PointClickCare Home Care

Session Guide:
Scheduling and Authorizations

After this session, office staff in charge of scheduling will be able to:

- Create authorizations
- Schedule either a single or series of appointments.
- Assign an employee to either a single or series of appointments.
- Manage appointment changes.
- Review Appointments.

When to Schedule Appointments

You are a Scheduler. How do you fit into the agency's work flow?

You understand that authorizations are necessary in order to schedule appointments. Creating an accurate authorization prevents you from inadvertently scheduling services that the client has not agreed to.

You create the authorization according to the client's request, and then schedule appointments according to the authorization.

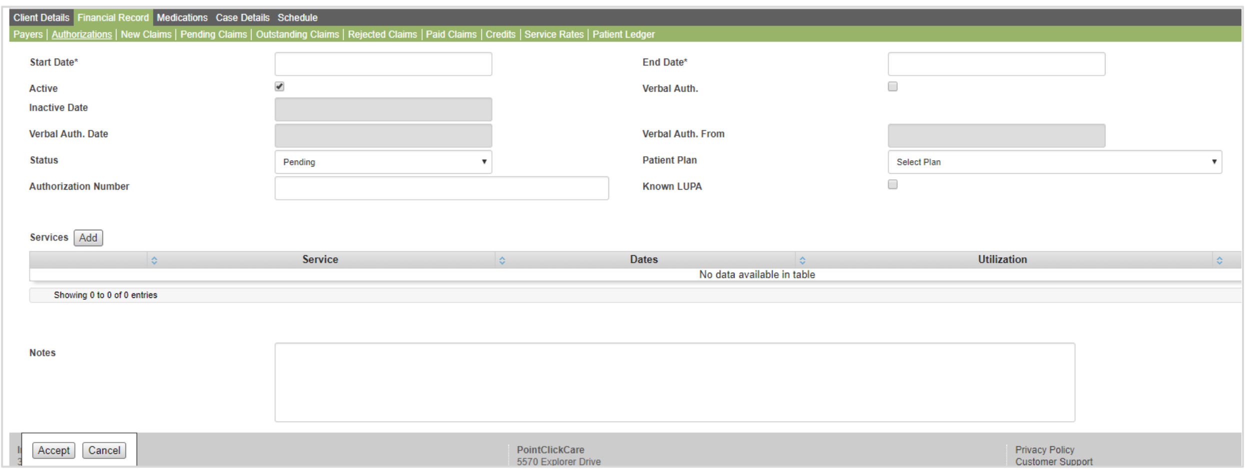
You understand that for proper billing appointments must be in a Reviewed status. You monitor the Held EVV Appointments and Patient Unreviewed dashboard tiles to identify appointments with issues. After you clear any issues with the appointment, you change the status to Reviewed.

Creating a Self-Pay Authorization

Home Care treats authorizations as a type of service agreement. For self-pay clients, authorizations ensure you do not schedule services that the client has not agreed to. Authorizations also drive appointments and billing. If you do not have authorizations set up, you cannot set up appointments or bill.

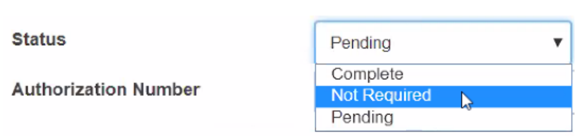
Procedure

1. From the Client Record, select Financial Record>Authorizations and click Add. The Create Authorization and Services screen appears.



