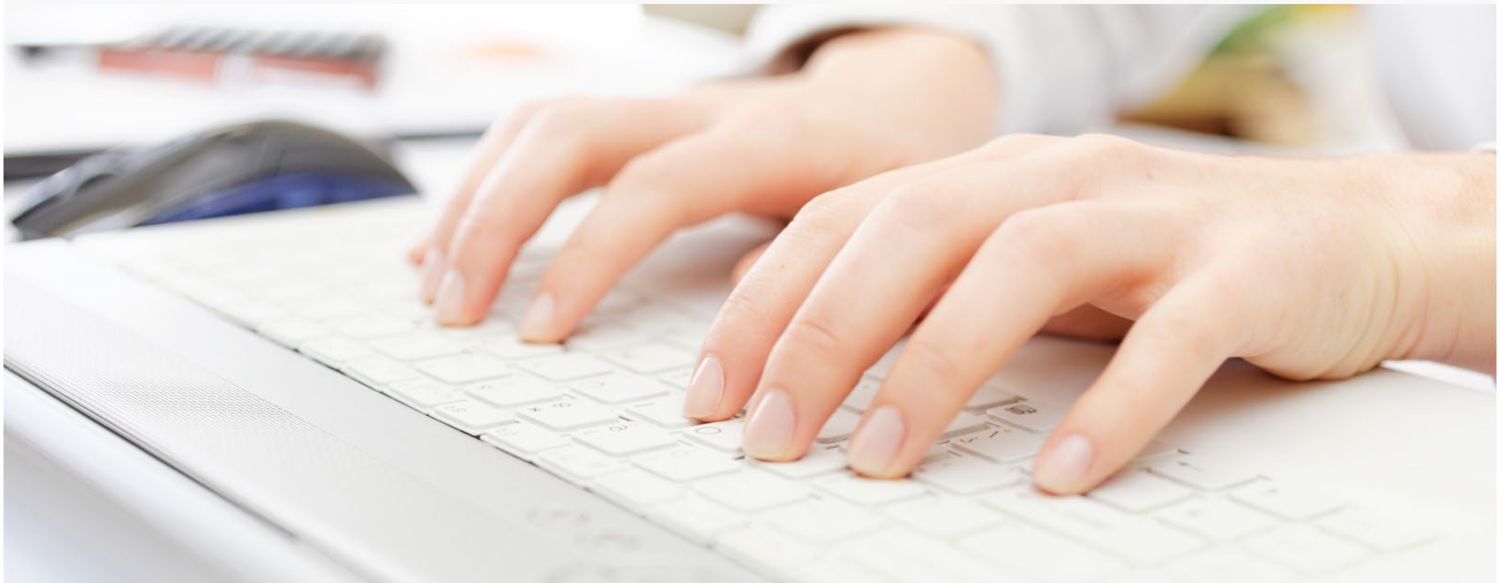
PointClickCare®

Home Health Care

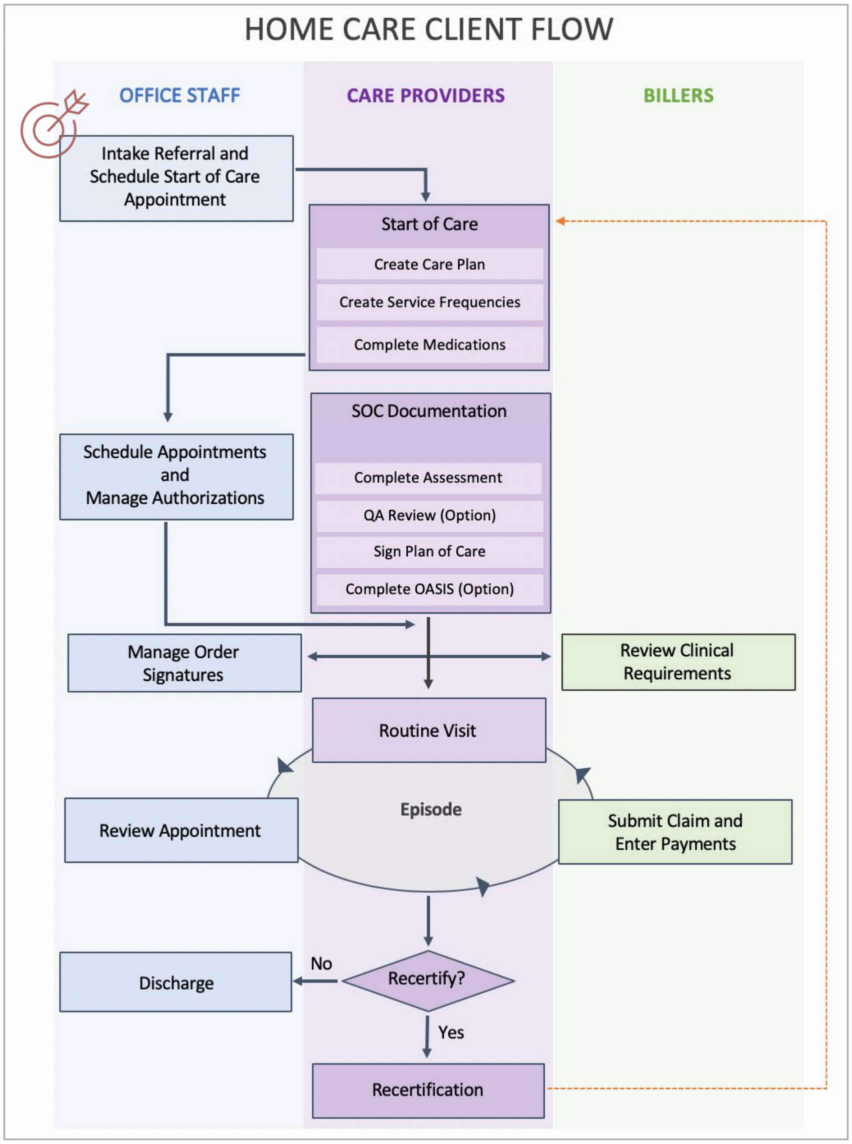


Session Guide: Intake and Scheduling Start of Care (SOC)

After this session, intake coordinators will be able to:

- Manage prospect referrals
- Add an intake
- Add payers and plans during intake
- Add physicians and contacts during intake
- Edit client information before an intake is complete
- Manage client information after the intake is complete
- Schedule a start of care appointment

Intake in the Home Care Flow



You are in charge of intaking referrals in a home care agency. How do you fit into the agency's work flow?

