



# Patient Placement and Management Process Guide

Provider User Guide

## Document Revision History

| Date       | Description of Revision         |
|------------|---------------------------------|
| 09/24/2020 | Initial version of the document |
| 03/08/2021 | Accessibility standards applied |
| 08/22/2022 | Updates                         |

# Table of Contents

- Overview ..... 1
  - HHAX System Key Terms and Definitions ..... 1
- Patient Placement..... 2
  - New Placements ..... 3
    - Placement Notifications..... 3
    - Accepting New Placements..... 4
    - The Pending Placement Queue..... 6
    - Automated Placement Notification ..... 7
- The Patient Profile ..... 9
  - The *General Page* ..... 9
    - Payer Admission ID becomes Alt Patient ID..... 10
  - The *Contracts Page* ..... 10
  - The *Profile Page* ..... 10
  - The *Authorization Page*..... 11
  - The *Special Requests Page* ..... 12
  - The *Master Week Page* ..... 12
  - The *Calendar Page* ..... 13
  - The *Visits Page* ..... 13
  - The *POC Page* ..... 13
  - The *Others Page* ..... 14
- Patient Status ..... 15
  - Active ..... 16
  - Hold ..... 16
  - Hospitalized..... 16
  - Discharged ..... 16

# Overview

Patient Profiles are created exclusively by Payers and sent to Providers via the **Patient Placement** process. Once accepted by the Provider, the system generates a Patient Profile where Providers can view and manage Patient details to include demographic information, Authorizations, scheduled Visits, and anything related to the Patient.

This guide covers the Patient Placement process via the HHAeXchange (HHAX) application as well as the management of the Patient record in the system. **Patient Management** varies from case to case depending on the authorizing Payer. System functionality may vary based on the permissions allowed by a Payer.

Please direct any questions, thoughts, or concerns regarding the content herein to [HHAX Client Support](#).

## HHAX System Key Terms and Definitions

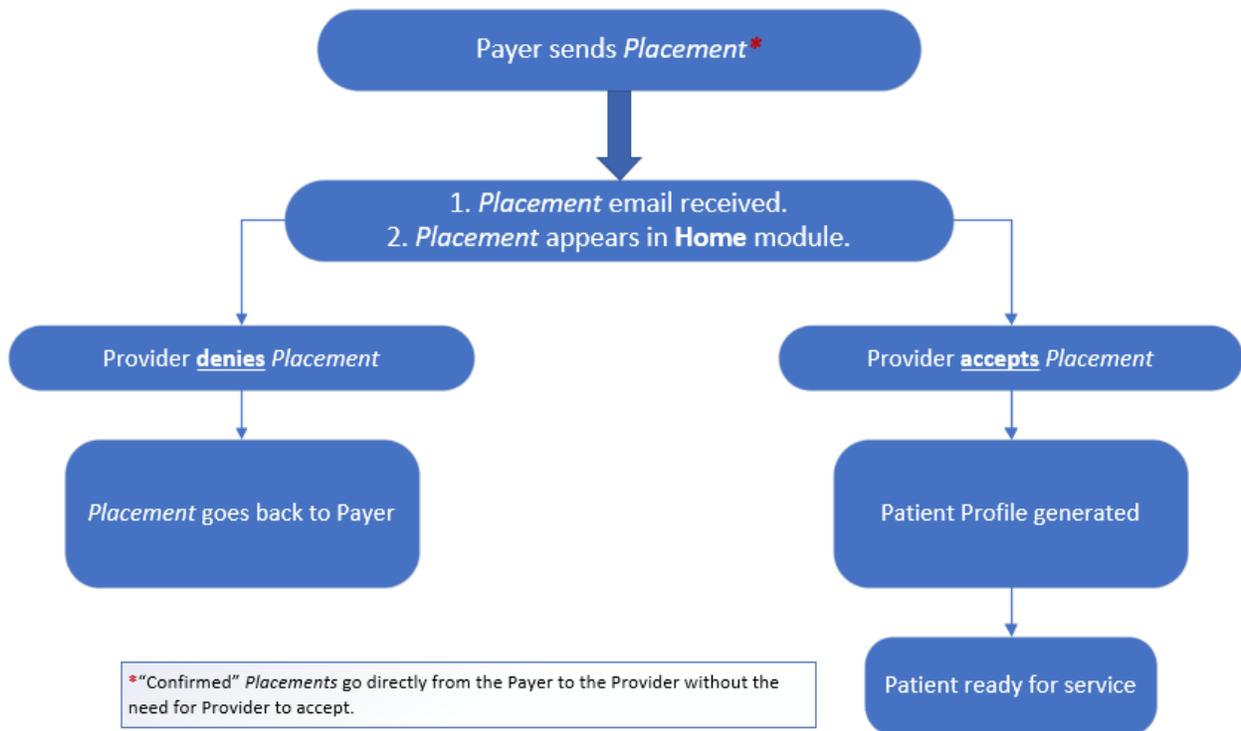
The following provides basic definition of HHAX System key terms applicable throughout the document.

