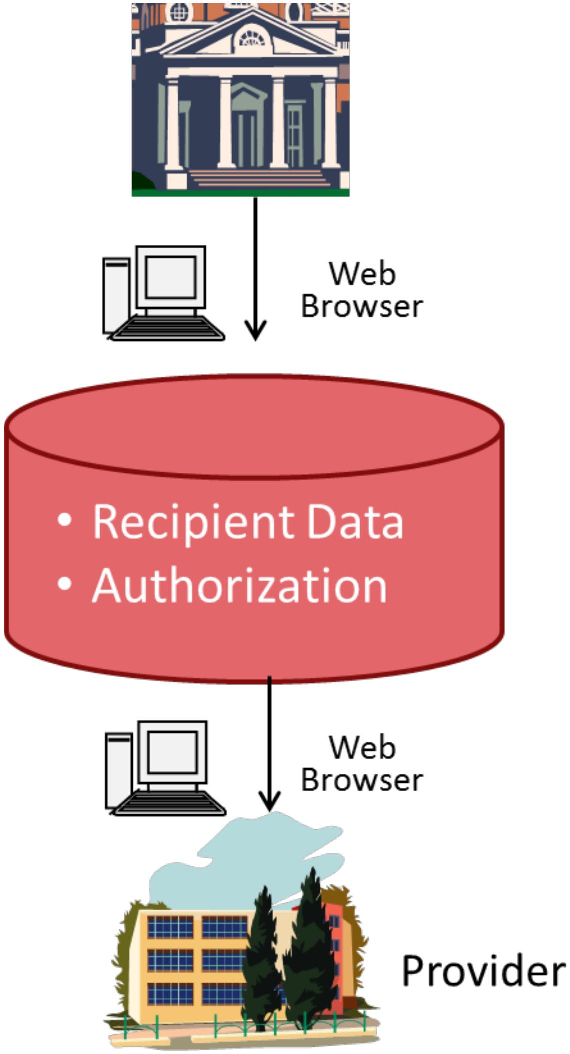
Rhode Island EOHHS Electronic Visit Verification (EVV) Program Provider Training – Phase I

Client Module

Agenda

- Locating Clients
- Using Client search functions
- Client record navigation
- Payor & Authorization details
- Entering Diagnosis Codes

Notification of a New Recipient



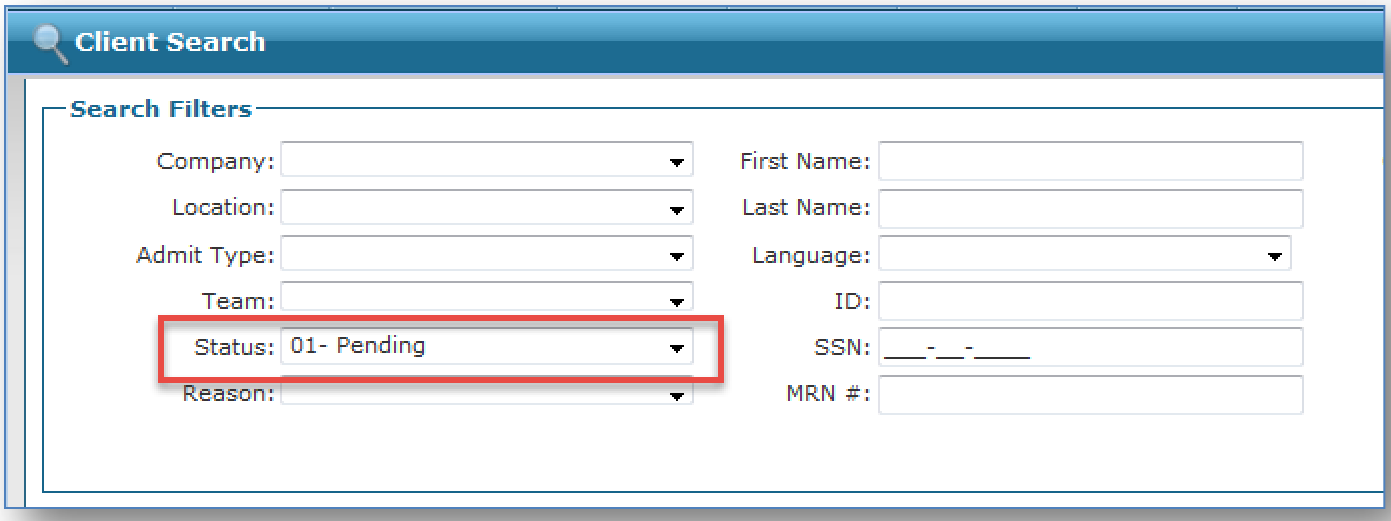
- Provider Agencies will be notified by EOHHS when they are assigned a new client.
- Client and authorization information needed to schedule services will be provided via the data feed.
- Providers are responsible for checking eligibility and prior authorizations through the State's Healthcare Portal.

Client Search Screen

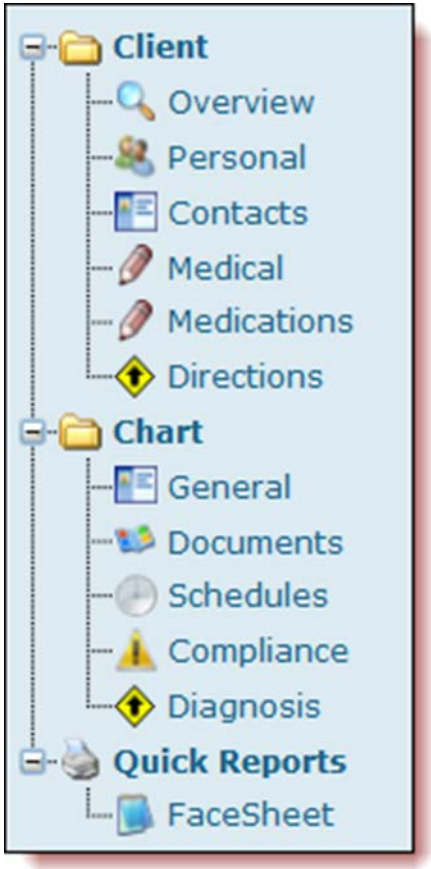
- Clicking the Client button from the menu bar opens a client search screen.
- Key Search Filters
  - Name
  - Coordinator or Manager
  - Location (branch office)

Locating New Recipients

- New recipients appear with a status of **01- Pending**
- Best Practice: Do a regular search for recipients with a Pending status .
- New recipients will need to be activated.



