Clinical Workflow Overview

1. Office/Intake staff

1. Intake referral. (You must enter Insurance and Physician at Intake.)
2. Schedule SOC/Eval appointment.
3. Assign staff to SOC/Eval appointment.

2. Clinician

1. Complete the SOC/Recert appointment using the Care at Home application. Complete as much documentation in the home as you want.
2. Sync the appointment back to the Web portal. Sync the OASIS D1 document **before signing** so that you can generate service orders and run the scrubber from the Web portal.
3. To complete the document, go to the Web portal and navigate to the client chart. Select the **Charting** tab or **My Incomplete Documents** dashboard to access the document. Complete the following steps:
    a. Complete page 1, including setting the **SOC Date**
    Tip: The system uses the entered SOC Date when creating a cert period and generating service orders.
    b. Complete the **Medications** page
    c. Complete the **Skilled Services** and **Care Plan** (DO NOT FORGET the Verbal Order!!)
    d. **Generate Service Orders** to push the medications, service frequency orders, and care plan to the chart for immediate use
    e. Complete the rest of the document and run the OASIS scrubber (select Run OASIS at the bottom of the document), and make any necessary changes
    f. **Sign** the document. Your signature pushes the document into QA review.

3. OfficeStaff/FieldStaff

1. Schedule ordered visits on the Patient Schedule.
2. Scan signed paper documents, and then upload them to the patient's Document Storage tab.
3. Select **Release of Information** (navigate to client chart and select **Case Details** to access Release of Information option).
4. Change status of intake from **Intake** to **Complete**.

4. Clinical Admin/QA

1. Use **Pending QA Review** dashboard to access documents. The QA staff reviews document, runs the scrubber, and makes notes or edits to documents as needed.
2. **If changes are required**, mark document **QA Complete-Updates Required**. This step sends the document back to the clinician to review or make changes. Click **Update Assessment** to enable editing directly in the assessment.

   If changes are not required, mark the document as **QA Complete-No Changes Required.** This action locks down the OASIS document, information from the document pushes to the Plan of Care/485, and the system automatically generates the OASIS file.

   Note: Documents can go through QA multiple times. The QA team indicates a document is ready to be locked down by clicking **QA Complete-No Changes Required.**

5. Clinician

1. Use the **My QA Requests Changes Documents** dashboard tile to access documents that have been through QA review and require changes. Make QA requested changes (or review changes made by QA staff) and **Sign** the document. After signature, the system sends the document back to QA for review.

   When the QA team locks down the OASIS document, information from the document pushes to the Plan of Care/485, and the system automatically generates the OASIS file.
2. Use the **My Draft Orders** dashboard tile to review the Plan of Care order, mark it as verbal if applicable, and **Sign**. This step pushes to the **Ready to Send** dashboard for Clinical Admin to QA review.

6. Clinical Admin

1. Use the **Ready to Send** dashboard tile to review or edit Orders or the Plan of Care.
2. If changes to orderables are needed, use the **Reject-Reorder** workflow and enter comments to clinicians on changes required.

   Note: The **Reject/Reorder** workflow pushes the order back to the clinician's **My Incomplete Orders** dashboard for changes, review, and a signature. The order can go through this process unlimited times before sending it to the Physician for signature.
3. When review is complete and no changes are required, select **Send to Provider** to push the order to Forcura.
4. Review appointments (dashboards: **Unreviewed Appointments**, **Held Appointments**, **Unassigned Appointments**).
5. Review the OASIS file for export, mark as **Reviewed and Transmittable** (reports: OASIS Information to Excel).
6. Run **OASIS Export**.
7. Upload file from Home Health Care to iQIES.
8. Monitor **Claims Conso**le to ensure completion of clinical requirements.

7. Biller

1. Go to **Agency > Billing** to manage claims.