| Term             | Definition  |
|------------------|---|
| <b>Patient</b>   | Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.                                     |
| <b>Caregiver</b> | Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.                  |
| <b>Provider</b>  | Refers to the Agency or organization coordinating services.   |
| <b>Payer</b>     | Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers. |
| <b>HHAX</b>      | Acronym for HHAeXchange   |

# Patient Placement

An individual who receives service, regardless of the type of service received (Skilled or Non-Skilled) is defined as a “Patient” in the HHAX system. Payers create a Patient Profile in their system and subsequently submit Patient cases to Providers via the HHAExchange (HHAX) system.

The following diagram illustrates the Patient Placement workflow once a Payer issues a Placement to a Provider.



# New Placements

New Patient cases are presented by Payers as **Placements** in HHAX. There are two types of Patient Placements, as follows:

- **Confirmed Placements** is issued directly from a Payer to a specific Provider (without the Provider having to accept).
- With **Pending Placements**, Providers are free to review the Placement information (such as the Patient’s service and scheduling requirements) before ultimately deciding whether to accept or deny it. When a Placement is accepted. The system generates a new profile in the Provider system based on the information created by the Payer.

## Placement Notifications

Placements issued by a Payer appear under the *Pending Placements* section on the Provider’s **Home** module (as seen in the following image). Users with access to the *Pending Placements* section on the **Home** module may review and accept the **Placement**.



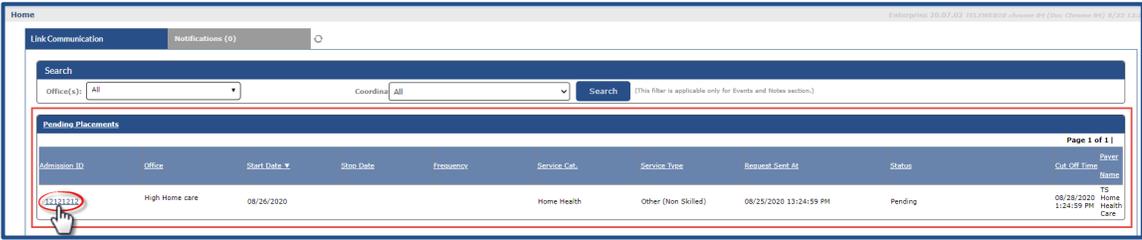
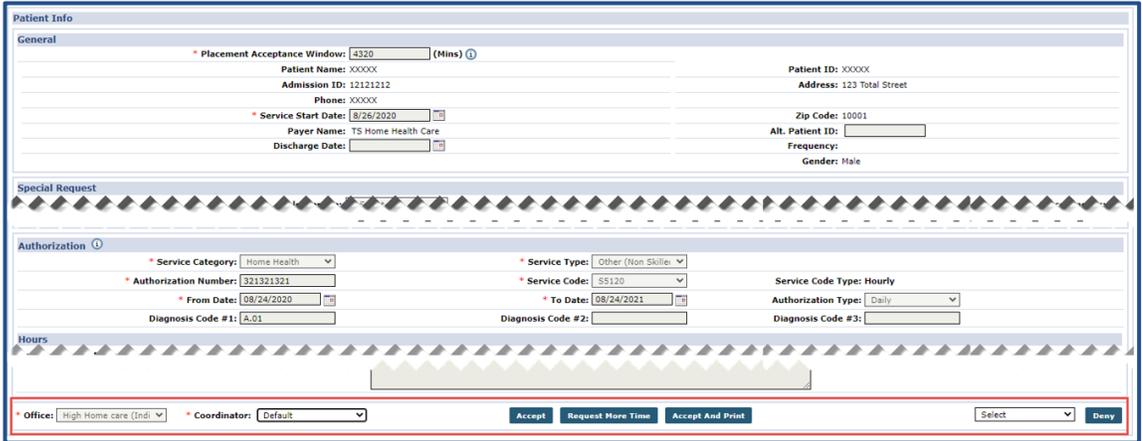
Home – Link Communication: Pending Placement

Alternatively, an automated email notification for new *Placements* may be set up with Administrative permissions. The *Placement* email is for notification purposes only as a new Placement can only be accepted by a user who is logged into the system. Refer to the [Automated Placement Notification](#) section for setup instructions.

