

Release v3.7 & Mobile App 3.7.0

April 2022

Macros

What is a *macro*?

This is a techy term for a single instruction that leads to subsequent events in order to perform a task.

As it relates to your role as a provider, a macro is a tool to ensure that the text fields available in the system are utilized in the proper way based on your company's needs and standards.





Client & Employee Macros

Text fields in a client's assessment, the client LPR, and client's Non-Med/Communication Orders can have macros created & applied. Notes in both client & employee charts, as well as in a user's inbox, can have macros created & applied.

Applying the macro will guide the user on information that should be included, topics that should be addressed, or verbiage that should be utilized in this specific text area.

Create Macros

Create a macro by **clicking the  icon** beside a text field.

Test Details	
Strengths	
Weaknesses	
Formal Observation	

Note: Creating macros is permission based. Users can have permission to apply a macro, or permission to create, edit, apply, and delete a macro.

Macro Title

Title macro in this field.

Macro



Write macro & click **Save**. Macros can include _____ or [] to designate where to put information specific to the client..

Macro

OT - Medical Necessity Macro

Macro Title
OT Med Necessity

Macro
Patient will benefit in regards to [] from occupational therapy services to address [] resulting from diagnoses of []


 SAVE  CANCEL

Applying Macros

Macro icon> Action options beside macro> Apply Macro or Apply Macro & Close.

Macro ×

Notes - Note Details - Supervision Macro

 Search + 1-2 of 2

Title	Macro
Supervision Note 1	Observed set up and infusion of enteral feed, infection control measures, proper use of PPE, client assessment, review of POC.
Supervision Note 2	The employee was provided updated education about COVID-19 vaccination and booster schedule. Employee was provided information about the a CDC Strategies to Mitigate Healthcare Personnel Staffing Shortages, contingency strategy. Information is available on client CubHub portal for futur Observed: g-tube care, g-tube feeding, transferred client properly from bed to floor mat, PROM, aspiration/safety/seizure precautions.

Apply Macro

Apply Macro and Close

Edit

Delete

Apply Macro

Puts macro into text field.

Apply Macro and Close

Puts macro into text field and closes macro modal.

Edit

Allows user to edit existing macro.

Delete

Removes existing macro.

Note: Options user sees will be based on permissions.

Client & Employee Macros

Client Macros Exist in Text Fields in the following:

- Assessments/Evaluations
- Live Patient Record
- Non-Med/Communication Orders
- Notes

Employee Macros Exist in Text fields in the following:

- Notes

Permissions for Macros

[Admin](#)> [Permissions](#)> [Select permission group](#)> [Admin: Macros](#)> [Check boxes](#)> [Save](#)

View: user can view and apply macros to text field

Edit: user can view, create, and apply macros to text field

Delete: user can view

	ADMIN	BILLING	CALENDAR	CLINICIAN	DASHBOARD	FAX	INBOX	PATIENT	PCG RESET	PERSON	PHYSICIANS
	SERVICE CODES AND RATES	USER	NOTIFICATIONS								
	<input type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	<input type="checkbox"/> Clone	<input checked="" type="checkbox"/> Download						
Billing Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
Modifiers											
Billing Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
Branch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>							
Clinician	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>	
Custom Fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
Custom Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									
Edit EVV Times		<input checked="" type="checkbox"/>									
Eligibility	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
Favorite Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									
Holiday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
Importing	<input type="checkbox"/>	<input type="checkbox"/>									
Macros	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
Mobile Devices	<input checked="" type="checkbox"/>										
Mobile Instructions	<input checked="" type="checkbox"/>										
Orders	<input checked="" type="checkbox"/>										
Pay Rates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									
Payers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
Permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									

Invoice e-File Options

Users may now designate that an invoice should not include the Diagnosis, Date of Birth, and/or Start of Care date. Users may also designate that an invoice should include assignment times on an invoice.

[Billing](#)> [Payers](#)> [Select Invoice Payer](#)> [Check box\(es\)](#)> [Save](#)

☐ Do Not Include Diagnosis

☐ Do Not Include DOB


☐ Do Not Include SOC

☐ Include Assignment Times

Client Condition Codes

Condition codes can now be included in the details for a specific payer assigned to a client. This section exists if the payer is billed on a UB04.