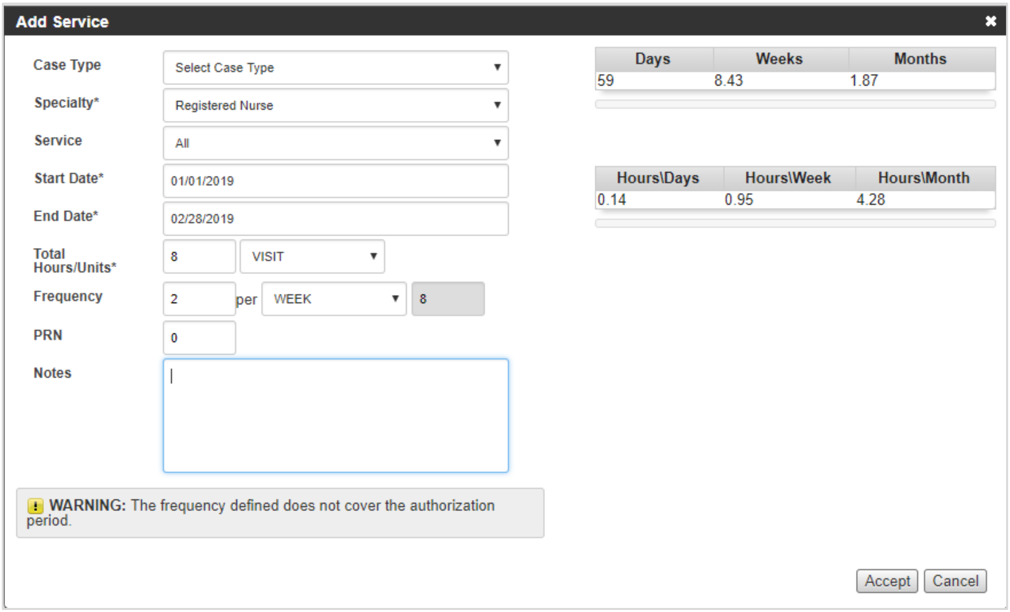
2. Set your **Start** and **End** dates.

3. Set **Status** to **Not Required**. No authorization Number is needed.



4. From the Patient Plan list, select **Self-Pay**.

5. Click **Add** next to Services and complete the **Add Services** fields.



Tips:

- It may be useful to enter **Frequency** BEFORE entering the **Total Hours/Units**. As you enter frequency numbers, the system tallies the total based on the time span. Enter this tallied amount into the Total Hours/Units field.

- **Important: You must choose hourly or visit depending on your agency's bill rate structure.** For example, if services are billed based on time select Hourly.

- Services should be entered as seen on the service agreement.

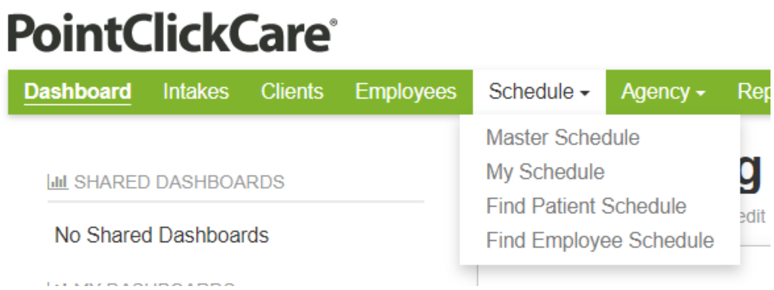
- Selecting a service will limit the schedule to only the service type. In the Service field, consider selecting All. This indicates all service or visit types may be scheduled.

6. Click **Accept** to create an authorization.

7. To complete the authorization, click **Accept** on the bottom left corner of the screen.

Overview of Scheduling Tools

Click the Schedule tab to access schedules.



Home Care Scheduling Tools

Master Schedule	Shows all appointments on the agency's schedule.
My Schedule	Shows all appointments for the person logged into the system.
Patient Schedule	Shows all appointments for a selected patient.
Employee Schedule	Shows all appointments for a selected employee.
Care at Home Scheduling	An add-in for the Care at Home mobile application that lets providers move appointments on their schedule. Your agency may not use this option.
Auto-Appointment Generation	An option that places compliant appointments on a client's schedule when services are generated. Schedulers need only assign a care provider and an exact time.

Tip: Care at Home Scheduling and Auto-Appointment Generation may not be available at your agency. Check with your supervisor.

