

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 Pa	Patient to open the New Patient screen.						
2	On the New Patient page, con image displays the Demograph "ent "office "First Name "Last Name "Last Name "Service Request Star Date Source of Admission Team Location	omplete all required fields (denoted with a red asterisk). The follow applics section (top of the page). affice fige & Care Providers * * </th <th>ving</th>	ving					
		New Patient Page: Required Fields						
2	Scroll to the Address 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							
5	that GPS is selected in the Ad	Address Type(s) field to allow the Caregiver Mobile App to associate	ciate					
	EVV and Visit Verification information.							



Step	Action
	Address Add Address Line 1 Address Line 2 City State County Zip Cross Street Primary Address Type(s) Notes 23 Ein Street ELMONT NY Nsssau 11003 - Coss Street Primary Address Type(s) Notes 24 Eosyt Road If More Phone NY Nsssau 11550 - Coss Street Add Select Add Phone Number Information Home Phone: 516 - 668 - 6886 Home Phone 2: Select Add Select Add Select Add Select Add Select Add Select Phone 2: Select Obscription: Phone 2: Select Obscription: Phone 3: - - Phone 3: - - Phone 3: - - Description: Description: Description: Direction: Direction: Costion: Select V Description: Direction: Costion: Select V Description: Direction: Costion: Costion: Select V Description: Direction: Direction: Costion: Select <t< th=""></t<>
	Address Type(s) Fields
4	(Optional) Review and enter information in other sections if/as available.
5	Click <i>Save</i> . The Patient Status is Waiting until a Contract is assigned to the Patient.

Phase 2 - Assign a Contract to the Patient

Step Action On the Patient Profile, select *Contracts* from the index. Click on the *Add* button. Patient Contracts Patient Info - Waiting Name: Hamilton Mark DOB: 09/03/1978 ontracts Admission ID: YNR-900021 Patient ID Contract: Home Phone: 516-968-8888 Primary Alt. Patient ID: Authorizations/Orders Special Requests Master Week 1 Coordinators: Zen Hamilton Office: Hope & Care Providers Languages: Calendar Visits Contracts POC Add Others No Contracts Found Search **Patient Contracts Page: Add Button** The Contracts 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. Contracts 2 * Contract: TS Home Health Care (YNR) v * Service Start Date: 12/01/2020 Alt Patient ID: $\overline{}$ Service Code: T1019 (1) Update Master Week: 2 Save Cancel **Contracts Window Fields** On the Patient's Contract page, the Status becomes Active. The Contract information displays 3 under the Placement section and the Contract Status History section provides historical activity for the Contract, as seen in the following image.

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







Phase 3 – Add a TEMP Authorization

Step	Action								
	On the Patient Profile, select Authorizations/Orders from the index. Click on the Add butto								
	,								
	Patient Authorizations and Orders Enterprise 20.10.02 TEXWEB(2 chrome Be (Ooc Chrome Bo) 11/22 (Bdd (SF								
	General Patient Info - Active Contracts Name: Hamilton Mark Admission ID: YNR-900021 Patient ID: Contract: TS Home Health Care								
	Primary Alt. Patient ID: Home Phone: 516-968-8888 Address: 23 Elm Street, ELMONT,								
1	Master Week Coordinators: Zen Hamilton Calendar Coordinators: Zen Hamilton Office: Hope & Care Languages: Providers								
-	Visits POC Others Authorizations/Orders								
	Search Order Frequency								
	First								
	Add favores								
	Patient Authorizations and Orders: Add Button								
	The Authorization window opens. Complete the required fields (denoted with a red asterisk) to								
	The Authorization window opens. Complete the required helds (denoted with a red astensk) 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								
	seneduring only.								
	Complete other fields such as Period and Max Hours per Period , as applicable.								
	Authorization ①								
	Contract: TS Home Health Care Discipline: PCA Decay								
2	* Authorization Number: TEMP () Service Code: T1019 V ()								
-	* From Date: 12/01/2020 * To Date: 12/31/2020								
	Type: Hourly Display: Hours Units (i)								
	Period: Weekly (1) Max Hours for Entire Auth: [0.00] (Enter 0 for unlimited) (1) Specific Date Type: (1)								
	Max Hours per Period: 50 Contract configured for Sunday Authorization Week-Ending Day.()								
	Additional Rules: 🗌 🛈								
	Billing Diagnosis Code 1:								
	Billing Diagnosis Code 2:								
	Billing Diagnosis Code 3:								
	Notes:								
	(500 Character Limit)								
	Save, Cancel								
	Authorization Window Fields								
3	Click Save to finalize								
-									
	The authorization displays on the Authorization page, as seen in the following image. The								
	authorization also displays in the Patient Calendar.								
4									
	The TEMP Authorization allows Providers to schedule the Patient for visits. An official								
	Authorization from the Payer is required to bill for a visit.								





Action							
Patient Info - Active							
Name: Hamilton Mark		Admission ID: YNR-900	021 Patient ID	Patient ID:		Contract: TS Home Health Care (YNR)	
DOB: 09/03/1	DOB: 09/03/1978 Primary Alt. Patient		Home Phone	516-968-8888	Address: 23 Elm S NY, 1100	ess: 23 Elm Street, ELMONT	
Coordinators: Zen Har	milton	Office: Hope & O Providen	Care Languages	:	G		
Authorizations/Order	rs						
Authorizations	Order Frequency						
					Deleted Author	ization Histor	
Contract Aut	th. From Date To Date D	iscipline Svc. Max units Code for Auth	Type Period Max. M T W	/ T F S S Remaining Note Units	s Add Visits/ Invoices		
TS Home Health Care (YNR)	IP 12/01/2020 12/31/2020 P	CA T1019 N/A	Hourly Weekly 50.00	0.00	Edit Update	3	
		Patien	t Authorization				