Patient Intake
Step by step

Demographics

Actions to get there:	**Client > Client List > New Client**	
	Information Recorded:	
1	Enter First & last name, phone number and email	
2	Click "Add New Client"	
3	Navigate to General Tab on the left hand side of the menu	
4	Add insurance ID (only for insurance/medicaid based clients)	
6	Navigate to Address Tab on the left hand side of the menu	
7	Enter address details	
8	Navigate to Other Fields Tab	
9	Add birthday and Gender	
10	Click "Save Client"	After this step, you are brought to the client "Overview Page"
NOTE:	Claims require the following fields to be filled out under Demographics: **Birthday**, **Gender**, **Active Insurance ID** Care Documentation > Medical History > **Primary Diagnosis** Coordination> Contacts > **Referring Physician Name** & **NPI #**	

Client Risks

Actions to get there:	**Client Profile > Overview > Risk Assessment**	
	Information Recorded:	
1	Click "+ Row" located on the green bar	
2	Enter category and type risk (type risk is a free text field)	NOTE: 'Allergies' entered here will pull through to section 17 of the 485s, Safety Measures will pull to section 15 of the 485 if selecting the Infection Diagnosis
3	Select severeity (1-5) 1 - 4 = moderate 5 = severe	Moderate risks will appear BLUE & Severe will appear RED
4	Add multiple risks by clicking "+ Row"	
5	Click "Save " when finished	

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Client Contacts

Actions to get there:	Client Profile > Coordination > Contacts	
	Information Recorded:	
1	Click "Add New Contact"	
2	Enter First & Last name & phone number	
3	Enter relationship and contact type (optional) & any additional fields	Make sure to add Referring Physician & NPI
4	Click "Save"	
5	Toggle Emergency button to "ON" if this contact is an Emergency contact	

Add Service(s)

		Create a service for each individual authorization that a client recieves
Services funded by Medicaid/Insurance (Claims)		
1	Navigate to Client > Services > Create a Service	
2	Enter Service Name ex) Skilled Nursing	
3	Add a start & end date	
4	Select **Electronic Billing** for funder methodology for any services funded by Medicaid or Insurance companies.	
5	Select correct funder for this service (Medicaid, Cigna etc)	
6	Add Service Code (Insert Real Value for NURSING, PCA Hourly for PERSONAL CARE)	
7	Add in "Prior Authorization Number"	
8	Add in any "skills" you would like to be considered when scheduling this client for this service. Ex) Ventilator Experience	
9	Add any forms that wil need to be filled out each time a visit is scheduled with this service	*Ex) For nusing services, attach nursing flow sheet*
10	Click Save	

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Step by step

Adding CM Service

1	Enter Service Name "Clinical Management"	
2	Add a start & end date (optional)	
3	Select **Single Payor** for funder methodology	
4	Select "INT|Internal" for Funder	
5	Select billing frequency	*Does not matter what billing frequency you select, these are non-billable visits*
6	Add "CM Select Visit Type" Service Code	*At the time of scheduling you can swap the service code for Supervisory, Assessment etc*
7	Click Save	

Add Funding Block (Authorization hours)

Navigate to:	Client Profile > Services > Click into the Service > Scroll down to Funding	
1	Click into the Service (click on the blue service name on the far left of the Services List screen)	
2	Scroll down to Funding > Add New Funding Block	
3	Enter Start/End date of authorization	*Start/End date will match the Service Start/End date*
4	Enter quantity of authorized hours per frequency	
6	Click OK	
	Add next funding block if applicable	

Patient Intake
Step by step

Add Primary Diagnosis

Navigate to:	Client Profile > Care Documentation > Medical History	
1	Navigate to "Current Medical History"	*This is required for Claims based payors*
2	Click "+ Row" to add a diagnosis ex) F79	*Diagnosis codes are pre-programmed in the system*
3	Check off "primary" to indicate this is the primary diagnosis	
4	Scroll all the way to the bottom of the page and click "Save"	

Add Associated Employees

Navigate to:	Client Profile> Coordination> Associated Employee
1	Click Assign employee
2	Select Employees you would like to assign. This will add the client to these employees "Caseload"

Add Service(s)

Create a service for each individual authorization that a client recieves

Services funded by Private Pay (Invoice)

1	Navigate to Client > Services > Create a Service	
2	Enter Service Name ex) Skilled Nursing	
3	Add a start & end date	
4	Select **Single Payor** for funder methodology	
5	Select correct funder for this service Ex) Private Pay	
6	Select billing frequency and billing contact	*Billing contacts sync through from Client Profile> Coordination> Contacts*
7	Add Service Code	
8	Add in any "skills" you would like to be considered when scheduling this client for this service. Ex) Ventilator Experience	
9	Add any forms that wil need to be filled out each time a visit is scheduled with this service	*Ex) For nusing services, attach nursing flow sheet*
10	Click Save	

AUTH REVAMP: Add Authorization Hours

Actions to get there:		Client Profile > Authorizations	
1	Select Add authorization		
2	Fill in the Start and End date		
3	Enter the client's authorization number		
4	Enter the state type of the authorization	This is the status of the authorization and can be configured in Schedules>Schedule Settings	
5	Select authorization methodology	Best practice recommendation is Payor and Bill Code	
6	Fill in the Member number	This is the client insurance/medicaid id and will pull into claims	
7	Fill in the case manager details		
8	Select the rule type to match the rules in the client's authorization		
9	Enter daily, weekly, month and period limits		
10	Add any notes and click save		