

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

Phase 1 - Create a New Patient

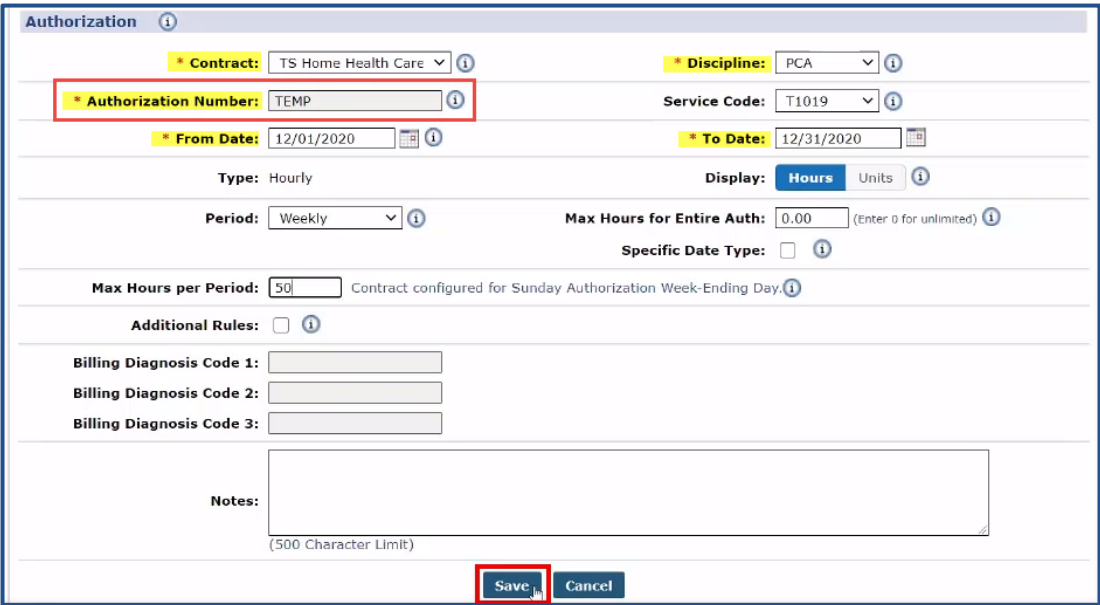
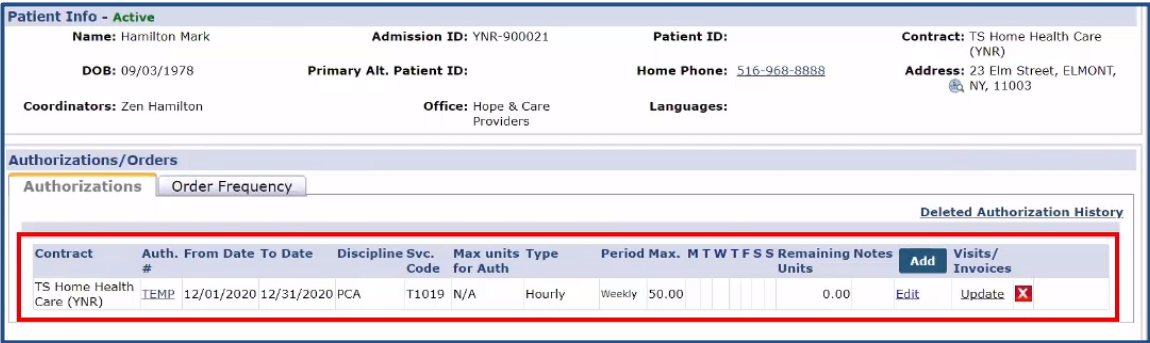
Step	Action
1	Navigate to Patient > New Patient to open the <i>New Patient</i> screen.
2	<p>On the <i>New Patient</i> page, complete all required fields (denoted with a red asterisk). The following image displays the <i>Demographics</i> section (top of the page).</p>
3	<p>Scroll to the <i>Address</i> 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>
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

Step	Action
1	<p>On the Patient Profile, select <i>Contracts</i> from the index. Click on the Add button.</p>
2	<p>The <i>Contracts</i> window opens. Select the Contract and enter the Service Start Date (required) fields.</p> <p>Select the applicable Service Code (corresponding to the selected Contract) to set as a default for visits if desired.</p> <p>Click Save.</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>

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>

Step	Action																																										
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> 																																										
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>  <table border="1" data-bbox="321 1562 1424 1646"> <thead> <tr> <th>Contract</th> <th>Auth. #</th> <th>From Date</th> <th>To Date</th> <th>Discipline</th> <th>Svc. Code</th> <th>Max units for Auth</th> <th>Type</th> <th>Period</th> <th>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></td> <td></td> <td>0.00</td> <td></td> <td>Edit</td> <td>Update </td> </tr> </tbody> </table>	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
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