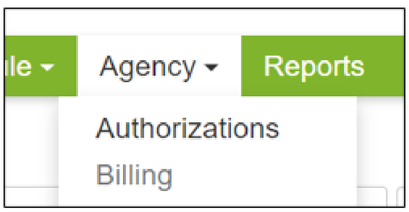
Appointment Statuses and Color Coding

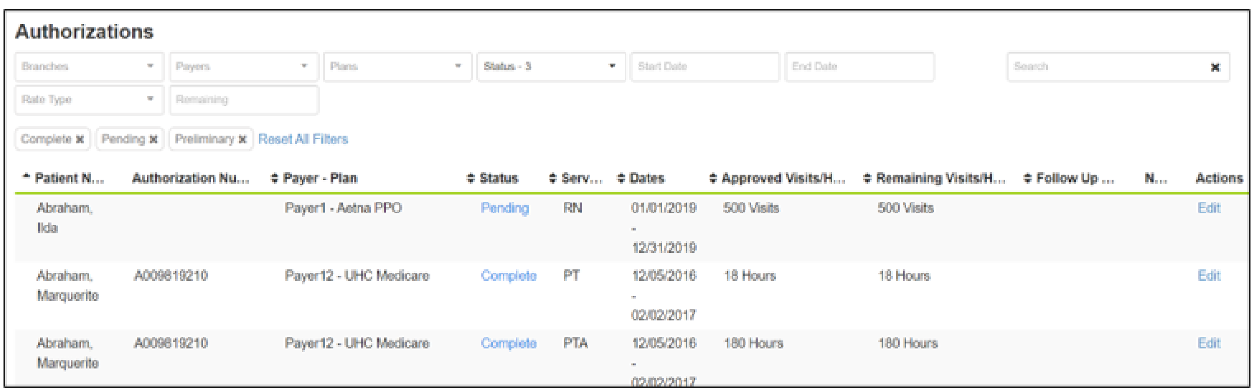
Colored tiles indicate the status of appointments on schedules.

Open (default status)	Appointment scheduled, but not yet completed.
Missed – Reschedule	Appointment missed and must be rescheduled.
Cancelled	Appointment canceled and not rescheduled

Reviewed	Appointment completed as scheduled and is now billable.
Held	Appointment completed but held. Held reasons might include: • Incorrect authorization. • Not completed at the correct location or time. • Entered time card note.
Scheduled, no employee assigned	Scheduled but no employee assigned.

Authorization Work Queue





Associated Dashboards

Preliminary Authorizations	Check Weekly
Pending Authorizations	Check Weekly
Ending Authorizations	Check Weekly
Unassigned Appointments	Check Daily
Patient Unreviewed Appointments	Check Daily

Associated Reports

Open Appointments Calendar	Shows appointments that have not been staffed in calendar form
Appointments Detail	Shows individual appts for a given date range. Run for pre-payroll processing.
Patient Unreviewed Appointments	Shows appointments in Open or Held status for dates prior to the current day.
Nonbillable Appointments	Shows appointments using a non-billable service type.

Scheduling

Procedure

1. From the **Schedule** menu select **Find Patient Schedule**.
2. Enter your search criteria in the **Select Patient** dialog, select the patient from the list of matches, and click **Accept**.
3. To add an appointment for the current date, click **Add Appointment**. To add an appointment on another date, double-click the calendar date cell to open the **Add Appointment** dialog box.
4. In the **Add Appointment** dialog, enter the following:
5. From a client's record, click **Schedule**.
6. To add an appointment for the current date, click **Add Appointment**. To add an appointment on another date, double-click the calendar date cell to open the **Add Appointment** dialog box.
7. In the **Add Appointment** dialog, enter the following:

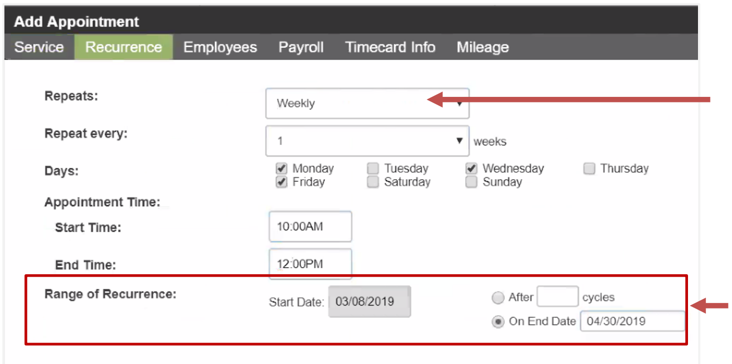
   Service tab:

   - Select Case Record from list.
   - Adjust Start, End Date and Time as necessary. (Start and End Dates refer to the start and end of a single appointment. Use the Recurrence tab to create a series of appointments.
   - Select Discipline from list.
   - Select the Service type.
   - Select the Authorization.
   - The Payroll Type defaults to the visit type set up.

Tip: Discipline and Service type selections determine the rate used for billing.

Recurrence tab:

Use the Recurrence tab to enter frequency for a series of recurring visits.



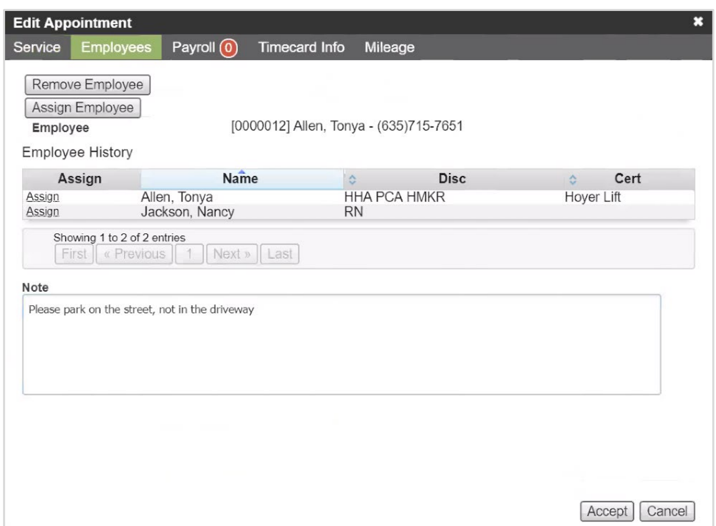
Select how often frequency repeats and enter appointments in subsequent fields.

End the Range of Recurrence by either entering the total number of cycles or an end date.

Employee tab:

To assign an employee:

1. Click **Employee** tab**.** You can select an employee from the **Employee History** or click **Assign Employee** to search for an employee.