Your agency receives a new intake referral. As the Intake Coordinator, you enter as much information as possible into Home Care. If you do not have enough information to intake the referral, you add a prospect to track the referral. You understand that you can convert the prospect to an intake when complete information is available.

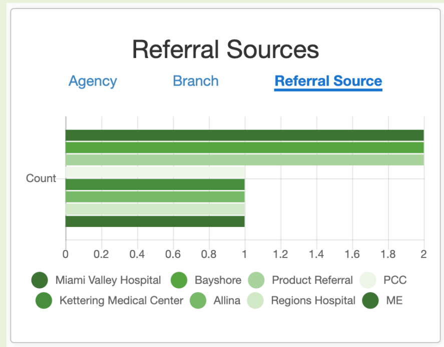
When you save the intake, a case is created in the Home Care database, and the information you entered flows into the patient chart.

According to your agency's procedures, after intake you contact the Scheduler to set up a Start of Care appointment, or you set it up yourself.

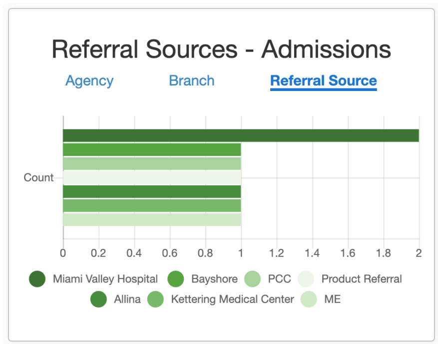
Associated Dashboards

The following dashboard cards and KPIs are available to help you manage intakes.

