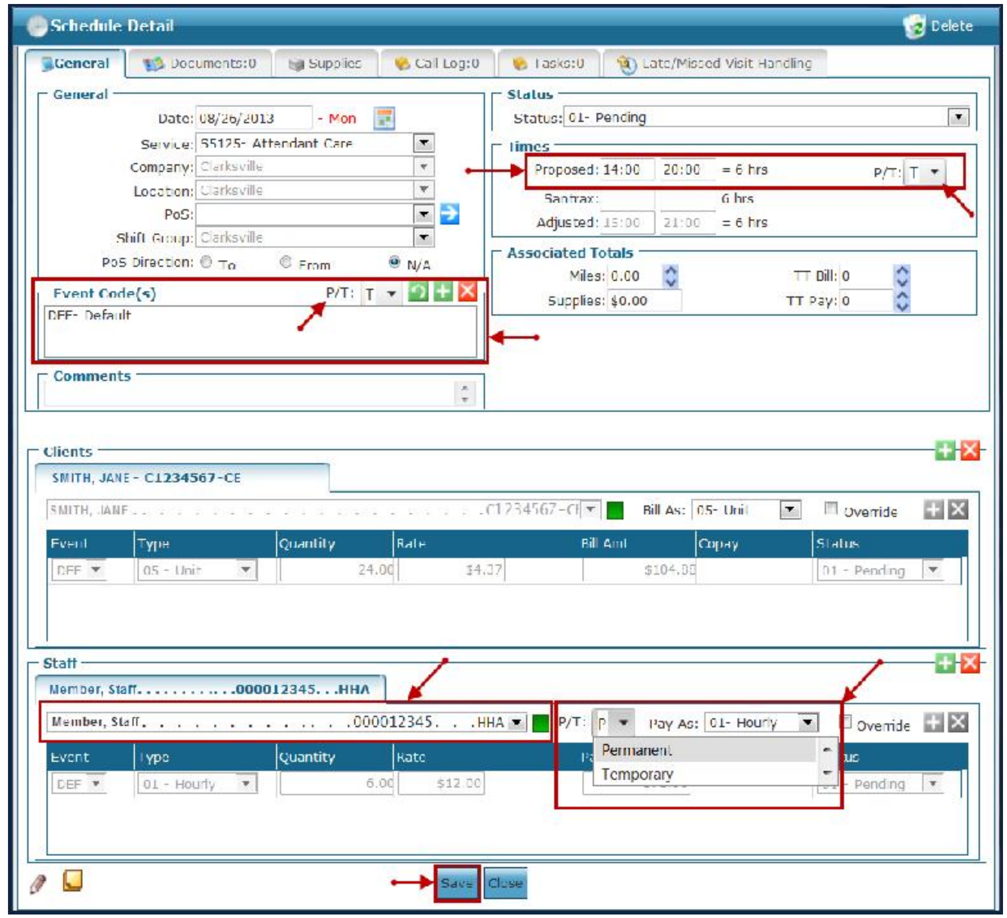


Permanent Schedules Screen



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**



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.