[Client](#)> [Profile](#)> [Financial](#)> [Edit Payer](#)> [Condition Codes](#)> [+> List codes](#)> [Save](#)

 Edit Payer - Cora Arden

+ ADD AUTHORIZATION

SAVE

PAYER

ACCIDENT INFO

CONDITION CODES

AUTHORIZATION(S)

Search

+ Showing 0 to 0 of 0 entries

<

>

Code

↑↓

No data available in table

Add Condition Code

Please enter the code you wish to add. You can enter multiple codes by putting a semi-colon (;) between each one

CANCEL

OK

Authorization Statuses

‘No Authorization Required’ is a new option for a client’s authorization status.

[Client](#)> [Financial](#)> [Edit Payer](#)> [+Add Auth](#)> [Create ‘no auth required’ status](#)> [Include one billing code](#)> [Save](#)

Status No Authorization Required		Authorization Number
Start Date	End Date	Re-Auth Date
Ordering Physician Natasha Fuksina (PCP) (Ordering)		
Description		
Time Period	Amount	Unit Type
Total Authorized	Service Type PDN	
Billing Codes LPN-1.5-S9124-HorizonNJHealth ✕		

Client Service Details

Client> Profile> Service Details> Select status to see Admit Table> + or edit admission event and/or Diagnosis codes> Save

A Waitlist status is available in the client’s admit table.

Admission

Patient Status

Active

Hide From Chart

Hold

Non-Admit

Re-Admit

Referral

Wait List

Note: This status is also now available for filtering in the Client List> Advanced Filter

Diagnosis codes may be applied to multiple service types.

Diagnosis Codes

Diagnosis Code

Z9911 - Dependence on respirator [ventilator] sta... x

Onset or Exacerbation

Service Types

PDN x School/Staffing x

☒ Is Primary for PDN

☐ Is Primary for School/Staffing

Users may check box to designate if code is primary for a specific service type.

Client Assessments/Evaluations

Functionality allows users to start an assessment or evaluation and clock in at a later time.

New Assessment

Assessment Type

Recertification Assessment (PDN)

Assessment Date

04/11/2022

Start Time

07 00

End Time

08 00

Are you Clocking in?

☐ Yes

☒ No

User will still be able to adjust date and time when starting the assessment.

User will see warning in assessment that they have not yet clocked in and cannot Submit until clock in is captured.

Clock in at time assessment is truly beginning by clicking **Clock In**.

Recertification Assessment - Happy Friday

...

CLOCK IN

Monday, April 11, 2022

You have not clocked into this assignment

Inactivating an Employee

User will now have the ability to remove an employee from assignments when they are made inactive. Users will also have the ability to remove the assignment from the calendar completely.

Employee> Action Options> Employee Data> Select one of the Inactive statues> Input date> Save> Select option re: assignments> OK

Deactivate Employee

This employee still has scheduled assignments. If you want to continue to deactivate their account, please select an option to handle all scheduled visits starting from 04/04/2022

☒ Set Assignments to Open

☐ Delete Assignments

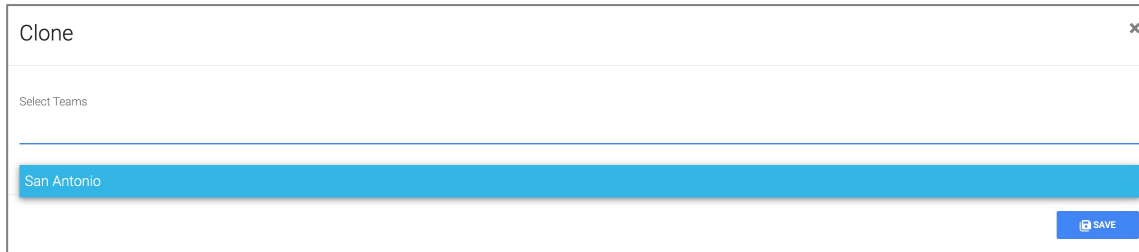
CANCEL

OK

Team Options

Users can now clone Employee Templates & QA Workflows to another team.

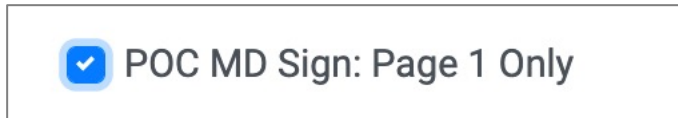
Admin> Teams> Select team> Empl Template or QA Workflow> Action options beside template/workflow> Clone> Select team(s)> Save



The screenshot shows a 'Clone' dialog box with a title bar containing 'Clone' and a close button. Below the title bar is a section labeled 'Select Teams'. A search bar is present, and below it, a list of teams is shown. 'San Antonio' is the only team listed and is highlighted with a blue background. At the bottom right of the dialog, there is a blue button with a floppy disk icon and the text 'SAVE'.

