

CubHub Systems, Inc.
October 2022



Release v4.11

Task Lists

Task List

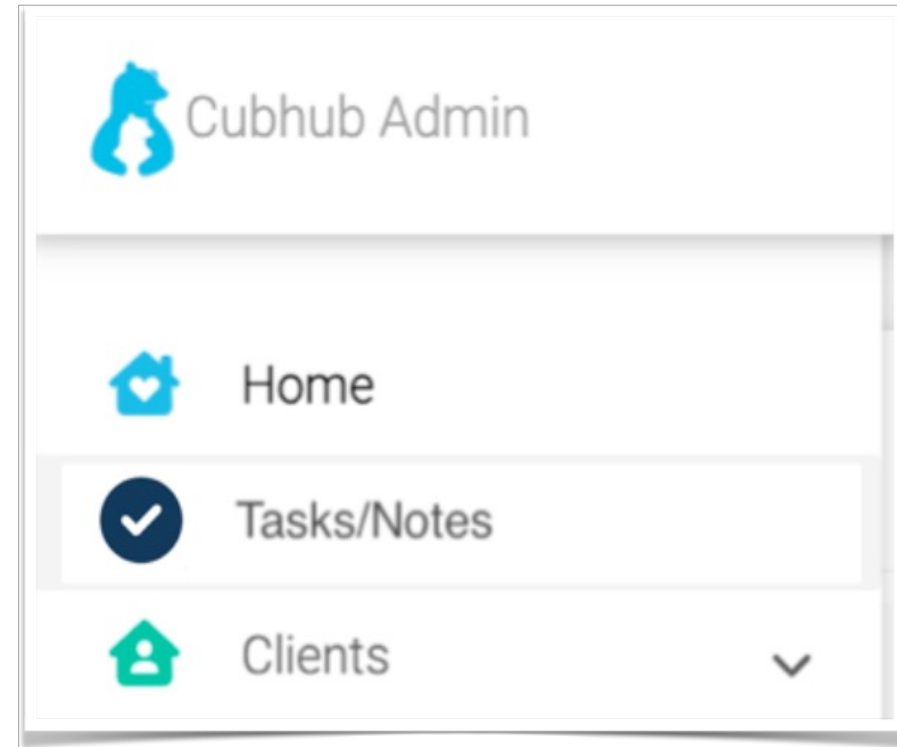
- New tab in permission groups and user settings: Tasks
 - two groups
 - Clinical
 - Intake/Auth/Billing

Clinical (15)

Discharge/Transfer Summary (OASIS)
Episode Summary (OASIS)
Pending QA Review
Pending QA Correction
Recert Due in [x] Days
Recert Due in 5 Days
Assess/Recert Completed
OASIS Ready for Review
Case Conference Due
Progress Report Due
Discharge Summary Due
Visits Outside Cert
Visits After Discharge
New Patient Order

Intake/Auth/Billing (35)

All auth statuses



Tasks/Notes replaced Inbox menu option





Tasks/Notes

[+ NEW](#)

Advanced Filter:

- Active
- Completed
- Archived
- Sent Notes

[Tasks](#)[Notes](#)

1-7 of 7 < >

<input type="checkbox"/>	Date ↑↓	Task	Details	Due Date ↑↓	
<input type="checkbox"/>	02/22/2022 1	Re-cert Due (14 Days)	Lisa Abbott Re-cert is due in 14 days	03/07/2022	...
<input type="checkbox"/>	02/22/2022 1	Re-cert Due (5 Days)	Karen Walker Re-cert is due in 5 days	02/27/2022	...
<input type="checkbox"/>	02/22/2022 1	Episode Summary Review	Cory Lewis Episode Summary	02/27/2022	...
<input type="checkbox"/>	02/22/2022 1	Assistant QA	Gus Church, PTA visits Pending QA Review		...
<input type="checkbox"/>	02/22/2022 1	Transfer/DC Summary Review	Adam Reeves Transfer/DC Summary	02/27/2022	...
<input type="checkbox"/>	02/22/2022 1	Visits After Discharge	Visit scheduled 2/22 for Todd Alan after discharge date 2/1/22		...
<input type="checkbox"/>	02/22/2022 1	New Patient Order	(485, Eval & Treat, New Med, etc) Order for Jane Upchurch		...
<input type="checkbox"/>	02/22/2022 1	Ready to Send Auth	Sally Nelson auth status is Ready to Send Auth Request		...
<input type="checkbox"/>	02/22/2022 1	Authorized	Bob Woodruff auth status is Authorized		...

