

Release v3.4 & Mobile App 3.6.0

January 2022

Permissions: Inbox

Allows user groups mobile app access to Inbox and gives users ability to create Notes in the mobile app.

[Admin](#)> [Permissions](#)> [Select user group](#)> [Inbox](#)> [Make selections](#)> [Save](#)

Note Types		Send To Options	
General Only	<input checked="" type="checkbox"/> All	Only Patient Admin Man...	
	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete
Note Attachments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Download
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Notes

View: see Inbox in mobile app menu, read notes, details of the Inbox Note

Edit: reply, reply all, add comment or resolution to Inbox note

Note Attachments

View: see attachments in Inbox

Edit: able to add attachments to note

Delete: able to delete attachments

Download: save attachments

Note Types

General Only: only a 'General' note type will be available to user group for selection when creating notes in the mobile app

All: all note types will be available to user group for selection when creating notes in the mobile app

Send To Options

All (based on team): users in group will be able to send note to any other user on the team, who also has access to inbox

Patient Admin Manager: users in group will be able to send note to only patient admin managers on their team

User groups will also need 'Can be emailed' checked in the permission options.

Group Name Clinician Admin			
<input type="checkbox"/> Default for Client User	<input checked="" type="checkbox"/> Can Be Tagged	<input checked="" type="checkbox"/> Can Tag	<input type="checkbox"/> Admin Manager
<input type="checkbox"/> Default for Employee User	<input checked="" type="checkbox"/> Can Be Emailed	<input type="checkbox"/> Hide Client Identifying Info	<input checked="" type="checkbox"/> Care Manager
<input type="checkbox"/> Default for Contact User	<input checked="" type="checkbox"/> Can Show Help	<input type="checkbox"/> Hide Employee Identifying Info	<input type="checkbox"/> Edit Segments After Paid
<input type="checkbox"/> Default for Physician User	<input type="checkbox"/> Do Not Show	<input type="checkbox"/> Can Request App Diagnostics	<input checked="" type="checkbox"/> Access All Assessments

Permissions: Notes

Access to the Notes section in the patient, clinician, physician, or user chart is controlled at a more granular level with this release.

[Admin](#)> [Permissions](#)> [Select user group](#)> [Clinician, Patient, Physician, OR User](#)> [Make selections](#)> [Save](#)

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"/> Download
Assignments	<input checked="" type="checkbox"/>			
Details	<input checked="" type="checkbox"/>			
Note Attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pay Rates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
QA Exclusion		<input checked="" type="checkbox"/>		
Reports	<input checked="" type="checkbox"/>			

Note Attachments

View: see attachments included with note

Edit: able to add attachments to note

Delete: able to delete attachments

Download: save attachments

Notes

View: see Inbox in mobile app menu, read notes, details of the Inbox Note

Edit: reply, reply all, add comment or resolution to Inbox note

Admin: Users

Users now have a Notes section.

[Admin](#)> [Users](#)> [Notes](#)> + to add new

User - Carri Craver

Inactive ☒ Active

...

SAVE

PROFILESECURITYNOTIFICATIONSPATIENT PERMISSIONSMOBILE DEVICESMOBILE INSTRUCTIONSDIAGNOSTICSDOCUMENTSNOTES

INBOX

Start
11/17/2021

End
12/17/2021

SEARCH

Search

+ Showing 0 to 0 of 0 entries < >

Creator	Date	Details	Type	Tags	Email Sent	Comments	Attachments
No data available in table							

Note: Notes created at the patient, employee, or physician level will also show here in the user profile; notes created in the user profile will also show in the patient, employee, or physician chart.

Billing: A/R

Updated: 3/21/2019 22:00

A/R Details

Start Date

End Date

Claim Number

Payer

Patient

APPLY

AR DETAILS

AGING SUMMARY

Search

1-112 of 112

<input type="checkbox"/>	Patient	Payer	Claim #	DOS Start ↑↓	DOS End ↑↓	Open ↑↓	Billed	Expected	Paid	Adj.	Balance	↑↓
<input type="checkbox"/>	Fleck, Arthur	Texas Childrens...	345BB1001	01/18/21	01/22/21	295	\$200.00	\$200.00	--	--	\$200.00	...
<input type="checkbox"/>	Fleck, Arthur	Texas Childrens...	337BA1001	01/04/21	01/04/21	321	\$100.00	\$100.00	--	--	\$100.00	...
<input type="checkbox"/>	Fleck, Arthur	Texas Childrens...	336BA1003	01/25/21	01/25/21	321	\$100.00	\$100.00	--	--	\$100.00	...
<input type="checkbox"/>	Fleck, Arthur	Texas Childrens...	333BA1000	12/28/20	12/28/20	321	\$100.00	\$100.00	--	--	\$100.00	...
<input type="checkbox"/>	Fleck, Arthur	Texas Childrens...	338BA1001	01/11/21	01/11/21	321	\$100.00	\$100.00	--	--	\$100.00	...