## Accepting New Placements

A new **Placement** contains essential information (such as *General Patient Info*, *Special Requests*, and *Authorizations*) for Providers to review a Patient’s case and scheduling requirements before deciding to accept or deny it.

Complete the following steps to review and accept or deny a new *Pending Placement*.

| Step | Action  |
|------|---|
| 1    | <p>Navigate to the <i>Pending Placement</i> section on the <b>Home</b> Module.</p>    |
| 2    | <p>Click on the <u>Admission ID</u> (link) of the <b>Placement</b>.</p>   |
| 3    | <p>The <i>Placement</i> window opens displaying the <i>Patient Info</i> page providing detailed information such as Demographics, Scheduling Preferences and Authorizations. Review the case and scroll to the bottom to proceed.</p>  <p style="text-align: center;"><b>Placement Window</b></p> <p><b>Note:</b> Some information is “view only” and some fields are masked until after the Patient is accepted.</p> |
| 4    | <p>Assign the <i>Placement</i> to a <b>Coordinator</b>.</p>   |
| 5    | <p>The following buttons perform specific actions. Click the desired action to proceed.</p> <ul style="list-style-type: none"> <li>• <b>Accept</b> – Accept the Placement and generate a Patient Profile.</li> <li>• <b>Request More Time</b> – Request more time from the Payer to review the case before proceeding.</li> </ul>   |

| Step | Action  |
|------|---|
|      | <ul style="list-style-type: none"> <li><b>Deny</b> – To deny the Placement.</li> </ul> <p style="text-align: center;"><b>Accept, Request More Time, or Deny Placement</b></p> |
| 6    | <p>Once a <i>Placement</i> has been accepted or denied, it is cleared from the <i>Pending Placement</i> section.</p>  |
| 7    | <p>When a <i>Placement</i> is accepted, a new <i>Active Patient Profile</i> is generated.</p>   |

**Note:** Every *Placement* has a **Cut Off Time** (deadline) when the system removes the case from the Provider’s system. When a case is approaching the **Cut Off Time**, the **Request Sent At** column (in the Pending Placements section of the Home module) displays the value in red. **Cut Off Times** may vary from Payer to Payer.

| Request Sent At        | Status  | Cut Off Time           | Payer Name                |
|------------------------|---------|------------------------|---------------------------|
| 08/03/2020 17:02:18 PM | Pending | 08/03/2020 17:30:00 PM | Pennsylvania Top MCO - PA |

**Case Nearing Cut Off Time**

## The Pending Placement Queue

The **Pending Placement Queue** (*Action > Pending Placement Queue*) page serves as a dashboard where placement activity is tracked. The queue is comprised of four placement categories/sections based on the action taken by the Provider, as described in the following table.

| Placement Queue Section     | Indicates Placements that...  |
|-----------------------------|---|
| Pending                     | are currently in the <i>Pending Placement</i> section of the <b>Home</b> module.  |
| Staffed with Temp Caregiver | have been accepted and scheduled with a <i>Temp</i> Caregiver.  |
| Staffed                     | have been accepted and staffed with a <i>named</i> Caregiver.   |
| Accepted with No Masterweek | have been accepted. Patients who are assigned by Payer as a “Confirmed” Placement appear here; easily identified as Confirmed Placements in the system. |

**Pending Placement Queue**

Total Pending: **0**    Total Accepted: **0**    Total Staffed: **0**    Total Accepted with no Masterweek: **1**

**Pending**

No Pending Patient Found.

**Staffed with Temp Caregiver**

No Accepted Patient Found.

**Staffed**

No Staffed Patient Found.

**Accepted with No Masterweek**

Page 1 of 1 |

| Name         | Admission ID | Office         | Start Date | Stop Date | Frequency | Time Accepted          | Payer Name          |
|--------------|--------------|----------------|------------|-----------|-----------|------------------------|---------------------|
| Mann Matthew | PZH-12121212 | High Home care | 08/26/2020 |           |           | 08/25/2020 13:29:15 PM | TS Home Health Care |

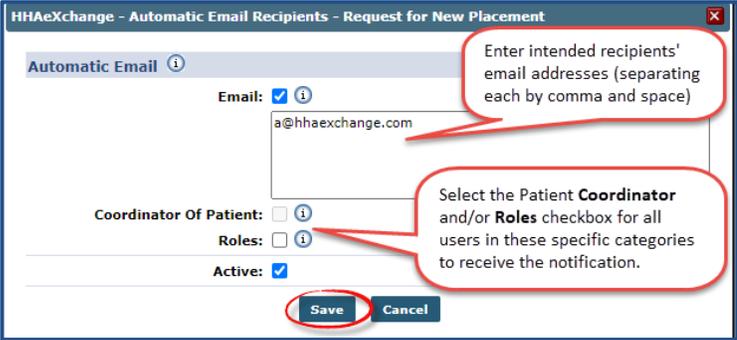
**OK**

Patient Placement Queue

## Automated Placement Notification

Complete the following steps to enable automated notifications.