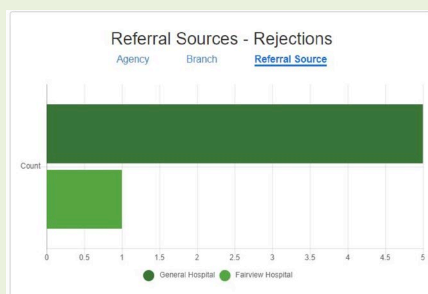
Referral Sources
Count of patients received from each Referral Source



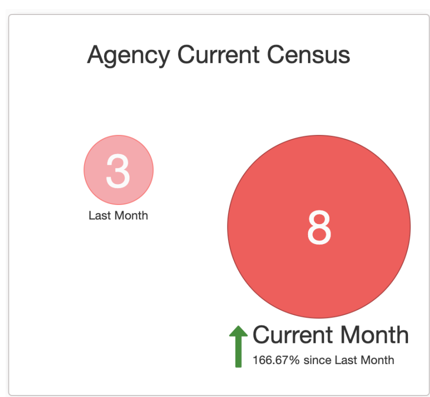
Referral Sources - Admissions
Count of patients received from each Referral Source that have a Start of Care date

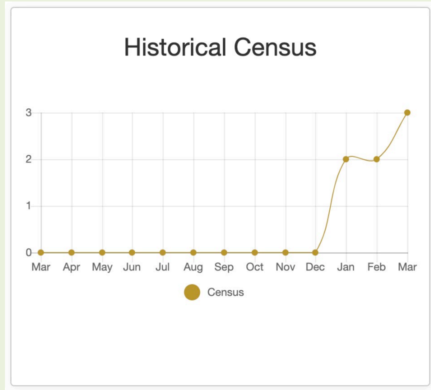


Referral Sources - Rejections
Count of patients received from each Referral Source that have the case status of Rejected



Agency Current Census
Current census versus previous month



Historical Census Monthly census	

Associated Reports

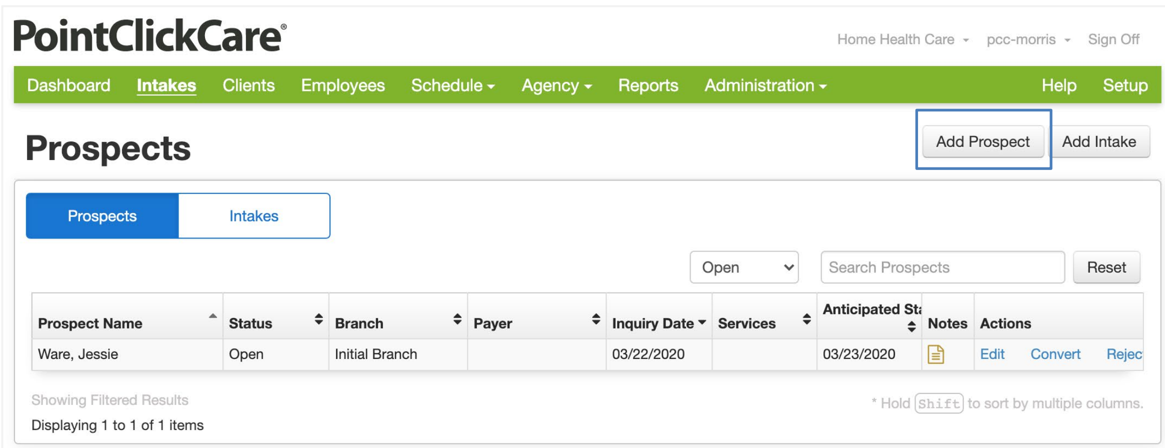
Patient Current Census	Shows all clients currently in an open status. Can be filtered by case type or case status (example: include intake cases).
Patient Referrals	Shows all referrals during a given time. Can include current intakes, admitted cases, or rejected cases.
Referral Source Statistics	Shows statistics for referral sources.
Patient Discharges	Shows all cases that discharged in a given date range.

Managing Prospects

The Prospect section of the Intake page allows you to enter potential client information into the application prior to the client becoming a true referral and beginning the intake process. With fewer required fields, entering a Prospect allows you to track new referrals when you have limited information.

Add a Prospect

1. On the Intake page, select **Add Prospect**.



2. Enter new prospect information. Required fields:

    - First and Last Name
    - Branch
    - Inquiry Date

    Tip: The Prospect form allows you to enter additional information as it becomes available. Be aware that any field marked with a † symbol is required for insurance validation.

