



Back Office-General Quick Reference Guide

Home Health Scheduling Tasks



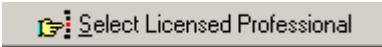




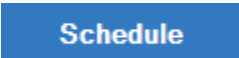
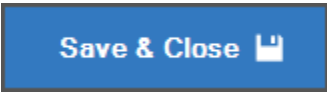






Table of Contents

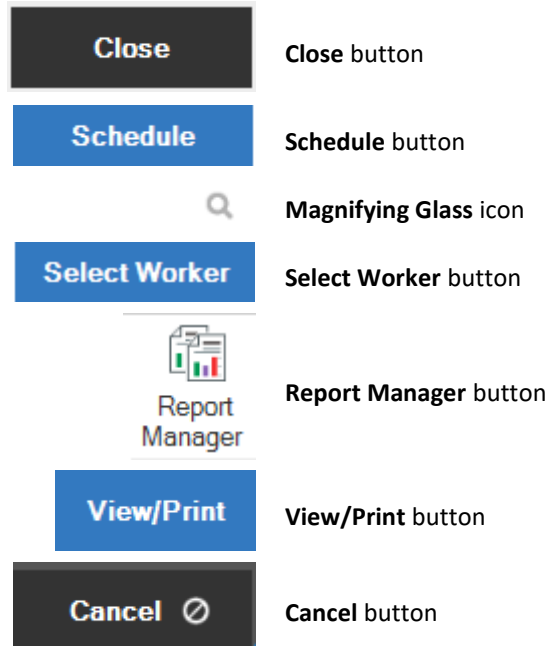
Perform Scheduling Tasks	3
Common Buttons & Icons	3
Assign the Evaluation Visit (Medicare)	4
Re-Assign a Licensed Professional to Evaluation Visits.....	4
Assign the Evaluation Visit for Multiple Disciplines.....	5
Assign the Evaluation Visit (Commercial Insurance).....	5
Schedule Week 1 Visits	5
Complete Requested Schedule	6
Schedule Discharge OASIS Collection	7
Process Declined Visits.....	8
Process Missed Visit.....	9
Process Reschedule Requests	9
Process Reassigned Visits.....	10
Complete Coordination Note Tasks	10
Complete Administrative Tasks	12
Run Agent Summary Report and Follow Up with Staff.....	13
View Report Options.....	13

Perform Scheduling Tasks

Many scheduling tasks are performed in the Workflow Console. When all previous steps are completed and a visit is ready to be scheduled for a patient, a task displays on your list. You can view scheduling reports and schedule most visits while still within the task. There are many events that happen throughout the patient's episode or benefit period that may affect or change the patient's pre-planned visits. When this occurs, the clinician has the ability to address those visits using one of the following four categories: reassign, reschedule, decline, or miss. When a pre-planned visit is changed using one of these categories, a task is generated in the Workflow Console for the scheduler to address. A scheduler is also responsible for viewing their assigned coordination notes and administrative tasks within the Workflow Console. Administrative tasks are generated to help the scheduler manage their non-patient related tasks through reports.

Common Buttons & Icons

	Magnifying Glass icon
	Select Worker button
	Select Licensed Professional button
	View Authorizations Summary button
	View Patient Calendar Report button
	Schedule Requested Visits button
	Filter icon
	Schedule button
	Save & Close button
	Stage Completed button
	Minimize button
	Close button
	Minimize button
	Add button
	Forward button



Assign the Evaluation Visit (Medicare)

From the Patient Related Tasks in the Workflow Console:

1. Double-click **ASSIGN THE EVALUATION VISIT**.
2. Click the **Magnifying Glass** icon in the Licensed Professional field.
3. Click the clinician you want to assign the visit to.

Note: You can use the filters at the top of the window to search for clinicians by specific criteria.

4. Click **Select Worker**.

Note: Some agencies may use the Scheduling Acuity drop-down to specify the visit priority. If the payor requires authorization, you need to select the authorization program as well.

5. Click **OK**.

Re-Assign a Licensed Professional to Evaluation Visits

From the Workflow Summary tab in the Workflow Console:

1. Use the filter pane on the left to search for the worker or patient.
2. Click **Load**.
3. Right-click **LP ASSIGNED**.
4. Click **Reassign Admit LP**.

Note: The visit cannot be reassigned if it is already accepted or incomplete. At that point, the visit must be synced back by the original clinician.

5. Click the **Magnifying Glass** icon in the Licensed Professional field.
6. Select the clinician.
7. Click **Select Worker**.

Note: You can change the visit date from here, if necessary.