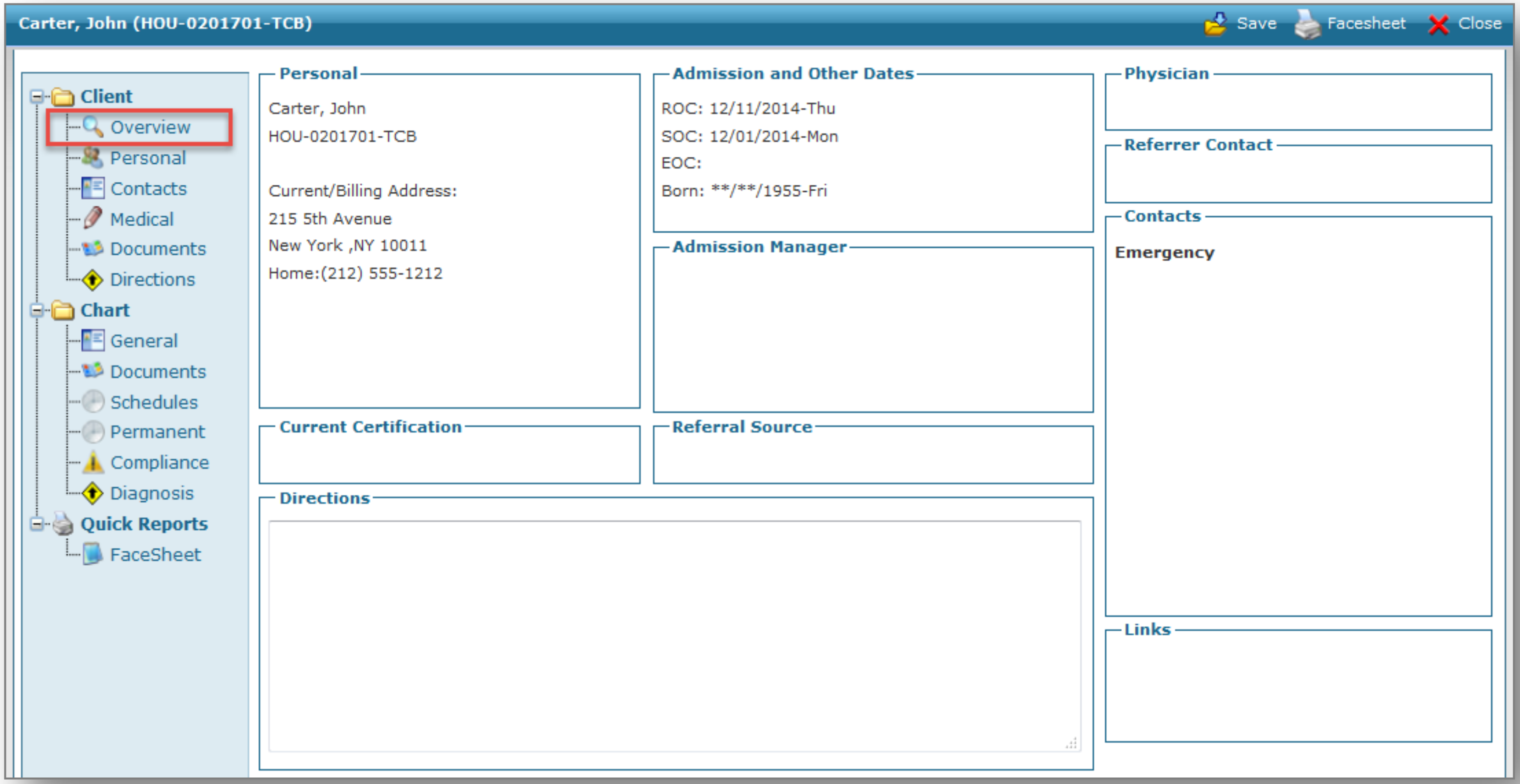
Client Record Navigation



- The Electronic Health Record (EHR) organizes information into folders for easy navigation
- The Client folder contains personal and demographic information
- The Chart folder contains information relating to the payer, services, authorizations, diagnosis, etc.