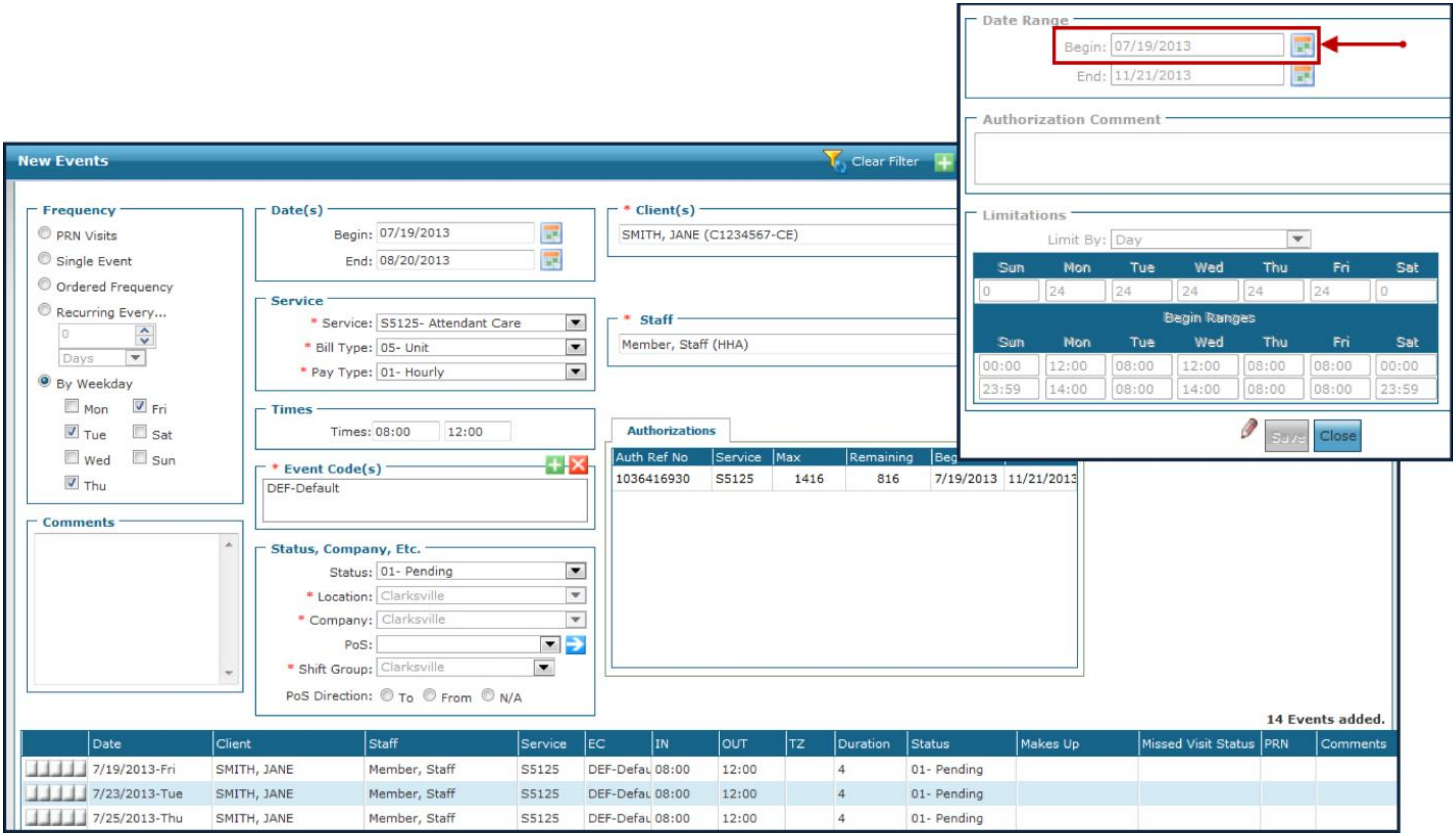
Eligibility/Authorization Changes (Cont'd)

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



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

1 Page size: 100 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				-	-	0		☐		No Show Exception		
	07/22/2013 - Mon	SMITH, JANE	S5100			08:30	16:30		8.00				-	-	0		☐		No Show Exception		
	07/22/2013 - Mon	SMITH, JANE	S5125			09:00	13:30		4.50				-	-	0		☐		No Show Exception		
	07/23/2013 - Tue	SMITH, JANE	S5125			08:00	14:00		6.00				-	-	0		☐		No Show Exception		
	07/23/2013 - Tue	SMITH, JANE	S5100			08:30	16:30		8.00				-	-	0		☐		No Show Exception		
	07/24/2013 - Wed	SMITH, JANE	S5125			08:00	14:00		6.00				-	-	0		☐		No Show Exception		
	07/24/2013 - Wed	SMITH, JANE	S5100			08:30	16:30		8.00				-	-	0		☐		No Show Exception		

