



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

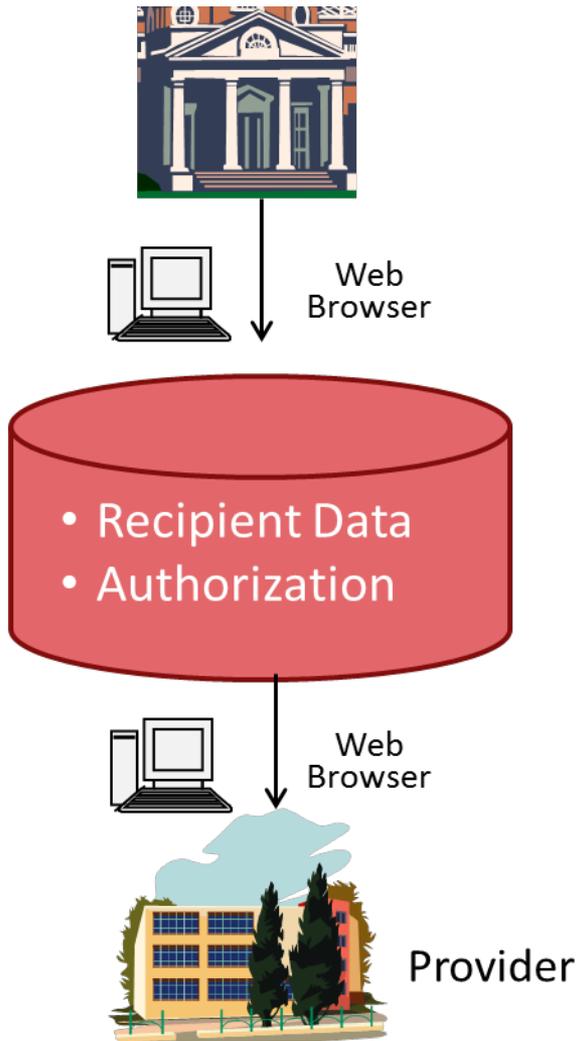
Client Module



Agenda

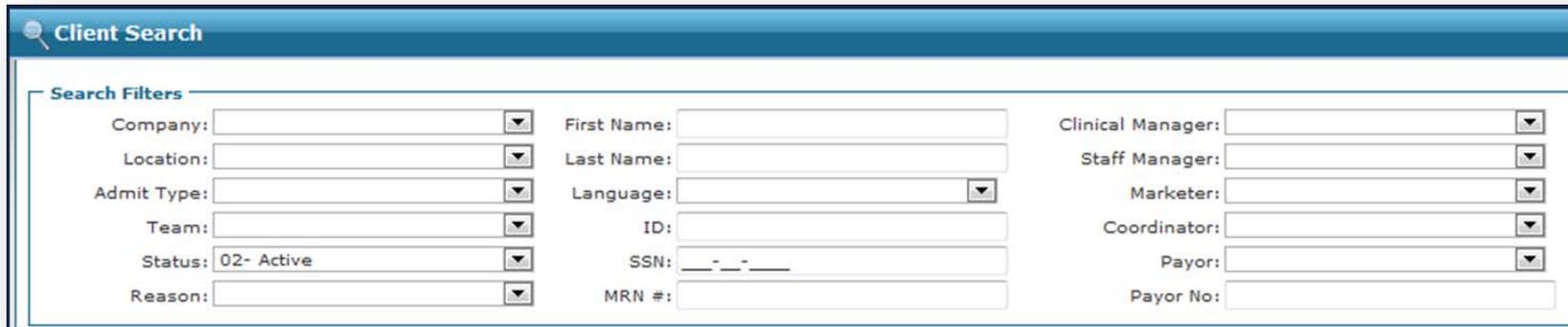
- ⚡ Locating Clients
- ⚡ Using Client search functions
- ⚡ Client record navigation
- ⚡ Payor & Authorization details
- ⚡ Entering Diagnosis Codes

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



The screenshot shows a 'Client Search' interface with a search bar and a 'Search Filters' section. The filters are organized into three columns:

Filter	Value
Company:	[Dropdown]
Location:	[Dropdown]
Admit Type:	[Dropdown]
Team:	[Dropdown]
Status:	02- Active
Reason:	[Dropdown]
First Name:	[Text]
Last Name:	[Text]
Language:	[Dropdown]
ID:	[Text]
SSN:	__-__-__
MRN #:	[Text]
Clinical Manager:	[Dropdown]
Staff Manager:	[Dropdown]
Marketer:	[Dropdown]
Coordinator:	[Dropdown]
Payor:	[Dropdown]
Payor No:	[Text]

- 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

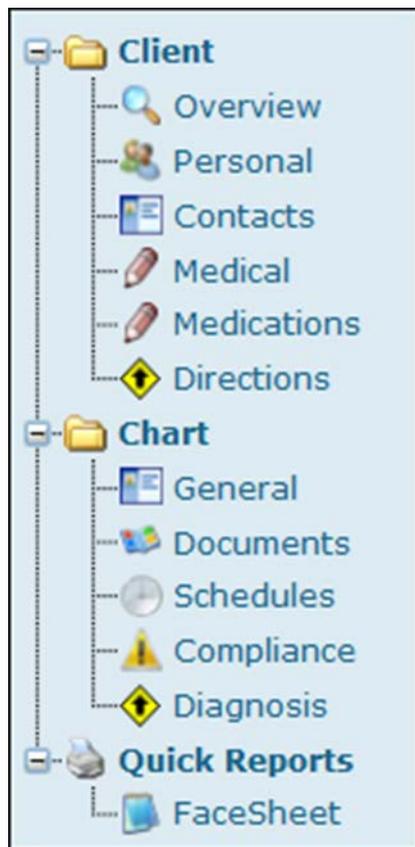
- ⚡ New recipients appear with a status of **01- Pending**
- ⚡ Best Practice: Do a regular search for recipients with a Pending status .
- ⚡ New recipients will need to be activated.

Client Search

Search Filters

Company:	<input type="text"/>	First Name:	<input type="text"/>
Location:	<input type="text"/>	Last Name:	<input type="text"/>
Admit Type:	<input type="text"/>	Language:	<input type="text"/>
Team:	<input type="text"/>	ID:	<input type="text"/>
Status:	<input type="text" value="01- Pending"/>	SSN:	<input type="text"/>
Reason:	<input type="text"/>	MRN #:	<input type="text"/>

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: A, Sandra(M0000009057-HH) Save Facesheet Close

Client

- Overview
- Personal**
- Contacts
- Medical
- Directions

Chart

- General
- Schedules
- Diagnosis
- Documents
- Quick Reports
- FaceSheet

Name

Title: []

First Name: Sandra

Middle Init: []

* Last Name: A

Suffix: []

Other Information

Birthdate: 01/03/1920

SSN: 000-00-0580

Marital: []

Gender: 2- Female

Language: []

Ethnicity: []

Religion: []

Current/Billing Address

Name: []

Address: 0000 Main Street

[] Apt.: []

City: MIAMI

County: []

State: FL Zip: 33193-1208

Phone Numbers, Etc.

Home: (305)555-9999

Mobile: () - -

Work: () - - Ext []

Fax: () - -

Email: []

Mobile Email:

Agency Designations

Disaster Lvl: []

DNR: []

Other ID: 0000049057

Attributes

Name	Properties	Req?

Misc

CAHPS Opt Out Live in CAHPS Opt Out

Other Notes/Comments

[]

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 must be added.
 - A maximum of three phone numbers can be entered for use with EVV calling.

Client (HOU-0201701-TCB)

Name

Title: []

First Name: John

Middle Init: []

* Last Name: Carter

Suffix: []

Other Information

Birthdate: 06/17/1955

SSN: []

Marital: []

Gender: 0- Unknown

Language: E- English

Ethnicity: H- Hispanic

Religion: []

Current/Billing Address

Name: []

Address: 215 5th Avenue

Apt.: []

City: New York

State: NY Zip: 10011- []

County: New York

Region: []

Type: []

Evacuation Zone: []

Phone Numbers, Etc.

Home: (212)555-1212

Mobile: () - -

Work: () - - Ext .

Fax: () - -

Email: [] Mobile:

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.

