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.

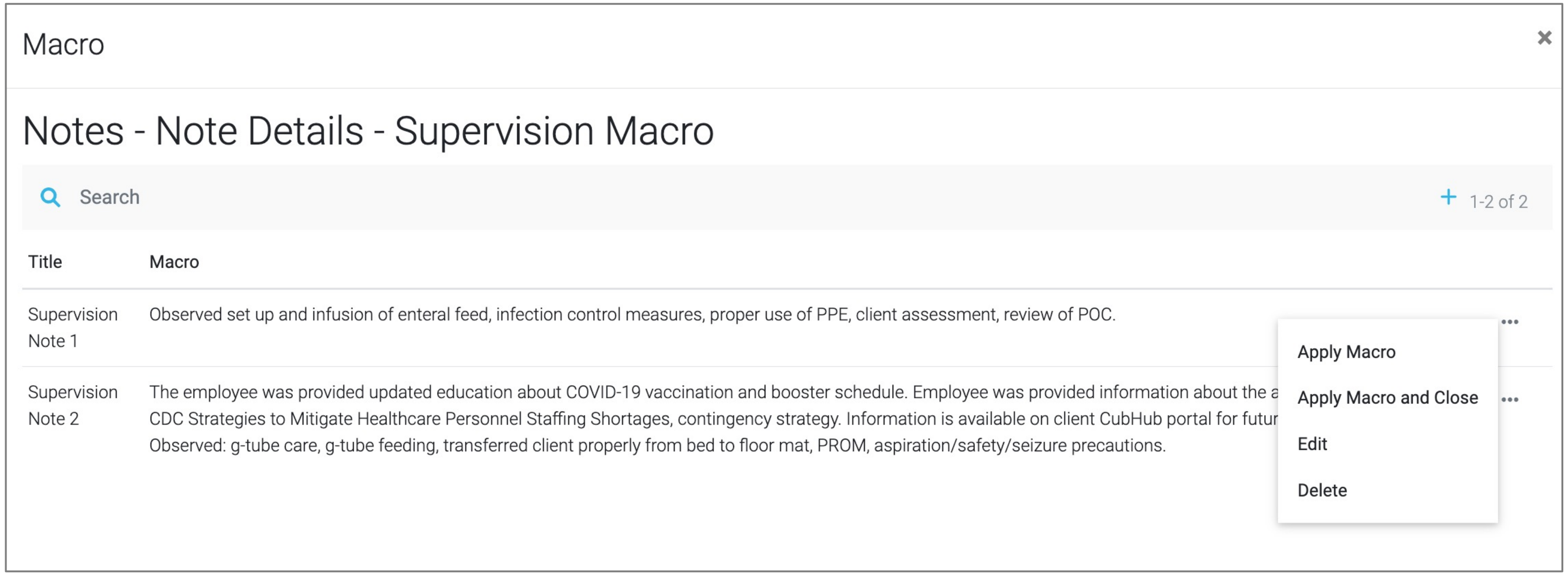
Note: Creating macros is permission based. Users can have permission to apply a macro, or permission to create, edit, apply, and delete a macro.

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..

Applying Macros

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



Note: Options user sees will be based on permissions.

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.

Client & Employee Macros

Client Macros Exist in Text Fields in the following:

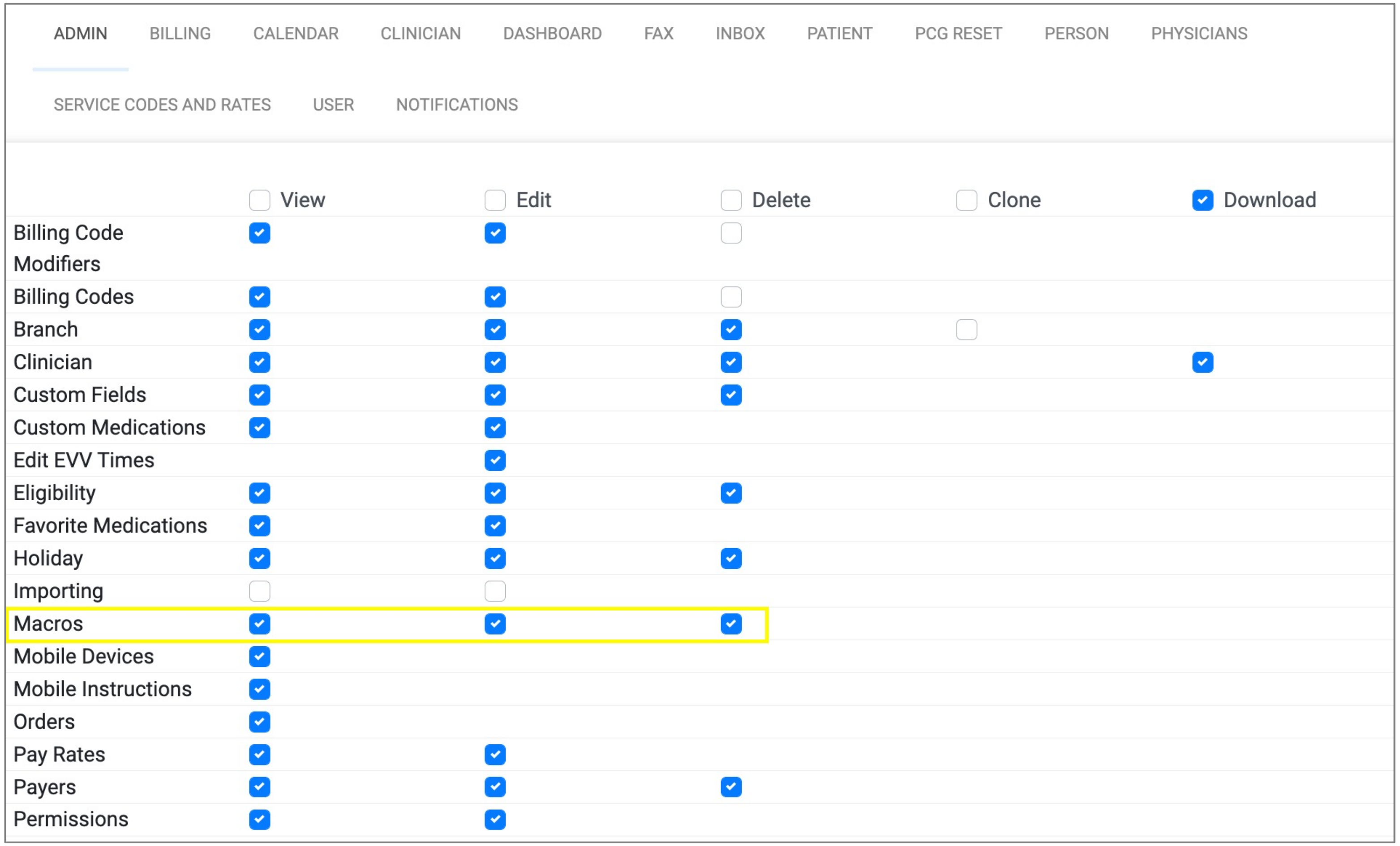
- Assessments/Evaluations
- Live Patient Record
- Non-Med/Communication Orders
- Notes

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

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 should assignment times on an invoice.