**Note:** Must have Admin permissions to enable notifications.

| Step | Action  |
|------|---|
| 1    | Navigate to <b>Admin &gt; Office Setup &gt; Search Office</b> to locate the applicable Office.  |
| 2    | <p>On the <i>Edit Office</i> page, scroll to the <i>Automatic Email</i> section (at the bottom of the page). Locate the <b>Request for New Placement</b> email notification and click the <i>Edit</i> link.</p>  <p style="text-align: center;"><b>Automatic Email set up – New Placement Notification</b></p>  |
| 3    | <p>The Request for New Placement window opens (as seen in the image below). Complete as follows:</p> <ol style="list-style-type: none"> <li>1. Enter the intended recipients' email addresses (separating each by comma and space). The Email checkbox is selected by default.</li> <li>2. Select the <b>Patient Coordinator</b> and/or <b>Roles</b> checkbox if the notification also applies to the Patient's Coordinator and/or all users in a specific Role.</li> <li>3. The <b>Active</b> checkbox is selected by default.</li> <li>4. Click the <b>Save</b> button.</li> </ol>  <p style="text-align: center;"><b>Request for New Placement – Automatic Email</b></p> |
| 4    | The system automatically generates a Placement Notification email (pictured to the right) each time a new <i>Placement</i> is sent.   |

| Step | Action  |
|------|---|
|      | <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;"> <p>This is an automated notification email. Do NOT reply.</p> <p>A new placement request has been sent to you with the following details.</p> <p>Payer Name : ██████████</p> <p>Admission ID : ██████████</p> <p>Start of service : ██████████</p> <p>Cut of time : ██████████</p> <p>Address : ██████████</p> <p>Frequency : SAT:0-0, SUN:0-0, MON:0-0, TUE:0-0, WED:0-0, THU:0-0, FRI:0-0</p> <p>Special Requests :Request Gender: Male , Primary Language: English, Secondary Language: Spanish</p> <p>Discharge Date :</p> </div> <p>HHA Exchange<br/>           This message and any accompanying attachments contain information from Homecare Software Solutions LLC which is confidential or privileged. The information is intended to be for the use of the individual or entity named above. If you are not the intended recipient, be aware that any disclosure, copying, distribution or use of the contents of this information is prohibited. If you have received this e-mail in error, please notify the sender immediately by reply e-mail and destroy all c copies of the original message.</p> <p style="text-align: center;"><b>Automated Placement Email</b></p> |

# The Patient Profile

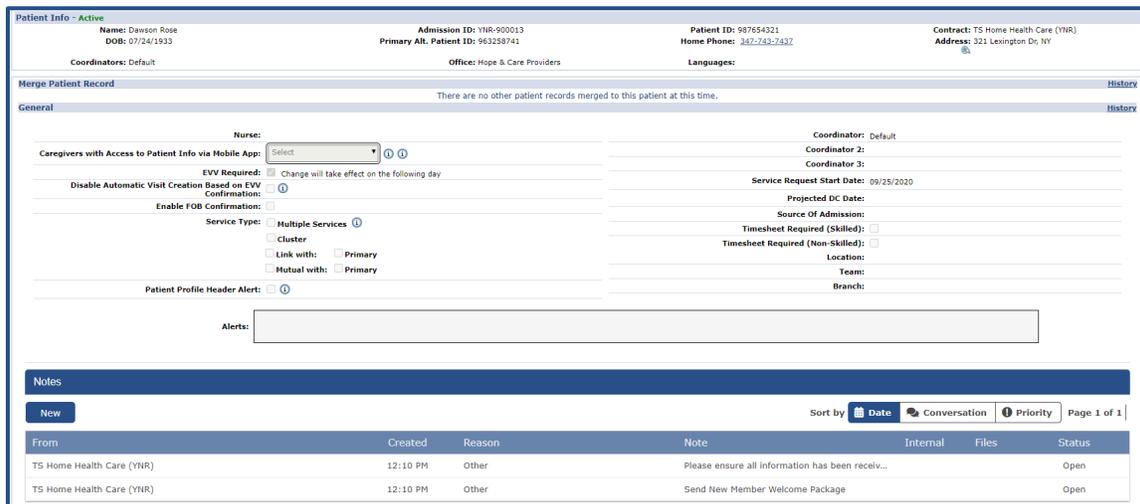
A new, *Active*, **Patient Profile** is generated for each accepted or confirmed **Placement**. The Patient Profile is used to manage Patient information and scheduling.