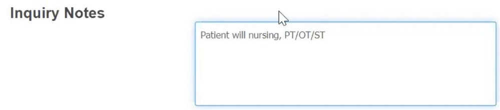
3. Optional Insurance Coverage check. Though not required while entering a prospect, you can enter insurance information in a Prospect and check for valid coverage.

    a. Complete all Prospect fields marked with a † symbol.

    b. Select Insurance Coverage to view additional insurance fields.

    c. Complete all fields with a † symbol in the Insurance section and select Check Coverage.

4. Enter Inquiry Notes if applicable.



Tip: From the Prospect table, you can hover over the page icon to quickly view Inquiry Notes.

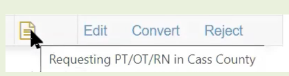
5. **Save** or **Cancel** the prospect.

Convert a Prospect to Intake

1. From the Prospect table select **Convert,** or while editing the prospect select Convert to Intake. This removes the client from the Prospect table and creates an Intake with the prospect information. The client's Intake page appears.
2. Complete Intake information.

Prospect Actions

The following actions are available to manage the Prospect table:

Add Prospect	Creates a new Prospect. Enter information as applicable. You have the option to Save or Cancel the prospect.
Edit	Allows you to add or change information as you learn more about the prospective client.
Reject	Allows you to reject the prospective client. A pop-up list allows you to select the rejection reason.
Convert	Allows you to convert a prospect to an intake.
View Inquiry Notes	From the Prospect table, you can hover over the page icon to quickly view Inquiry Notes. 

Filter	Click the filter and select an option to specify prospects viewed in the table. Allows you to view **All** prospects, **Open** prospects, **Converted** prospects, or **Rejected** prospects. 
Sort	Click a column header to sort according to the column.
Search	Enter a name in the Search field to quickly locate a prospect. 
Reset	Resets the filters, search, and sort to the default view of Open prospects sorted newest to oldest.

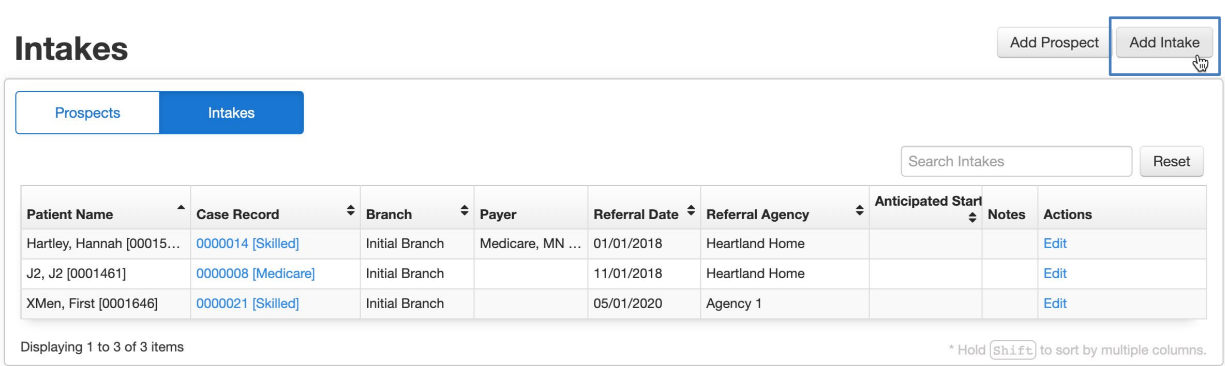
Intaking a Referral

From the Intake tab, you can enter demographic, referral, and insurance information for a newly referred client. This creates the client record in the system, after which visit and billing activities can be documented.

Tip: Not all information fields are required. However, we recommend you enter as much information as possible during intake to populate the client record. You can also reopen an intake to enter additional information as it becomes available.