Carter, John (HOU-0201701-TCB) Save Facesheet Close

Client

- Overview
- Personal
- Contacts**
- Medical
- Documents
- Directions
- Chart

Contacts

	Name	Home Phone	Mobile Phone	Work Phone
GEN	Carter, James	(347) 999-1234	(646) 919-2525	

Client Folder > Directions Screen

🌀 Built in Google Maps functionality

Carter, John (HOU-0201701-TCB) Refresh Print Close

Client

- Overview
- Personal
- Contacts
- Medical
- Documents
- Directions**
- Chart**
- General
- Documents
- Schedules
- Permanent Compliance
- Diagnosis
- Quick Reports
- FaceSheet

Directions

From: 10 Nathan D Perlman Pl, ny, ny 10003 **To:** 215 5th Avenue, New York, NY 10011 **Get Directions!**

A 10 Nathan D Perlman Pl, New York, NY 10003, USA

1.2 mi. About 10 mins

- Head southwest on Nathan D Perlman Pl toward E 15th St 108 ft
- Turn right onto E 15th St 0.2 mi
- Turn right onto 3rd Ave 0.6 mi
- Turn left onto E 27th St 0.4 mi
- Turn left onto 5th Ave 230 ft
Destination will be on the left

B 215 5th Ave, New York, NY 10010, USA

Map data ©2016 Google

Chart Folder > General Screen

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

Cartier, John (NY-0201701-MCD) Coord: 525-Brown, Fred Save Facesheet Close

Client

- Overview
- Personal
- Contacts
- Medical
- Documents
- Directions
- Chart**
- General
- Documents
- Schedules
- Permanent
- Compliance
- Diagnosis
- Quick Reports
- FaceSheet

Admission Ties And Dates

Company: 1- NYC Care
Location: NY- New York City
ROC: 03/25/2016
SOC: 03/25/2016
EOC:

Managers/Etc.

Staff Manager:
Clinical Manager:
Coordinator: Brown, Fred
MRN #:
Marketer:
Team:
Admit Type: MCD- Medicaid

Admission Status

02-Active
No Secondary Status Selected
As Of: 03/25/2016

Admission Source

Services

Code	Description	Begin	Ended	Case Seq #
PC	Personal Care	03/25/16		

Pay Source

Referral Source

Physicians

Primary:
Secondary:
Certifying:

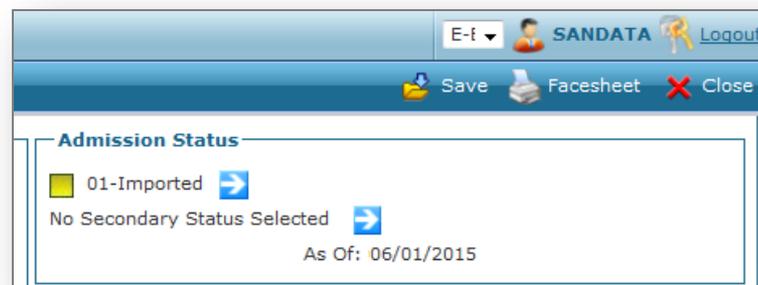
Payors

Payor	Customer No.
1 Medicaid	988756

Misc

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.