Individual line ellipsis:

- Pin to Top
- Mark as Completed
- Mark Unread
- Navigate to Task



Assess/Recert Completed

- Action: Assigns task to user that Assess/Recert completed
- Trigger: an assessment has been submitted
- Date of Trigger/Task: date submitted
- Due Date: n/a
- Redirect: Calendar
- Redirect Page default filters: - filtered to that patient
- Secondary Function: none

Task Layout:

03/03/2022 * Assess/Recert Completed * [Patient] [[Form Name Assess](#)] submitted

Pending Corrections

- Action: Assigns task to user that document is pending corrections
- Trigger: assignment rejected in QA and status = pending correction
- Date of Trigger/Task: date status = pending correction
- Due Date: n/a
- Redirect: client - chart - visits
- Redirect Page default filters: n/a
- Secondary Function: n/a

Task Layout:

03/03/2022 * [Form Name] for [Patient] on [date] is [Pending Correction for \[\]](#)

Assistant QA

- Action: Assigns task to user that document is pending QA review
- Trigger: visit submitted & status = pending QA AND signing clinician is asst
- Date of Trigger/Task: date visit submitted
- Due Date: n/a
- Redirect: QA Page
- Redirect Page default filters: filtered by that employee
- Secondary Function: n/a

Task Layout:

03/03/2022 * Assistant QA * [Name] visit [date] with [Patient] is [Pending QA](#)

Auth Status

- Action: Assigns task that patient auth status is [1 of the 35 statuses)
- Trigger: patient payer auth gets updated to the status
- Date of Trigger/Task: date change is made
- Due Date: --
- Redirect: client - financial - payer - auth
- Redirect Page default filters: n/a
- Secondary Function: none

Task Layout:

03/03/2022 * Auth Status * [Patient] [Payer] [Auth is in a status of \[x\]](#)

Pending QA Review

- Action: Assigns task to user that document is pending QA review
- Trigger: assignment submitted and status = pending QA
- Date of Trigger/Task: date visit submitted
- Due Date: n/a
- Redirect: QA Page
- Redirect Page default filters: filtered by that patient and form
- Secondary Function: n/a

Task Layout:

03/03/2022 * Pending QA * [Form] for [Patient] on [date] is [Pending QA](#)

OASIS Ready for Review

- Action: Assigns user a task that OASIS ready for review
- Trigger: Form = is OASIS & was submitted
- Date of Trigger/Task: Date the OASIS submitted
- Due Date: n/a
- Redirect: Clinical - QA
- Redirect Page default filters: Patient
- Secondary Function: n/a

Task Layout:

03/03/2022 *OASIS [Type]* for [Patient] is [Ready for Review](#)



Recert Due in 5 Days

- Action: Assigns user a task that recert is due in 5 days
- Trigger: 5 day from end of current 485
- Date of Trigger/Task: 5 days from end of 485
- Due Date: last date of 485
- Redirect: Client - Chart
- Redirect Page Filter: n/a
- Secondary Function: n/a

Task Layout:

03/03/2022 * [Recert Due](#) for [Patient] is due in 5 days * [3/8/2022](#)

Task Name: Patient Has New Order

- Action: assigns user a task that Patient Has a New Order
- Trigger: Order for patient = New (Ready to Send)
- Date of Trigger/Task: Date of Order
- Due Date: n/a
- Redirect: Clinical - Orders - New
- Redirect Page default filters: filtered to that patient
- Secondary Function: n/a

Task Layout:

03/03/22 * New Patient Order * [\[order type\] order](#) for [Patient]

Case Conference Due

- Action: Assigns task to user that client case conference is due
- Trigger: client has 2 or more services and one of them starts a recert
- Date of Trigger/Task: date recert assess started
- Due Date: last day of cert
- Redirect: client - chart - assess
- Redirect Page default filters: n/a
- Secondary Function: n/a

Task Layout:

03/03/2022 * Case Conf Due * [Case Conference](#) for [Patient] * [03/15/2011](#)

Visits Outside Cert

- Action: Assigns task to user that visit scheduled outside cert
- Trigger: assignment created outside cert dates
- Date of Trigger/Task: date assignment created
- Due Date: n/a
- Redirect: Calendar
- Redirect Page default filters: Patient
- Secondary Function: Week of Assignment

Task Layout:

03/03/2022 * [Name] scheduled visit [date] for [Patient] [Outside Cert](#)

Discharge Summary Due

- Action: Assigns task to user that client discharge summary is due
- Trigger: client admit status for service [x] changed to discharged
- Date of Trigger/Task: date of change above
- Due Date: n/a
- Redirect: client - chart - assess
- Redirect Page default filters: n/a
- Secondary Function: n/a

Task Layout:

03/03/2022 * Bob as Discharged * [Discharge Summary for \[Patient\]](#) * [03/15/2011](#)

Visits After Discharge Date

- Action: Assigns task to user visits scheduled after discharge
- Trigger: assignment created after service details discharge date
- Date of Trigger/Task: date assignment created
- Due Date: n/a
- Redirect: Calendar
- Redirect Page default filters: filtered by that patient
- Secondary Function: filtered to the week of assignment

Task Layout:

03/03/2022 * [Name] scheduled visit [date] for [Patient] [After Discharge](#)



New Team tab: Automation

Will include existing settings:

- Cert Default
- POC Recert Notice
- 3 new settings:

☐ Recertification hard stop at 5 Days from 485 end

if checked if an assessment that = is recert/re-assess is not scheduled yet for a service and the POC for that service ends in 5 days **the system will not allow anything to be scheduled in the calendar except a recert until one has been created**

Automated Tasks based on cert or 485:

- ☐ Progress Report Due Every [x] Days
- ☐ Recert Notice Due [x] days from end of current 485

Admin> Teams> Automation

Progress Due

- Action: Assigns task to user that progress report is due
- Trigger: Progress Report Due Every [x] days from team setting is hit (cert start date + [x] days)
- Date of Trigger/Task: date the above is hit
- Due Date: last day of cert
- Redirect: client - chart - assessments
- Redirect Page default filters: n/a
- Secondary Function: n/a

Task Layout:

03/03/2022 * [Progress Report Due](#) * Progress Report for [Patient] * **03/15/2011**

Recert Due

- Action: Assigns task that patient recert is due in [x] days
- Trigger: team re-cert notice setting **only when re-assess not yet scheduled (any status: sched, working, pending QA, completed)**
- Date of Trigger/Task: 485 end date - [x] days based on Team
- Due Date: 485 end date
- Redirect: client - chart - assessments
- Redirect Page default filters: n/a
- Secondary Function: none

Task Layout:

03/03/2022 *e [Recert Due](#) * [Patient] Re-cert due in 14 days * **03/17/2022**



CoP Episode Summary & Transfer/DC Summary

Episode Summary Review (OASIS)

- Task Details: Episode Summary ready for review for patient []
- Form Type: OASIS Recert marked to generate Episode Summary
- Order Type = Episode Summary
- Action: Assigns task to review Episode Summary
- Trigger: OASIS Recert Submitted with Episode Summary, Summary in status of Ready to Send
- Date of Trigger/Task: Date status of Summary = Pending Review
- Due Date: 485 end date +5
- Redirect: Orders: Ready to Send
- Secondary Filter: filtered to patient

Task Layout:

03/03/2022 * Episode Review * [Patient] Episode Summary Pending Review * 03/08/2022

Transfer/DC Summary Review (OASIS)

- Task Details: Transfer/DC Summary Ready for Review for patient []
- Form Type: OASIS Transfer/DC marked to generate Transfer/DC Summary
- Order Type = Transfer/Discharge Summary
- Action: Assigns task that Transfer/DC Summary Ready for Review
- Trigger: OASIS Transfer/Discharge submitted for patient with Transfer/DC Summary
- Date of Trigger/Task: Date Transfer D/C gets to Ready to Send orders
- Due Date = OASIS Assess Date + 5
- Re-direct: Orders Ready to Send
- Secondary filter: filtered to patient

Task Layout:

03/03/2022 * Transfer/DC * [Patient] Transfer/DC Summary Pending Review * 03/08/2022

Episode Summary & Transfer/Discharge Summary

Treated as an order; lives in that section of chart

3 Ways They Are Generated:

- Auto-created when OASIS Recert or OASIS Transfer/Discharge submitted
- Manually: from the assessment ellipsis in chart:
 - [Archive & Create](#) (will archive existing)
 - [Create](#) (will leave existing intact)
- OASIS QA corrected or unlocked & corrected:
 - if [x] Recreate Summary is marked will replace
 - if NOT [] will leave existing intact
 - defaults to being marked [x] Recreate



Admin> Permissions> Tasks

ADMIN BILLING CALENDAR CLINICIAN DASHBOARD FAX INBOX PATIENT PCG RESET PERSON			
PHYSICIANS SERVICE CODES AND RATES USER NOTIFICATIONS TASKS			
Clinical			
Assess/Recert Completed N/A	Assistant QA N/A	Case Conference Due N/A	Discharge Summary Due N/A
Discharge/Transfer Summary (...) N/A	Episode Summary (OASIS) N/A	New Patient Order N/A	OASIS Ready for Review N/A
Pending QA Correction N/A	Pending QA Review N/A	Progress Report Due N/A	Recert Due in [x] Days N/A
Recert Due in 5 Days N/A	Visits After Discharge N/A	Visits Outside Cert N/A	

Task Assignment Options

- Admin Manager
- All
- All on Care Team
- Care Manager
- Care Manager, Admin Manager, or Supervisor
- Intake Coordinator
- Lead Therapist
- Marketer
- N/A
- RN Case Manager
- Supervisor
- Therapy Assistant

Permissions

Intake/Auth/Billing			
Auth Request Denied Lead Therapist	Authorized Lead Therapist	CPAN N/A	Eval & Treat N/A
EVV: Waiting on Admission N/A	EVV: Waiting on Auth Upload N/A	Expired N/A	Final Appeal N/A
First Appeal N/A	Hide In WorkFlow N/A	New Referral N/A	No Auth On File N/A
No Authorization Required N/A	Office Auth N/A	Pending /Hold for New Therapist N/A	Pending CG Call back N/A
Pending Client Payment N/A	Pending Clinical Info Request N/A	Pending Consents/Contracts N/A	Pending Insurance Card N/A
Pending MD Call Back N/A	Pending Quote of Benefits N/A	Pending Retainer N/A	Pending Staff N/A
Ready to Send Auth Request N/A	Ready to Send to MD N/A	Second Appeal N/A	Wait List Lead Therapist
Waiting on Auth Approval N/A	Waiting on Eval/Assessment Lead Therapist	Waiting on Eval/Treat Order N/A	Waiting on MD Signature N/A
Waiting on Patient Entry N/A	Waiting on Pre-Auth Approval N/A	Waiting on Pre-Authorization N/A	Waiting on QA N/A
Waiting on Re-Eval/Assessment Lead Therapist			



4.11 Additional Updates

Workflow

Removed Expired Status; Users now control when something is removed from WF

Calendar

Therapy make-up visits now indicated visually in calendar and will not count against period auth limits, only total

Billing Claims

Add claims to batch via payer or payers using multi-select payer field

Therapy LPR

LPR Data fields will no longer update until the new cert starts (excludes goals)








Chart Plan of Care

User will have option to generate based on LPR data or prior Assess (defaults to LPR)



Workflow Update

- 'Expired' removed from Authorization Status options
- When the auth expiration date is hit the auth will remain in the status it is in at that time
- The date & status will be highlighted in red
- Authorizations that meet their expiration date will remain at the top of the list until user removes/updates