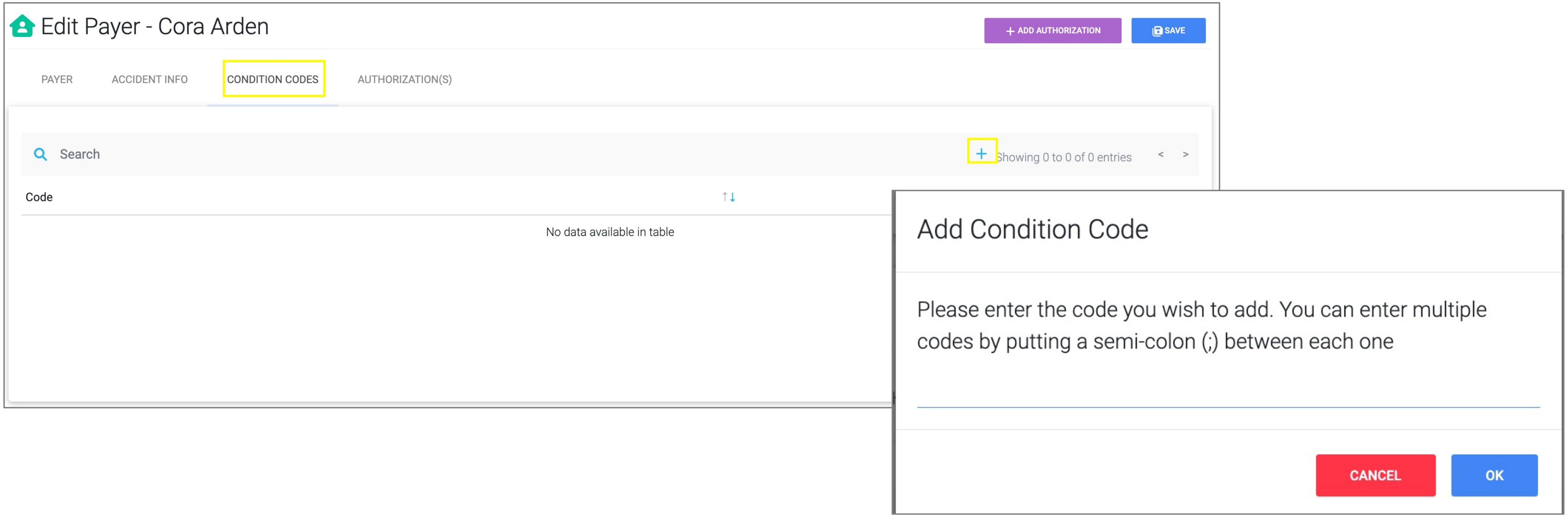
Billing> Payers> Select Invoice Payer> Check box(es)> Save

- [ ] 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.

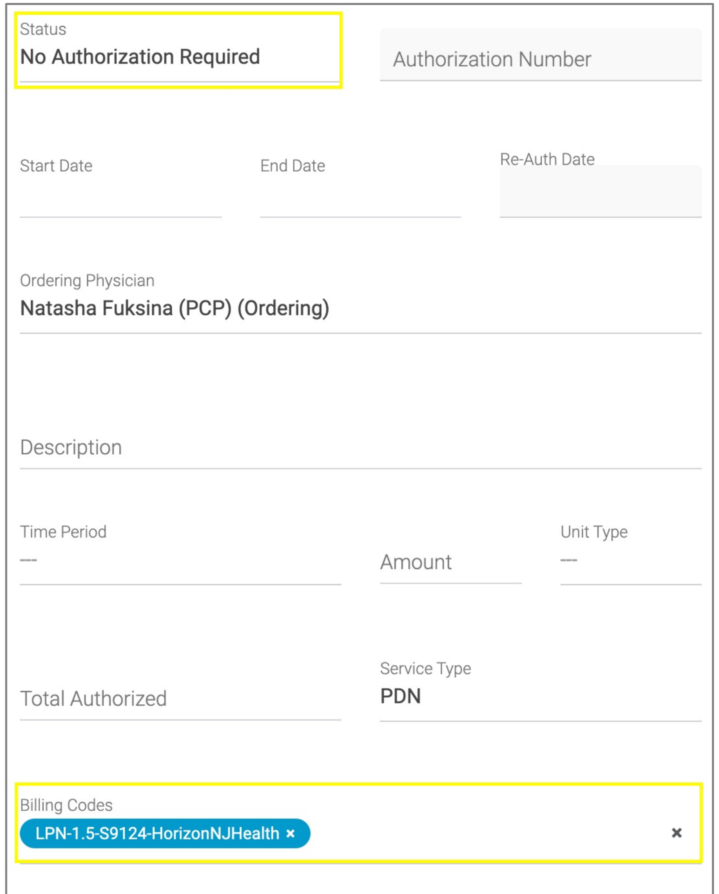
Client> Profile> Financial> Edit Payer> Condition Codes> +> List codes> Save