Users can set a team's Plan of Care to only require MD signature on page 1.

Admin> Teams> Check box 'POC MD Sign Page 1 Only'> Save



The screenshot shows a checkbox labeled 'POC MD Sign: Page 1 Only'. The checkbox is checked, indicated by a blue square with a white checkmark inside.

Therapy Method Updates: Web & Mobile App

ROM Degrees and Other are new therapy method options that can be used to track and record finite values regarding a client's progress towards a goal.

The screenshot shows a mobile app interface for a 'Selected Intervention'. The form includes sections for 'RomDegrees: 10 ROM Degrees (Not Applicable)', 'Prior Visit', 'RomDegrees: 37 ROM Degrees (Supervision)', and a 'Mastered Goal' section with 'No' and 'Yes' buttons. The 'Method' section has a dropdown menu with 'RomDegrees' selected. A 'Done' button is at the bottom right. A bottom sheet is open, showing options: 'Percentage', 'Count', 'Trials', 'RomDegrees', 'Other', and 'Not Applicable'.

ROM Degrees

Data recorded in degrees

Other

Data recorded in text field

When charting on a goal, the method will default to the method used in prior visit to ensure consistency in data charted towards goal progress.

The screenshot shows a mobile app interface for a 'Selected Intervention'. The form includes sections for 'Baseline', 'Percentage: 45% (Supervision)', 'Prior Visit', 'Percentage: 76% (Independent)', and a 'Mastered Goal' section with 'No' and 'Yes' buttons. The 'Method' section has a dropdown menu with 'Percentage' selected. Below the 'Method' section are input fields for 'Amount' with the value '0'.



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Section	Feature	Details
Billing	Invoice Options	New Invoice e-file options: Do not include Diagnosis, DOB, SOC & Include Assignment Times
Billing	No Auth Required	Create Claims scrub updated to handle new auth status: No Auth Required
Billing	Payers	Payers page function updated so user may select a payer and it will open in new tab
Client	Admit: Waitlist	New admit status added: Waitlist (overall client status is inactive)
Client	Macros Forms	Create/Edit/Delete macros now available for all text fields in client form docs
Client	Workflow Redirect	Added workflow redirect to navigate directly to client chart pages
Client Financial	Condition Codes	Condition Codes added as payer set up for UB04 client payers
Client Financial	No Auth Required	Client Financial Auth Status added: No Auth Required; only service codes required to create
Client	Services: Dx Codes	Codes that exist on other services may now be used to add to additional services
Clinical	Assess: Clock-In	User may choose to start assess without clock-in to do pre-work and clock in later for EVV capture (web only)
Clinical	Macros Assess	Create/Edit/Delete macros now available for all text fields in assessments
Clinical	Macros Orders	Create/Edit/Delete macros now available for all text fields in non-medication orders
Clinical	Non-med Orders	Non-med order types added: Discharge, Freq & Dx Change, Hosp Hold, Non-Hosp Hold, Swallow Trtmt, Transfer
Employee	Inactivating	When employee inactivated new option to remove all visits or mark all visits open
Employee	Macros Forms	Create/Edit/Delete macros now available for all text fields in employee form docs
Inbox	Regarding	Inbox added column: Regarding



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Section	Feature	Details
Notes	Macros Notes	Create/Edit/Delete macros now available for all text fields in notes (inbox, employee & client)
Permissions	Macros	New admin permission Macros for view/edit/delete (only view needed to apply a macro)
Preferences	Default Form	User may now set preferences to default calendar assignment to specific visit form
Reports	Macros Report	Client Reports includes Macros report to view all existing system Macros
Reports	Make-Up Visit	Client Report Make-Up Visit column added: Physician
Team	Clone QA Workflow	Team QA Workflow may now be cloned to other teams
Team	Clone Template	Team Employee Templates may now be clones to other teams
Team	POC MD Signature	Team setting: POC Signature Page 1 only: applies 'see sign field 27' on addendum pages
Therapy	Chronological Age	Data Point Chronological Age update to auto-calculate based on DOB and today's date
Therapy	Goal Method	Last visit Method recorded pre-populates in current visit (web & mobile)
Therapy	Goal Progress	ROM Degrees and Other added to goal method options (web & mobile)
Therapy	Goal Progress	Not Applicable added to goal method and assist/cuing options (web & mobile)
Therapy	Goal Progress	Goal Progress Report updated to exclude discontinued goals and protocols