

Creating a New Patient and TEMP Authorization Job Aid

This Job Aid provides a high-level overview of the 3-phased process (listed below) to follow if:

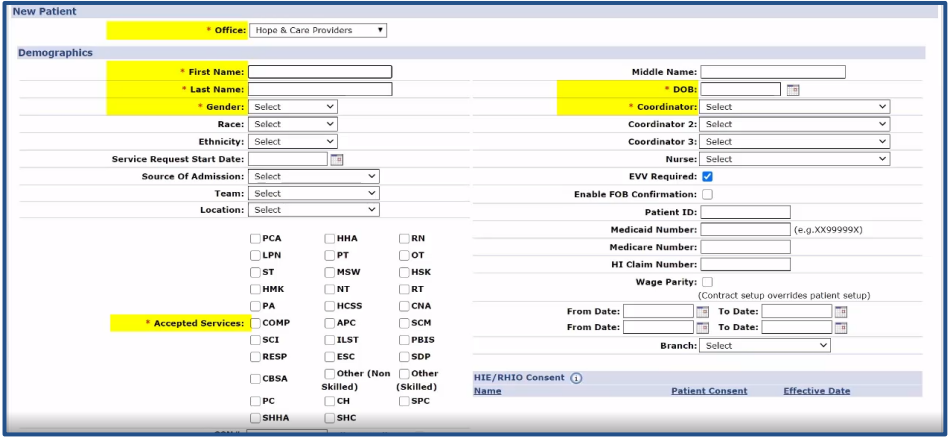
- A timely Patient Placement and/or timely Authorization is not received from a Linked Payer, or
- *No Placement or Authorization* is expected to be received from a Linked Payer.

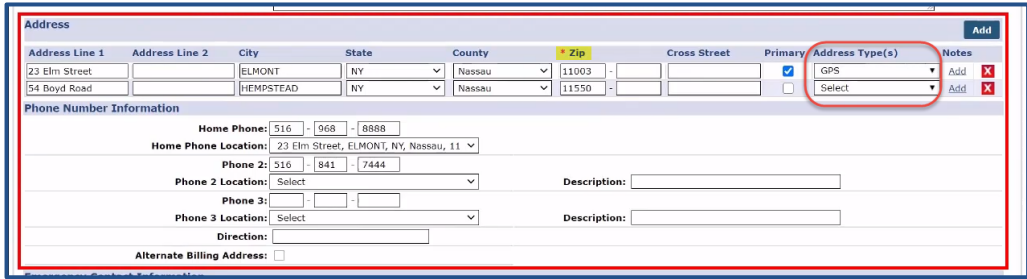
Refer to the [Adding a New Patient and TEMP Authorization](#) video for more details.

Process phases include the following phases listed in order below:

1. Create a New Patient
2. Assign a Contract to a Patient
3. Add a TEMP Authorization


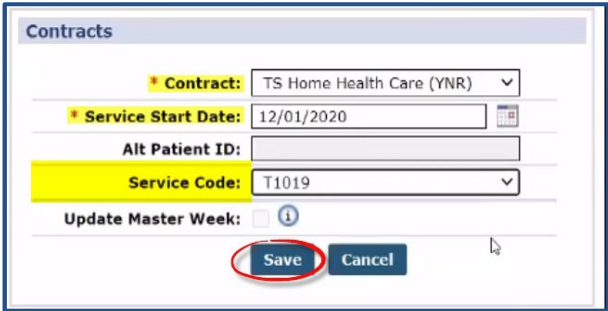
Phase 1 – Create a New Patient

Step	Action
1	Navigate to Patient > New Patient to open the <i>New Patient</i> screen.
2	<p>On the <i>New Patient</i> page, complete all required fields (denoted with a red asterisk). The following image displays the <i>Demographics</i> section (top of the page).</p>  <p style="text-align: center;">New Patient Page: Required Fields</p>
3	<p>Scroll to the <i>Address</i> section and complete. While only the Zip (Code) field is required per address, it is ideal to complete all fields as thoroughly as possible. It is also important to ensure that GPS is selected in the Address Type(s) field to allow the Caregiver Mobile App to associate EVV and Visit Verification information.</p>

Step	Action
	 <p style="text-align: center;">Address Type(s) Fields</p>
4	(Optional) Review and enter information in other sections if/as available.
5	Click Save . The Patient Status is Waiting until a Contract is assigned to the Patient.