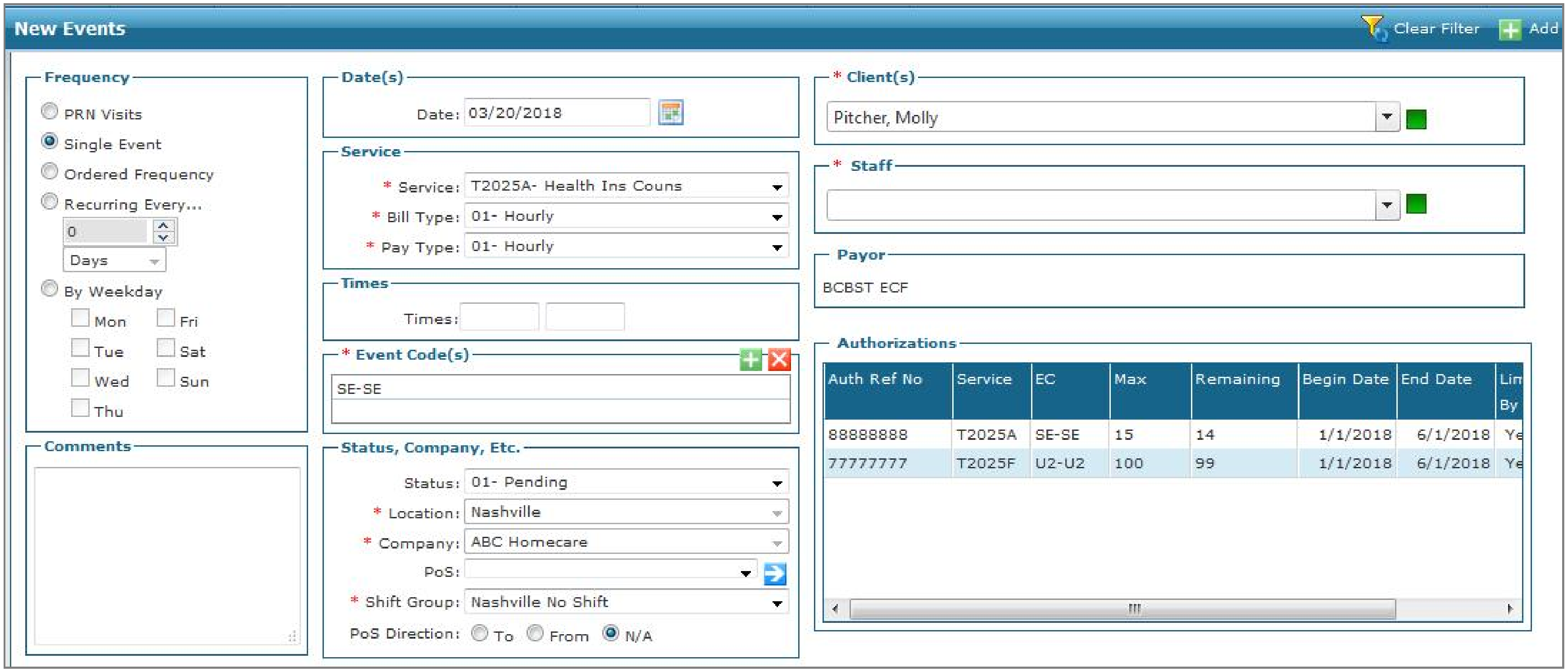
CREATING SCHEDULES FROM NEW EVENTS

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)



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.

New Events (Cont'd)

For services which <u>do not</u> 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

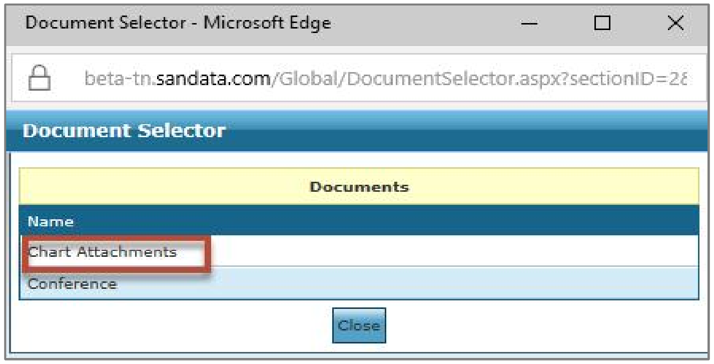
Uploading Documents

- 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.

Uploading Documents

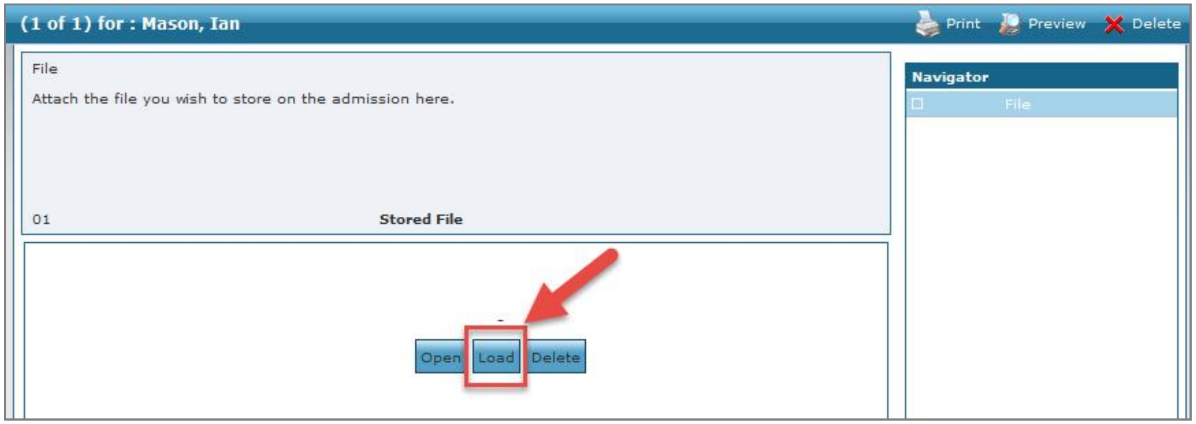
- Select the Green + symbol at the top right of the page.