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



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Admission Ties And Dates

Company: 1- NYC Care

Location: NY- New York City

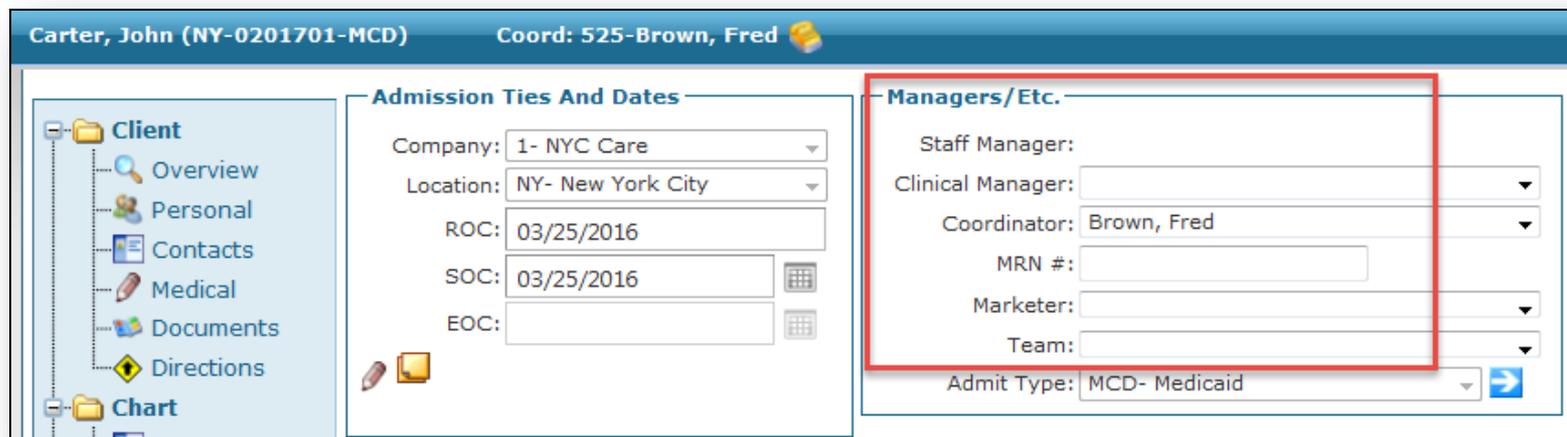
ROC: 03/25/2016

SOC: 03/25/2016

EOC:

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.



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Client

- Overview
- Personal
- Contacts
- Medical
- Documents
- Directions

Chart

Admission Ties And Dates

Company: 1- NYC Care

Location: NY- New York City

ROC: 03/25/2016

SOC: 03/25/2016

EOC:

Managers/Etc.

Staff Manager:

Clinical Manager:

Coordinator: Brown, Fred

MRN #:

Marketer:

Team:

Admit Type: MCD- Medicaid

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.

Admission Status
02-Active
No Secondary Status Selected
As Of: 05/02/2016

Admission Source

Pay Source

Referral Source

Physicians
Primary:
Secondary:
Certifying:

Misc
Live In: Equip: _____ In Collection:
Cluster: Group #: _____

Santrax
 Enable Santrax
Effective: _____
 FVV Enabled FVV Registration
FVV registration number: Not Registered
Care Embrace Enabled: (No)
Registration Number:

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

The screenshot displays the software interface. On the left, a navigation tree shows 'Chart' expanded to 'General'. The main area is divided into 'Services' and 'Payors' sections. The 'Services' table has one row: 'PC Personal Care'. The 'Payors' table has one row: '1 Medicaid'. A red box highlights 'Medicaid' in the 'Payors' table, with a red arrow pointing to the 'Authorizations' tab in a pop-up window. The 'Authorizations' tab is also highlighted with a red box. The pop-up window shows a table with columns 'Service', 'Ref no.', and 'Format', and one row: 'PC- Personal Care', '1234567', 'Hours'. There are also checkboxes for 'Hide Outdated Auths' and 'Hide Voided Auths'.