Procedure

1. Select **Add Intake**.



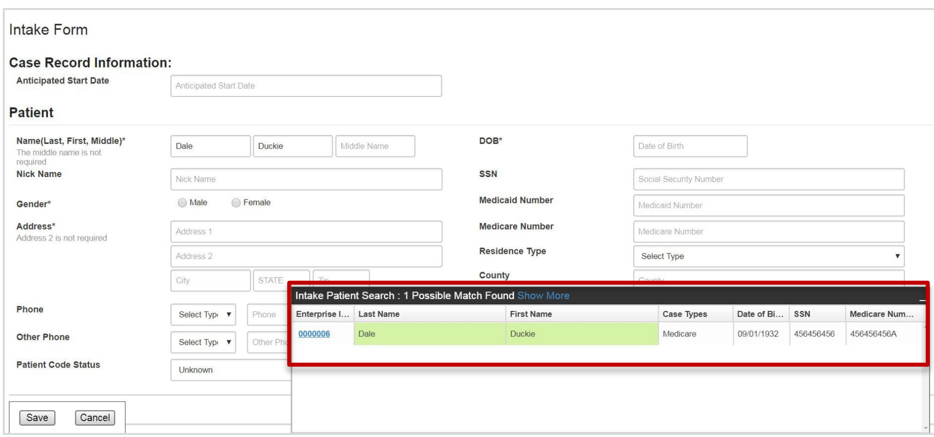
2. Option: If a Continuity of Care Document (CCD file) from a PointClickCare facility outside your organization is available, you can import it by selecting **Import a CCD File**. Drag and drop the file into the system or browse to select it from a location. (Only PointClickCare CCD files in XML format accepted at this time.) **See the Appendix for more information.**

3. Enter Anticipated Start Date. Though this field is not required, it allows you to target a start of care date for tracking purposes.

4. Enter the Patient details. Begin entering the client's name. Within the **Intake Patient Search**, a list of possible matches appears if the patient has a previous record.

    - If the system finds no matches, continue entering information to create a new Patient Record.

    - If the patient's name appears as a possible match, click the Enterprise ID to view the client information. If the patient details match those under the Enterprise ID, click Accept to select the patient. This prevents creating duplicate records for the same patient. All previous demographic information updates the intake form. Allergies, diagnoses, and active medications will populate the patient record.



5. Complete and/or review and update all required fields (indicated by an asterisk in the program).

Demographics	**Required:** Name, Date of Birth, Gender, Address. If you enter a Medicare number, County and Residence Type become required fields.
Case Record	**Required:** Branch, Line of Business, Case Type.
Location	If required by your agency, enter patient's location. This information helps the scheduler choose staff for visits based on the geographical location of the client.
Referral Details	Enter Episode Timing and Discharge Location. These fields are not required, but useful for some case types.

Referral Source	**Required:** Referral Source and Referral Date. Click **Select Referral Source/Contact** and type a few letters of agency name, select agency and click **Accept**. Enter the **Referral Date** and **Time**. **Note:** If the referral source is new, it does not appear in the Referral Source/Contact list. Enter the information, and the system stores it for future selection.
Patient Attributes	If required by your agency, enter Patient Attributes.
Previous Provider	If the previous provider information is known, or the client is also being seen by another agency, enter the information in this field.
Patient Contacts	Click **Add Contact,** complete all applicable fields, and click **Accept**.
Professional Contacts	Click **Add Professional Contact**, complete all fields, and click **Accept**. Professional contacts are non-physician contacts such as insurance and/or social service case managers, attorney, and religious leaders.
Physician	If required by your agency, enter physician information. Click **Add Physician,** and then click **Select Physician**. In the **Select Physician** dialog box, type the first letters of the last name, highlight and select the required physician, and click **Accept**. Be sure the physician meets all agency requirements (PECOS, active). You may add multiple physicians to the client record. **Be sure to select the check box for the primary physician.** **Tip:** Physician information is loaded from the NPI database. If you update physician information, be sure to select **Manual Entries** when searching for a physician to use the updated entry.
Insurance Coverage	Click **Add Insurance** and complete all fields marked with an asterisk. If the client is paying for the service, select Self-Pay NOT Private Pay. Enter information from left to right as fields populate based on earlier field information. If your agency is using Eligibility Verification, confirmation and details of your client's eligibility appears after accepting the payer information. The same information is available in the patient record. **IMPORTANT:** When entering Plan information, **Relationship** refers to the patient's relationship to the policy holder (the responsible party). Selecting **Self** means that the patient is the policy holder, and all subsequent **Subscriber** fields are greyed out. If you select another relationship as the plan holder, spouse for example, enter the **Subscriber** information. This information flows to the patient's invoice statement.