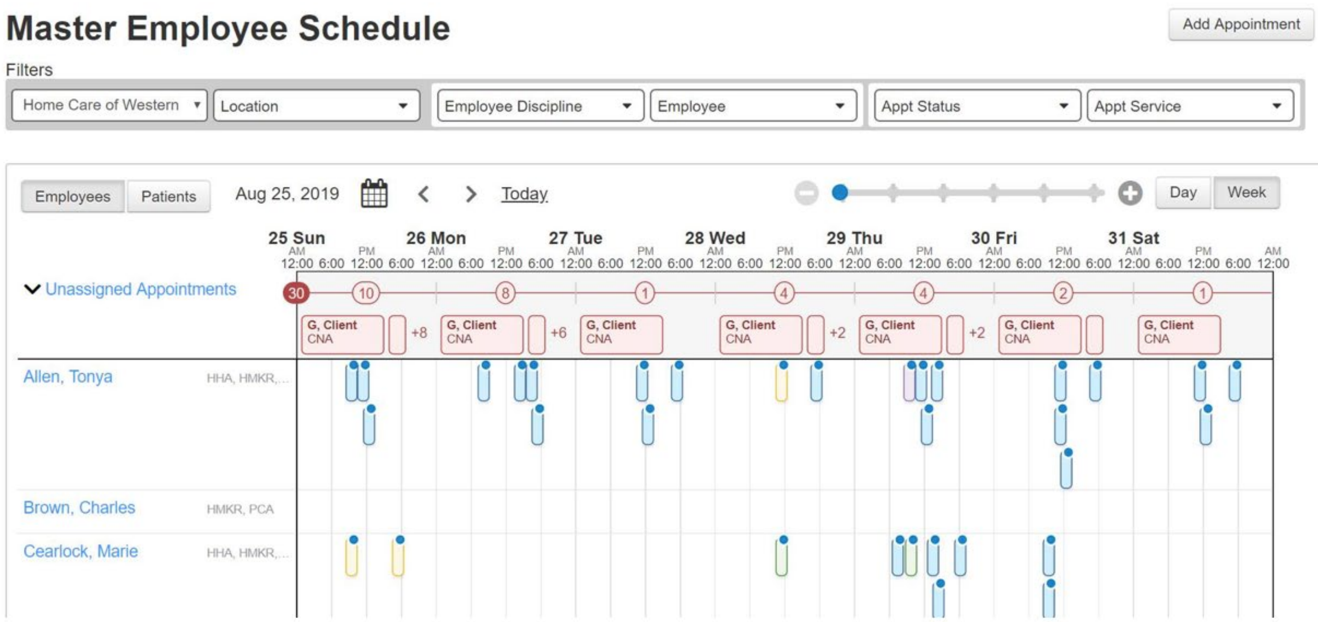


2. Use the Note field to communicate details relevant to the appointment (such as patient special requests). These notes display on the Care at Home application.

3. Click **Accept** to complete the appointment.

Managing Appointments Using Master Schedule

The Master Schedule allows you to view and manage all appointments on your agency's schedule. You can filter the schedule in many ways, change the time frame, drag appointments to another time or employee, and add an appointment.

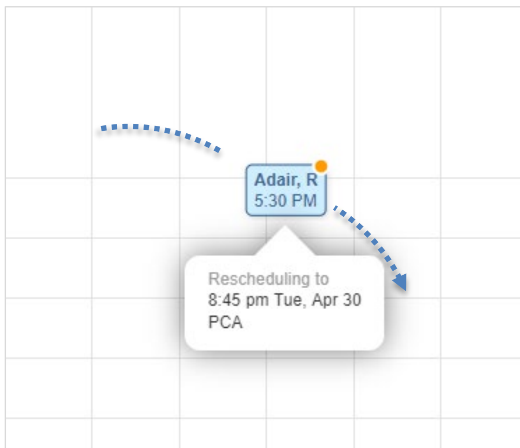


Master Schedule Actions:

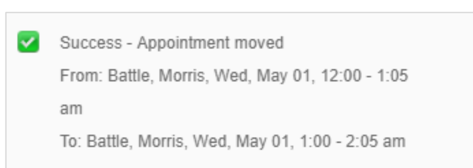
<table>
<tr>
<td>To switch between employee and patient view</td>
<td>
Click to select Patients or Employees.

</td>
</tr>
<tr>
<td>To move an appointment to another time or employee</td>
<td>

1. Click on the appointment and hold the mouse button down while you drag the appointment to a new location.

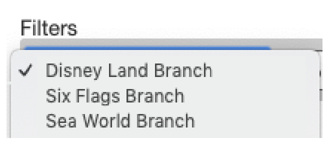


2. Release the mouse button to complete the move. A confirmation message appears on the schedule. If the new location is non-compliant (not within allowable service times or to an employee without required discipline), the appointment bounces back to its original position.



</td>
</tr>
<tr>
<td>To edit an appointment</td>
<td>Double click the appointment or hover over the Edit This Appointment option in appointment details.</td>
</tr>
<tr>
<td>To filter the schedule for specific appointments</td>
<td>
The following filters can be applied singly or in combination to limit the appointments displayed on the schedule.