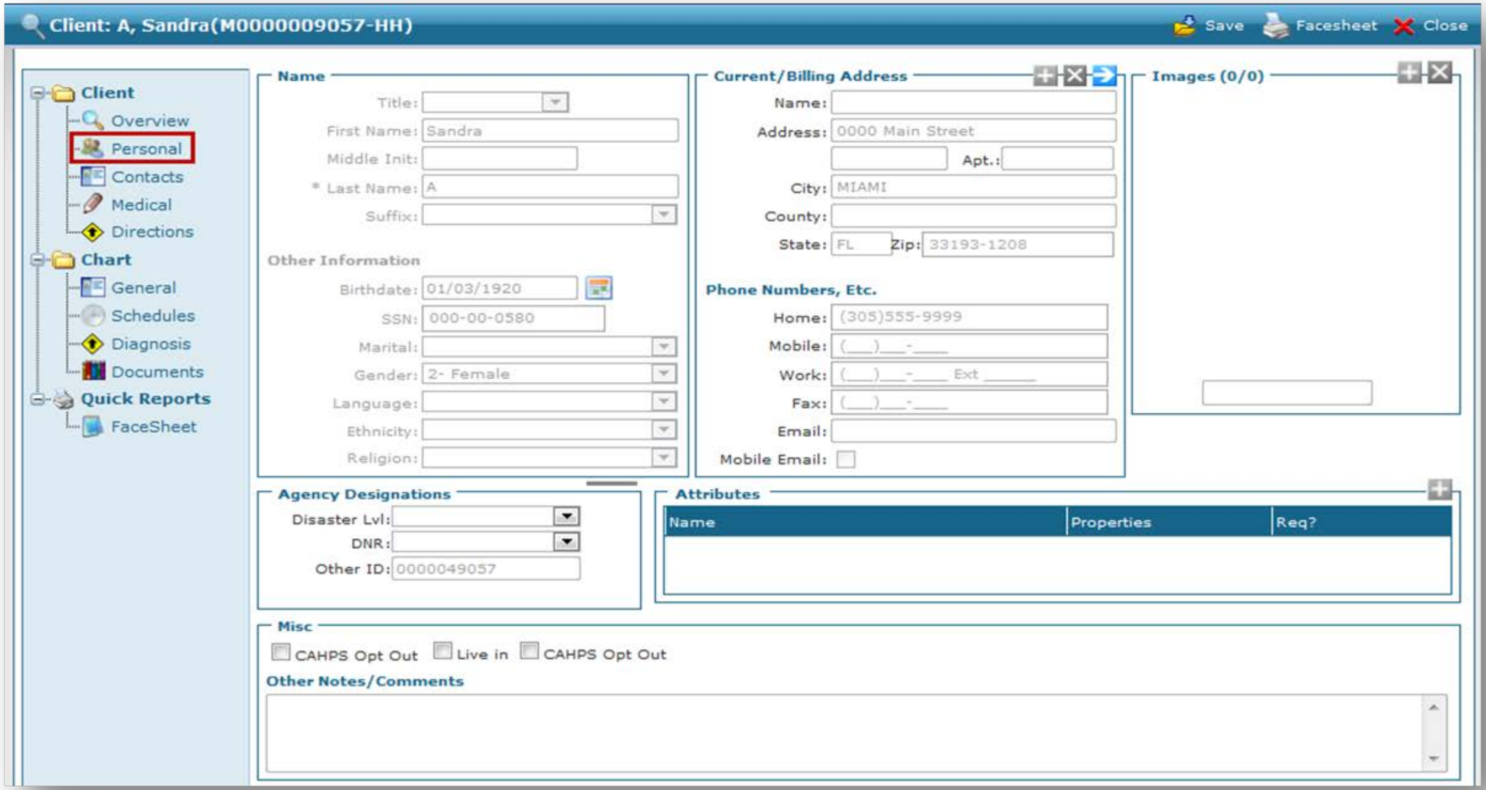
Client Folder > Overview Screen

The Overview screen provides a summary of information from other screens in the client record.



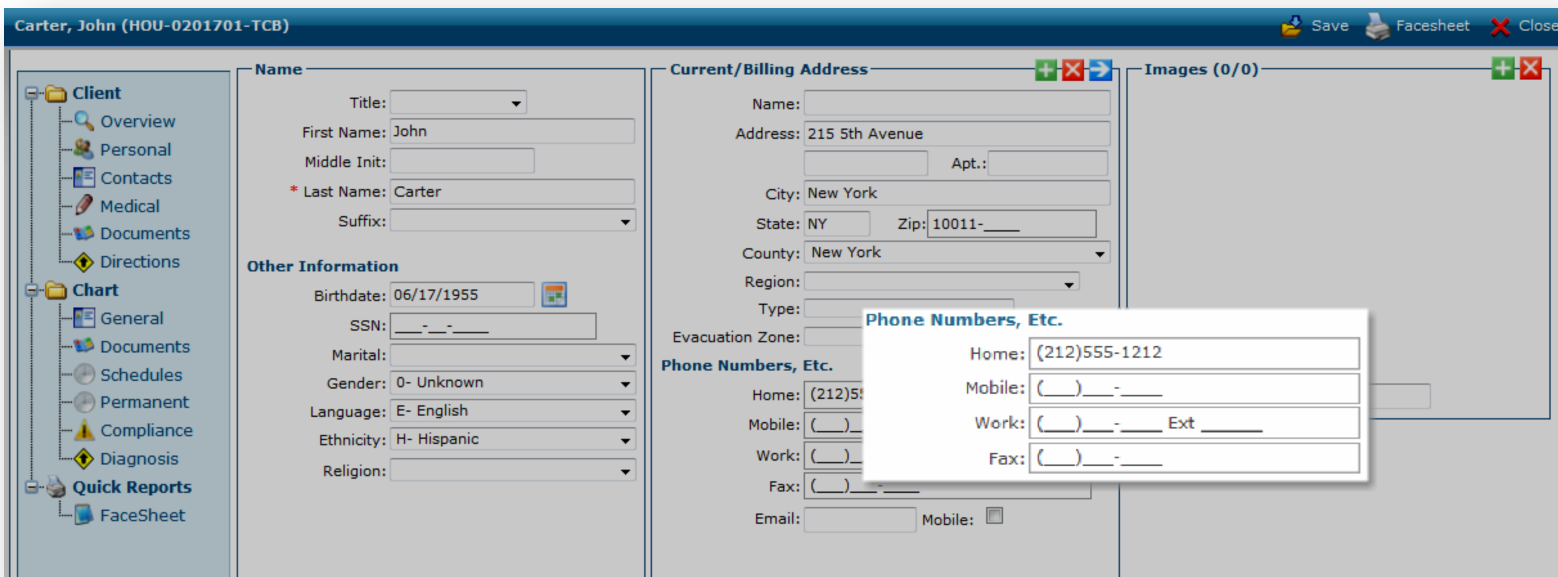
Client Folder > Personal Screen

- Information in the **Personal** screen will be read-only. Fields populated by data feed will be greyed-out.