8. Click **OK**.

Assign the Evaluation Visit for Multiple Disciplines

From the Patient Related Tasks tab of the Workflow Console:

1. Double-click **ASSIGN THE EVALUATION VISIT**.
2. Assign an LP for the visit(s).
3. Click the Licensed Professional **Magnifying Glass** icon in the Admitting box.
4. Select the worker.
5. Click **Select Worker**.
6. Adjust the dates for the visits if necessary.
7. Repeat steps 3-6 for the add-on evaluation visits.
8. After all visits are assigned, click **OK**.

Assign the Evaluation Visit (Commercial Insurance)

From Patient Related Tasks tab on the Workflow Console:

1. Double-click **ASSIGN THE EVALUATION VISIT**.

Note: For some payors, authorization is required. The Show Only OASIS Service **Codes** check box is automatically selected for all patients. If your agency does not perform OASIS for patients with commercial insurance, you need to clear this check box so that you can view non-OASIS service codes as well.

2. Clear the **Show Only OASIS Service Codes** check box, if appropriate.
3. Select the appropriate service code for this visit.
4. Click the **Magnifying Glass** icon in the Licensed Professional field.
5. Click the appropriate worker.
6. Click **Select Worker**.
7. Select the correct authorization program.
8. Click **OK**.

Schedule Week 1 Visits

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **COMPLETE REQUESTED SCHEDULE FOR WEEK 1 OF EPISODE**.

Note: The Complete Requested Schedule for Week 1 of Episode window displays the number of visits ordered, authorized, scheduled, and requested for each discipline. Insufficient means more visits are ordered than authorized.

2. Click **View Authorizations Summary**.
3. After reviewing this information, click the **Close** button.
4. Click **View Patient Calendar Report**.
5. Review the report; then click the **Close** button.
6. Click **Schedule Requested Visits**.
7. Click the **Date** column header to sort the visits by date so that the first visit is listed at the top.
8. Click the **Date filter** icon; then select the check boxes next to the first seven days of the episode.
9. Click **OK**.
10. Click the **Service Code filter** icon; then select only the check box for the service code you want to schedule.

Note: You can only schedule visits for one discipline at a time.

11. Click **OK**.
12. Select the check boxes next to the dates you want to schedule.
13. Click **Schedule**.
14. If the payor requires authorization, click the **Authorization/Program** drop-down arrow; then click the program that provides authorization for the visits.
15. Click the **Magnifying Glass** icon in the Worker field.
16. Select the worker.
17. Click **Select Worker**.
18. Click **Save**.

Note: The scheduled visits display in green.

19. Repeat steps 10-18 to schedule visits for each discipline.
20. When all visits for the first 7 days are scheduled, click **Close**.
21. Click **Stage Completed**.

Complete Requested Schedule

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **COMPLETE REQUESTED SCHEDULE**.

Note: The Complete Requested Schedule window displays the number of visits ordered, authorized, scheduled, and open for each discipline. Insufficient means more visits are ordered than authorized.

2. Click **View Authorizations Summary**.

3. Review the authorization details; then click the **Close** button.
4. Click **View Patient Calendar Report**.

Note: The Status column shows the status of each visit. V means Verified, S means Scheduled, and R means Requested. For verified visits, you can also see the begin and end time of the visit.

5. Review the report; then click the **Close** button.
6. Click **Schedule Requested Visits**.

Note: The Add/Edit Visits window displays. This screen only lists visits that are still in a requested status.

7. Click the **Date** column header to bring the earliest visits to the top of the grid.
8. Click the **Service Code** filter icon; then select only the check box next to the service code you want to schedule.

Note: You can only schedule visits for one discipline at a time.

9. Click **OK**.
10. Select the check boxes next to all visits you want to schedule.
11. Click **Schedule**.
12. If the payor requires authorization, click the **Authorization/Program** drop-down arrow; then click the program that provides authorization for the visits.
13. Click the **Magnifying Glass** icon in the Worker field.
14. Select the worker.
15. Click **Select Worker**.
16. Click **Save**.

Note: The scheduled visits display in green.

17. Repeat steps 8-16 to schedule visits for each discipline.
18. When all visits are scheduled, click **Close**.
19. Click **View Patient Calendar Report**.
20. Review the calendar report to make sure all visits are scheduled; then click the **Close** button.
21. Click **Stage Completed**.

Schedule Discharge OASIS Collection

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **SCHEDULE DISCHARGE OASIS COLLECTION**.

Note: You do not need to complete any steps within the task; it is simply a reminder to schedule the discharge visit. If this patient was mistakenly chosen for Discharge, you can

click Back to Recert/DC Decision to send the task back to the Clinical Supervisor for consideration.