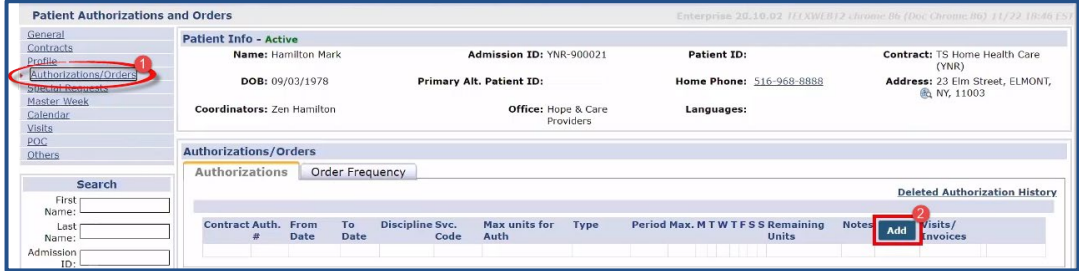
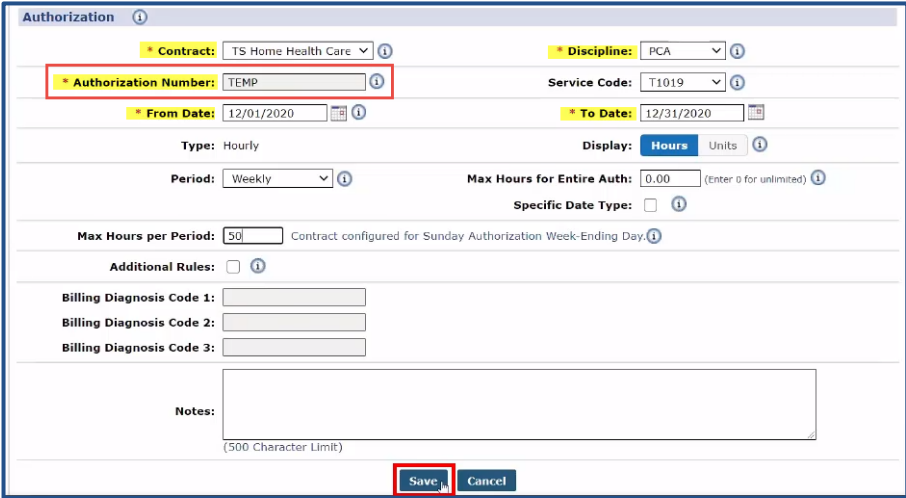
Phase 2 – Assign a Contract to the Patient

Complete the following steps to change language settings on the Mobile App.

Step	Action
1	<p>On the Patient Profile, select <i>Contracts</i> from the index. Click on the Add button.</p>  <p style="text-align: center;">Patient Contracts Page: Add Button</p>
2	<p>The <i>Contracts</i> window opens. Select the Contract and enter the Service Start Date (required) fields. Select the applicable Service Code (corresponding to the selected Contract) to set as a default for visits if desired. Click Save.</p>  <p style="text-align: center;">Contracts Window Fields</p>
3	<p>On the Patient's <i>Contract</i> page, the Status becomes Active. The Contract information displays under the <i>Placement</i> section and the Contract Status History section provides historical activity for the Contract, as seen in the following image.</p>

Step	Action																												
	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Patient Info Active</p> <p>Name: Hamilton Mark Admission ID: YNR-900021 Patient ID: Contract: TS Home Health Care (YNR)</p> <p>DOB: 09/03/1978 Primary Alt. Patient ID: Home Phone: 516-968-8888 Address: 23 Elm Street, ELMONT, NY, 11003</p> <p>Coordinators: Zen Hamilton Office: Hope & Care Providers Languages:</p> </div> <div style="border: 1px solid red; padding: 5px; margin-top: 5px;"> <p>Contracts Add</p> <table border="1"> <thead> <tr> <th>Placement ID</th> <th>Contract</th> <th>Is Primary Contract</th> <th>Alt Patient ID</th> <th>Service Start Date</th> <th>Source Of Adm</th> <th>Service Code</th> <th>Discharge Date</th> <th>Discharge To</th> </tr> </thead> <tbody> <tr> <td>3330170</td> <td>TS Home Health Care (YNR)</td> <td><input checked="" type="checkbox"/> H</td> <td>Edit H</td> <td>12/01/2020</td> <td></td> <td>T1019 H</td> <td>Edit</td> <td>Additional Options X</td> </tr> </tbody> </table> <p>Contract Status History</p> <table border="1"> <thead> <tr> <th>Placement ID</th> <th>Date</th> <th>Contract Name</th> <th>Note</th> <th>User Name</th> </tr> </thead> <tbody> <tr> <td>3330170</td> <td>11/22/2020 6:46:33 PM</td> <td>TS Home Health Care (YNR)</td> <td>Contract Added(12/01/2020)</td> <td>MarkENTF</td> </tr> </tbody> </table> </div> </div> <p style="text-align: center;">Patient Active Status</p>	Placement ID	Contract	Is Primary Contract	Alt Patient ID	Service Start Date	Source Of Adm	Service Code	Discharge Date	Discharge To	3330170	TS Home Health Care (YNR)	<input checked="" type="checkbox"/> H	Edit H	12/01/2020		T1019 H	Edit	Additional Options X	Placement ID	Date	Contract Name	Note	User Name	3330170	11/22/2020 6:46:33 PM	TS Home Health Care (YNR)	Contract Added(12/01/2020)	MarkENTF
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Phase 3 – Add a TEMP Authorization