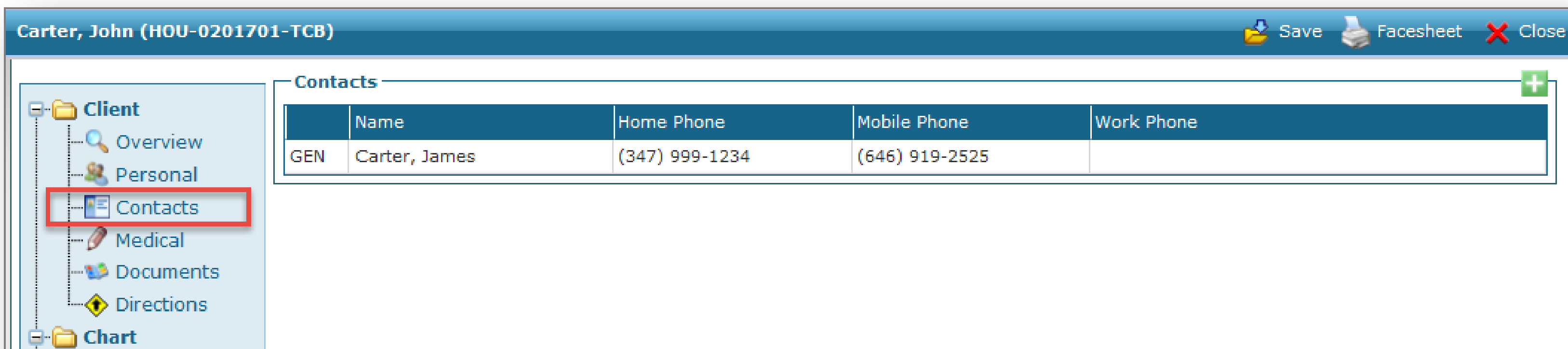
Client Folder > Personal Screen

- Verify the recipient info and update the phone number(s) if necessary.
  - If the client record does not have a phone number, one <u>must</u> be added.
  - A maximum of three phone numbers can be entered for use with EVV calling.



Client Folder > Contacts Screen

- Multiple contacts can be entered for each client.
  - Contacts can be family members, pharmacists, clergy etc.
- Double-click one of the contacts listed to display the contact's information.
- Click the green plus sign (+) to add new contacts.