2. Click **Cancel** to ensure the task stays on your list until the visit is scheduled.
3. Click the **Minimize** button.
4. Navigate to the Scheduling Console.
5. Open the patient's calendar.
6. Double-click the requested discharge visit.
7. Click the **Magnifying Glass** icon in the Worker field.
8. Double-click the appropriate worker.
9. Click **Save**.
10. Click **Close**.
11. Return to the Workflow Console.
12. Double-click **SCHEDULE DISCHARGE OASIS COLLECTION**.
13. Click **Stage Completed**.

Process Declined Visits

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **RESCHEDULE DECLINED VISIT**. The Reschedule Declined Visit window displays.
2. Click **View Declined Visit Report**. The Visits Declined Report displays.

Note: The patient's information displays at the top, followed by the visit information. You can also see additional information about the visit including the discipline and the visit number. The reason the visit was declined is also listed.

3. Review the report; then click the **Close** button.

Note: You have three options:

Cancel - Exit out of the task and leave it on the Workflow Console to be completed at a later time.

Don't Reschedule Visit - Allows you to miss the visit instead of rescheduling it for another worker or date.

Reschedule Visit - Allows you to either reassign the visit to another worker or reschedule for another day. Visits are most often rescheduled to another worker, except for certain circumstances such as when the patient has declined services or inclement weather prohibits any worker from being able to travel during the Medicare week.

4. Click **Reschedule Visit**. The Scheduling Console displays.
5. Open the patient's calendar.

6. Double-click the visit you need to reschedule. The Add/Edit Visits window displays.
7. Click the **Magnifying Glass** icon in the Worker field to select a different worker.
8. Double-click the worker.
9. Click **Save**. The new worker name now displays in the Worker Name column.
10. Click **Close**. You return to the Scheduling Console.
11. Click the **Close** button. You return to the Workflow Console.
12. Click **Stage Completed**.

Process Missed Visit

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **PROCESS MISSED VISIT**. The Reschedule Missed Visit window displays.
2. Click **View Visit Missed Report**. The Patient Missed Visit Report displays.

Note: Patient information, visit information, a reason for missing the visit, and the patient's episode summary are included in the report.

3. Review the worker's reason for missing the visit; then click the **Close** button. You return to the task window.
4. Click **Don't Reschedule Visit** if you are unable to reschedule the visit within the same Medicare week. A message displays, asking if you want to mark the visit as missed.
5. Click **Yes**.
6. Click the appropriate reason.
7. Click **Select**. A message displays, asking you if you want to notify the patient physician about the missed visit.
8. Click the appropriate answer according to your agency's policy.

Process Reschedule Requests

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **PROCESS RESCHEDULE REQUEST**. The Process Reschedule Request window displays.

Note: If your agency is using the Rapid Reschedule feature, then you will not receive a task for the service codes and workers for which this feature is active.

2. Click **View Visit Rescheduled Report**.
3. Review the report, making note of the Days Rescheduled number; then click the **Close** button. You return to the task window. If the number is positive, you move the visit forward that many days. If the number is negative, you move the visit back that many days.

Note: You have three options:

Cancel - Exit out of the task and leave it on the Workflow Console to be completed at a later time.

Don't Reschedule Visit - Mark the visit as missed and remove the task from the Workflow Console.

Reschedule Visit - Reschedule the visit within the Medicare week.

4. Click **Reschedule Visit**. The Scheduling Console displays.
5. Click and drag the visit you want to move from the original date to the new date.
6. Click **Yes** to confirm the move.
7. Click the **Close** button to close the Scheduling Console.
8. Click **Stage Completed**.

Process Reassigned Visits

From the Patient Related Tasks tab in the Workflow Console:

1. Double-click **PROCESS REASSIGNED VISIT**. The Process Reassigned Visit window displays.

Note: Reassigned visits are generally initiated after the clinician has contact with the back office

2. Click **View Visit Reassigned Report**.
3. Review the report; then click the **Close** button.
4. Click **Reschedule Visit**. The Scheduling Console displays.
5. Open the appropriate calendar.
6. Double-click the visit you need to reassign. The Add/Edit Visits window displays.
7. Click the **Magnifying Glass** icon in the Worker field to edit the worker that the visit is assigned to.
8. Click the worker of interest.
9. Click **Select Worker**.
10. Click **Save**.
11. Click **Close** to return to the calendar. The visit is assigned to the new worker.
12. Click the **Close** button to close the Scheduling Console.
13. Click **Stage Completed**.

Complete Coordination Note Tasks

From the Review Coordination Notes tab in the Workflow Console:

Scheduler Notification Notes

Note: When a clinician has pertinent information about the patient's schedule that the Scheduler needs to be informed about, they can create a scheduler notification note, which is assigned to the Scheduler position.