Step	Action
1	<p>On the Patient Profile, select <i>Authorizations/Orders</i> from the index. Click on the Add button.</p>  <p style="text-align: center;">Patient Authorizations and Orders: Add Button</p>
2	<p>The <i>Authorization</i> window opens. Complete the required fields (denoted with a red asterisk) to include Contract, Discipline, From Date and To Date. The Authorization Number field auto-fills with “TEMP” when the Contract is selected as this is a temporary contract, used for purposes of scheduling only.</p> <p>Complete other fields such as Period and Max Hours per Period, as applicable.</p>  <p style="text-align: center;">Authorization Window Fields</p>
3	<p>Click Save to finalize.</p>
4	<p>The authorization displays on the <i>Authorization</i> page, as seen in the following image. The authorization also displays in the Patient Calendar.</p> <p>The TEMP Authorization allows Providers to schedule the Patient for visits. An official Authorization from the Payer is required to bill for a visit.</p>

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	<div style="border: 1px solid #003366; padding: 5px;"> <p>Patient Info - Active</p> <table border="0" style="width: 100%;"> <tr> <td>Name: Hamilton Mark</td> <td>Admission ID: YNR-900021</td> <td>Patient ID:</td> <td>Contract: TS Home Health Care (YNR)</td> </tr> <tr> <td>DOB: 09/03/1978</td> <td>Primary Alt. Patient ID:</td> <td>Home Phone: 516-968-8888</td> <td>Address: 23 Elm Street, ELMONT, NY, 11003</td> </tr> <tr> <td>Coordinators: Zen Hamilton</td> <td>Office: Hope & Care Providers</td> <td>Languages:</td> <td></td> </tr> </table> <hr/> <p>Authorizations/Orders</p> <p>Authorizations Order Frequency Deleted Authorization History</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contract</th> <th>Auth. #</th> <th>From Date</th> <th>To Date</th> <th>Discipline Svc. Code</th> <th>Max units for Auth</th> <th>Type</th> <th>Period Max.</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> <th>S</th> <th>Remaining Units</th> <th>Notes</th> <th>Add</th> <th>Visits/Invoices</th> </tr> </thead> <tbody> <tr> <td>TS Home Health Care (YNR)</td> <td>TEMP</td> <td>12/01/2020</td> <td>12/31/2020</td> <td>PCA</td> <td>T1019</td> <td>N/A</td> <td>Hourly</td> <td>Weekly</td> <td>50.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>0.00</td> <td></td> <td>Edit</td> <td>Update X</td> </tr> </tbody> </table> </div> <p style="text-align: center; margin-top: 10px;">Patient Authorization</p>	Name: Hamilton Mark	Admission ID: YNR-900021	Patient ID:	Contract: TS Home Health Care (YNR)	DOB: 09/03/1978	Primary Alt. Patient ID:	Home Phone: 516-968-8888	Address: 23 Elm Street, ELMONT, NY, 11003	Coordinators: Zen Hamilton	Office: Hope & Care Providers	Languages:		Contract	Auth. #	From Date	To Date	Discipline Svc. Code	Max units for Auth	Type	Period Max.	M	T	W	T	F	S	S	Remaining Units	Notes	Add	Visits/Invoices	TS Home Health Care (YNR)	TEMP	12/01/2020	12/31/2020	PCA	T1019	N/A	Hourly	Weekly	50.00						0.00		Edit	Update X
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