Client Folder > Directions Screen

- Built in Google Maps functionality

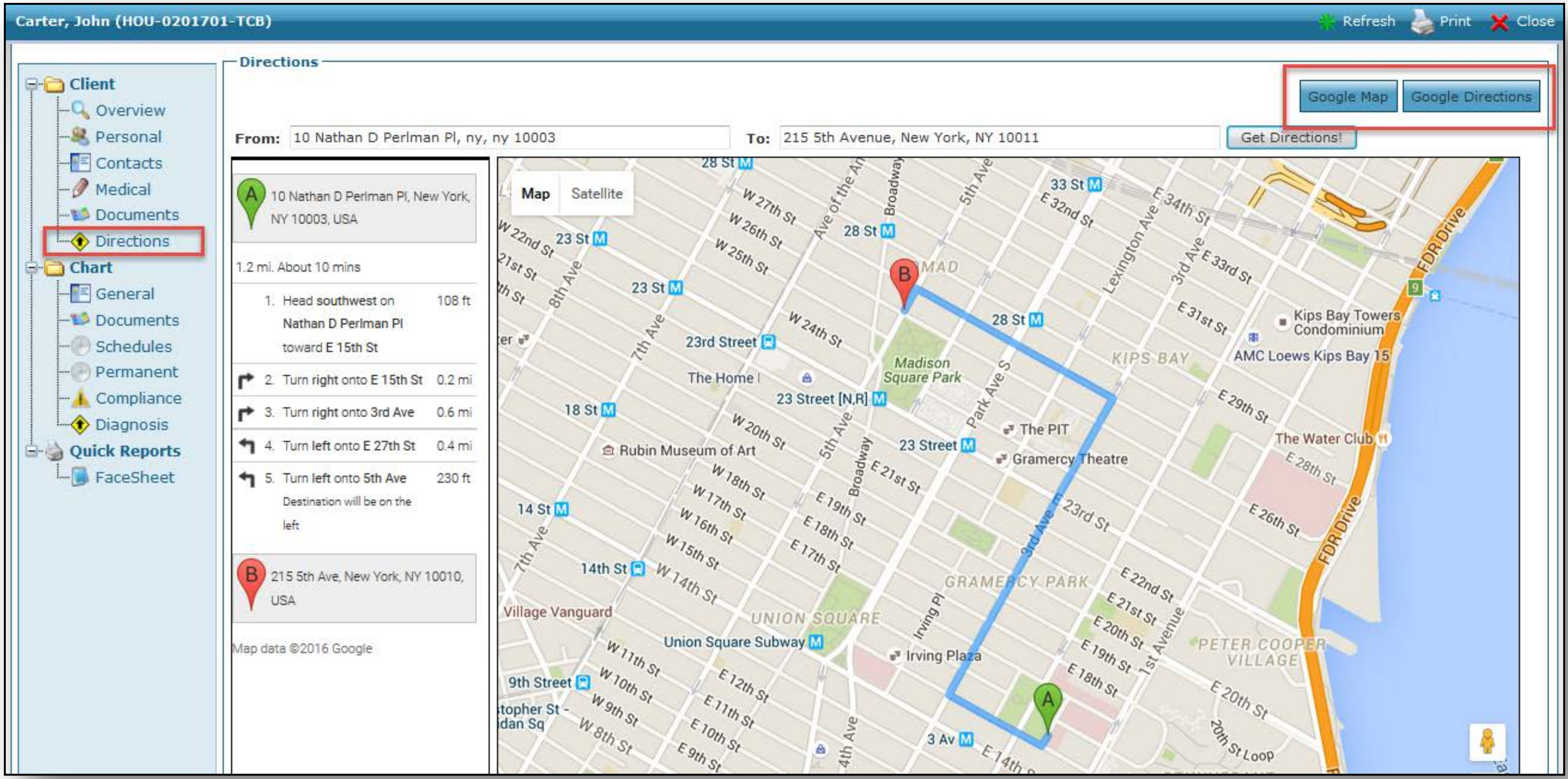
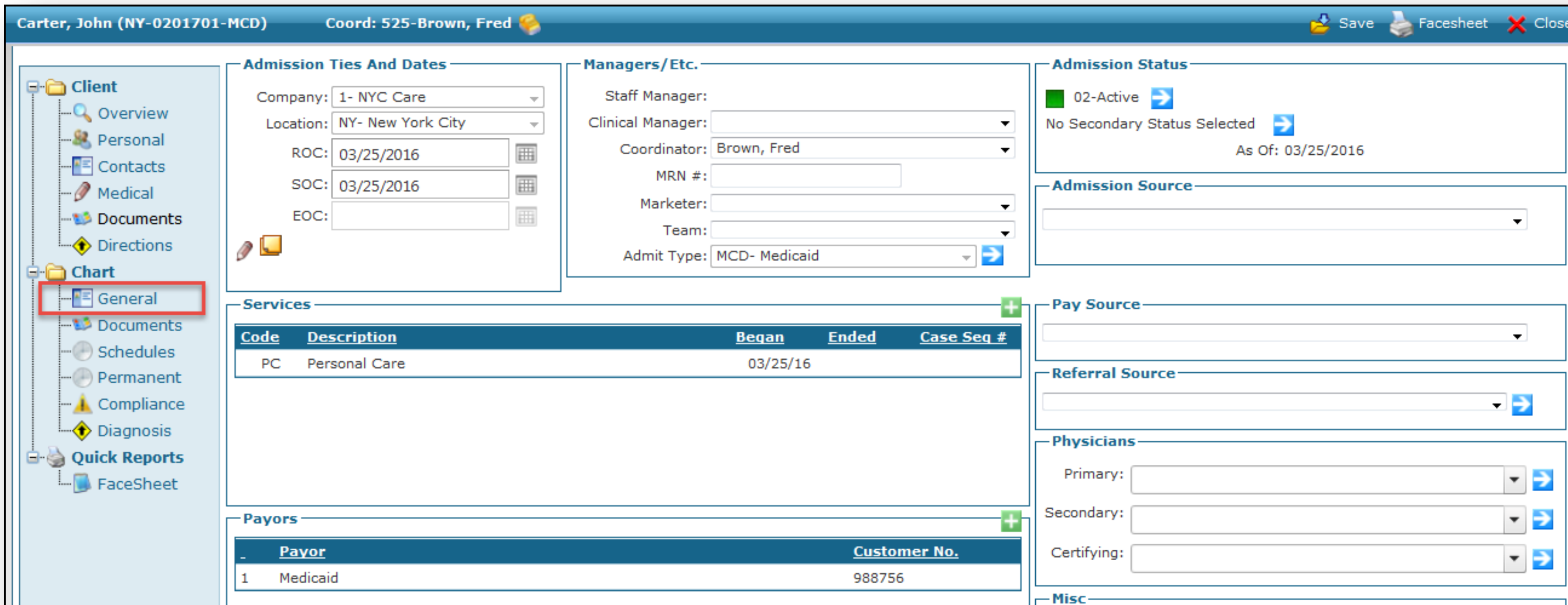


Chart Folder > General Screen

- The General screen contains admission details including:
  - Approved Services
  - Admission Status
  - Payer and authorization information



Activating New Clients

1. New clients can be found by running a search with the **Status** filtered for **'Pending'** on the Client Search screen
2. Open the client's record and go to the Admission Status section of the **General** screen.
3. Click the blue arrow next to the Admission Status.
4. Confirm the status as Active and set the Start of Care date.
5. Click **Save** in upper right corner.

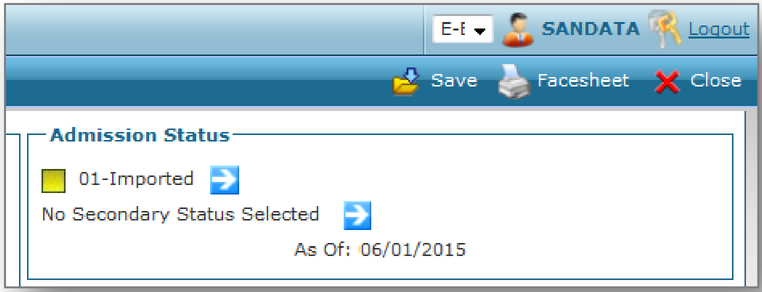
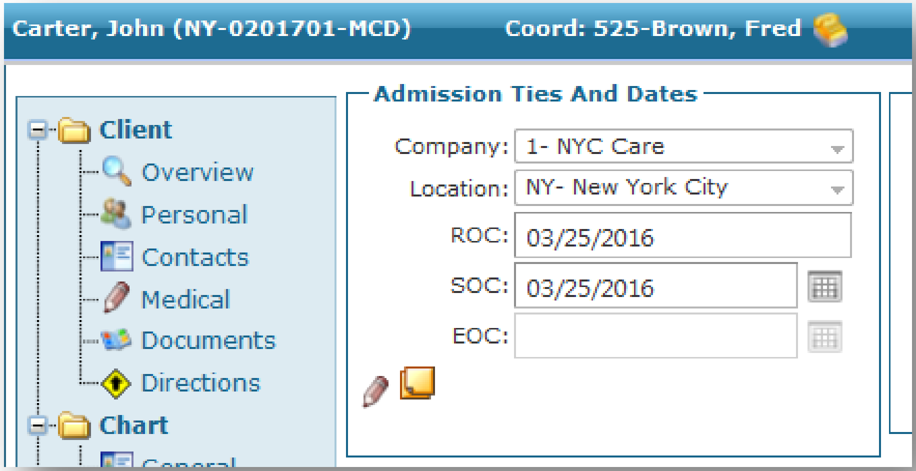