	
Service Information	If required by your agency, enter the start of care date (i.e. date of admission). If your agency conducts an initial/start of care assessment before scheduling services, consider not adding a start of care date. This date should be entered in the start of care assessment, and a date entered during Intake could conflict with a date entered in the start of care assessment.

6. Save, complete or reject the intake:

- To save your work to complete or accept an intake later, click **Save**. This keeps a client in your Intake Queue. Many agencies choose to keep clients in the Intake queue until after the initial (Start of Care) appointment, during which a clinician determines if the client is a candidate for home care services.
- Once a patient has been admitted via the SOC appt being completed, you will click **Complete**. This changes the case status to Open and includes the client in the Active Census report.
- To reject an intake, click **Reject**. Rejected cases do not appear in the Active or Discharged Census reports. To view them in a client search, select **Rejected** in the search dialog.

Scheduling Start of Care

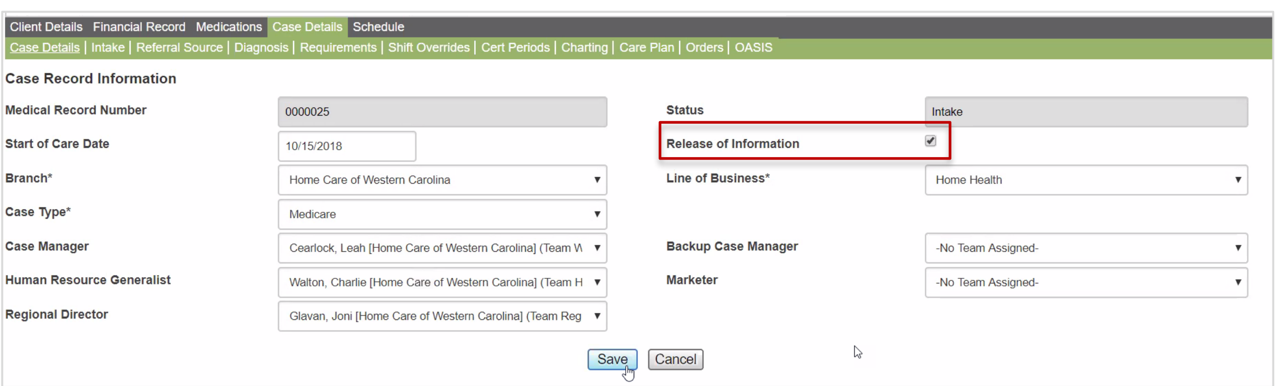
1. Navigate to the patient schedule.
2. Click **Add.**
3. On the **Service** tab, fill in drop downs. Be sure to enter information starting at top left and moving left to right, top to bottom since one field determines the next field.
   - Select the correct case record, especially if the patient has multiple cases.
   - Enter the start and end date/time.
   - Select Discipline (this determines the next field listing services this discipline is allowed to do).
   - Select Service - SOC or initial eval (this determines what documentation the clinician receives when they start their appointment in the Care at Home application).
4. On the **Employee** tab, select from previous employees or search for employee.
5. **Accept** appointment.

Completing Release of Information

Release of Information must be manually indicated after the intake is complete. Checking this box attests to the patient's consent to release information for billing. This is necessary before sending a claim for payment.

Procedure

1. From the client's record, click **Case Details**.
2. On the Case Details tab, click **Release of Information**.



3. Click **Save** at the bottom of the page.

Editing Client Information After Intake is Complete

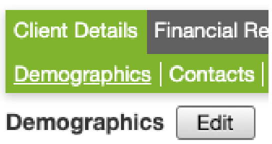
You may be required to update client information in the case file.

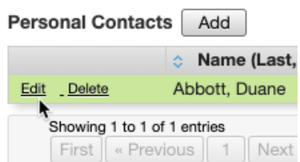
Procedure

1. From the **Client** tab, enter the client information in the search field, and select the client from the results.

2. Select the tab for the information you need to update.

3. Click **Edit**. Entry fields become editable. Note that the Edit selection may look different on each tab.





4. Update information as necessary.

5. Click **Save**.

Appendix- CCD Imports

Overview

If a Continuity of Care Document (CCD file) from a PointClickCare facility outside your organization is available, you can import it by selecting **Import a CCD File** during Intake. Drag and drop the file into the system or browse to select it from a location. (Only PointClickCare CCD files in XML format accepted at this time.)