Branch – Lists branches if available.



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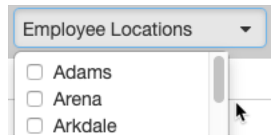
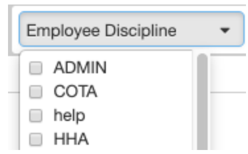
</tr>
</table>

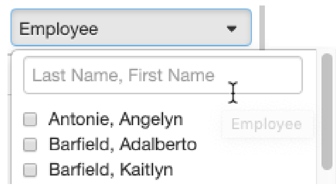
Employee Locations – Lists locations if supported by your agency.



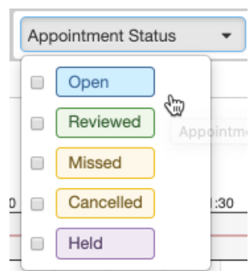
Discipline



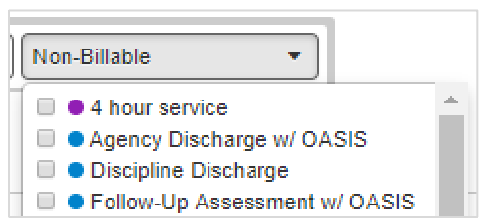
Employee



Appointment Status

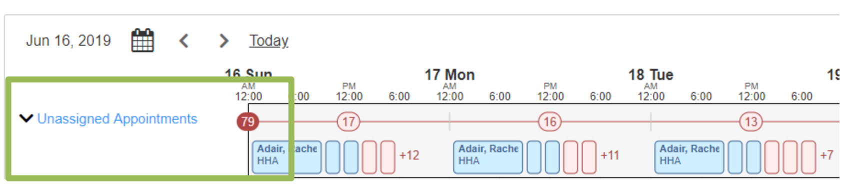


Appointment Service



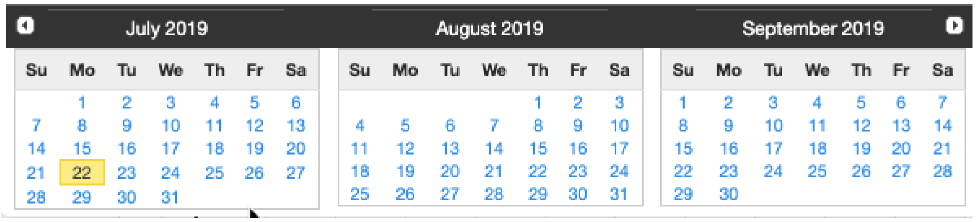
To view unassigned appointments that have no employee scheduled

On the employee schedule view, click **Unassigned Appointments** to easily work through your queue of unassigned appointments.



To change the month displayed on the schedule

Click the (calendar) icon and select the month you want to display.

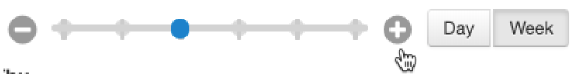


To change the Day / Week view.

Select

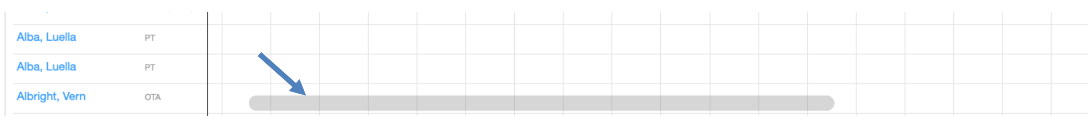
To zoom into or out of the schedule

Click the plus sign (+) to zoom in, or click the minus sign (-) to zoom out. You can also adjust the zoom by clicking a dot on the line.



To scroll across the schedule

Drag the scroll bar at the bottom of the screen.