This section provides a high-level review of the pages in the Patient Profile, accessible using the Index (left navigation, pictured on the right). Note that the extent to which users may review and edit information on the Patient Profile depends on the authorizing Payer.



## The General Page

The *General* page contains basic information concerning the Patient’s homecare service requirements as well as the Patient’s *Notes* (as pictured in the image). The **Notes** functionality is located at the bottom of this page. Refer to the [Communications Process Guide](#) for further information and instructions.



Patient General Page

## Payer Admission ID becomes Alt Patient ID

The **Admission ID** (the Payer’s original at the time of placement) becomes the **Alt Patient ID** upon Patient Placement. In turn, the system creates a new Admission ID (specific to the Provider) and the **Alt Patient ID** is stored for tracking purposes.

## The Contracts Page

The *Contracts* page contains contract information to include the Contract Status History per contract (as pictured in the image).

**Patient Info - Active**

Name: Dawson Rose  
DOB: 07/24/1933

Admission ID: YNR-900013  
Primary Alt. Patient ID: 963258741

Patient ID: 987654321  
Home Phone: 347-743-7437

Contract: TS Home Health Care (YNR)  
Address: 321 Lexington Dr, NY

Coordinators: Default  
Office: Hope & Care Providers  
Languages:

---

**Contracts** Add

| Placement ID | Contract                  | Is Primary Contract                   | Alt Patient ID | Service Start Date | Source Of Adm | Service Code | Discharge Date | Discharge To |                      |
|--------------|---------------------------|---------------------------------------|----------------|--------------------|---------------|--------------|----------------|--------------|----------------------|
| 3191395      | TS Home Health Care (YNR) | <input checked="" type="checkbox"/> H | 963258741 H    | 09/25/2020         |               | Edit H       | Edit           |              | Additional Options X |

---

**Contract Status History**

| Placement ID | Date                  | Contract Name             | Note  | User Name    |
|--------------|-----------------------|---------------------------|---|--------------|
| 3191395      | 9/24/2020 11:59:20 AM | TS Home Health Care (YNR) | Contract Added(09/24/2020, Alt Patient ID: 963258741) | entf_Lissett |

Patient Contracts Page

## The Profile Page

The *Profile* page contains the Patient’s *Demographics, Address, Phone Number Information, Emergency Contact Information, Emergency Preparedness, and Physician* information. To edit information on this page, click the **Edit** button at the bottom of the page.

**Patient Info - Active**

Name: Dawson Rose  
DOB: 07/24/1933

Admission ID: YNR-900013  
Primary Alt. Patient ID: 963258741

Patient ID: 987654321  
Home Phone: 347-743-7437

Contract: TS Home Health Care (YNR)  
Address: 321 Lexington Dr, NY

Coordinators: Default  
Office: Hope & Care Providers  
Languages:

---

**Profile** Print Profile

**Demographics** History

First Name: Rose  
Last Name: Dawson  
Gender: Female  
Race:  
Ethnicity:  
Start Date: 09/25/2020  
Admission ID: YNR-900013  
Accepted Services: N/A  
SSN:  
Allow Duplicate: No  
Alerts:

Middle Name:  
DOB: 07/24/1933  
Coordinator: Default  
Coordinator 2:  
Coordinator 3:  
Nurse:  
EVP Requested:  
Patient ID: 987654321  
Medicaid Number:  
Medicare Number:  
IEC Claim Number:  
Wage Parity:  
From Date:  
To Date:  
From Date:  
To Date:  
Patient Consent:  
Effective Date:

---

**Address**

| Address Line 1   | Address Line 2 | City     | State | County   | Zip   | Cross Street | Primary | Address Type(s) | Notes |
|------------------|----------------|----------|-------|----------|-------|--------------|---------|-----------------|-------|
| 321 Lexington Dr |                | NEW YORK | NY    | New York | 10001 |              | Yes     |                 | H     |

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**Phone Number Information** History

Home Phone: 347-743-7437

Home Phone Location:  
Phone 1:  
Phone 2 Location:  
Phone 3:  
Phone 3 Location:  
Direction:  
Alternate Billing Address: No