Chart Folder > General Screen

Admission Ties and Dates

- Located in the top left section of the General screen.
- Can access Historian and Notes
- Displays the Company, Location to which the client has been assigned, plus the ROC, SOC and EOC.
    - Referral of Care
    - Start of Care
    - End of Care



Manager/Etc.

- Coordinators need to be assigned to each client in order for the office to receive alerts if the caregiver does not call in at the scheduled start time.

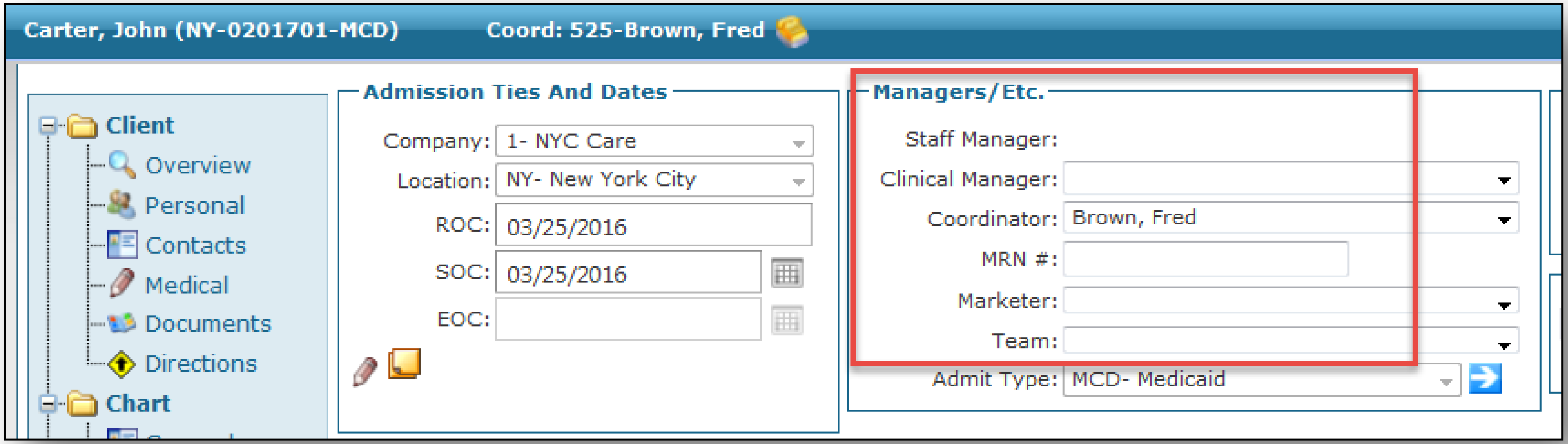
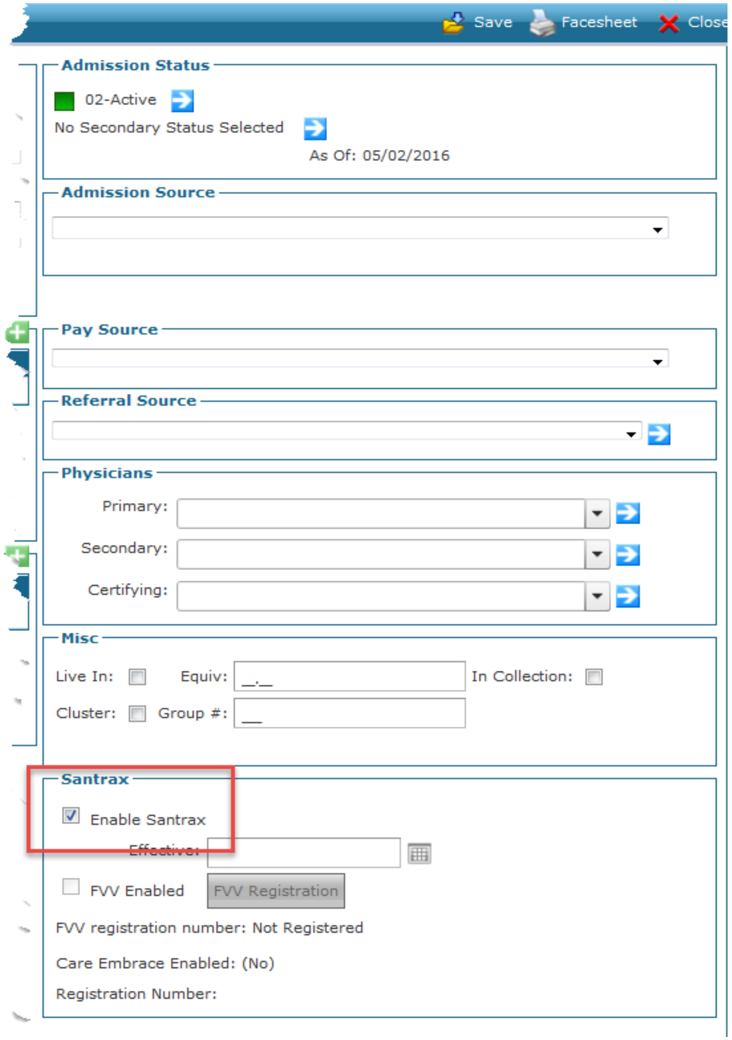


Chart Folder > General Screen

Santrax

Confirm that the Enable Santrax box is checked. Check the box and **Save** the record if is not checked.

