

Field Clinician Quick Guide

Begin Appointment

1. **Log in to the Care at Home application** to view appointments.
2. View Care at Home Scheduling application if needed.
3. **Choose a patient appointment** to complete. Review chart as needed prior to appointment.

Complete Appointment

To start OASIS/Eval appointment

1. **Start the appointment** when you have verified the patient is at home and accepting your visit.
2. Mileage is auto tracked after second visit
3. Do as much documentation in the home as possible.
 - When you are ready to leave the patient home at the top left of the screen, tap close and save draft.
4. **End the appointment** and obtain the patient's signature when leaving the home.

Resume and Complete Documentation

1. You may resume documentation at your earliest convenience by going back to patient chart and tap on the document name you want to resume
2. **Complete documentation:**
 - **Skilled Services**
 - a. Enter your new service frequency orders - **IMPORTANT:** Check verbal order to schedule subsequent appointments.
 - **Care planning**
 - a) Add/Document goals and interventions on each section as needed for your patient
 - **Fill in required fields**
3. **Run Oasis Scrubber** - Make edits as necessary
4. **Top Left, tap close then choose {Save and Close} or {Sign} if complete**
5. **At Appointment screen you may Add additional time tracking if necessary up until Midnight of the same day.**

To start routine appointment

1. **Start the appointment** when you have verified the patient is at home and accepting your visit.
2. Mileage is auto tracked after second visit
3. Do as much documentation in the home as possible.
 - When you are ready to leave the patient home at the top left of the screen, tap close and save draft.
4. **End the appointment** and obtain the patient's signature when leaving the home.

Resume and Complete Documentation

1. You may resume documentation at your earliest convenience by going back to patient chart and tap on the document name you want to resume
2. **Complete documentation:**
 - **Skilled Services**
 - b. Enter any new service frequency orders - **IMPORTANT:** Check verbal order to schedule subsequent appointments.
 - **Care planning**
 - b) Document against the goals and interventions on each section as needed for your patient
 - **Fill in required fields**
3. **Top Left, tap close then chose {Save and Close} or {Sign} if complete**
4. **At Appointment screen you may Add additional time tracking if necessary up until Midnight of the same day.**

Manage TO DO tab in CAH-C

Charting in Progress

- Lists documentation that you have not yet signed.
- **Important:** Always complete documentation in chronological order and as soon as possible per agency policy and procedure.

Unsigned Orders

- Lists all unsigned orders (Plan of Care and Service Frequency orders) and manually created orders. **After signature, Orders move to the QA review {Ready to Send Status}**
- Your orders must be reviewed by you, marked as verbal (if applicable), AND signed by you.
 - Note: agency cannot send out your orders until you do these steps.

a) Orders managed and signed in CAH-C

- **Service Frequency Orders** - If you check the Verbal Order option, these orders will auto- generate authorizations so that you can schedule billable appointments.

- **Note:** If you do not have a verbal order the system will not allow you to schedule billable appointments until the verbal or a signed order is available
- **Generic Supplemental/Medication Orders** – Auto-generated when you enter orders outside of a Plan of Care order. Follow agency procedures for sending medication orders to physicians.

b) Orders managed and signed in Web Version

- **Plan of Care/485** - These are automatically generated at intake and autofill with information from Oasis assessments once QA is complete. You must review and sign these from web version via the My Draft Orders dashboard.

QA Review Complete

- Lists QA-reviewed documents that require your attention.
- **Tap on Document you want to review QA requests**
- **Tap {Show QA} to see changes requested**
- **Tap on each QA item,**
 - **makes edits if applicable,**
 - **reply back to QA if needed,**
 - **mark accept or reject for each change requested**
- **Run Scrubber again if needed**
- **Tap Close and {save and close} to come back later to finish or {Sign} if completed with changes**

Web Version: Self-Scheduling new appointments

2. Log in to the web portal and navigate to the Patient Schedule.
3. Schedule appointments as needed.