Demographic information from the CCD file is imported. The system validates the data for file type, version and data format. Users have the opportunity to ensure they are importing data from the correct patient before copying it to the Intake page.

When the patient information is copied into the Intake, the system checks if the patient is already existing in the system and presents a list of possible matches. If you select a match, the existing information is used instead of the CCD information.

Home care agency requirements

To receive CCD import files, a home care agency must have a secure email address:

- Secure email addresses are assigned by a Health Information Service Provider (HISP).

  Tip: Email addresses such as a company email address or emails from services such as Yahoo, Gmail, or AOL do not work with Integrated Direct Messaging. If you enter a properly formatted email address in Secure Email, and it is not a secure mail address assigned by a HISP, messages sent to the External Facility fail.

- PointClickCare Home Health Care can supply the Agency with a Secure Email Address if needed. Contact your implementation specialist or support.

Referring facility procedures

Using Direct Messaging from PointClickCare

If using Direct Messaging from PointClickCare, referring facilities should add the home care agency secure email address and hotlist the agency.

Add the secure email address

1. Click your user name and select **Management Console > Standards > Financial Management > External Facilities**.

3. Click **Edit**.

4. Complete the **Secure Email** field.

5. Click **Save**.

Hotlist the agency

1. Single facility: **Admin > Setup > External Facilities**.

2. Click your user name and select **Management Console > Standards > Financial Management > External Facilities**.

3. Click **Hotlist**.

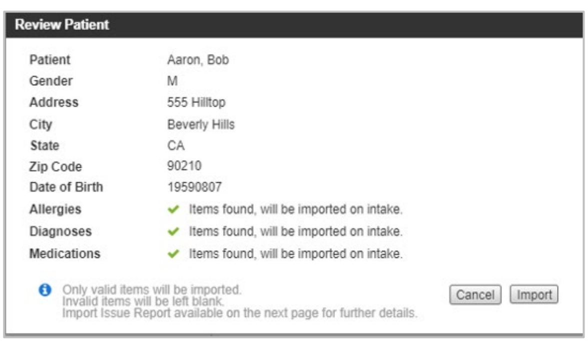
Generate and send the CCD

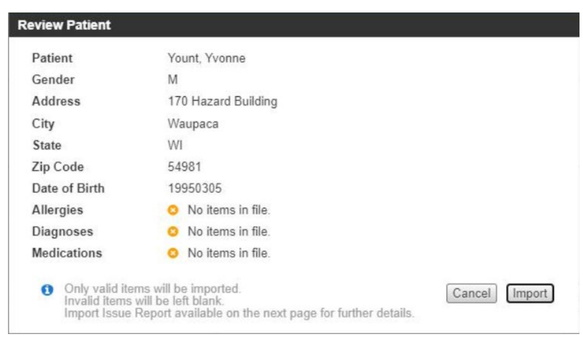
Generate the CCD according to your agency procedures and send it to the home health care agency secure email address.

Importing a CCD file during Home Health Care Intake

1. On the Intake page, select **Import a CCD File**. Drag and drop the file into the system or browse to select it from a location. (Only PointClickCare CCD files in XML format accepted at this time.)

2. Review the CCD information to ensure you are importing data from the correct patient before copying it to the Intake page.





3. After verifying the patient is correct, click **Import**.

   - If the patient exists in the database, Home Health Care presents a list of possible matches. Select a match to use existing patient information instead of the CCD information.

   - If the data file import is successful, a **File data copied message** appears at the top of the page.

- If data import fails, a Review Import Issues option is available to review the fields that were not imported, the original data from the CCD, and what the accepted format is within the Intake form.

Tip: The failed CCD Imports report is also accessible from Reports.

Reports Add ccd

		Name	Category	Type	Output	Description
Run	Edit	CCD	Patient	Standard	PDF	Outputs the CCD for a patient
Run	Edit	Referral CCD	Patient	Standard	PDF	Outputs the referral CCD for a patient
Run	Edit	Failed CCD Imports	Patient	Standard	XLS	Show the failed CCD imports for each patient and their failed reasons.

Showing 1 to 3 of 3 entries (filtered from 356 total entries)