Authorization Statuses

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

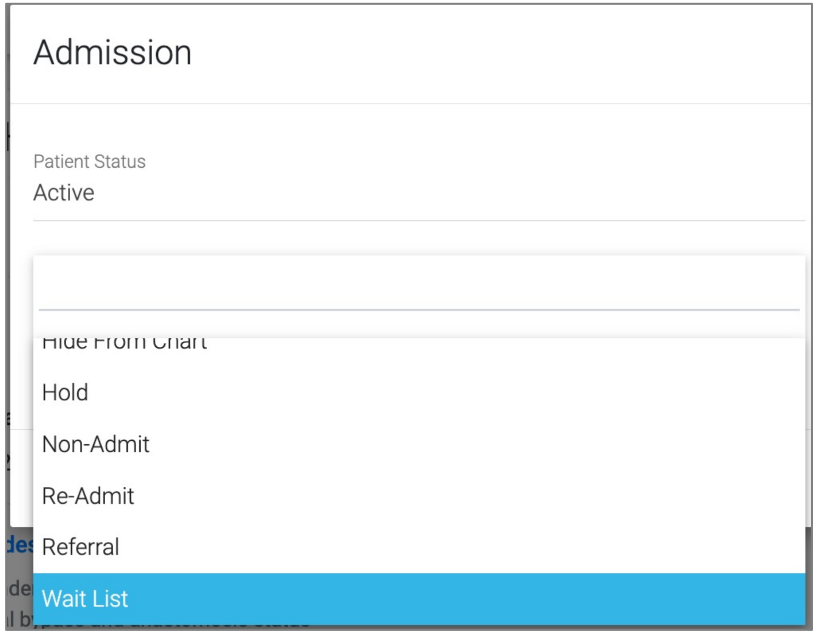
Client> Financial> Edit Payer> +Add Auth> Create 'no auth required' status> Include one billing code> Save



Client Service Details

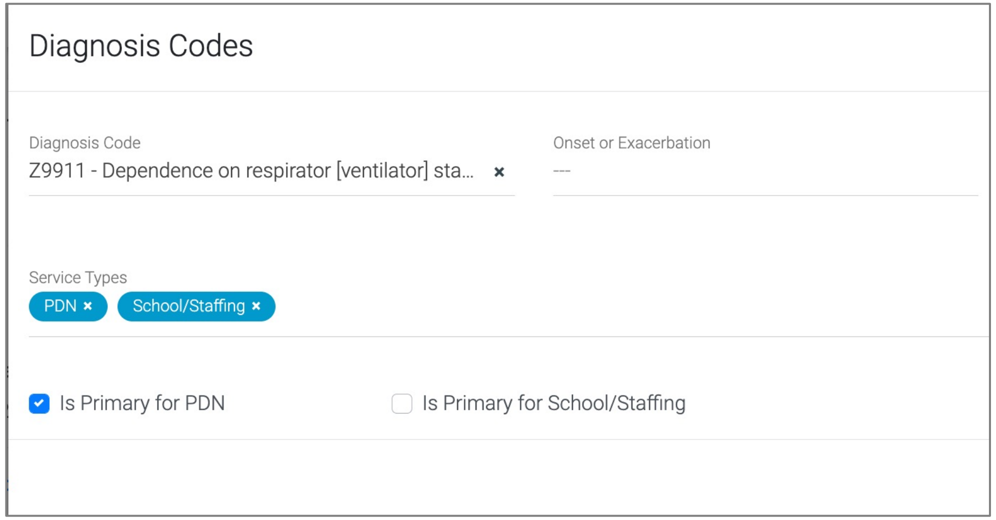
Client> Profile> Service Details> Select status to see Admit Table> + or edit admission event and/or Diagnosis codes> Save