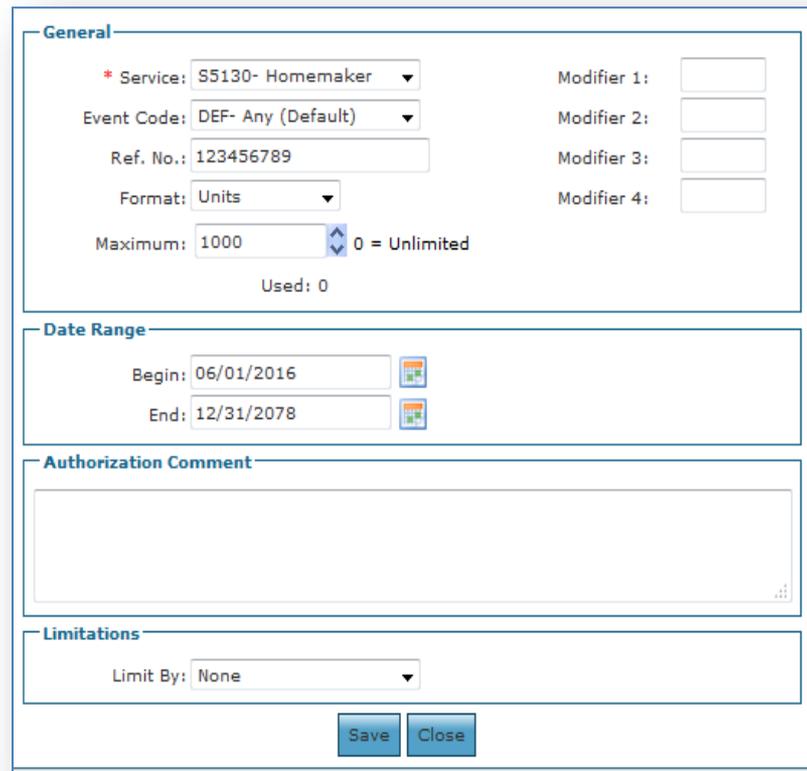
Chart Folder > Viewing an Authorization

§ 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



The screenshot shows a web-based authorization form with the following sections:

- General:** Includes fields for Service (S5130- Homemaker), Event Code (DEF- Any (Default)), Ref. No. (123456789), Format (Units), and Maximum (1000). It also has four Modifier fields (Modifier 1-4) and a 'Used: 0' indicator.
- Date Range:** Includes 'Begin' (06/01/2016) and 'End' (12/31/2078) fields with calendar icons.
- Authorization Comment:** A large empty text area for notes.
- Limitations:** Includes a 'Limit By' dropdown menu set to 'None'.

At the bottom right of the form are 'Save' and 'Close' buttons.

Chart Folder > Schedule Screen



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

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Client/Admission Information
Addr: 215 5th Avenue New York, NY 10011
Home: (212) 555-1212 Mobile: Work:
MRN #:

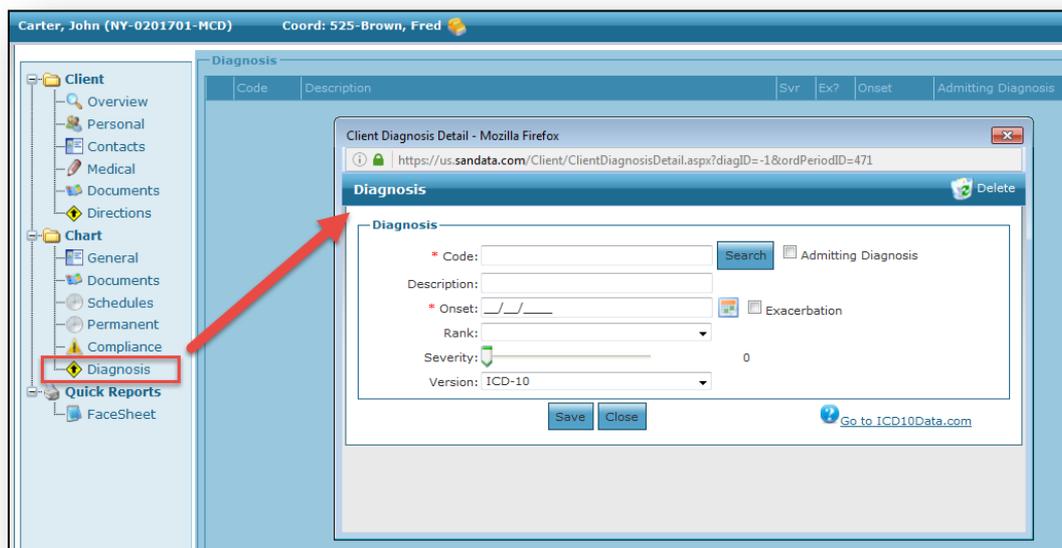
Client Schedules
Date From: 03/25/2016 Date To: 04/08/2016 Hide Cancelled Events Show All Admissions

Page size: 20 9 items in 1 pages

Date	Staff	P/T	Pos	Service	EC	P/T	INP	OUTP	P/T	TZ	HrsP	IN	OUT	Hrs	Auth	Supplies	Status	PRN	Comments
03/25/16-Fri	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		
03/28/16-Mon	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		
03/30/16-Wed	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		
03/31/16-Thu	Davis, Emily	T	HHA	PC	DEF	T	10:00	14:00	T	E	4			4		0	01- Pending		

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