Workflow									
Search									
151-200 of 2,052									
Patient ↑↓	Service ↑↓	Payer ↑↓	Cert Start ↑↓	Cert End ↑↓	Auth Start ↑↓	Auth End ↑↓	Auth Status ↑↓	POC Status ↑↓	
 [REDACTED]	PDN	Horizon NJ Health (PDN)(MCO)	10/12/2022	12/11/2022	7/31/2022	10/28/2022	Authorized	Pending MD Signature	...
 [REDACTED]	PDN	Keystone First CHC (BS) (PDN)	8/23/2022	10/21/2022	8/22/2022	10/28/2022	Authorized	Completed	...
 [REDACTED]	PDN	Horizon Blue Card Out of State (PDN)	10/17/2022	12/16/2022	8/29/2022	10/28/2022	Waiting on Re-Eval/Assessment	Completed	...
 [REDACTED]	PCA	UPMC Health Plan (Unskilled)	9/4/2022	11/2/2022	7/10/2022	10/29/2022	Authorized	Completed	...
 [REDACTED]	PCA	UPMC Community HealthChoices (PITTS) (Unskilled)	9/4/2022	11/2/2022	7/10/2022	10/29/2022	Authorized	Completed	...
 [REDACTED]	PCA	UPMC EPSDT (PITTS) (Unskilled)	9/4/2022	11/2/2022	7/10/2022	10/29/2022	Authorized	Completed	...
 [REDACTED]	PDN	Keystone First (skilled) (Bala)	10/3/2022	12/1/2022	8/4/2022	10/29/2022	Authorized	Pending MD Signature	...



Workflow Update

- CubHub will still auto-create the next auth in a status of Pending Re-Eval/Re-Assess when the workflow re-auth date hits (if that field is utilized in client's authorization).
- CubHub will no longer drop authorizations from workflow; the user will be given option to do this when updating authorizations.
- The action to remove from workflow may be done in workflow & directly in patient financial authorization.
- Once an auth has been removed from workflow it can be reversed in patient financial auth and put back into workflow.


Remove	Patient	Service	Payer	Auth Number	Auth Start	Auth End	Auth Status
<input checked="" type="checkbox"/>	[REDACTED]	ST	CO Medicaid - LTC	Waived	2/20/2022	4/30/2024	Authorized

Auth End ↑↓	Auth Status ↑↓	POC Status ↑↓
10/28/2022	Authorized	Pending MD
10/28/2022	Authorized	
10/28/2022	Waiting on Re-Eval/Assessm	



Therapy Make-Up Visits

Visits designated as a ‘Make-Up Visit’ will are now indicated visually in calendar and will not count against period auth limits, only total.

Calendar

Client
Carol Aabas

Show - Unlocked

Employee
All

VISIT CLIENT AUTH(S) EMPLOYEE

AZ DDD (PT - 12345)

Authorized (10/9/2022-12/10/2022)

Period Limits: 2 Visits/Week

	Used	Authorized
This Week	2	2
Total	9	8

October 2022

SUN 23	MON 24	TUE 25	WED 26	THU 27
	<div>Visits - 1 Hours - 1</div> <div>Therapy Testing 07:00-08:00 (4) PT- AZ DDD PT VISIT-9</div>	<div>Visits - 1 Hours - 0.75</div> <div>Therapy Testing 07:00-07:45 (3) PT- AZ DDD PT VISIT-9</div>		<div>Visits - 1 Hours - 0.75</div> <div>Therapy Testing 07:00-07:45 (3) PT- AZ DDD PT VISIT-9</div>



Billing – Claims: Payer Filter

Add Claims to batch via payer or payers using multi-select payer field

Claim Status All	Start Date 10/16/2022	End Date 10/22/2022
Payer		
<div>BCBSTX HMO ✕</div> <div>BCBSTX HMO (1) ✕</div> <div>BCBSTX PPO ✕</div> <div>BCBSTX PPO (1) ✕</div> <div>BCBS Medicaid ✕</div> <div>✕</div>		
<div>BCBS Medicaid</div> <div>BCBSTX HMO</div> <div>BCBSTX HMO (1)</div> <div>BCBSTX PPO</div> <div>BCBSTX PPO (1)</div>		



Chart: Plan of Care

User will have option to generate based on LPR data or prior Assess (defaults to LPR)

Create Plan of Care

Time Frame

Custom

Print Start

01/15/2023

Print End

07/08/2023

Recert Notification Date

10/15/2022

Verbal SOC

Service Type

ST

Pull ST Data from

LPR Data

SLP Evaluation on 08/09/2021

Defaults to pull from LPR and gives option to pull from prior assess/evals

Physician Address

7777 Forest Lane Building B Suite 300-308 Dall...