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



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

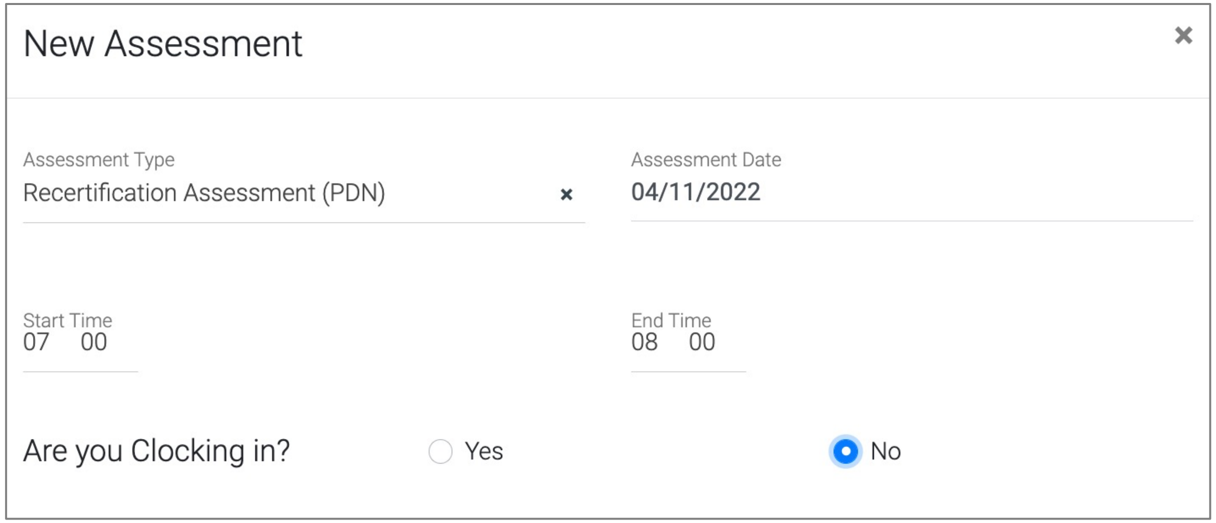
Diagnosis codes may be applied to multiple service types.



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

Client Assessments/Evaluations

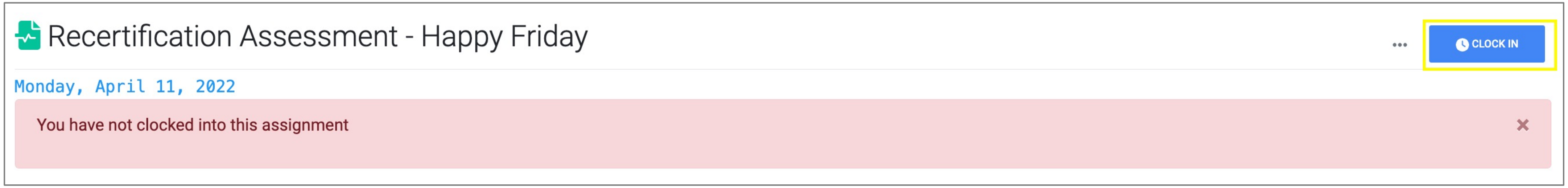
Functionality allows users to start an assessment or evaluation and clock in at a later time.



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.

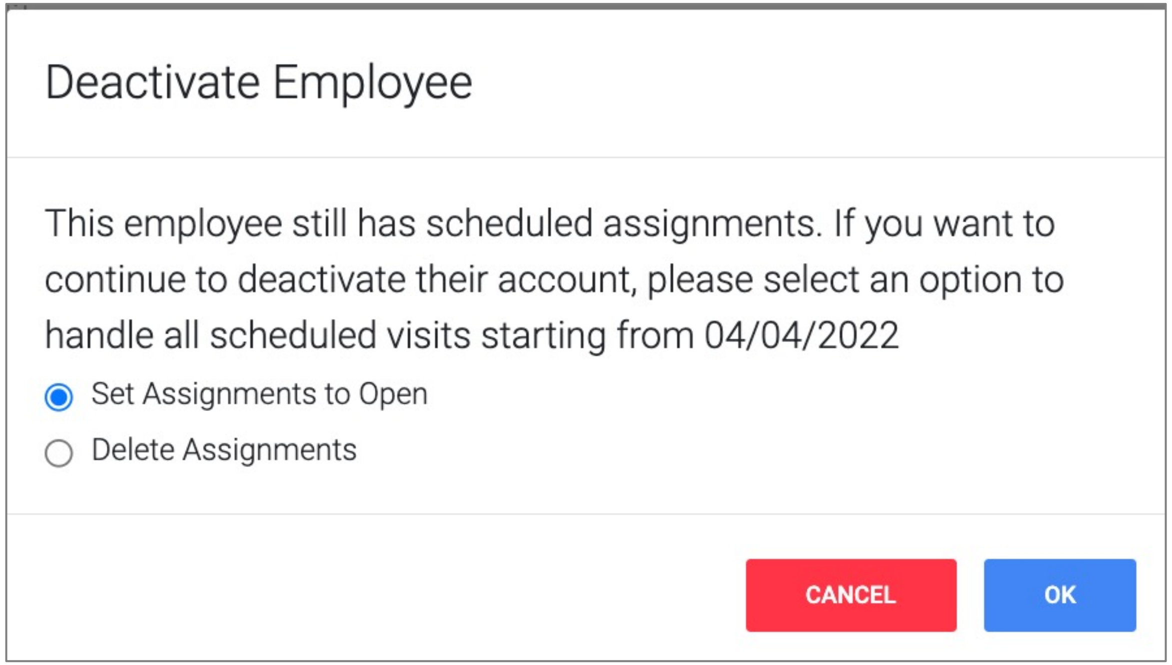
Clock in at time assessment is truly beginning by clicking **Clock In**.