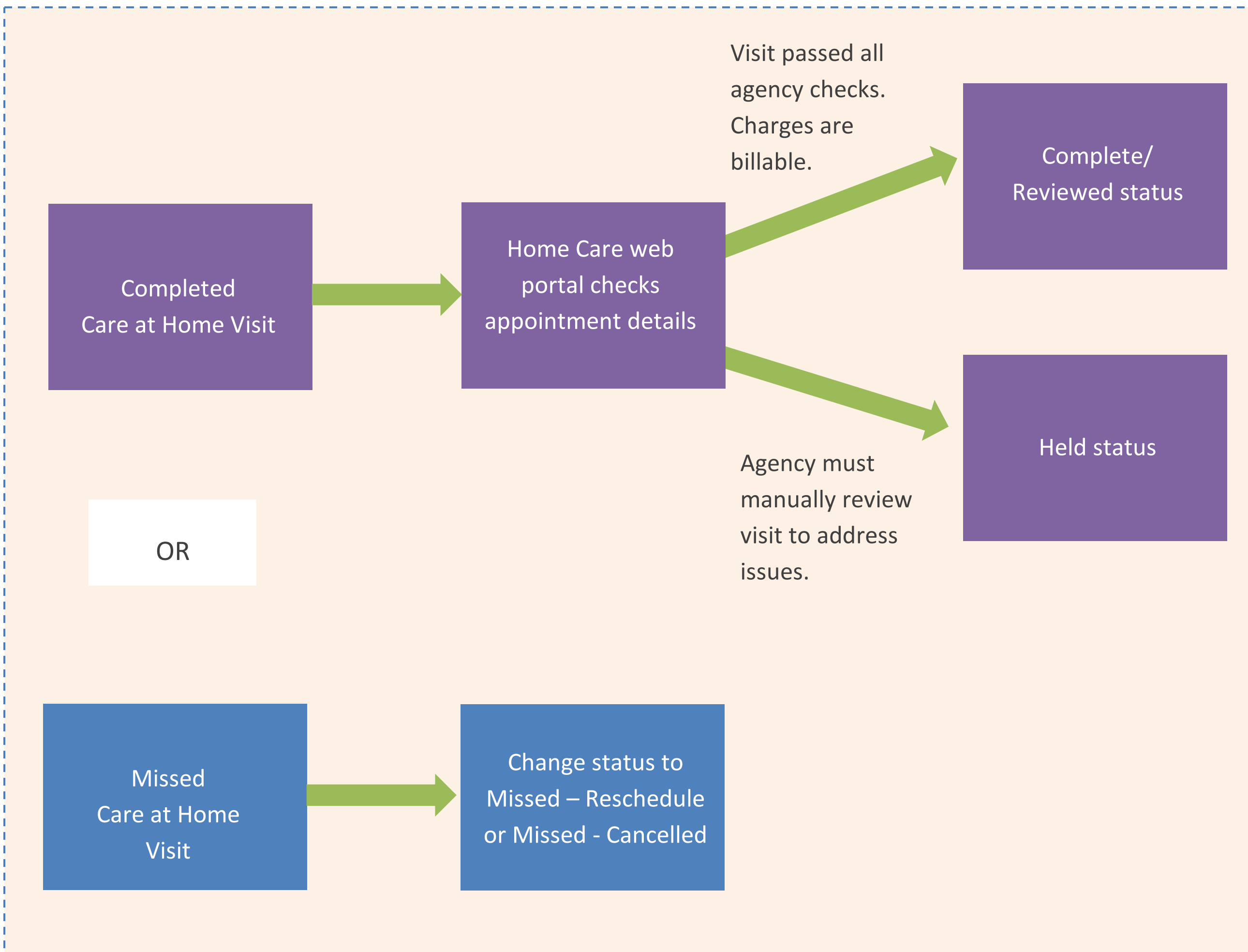


Managing Completed Appointments

Overview

As care providers complete visits on the Care at Home application, information is synced back to the web. Home Care confirms the appointment details and changes the status on the schedule to either **Reviewed** or **Held**. Charges for Reviewed appointments flow to the client's financial account for billing. You must manually clear issues in Held appointments and mark them as Reviewed before charges are billable

If an appointment is missed or cancelled, you can open the appointment and change the status from **Open** to **Missed – Reschedule** or **Missed – Cancelled**.