---

**Emergency Contact Information** History

Name: Jacki Dawson  
Lives with Patient:  
Have Keys:  
Address:  
Relationship: Other (husband)  
Phone 1:  
Phone 2:

---

**Emergency Preparedness** History

Priority Code:  
Mobility Status:  
Evacuation Location:  
Evacuation Zone:  
Electric Equipment Dependency:

---

**Physicians**

| MD Name | Phone | Note | Primary                             | Address | NPI |
|---------|-------|------|-------------------------------------|---------|-----|
|         |       |      | <input checked="" type="checkbox"/> |         |     |

Patient Profile Page

In *Edit* mode, most fields are editable and Providers can add multiple Patient addresses. Click the **Save** button to ensure any updates are registered by the system. Any changes/updates are NOT synced back to the Payer platform (self-contained within the Provider Portal platform).

Patients placed with multiple Providers have their own profile per Provider; no information (including addresses) is shared between Providers.

**Edit Patient Profile**

**Note:** It is recommended that the **Primary (Billing)** address coming from the Payer not be changed to prevent billing/claims issues. Providers can add and track multiple alternative addresses for EVV and operational purposes. To add or edit a Patient Address, refer to the [Managing Member Addresses Job Aid](#).

## The Authorization Page

The **Authorization** page maintains a record of all active and inactive Authorizations for the Patient. Further information concerning **Authorizations** is found in the [Scheduling Visits Process Guide](#) and the [Authorizations Job Aid](#).

**Patient Authorization Page**

## The Special Requests Page

The **Special Requests** page is optional and indicates Patient preferences used for scheduling such as *Preferred (Caregiver) Gender*, the Patient's *Primary Language*, and custom values setup by the Payer. Providers may review these preferences when scheduling a Caregiver.

**Patient Info - Active**

|                                      |  |   |  |
|--------------------------------------|--|---|--|
| Name: Dawson Rose<br>DOB: 07/24/1933 | Admission ID: YNR-900013<br>Primary Alt. Patient ID: 963258741 | Patient ID: 987654321<br>Home Phone: 347-743-7437 | Contract: TS Home Health Care (YNR)<br>Address: 321 Lexington Dr, NY |
| Coordinators: Default                | Office: Hope & Care Providers                                  | Languages:  |  |

---

**Special Requests** History

**Patient Preferences: Used for Scheduling**

Dogs  Smoking

Primary Language:  Secondary Language:

Preferred Gender:

Other:

---

**Patient Preferences: Not Used for Scheduling**

Gender

The Special Requests Page

## The Master Week Page

A *Master Week* is a reoccurring weekly schedule. This page allows Providers to create a reoccurring schedule for the Patient. Refer to the [Scheduling Visits Process Guide](#) for further information on this functionality.

**Patient Info - Active**

|                                      |  |   |  |
|--------------------------------------|--|---|--|
| Name: Dawson Rose<br>DOB: 07/24/1933 | Admission ID: YNR-900013<br>Primary Alt. Patient ID: 963258741 | Patient ID: 987654321<br>Home Phone: 347-743-7437 | Contract: TS Home Health Care (YNR)<br>Address: 321 Lexington Dr, NY |
| Coordinators: Default                | Office: Hope & Care Providers                                  | Languages:  |  |

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**Last 3 authorizations**

| Contract                  | Auth. # | From Date  | To Date    | Discipline | Svc. Code | Max units for Auth | Type   | Period | Max. S | S    | M    | T    | W    | T    | F    | Remaining Units | Notes |
|---------------------------|---------|------------|------------|------------|-----------|--------------------|--------|--------|--------|------|------|------|------|------|------|-----------------|-------|
| TS Home Health Care (YNR) | 134679  | 09/01/2020 | 09/01/2021 | HHA        | Rate0     | N/A                | Hourly | Daily  | 8.00   | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00            |       |