1. Double-click **SCHEDULER NOTIFICATION**. The Review Coordination Note Report displays.
2. Click **Review Coordination Note**. The Patient Coordination Note Report displays.
3. Review the report; then click the **Close** button.
4. Open the Scheduling Console to complete the requested task.
5. Open the appropriate calendar.
6. After completing the requested task, return to the Workflow Console.
7. Click **Add Follow Up Comments**. The Add Follow-Up Comments window displays.
8. Document the appropriate comment.
9. Click **Save & Close**.
10. Click **Note Reviewed**. You return to the Workflow Console and the Scheduler Notification coordination note is removed.

Note: To keep the coordination note on the Workflow Console to be completed at a later time, use the **Cancel** option.

Visit Time Change Request Notes

Note: When a clinician needs their visit time adjusted, a Visit Time Change Request coordination note is generated.

1. Double-click **VISIT TIME CHANGE REQUEST**. The Review Coordination Note window displays.
2. Click **Review Coordination Note**. The Patient Coordination Note Report displays.
3. Review the requested time changes in the report; then click the **Close** button.
4. Click **Change Visit Time**.
5. Click **Edit Visit Times**. The View/Edit Visit Times window displays.
6. Select the information you want to edit.

Note: If you need to edit the in-home start time, you must first edit the travel time.

7. Click **Edit**.
8. Edit the appropriate time fields.
9. Click **Save & Close**.
10. Select additional time options to edit as needed.
11. Click **Add** to add new time information.
12. Click the **Time Type** drop-down arrow; then click the appropriate type.
13. Enter the times as necessary.
14. Click **Save & Close**.
15. When all time adjustments are complete, click **Close**. You return to the Visit Notes window.

16. Click **Close**.

Note: If desired, you can add follow-up comments, but they are not required.

17. Click **Note Reviewed** to complete the task.

Missed Visit Notification

Note: When a visit is missed, a coordination note is automatically generated to prompt you to follow up on the missed visit.

1. Double-click **MISSED VISIT NOTIFICATION**.
2. Click **Review Coordination Note**. The Patient Coordination Note Report displays.
3. Review the note; then click the **Close** button.

Note: Missed visits are processed through a different Workflow task. You can add follow-up comments if desired, but they are not required. This note can be delivered to the patient's physician if your agency requires.

4. Click **Note Reviewed**. You return to the Workflow Console and the Missed Visit Notification Note task is removed.

Complete Administrative Tasks

From the Review Coordination Notes tab in the Workflow Console:

Review Scheduling Requests Report

Note: The Scheduling Requests Report compiles all visits that are in a requested state and need to be scheduled to a clinician. Use this report to ensure no outstanding scheduling requests are missed.

1. Double-click **REVIEW SCHEDULING REQUESTS REPORT**.

Note: Tasks can be generated on a daily, weekly, or monthly basis, depending on your agency's settings. If you keep up with your administrative tasks, you should only have one of each report type at a time.

2. Click **View Report**. A window displays with available filters.
3. Select report criteria as necessary.
4. Click **View/Print**. The Scheduling Requests Report displays.
5. Review the report; then click the **Close** button.
6. Click **Cancel** to close the criteria window.
7. Click **Yes** to complete the task.

Run Unverified Visits Report in HCHB Back Office

Note: The Unverified Visits Report task is used to see any visits that have not been verified or remain incomplete.

1. Double-click **RUN UNVERIFIED VISITS REPORT IN R2**.
2. Click **View Report**.
3. Click the **Visits to Include** drop-down arrow; then clear the **VERIFIED** check boxes so that only **SCHEDULED** is selected.
4. Click **Done**.
5. Select additional criteria as necessary.
6. Click **View/Print**.

Note: Follow up with each worker to have them complete their visits. In some instances, the visits may have been done on paper and need to be manually verified. Check your agency's policy regarding visits completed on paper.

7. Click the **Close** button after completing all follow-up tasks.
8. Click **Cancel**.
9. Click **Yes** to complete the task.

Run Agent Summary Report and Follow Up with Staff

Note: The Run Agent Summary Report and Follow Up With Staff task is created to see the status of all visits that are currently out on a worker's device.

1. Double-click **RUN AGENT SUMMARY REPORT AND FOLLOW UP WITH STAFF**.
2. Click **View Report**.
3. Select the appropriate Scheduled Dates.
4. Select additional criteria as appropriate.
5. Click **View/Print**. The Agent Summary Report displays.
6. Review the report; then click the **Close** button.
7. Click **Cancel**.
8. Click **Yes**. You return to the Administrative Tasks tab and the task is removed.

View Report Options

From the Home screen:

1. Click **Report Manager**. The Report Manager window displays, listing all available reports.
2. Enter all or part of the report name in the **Search For** field; then click the **Magnifying Glass** icon.
3. Double-click the report you want to view.
4. Select report criteria as necessary.
5. Click **View/Print**. The report displays.

6. Click the **Close** button to close the report.
7. Click **Cancel** to close the criteria window.