Managing Appointment Status

You can open an appointment's details to change the status to Canceled, Missed, Deleted, Held or Reviewed.

To change an appointment's status

1. Open either a patient or employee schedule.
2. To open the appointment, click the appointment block.
3. Click the Status field to select an appointment status.

Open	Appointment scheduled, but not yet completed.
Missed – Reschedule	Appointment missed and must be rescheduled. (Require reasons.)
Cancelled	Appointment canceled and not rescheduled. (Require reasons.)
Deleted	Removes tile and appointment from schedule
Reviewed	Appointment completed as scheduled and is now billable. See Reviewing Held Appointments.
Held	Appointment completed but held. Held reasons might include: • Incorrect authorization. • Not completed at the correct location or time. • Entered timecard note.
Scheduled, no employee assigned	Scheduled but no employee assigned.

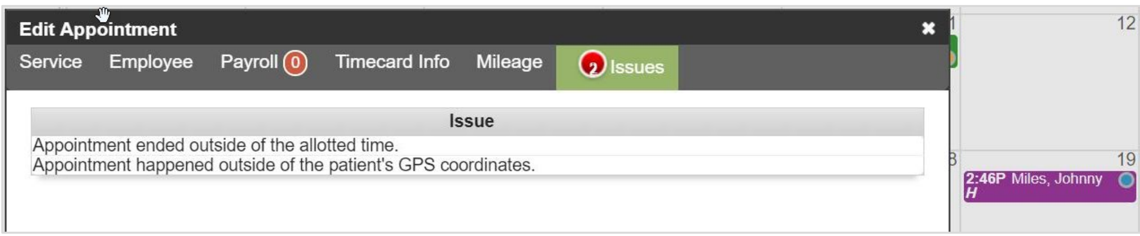
Reviewing Held Appointments

You must review Held appointments and clear all issues before charges flow to the client's financial account for billing.

To view Held reasons

1. Open either a client or employee schedule.

2. To review issues related to a Held appointment, click the appointment block.



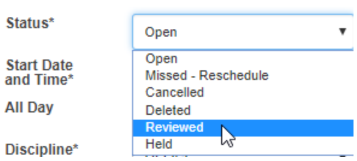
3. Click the **Timecard Info** tab to view the issue details.

To change a Held appointment to Reviewed status

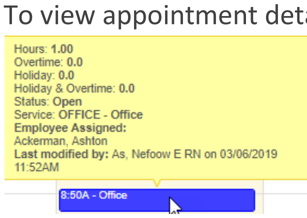
After you have resolved issues with a held appointment, you need to mark it Reviewed.

1. Select the appointment by hovering over the appointment and pressing Shift+click. Select **Review Appointment**. The appointment turns green to show when marked Reviewed.

2. Open the appointment by clicking on the block on the schedule. Click in the Status field and select Reviewed. Click Accept. The appointment turns green (Reviewed).



Tip:
To view appointment details, hover your mouse over an appointment



Associated Reports and Dashboards

Held EVV Appointments dashboard	Shows appointments held due to EVV compliance issues.
Patient Unreviewed Appointments dashboard	Shows appointments in Open or Held status for dates prior to the current day.
Appointments Cancelled report	Shows cancelled, missed or deleted visits.
Appointments Detail report	Lists all appointments on a patient or employee calendar with all related detail.

Workflow Considerations

- Who will notify you when services are generated so that you can schedule the associated appointments?
- Does your agency use auto-generated appointments?
- Does your agency use Care at Home – Scheduling?

Notes