Effective date is not required.



Payors and Authorizations

- Authorizations are accessed via the Payor panel on the **General** screen.
  - Double-click the name of the payor to open the details
  - Go to the **Authorizations** tab to see current authorization information
  - Double-click on the Authorization line to open the details

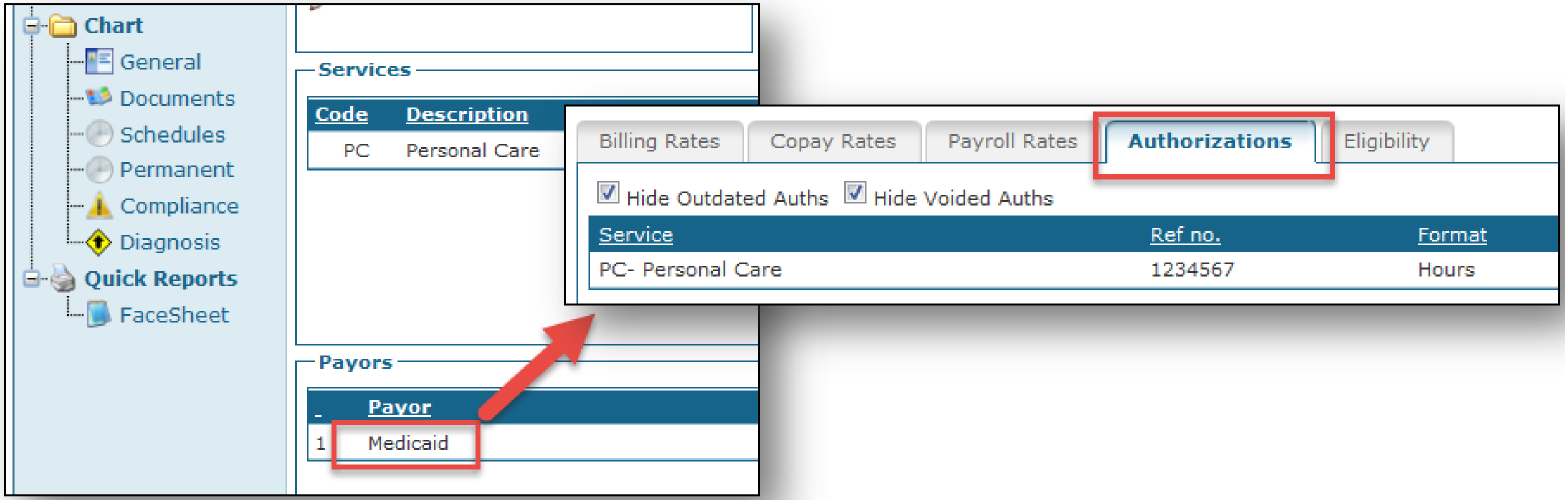


Chart Folder > Viewing an Authorization

- An authorization specifies limits established by the payor on the services a client may receive:
    - Service: type of encounters
    - Date Range of encounters
    - Limitations – Maximum number of encounters per day/week/month
- For June 1st Phase 1 program launch:
    - Placeholder authorizations will have default dates of 6/1/2016 – 12/31/2078
    - Providers will be able to edit authorization units and limits

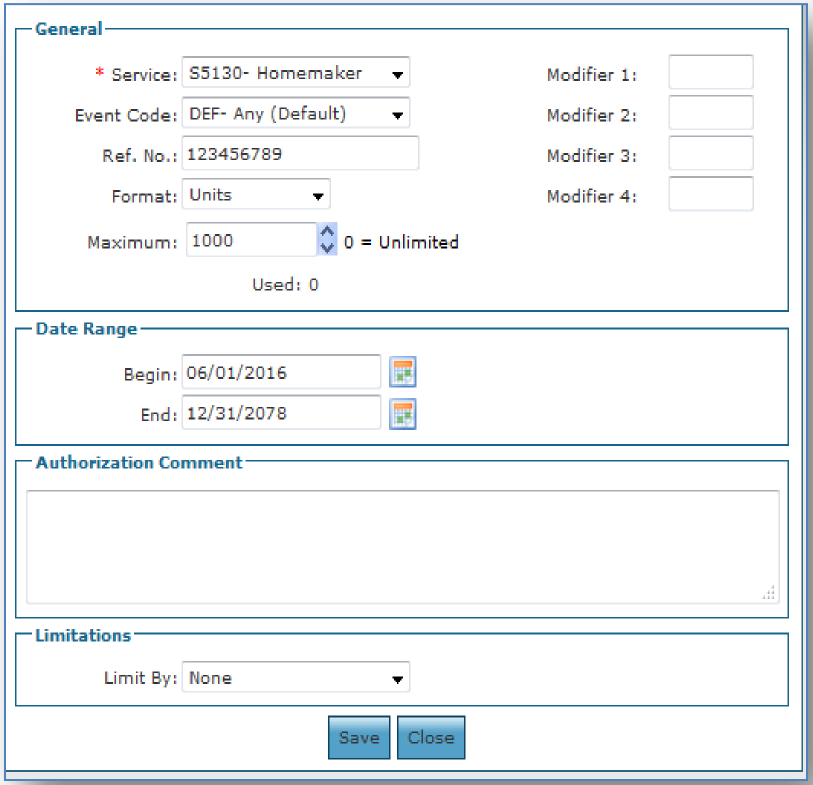


Chart Folder > Schedule Screen

- Client's scheduled visits
- Schedules can be filtered for a specified date range
- Schedules can be edited from this screen