---

**Master Week** History

09/01/20 -

|                            | Monday Alt.              | Tuesday Alt.             | Wednesday Alt.           | Thursday Alt.            | Friday Alt.              | Saturday Alt.            | Sunday Alt.              |
|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Hours:</b>              | 0800 - 1600              | 0800 - 1600              | 0800 - 1600              | 0800 - 1600              | 0800 - 1600              |                          |                          |
| <b>Caregiver:</b>          | YNR-1004<br>Hamilton Xen |                          |                          |
| <b>Asst. ID:</b>           | 100004                   | 100004                   | 100004                   | 100004                   | 100004                   |                          |                          |
| <b>Pay Code:</b>           | PCA Hourly               | --Select--               | --Select--               |
| <b>POC:</b>                | --Select--               |
| <b>Bill To:</b>            | TS Home Health C         | --Select--               | --Select--               |
| <b>H:</b>                  | 08                       | 08                       | 08                       | 08                       | 08                       | 00                       | 00                       |
| <b>M:</b>                  | 00                       | 00                       | 00                       | 00                       | 00                       | 00                       | 00                       |
| <b>Service Code:</b>       | Rate0                    | Rate0                    | Rate0                    | Rate0                    | Rate0                    | --Select--               | --Select--               |
| <b>Rate Type:</b>          | Hourly                   | Hourly                   | Hourly                   | Hourly                   | Hourly                   |                          |                          |
| <b>Include in Mileage:</b> | <input type="checkbox"/> |

From Date: 9/24/2020 To Date: 10/15/2020 Save & Update Calendar Add Master week

\* [Update Calendar] will update only unbilled visits  
\* Master Week will create schedules only for Active contracts

The Master Week Page

## The Calendar Page

A Patient’s schedule is managed in the *Calendar* page. This page also displays the Patient’s last 3 Authorizations. Refer to the [Scheduling Visits Process Guide](#) for further information on the *Calendar* page.

**Patient Info - Active**

|  |  |   |  |
|--|--|---|--|
| <b>Name:</b> Dawson Rose<br><b>DOB:</b> 07/24/1933 | <b>Admission ID:</b> YNR-900013<br><b>Primary Alt. Patient ID:</b> 963258741 | <b>Patient ID:</b> 987654321<br><b>Home Phone:</b> 347-743-7437 | <b>Contract:</b> TS Home Health Care (YNR)<br><b>Address:</b> 321 Lexington Dr, NY |
| <b>Coordinators:</b> Default                       | <b>Office:</b> Hope & Care Providers   | <b>Languages:</b>   |  |

---

**Last 3 authorizations**

| 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 |
|---------------------------|---------|------------|------------|------------|-----------|--------------------|--------|--------|------|------|------|------|------|------|------|------|-----------------|-------|
| TS Home Health Care (YNR) | 134679  | 09/01/2020 | 09/01/2021 | HHA        | Rate0     | N/A                | Hourly | Daily  | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00            |       |

---

**Calendar**

Month: October Year: 2020 Search ◀ ▶ Rollover History Legend Create Visit Print

| Monday                                     | Tuesday                                    | Wednesday                                  | Thursday                                   | Friday                                    | Saturday | Sunday   |
|--|--|--|--|---|----------|----------|
| 28   | 29   | 30   | 1<br>S: 0800-1600<br>B: N<br>Hamilton Xen  | 2<br>S: 0800-1600<br>B: N<br>Hamilton Xen |          |          |
| 5<br>S: 0800-1600<br>B: N<br>Hamilton Xen  | 6<br>S: 0800-1600<br>B: N<br>Hamilton Xen  | 7<br>S: 0800-1600<br>B: N<br>Hamilton Xen  | 8<br>S: 0800-1600<br>B: N<br>Hamilton Xen  | 9<br>S: 0800-1600<br>B: N<br>Hamilton Xen |          | 10<br>11 |
| 12<br>S: 0800-1600<br>B: N<br>Hamilton Xen | 13<br>S: 0800-1600<br>B: N<br>Hamilton Xen | 14<br>S: 0800-1600<br>B: N<br>Hamilton Xen | 15<br>S: 0800-1600<br>B: N<br>Hamilton Xen |   |          | 17<br>18 |
| 19   | 20   | 21   | 22   | 23  |          | 24<br>25 |

Patient Calendar Page

## The Visits Page

The *Visits* page is used to review a Patient’s scheduled and confirmed Visits. Providers can search for visits based on a specified date range, or by billing status. Visits can also be deleted from this page. For further information on the *Visits* page refer to the [Scheduling Visits Process Guide](#).

**Patient Info - Active**

|   |  |  |   |
|---|--|--|---|
| <b>Name:</b> Mann Matthew<br><b>Admission ID:</b> PZH-12121212<br><b>Home Phone:</b> 347-347-3473 | <b>Payer Name:</b> TS Home Health Care<br><b>Patient ID:</b> 12121212<br><b>Office:</b> High Home care | <b>Frequency:</b><br><b>DOB:</b> 08/27/1939<br><b>Address:</b> 123 Total Street, NEW YORK, NY, 10001 | <b>Payer Coordinator:</b><br><b>Coordinators:</b> Default |
|---|--|--|---|