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

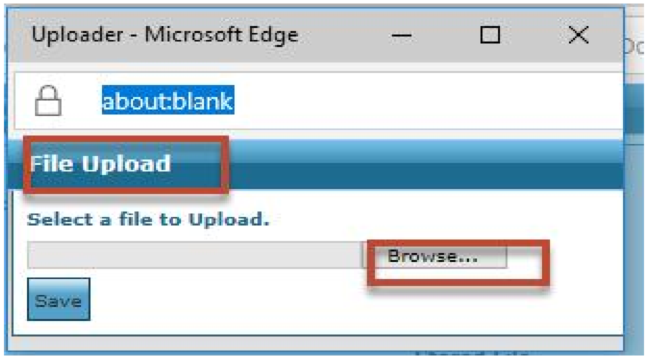


Uploading Documents

- Select Load from the next dialog window.

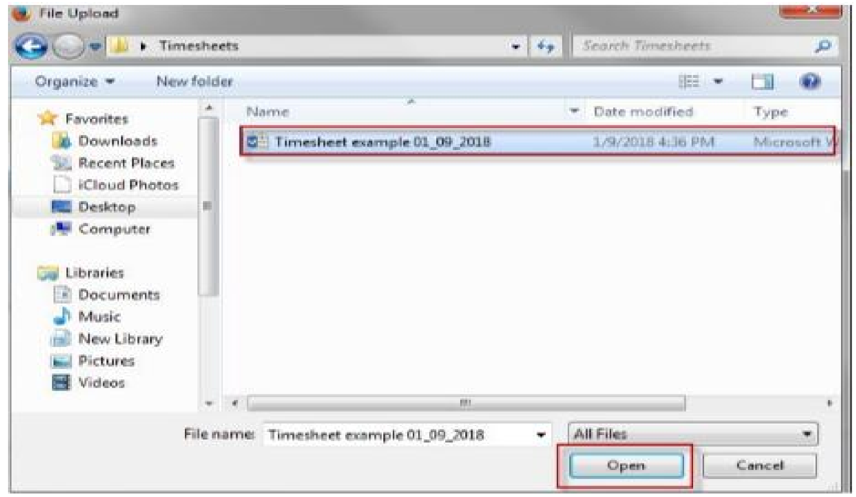


- From the File Upload select the Browse option in the dialog window.

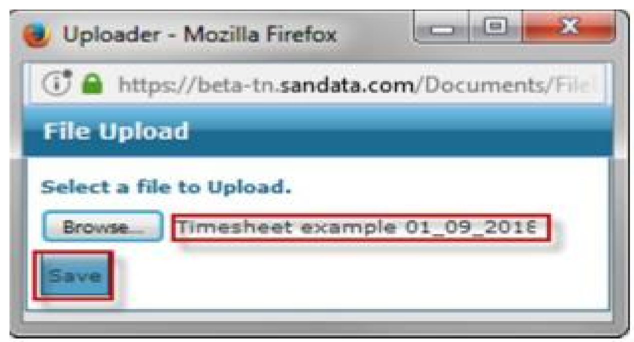


Uploading Documents

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

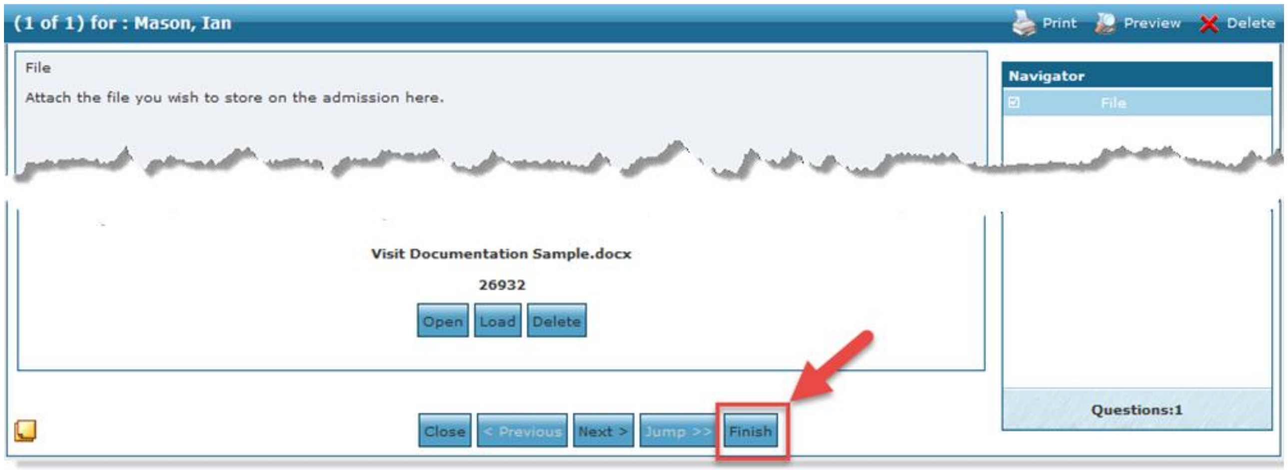


- Confirm you have the correct document and select save.



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!