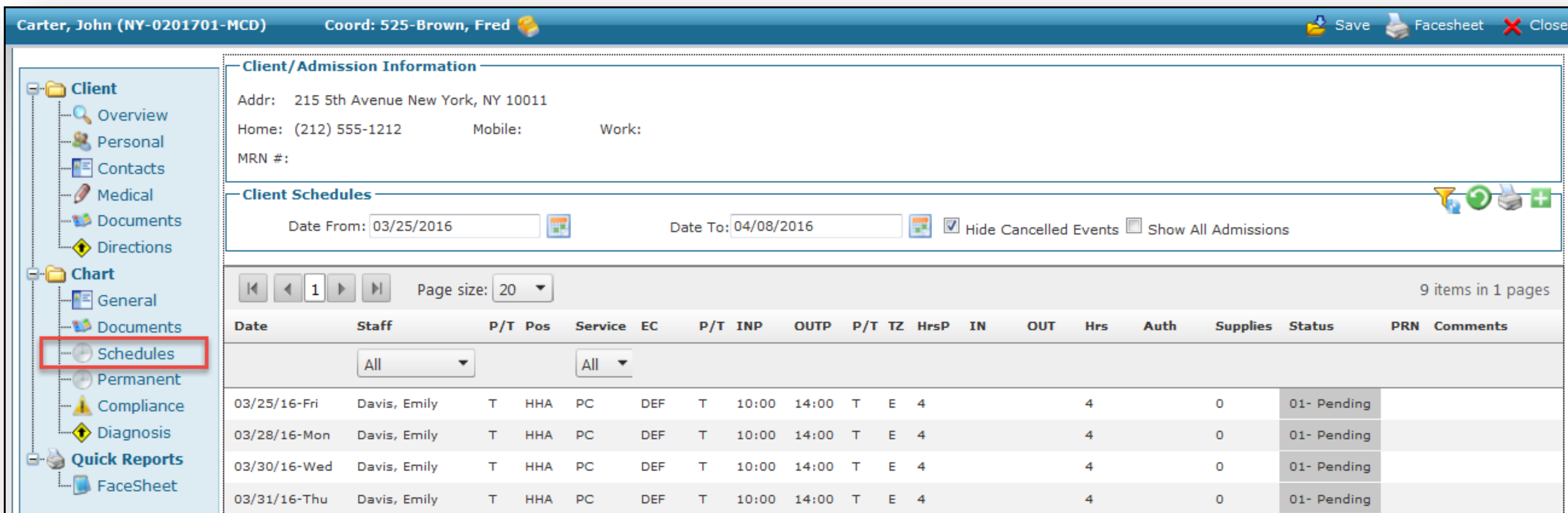
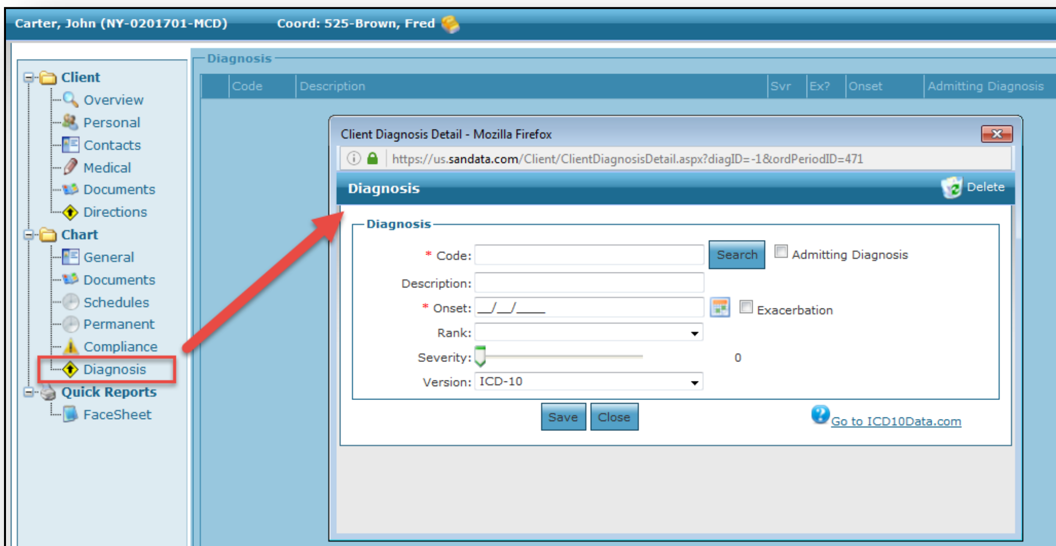


Chart Folder > Diagnosis Screen

- Provider Agencies will be required to add a Diagnosis code.
  - From the client profile, click **Diagnosis.**
  - Click the plus button in the upper right corner of the screen to add.
  - Click the **Search** button and enter a description to find matching results
  - ICD-10 Code and Onset Date are required fields.
  - Click **Save** in both the Client Diagnosis detail screen and the Diagnosis screen.



What You Have Learned

- Notification of a new client:
  - EOHHS will notify provider agencies when they are assigned a new client.
  - Client and Authorization will be sent to SPM via a data feed.
  - Verifying pre-populated client information.
- Accessing the Client module and utilizing the search filters.
- Locating new clients.
- Activating new clients; changing status from Imported to Active.
- Accessing and viewing Payors and Authorizations.
- Reviewing/Entering Diagnosis codes.

DEMONSTRATION

- Client Search
- Activating Clients
- Client Electronic Health Record
- Viewing Authorizations
- Adding a Diagnosis