---

**Search Visits**

From Date:  To Date:  Billed: All Go

---

**Visits**

| <input type="checkbox"/> | Date       | Schedule  | Provider       | Service Code | Caregiver       | Confirmed Time | Billed | Billed Units | Billed Amount | Hold Visit |
|--------------------------|------------|-----------|----------------|--------------|-----------------|----------------|--------|--------------|---------------|------------|
| <input type="checkbox"/> | 08/31/2020 | 0800-1600 | High Home care | S5120        | Hamilton Ben    | 0800-1500      | No     |              |               | No         |
| <input type="checkbox"/> | 08/27/2020 | 0800-1300 | High Home care | S5120        | Hamilton Ashley | 0800-1300      | No     |              |               | No         |

Patient Visits Page

## The POC Page

A Patient’s Plan of Care (POC) is created and managed on the *POC* page. Multiple POCs can be entered, as required. Refer to the [Scheduling Visits Process Guide](#) for further information.

| Patient Info - Active                |                |  |          |  |              |  |
|--------------------------------------|----------------|--|----------|--|--------------|--|
| Name: Dawson Rose<br>DOB: 07/24/1933 |                | Admission ID: YNR-900013<br>Primary Alt. Patient ID: 963258741 |          | Patient ID: 987654321<br>Home Phone: <a href="tel:347-743-7437">347-743-7437</a> |              | Contract: TS Home Health Care (YNR)<br>Address: 321 Lexington Dr, NY |
| Coordinators: Default                |                | Office: Hope & Care Providers                                  |          | Languages:   |              |  |
| POC                                  |                |  |          |  |              |  |
| POC Number -                         | POC Start Date | POC Stop Date  | POC Note | Shift  | Created By   | Created Date   |
| 3180311                              | 09/25/2020     | <a href="#">Edit</a> <a href="#">H</a>                         |          | All  | entf_Lisset1 | 09/24/2020   |
|                                      |                |  |          |  |              | <a href="#">Print</a> <a href="#">X</a>                              |

Patient POC Page

## The Others Page

This page is used for Custom Fields, if/as necessary.

# Patient Status

The **Patient Status** specifies the state of a Patient’s case from the moment a Patient Profile is created to the moment when the Patient is *discharged*. Patient Status is governed by the Payer to immediately restrict or reinstate a Provider’s ability to schedule and bill services for a specific Patient.

This section covers each status and how status is designated accordingly. The **Patient Status** is shown on the *Patient Info* section in **Green** (as indicated in the images and descriptions below).

**Patient Info Section**

The following table provides the **Patient Status** and a description of each status.

| Status                     | Description  |
|----------------------------|--|
| <p><b>Active</b></p>       | <p>The <i>Active Status</i> signifies that a Patient is ready to receive service. Providers may actively schedule and bill for Patient with an <i>Active Status</i>.</p> <div data-bbox="570 359 1300 499" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Patient Info - <b>Active</b></p> <p>Name: Mann Matthew      Payer Name: TS Home Health Care<br/>           Admission ID: PZH-12121212      Patient ID: 12121212<br/>           Home Phone: <a href="tel:347-347-3473">347-347-3473</a>      Office: High Home care (Inc.)</p> </div>  |
| <p><b>Hold</b></p>         | <p>When a Patient is placed on <i>Hold</i>, the system restricts the account, and the Provider cannot schedule visits from that moment forward. Additionally, any scheduled services that fall beyond the date in which the Patient is placed on <i>Hold</i> is deleted. If the Patient has an active <b>Master Week</b>, then the system stops it from rolling over. A <i>Hold</i> status may be updated to <i>Active</i> once Patient services resume.</p> <div data-bbox="570 793 1300 926" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Patient Info - <b>Hold</b></p> <p>Name: Mann Matthew      Payer Name: TS Home Health Care<br/>           Admission ID: PZH-12121212      Patient ID: 12121212<br/>           Home Phone: <a href="tel:347-347-3473">347-347-3473</a>      Office: High Home care</p> </div> |
| <p><b>Hospitalized</b></p> | <p>The <i>Hospitalized Status</i> means that the Patient is in the hospital. Updating a Patient's <b>Status</b> to <i>Hospitalized</i> automatically discharges them from the Provider; therefore, the Provider may no longer service them.</p>  |
| <p><b>Discharged</b></p>   | <p>The <i>Discharged Status</i> indicates that the Patient will no longer be receiving service from the Provider. Once discharged, the Patient's Profile is not deleted but instead is kept on record. In turn, the Payer may send the Patient as a new <b>Placement</b> elsewhere. In this case, the system reactivates the existing Profile instead of creating a new one.</p>   |