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



Team Options

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

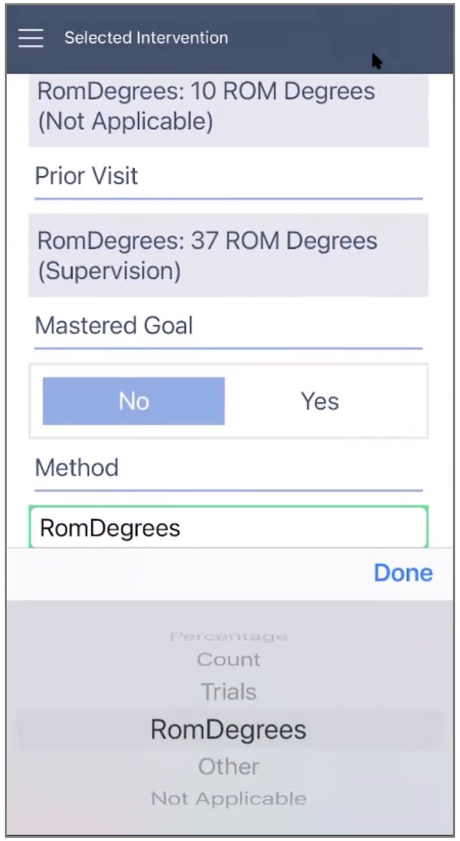
Admin> Teams> Select team> Empl Template or QA Workflow> Action options beside template/workflow> Clone> Select team(s)> Save

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

Therapy Method Updates: Web & Mobile App

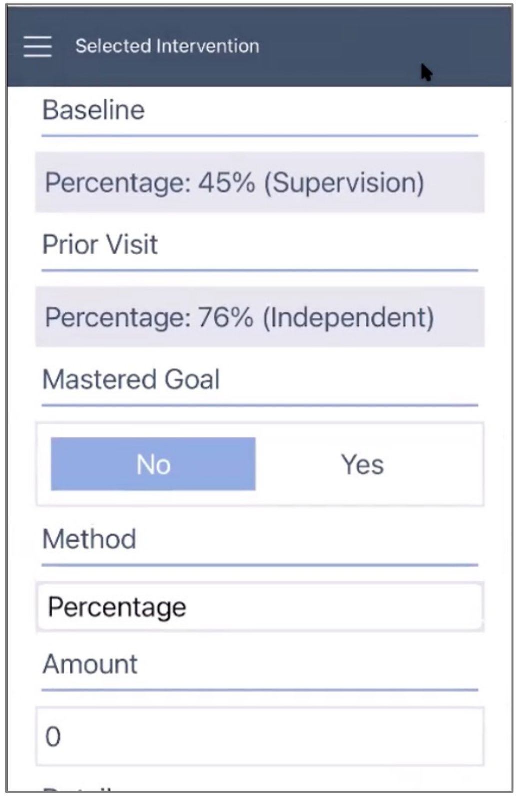
ROM Degrees and Other are new therapy method options that can be used to track and record finite values regarding a client's progress towards a goal.



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.



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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