Advanced Filter

Team Filter

Dallas - North

Dallas - South

QA

Patient Status

All

A/R Type

All

☒ Past Due

☐ Only Denials

RESET

APPLY

- The infinite scroll has been reinstated on the A/R page.
- The Billed Amount column has been reinstated on the A/R page.
- The Days Open column will now show in red, if the period of time exceeds the average amount of time between billing the claim and the payment from the payer.
- The Advanced Filter now has a 'Past Due Only' checkbox to limit to the claims exceeding the average amount of time between billing the claim and payment from the payer.

Billing: Payer Billing Code Report

Now includes the details of service code bill rates and discounts.

Billing> Reports> Payer Billing Code report> Queue Report

Billing Reports

QUEUE REPORT(S)

BILLING REPORTS

HISTORY

MEC

Team Filter

Dallas - North

Dallas - South

Report

Payer Billing Codes

Start

End

Patient Status

Patient(s)

Active

Payer(s)

Employee(s)

Admin Service Type(s)

☐ Exclude Unbilled

☐ Pending Claims Only

H	I	J	K	L	M	N
Effective Start Date	Effective End Date	Rate Type	Bill Rate	Discount Amount	Discount Type	Expected Rate

Billing: Place of Service

Place of Service can be set at individual service code level.

[Billing](#)> [Payers](#)> [Action options next to payer](#) > [Service Codes](#)> [Select Type of Facility](#)> [Save](#)

Edit Service Code

Skill

Occupational Therapy

Description

OT-BCBS Routine

32 - Home Health - Inpatient

33 - Home Health - Outpatient

02 - Telehealth

03 - School

11 - Office

12 - Home

Acuity Level

Not Applicable

Modifier (2)

U5 Licensed Therapist

Modifier (3)

Modifier (4)

DELETE

SAVE

Note: This setting was already available at the Payer and Patient Payer level, and now is available at the individual service code level.

Note: The same Type of Facility (POS) options exist in all drop downs.

Note: The patient payer setting will trump the service code setting, which will trump the payer setting.

Teams: Certification Dates

Select a default certification date of 30, 45, 60, 90, or 180 days. If this setting is used, the current cert and next cert will be automatically created in the assess/eval re-assess/re-eval.

[Admin](#)> [Teams](#)> [Cert Date Default](#)> [Make selection](#)> [Save](#)

Cert Date Default	Re-Cert Notification Default
60 Days	10

The capability of this feature does rely on form settings. Please check with support@cubhubsystems.com before implementing.

Note: Users may still manually adjust certification dates in the patient assessment or LPR.

Note: Count will be the patient SOC date + the number of days chosen.

Cert Date Default

60 Days

Custom

30 Days

45 Days

60 Days

90 Days

180 Days

Clinical: Therapy Goal Baseline

Baseline of a goal may be captured during an eval or re-eval.

Client> Chart> Assessment> Click into new or working Eval or Re-Eval> Plan> STGs> ⓘ beside goal> add in baseline> Save

Short Term Goals	
Cora will increase independence during self-care tasks through participation in a variety of therapeutic activities to build body awareness, learn sequencing of multi-step tasks, and develop appropriate motor control for dressing and managing clothing fasteners (zippers, buttons, snaps) with at least 80% accuracy during 3 opportunities.	ⓘ
Pt will copy numbers with correct formation 60 % of all opportunities.	ⓘ
Pt will demonstrate independence with manipulating fasteners for daily living skills with 40 % accuracy.	ⓘ
Pt will imitate and copy pre-writing shapes (vertical, horizontal lines, shapes) with 60 % accuracy.	ⓘ

Note: This functionality is only for goals that are new/not yet charted against in the patient’s chart.

Short Term Goals Information ×

Short Term Goal:
Pt will imitate and copy pre-writing shapes (vertical, horizontal lines, shapes) with 60 % accuracy.

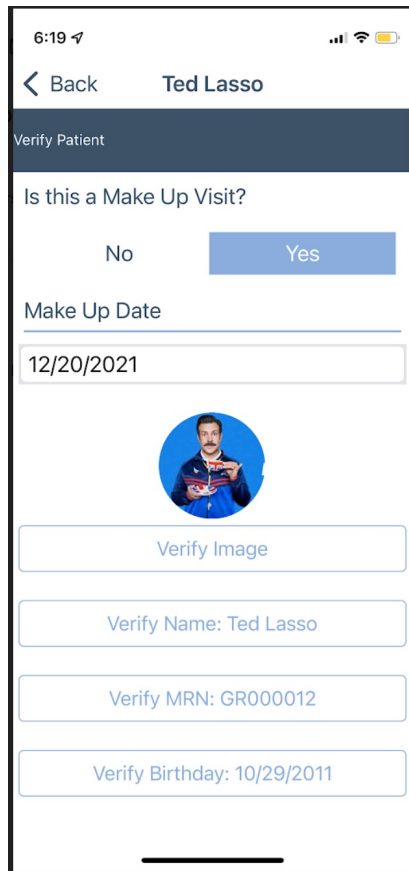
Long Term Goal:
Visual Motor: Improve visual motor skills for success with self-care, fine motor tasks.

Type	Amount	Assist/Cuing
%	20	Mod
×		×

SAVE BASELINE

Clinical & Calendar: Make Up Visit

At clock in of therapy visit (web or mobile), users will be asked to indicate if this is a make-up visit, to indicate the date being made up, & the date will also be reportable.



6:19

< Back Ted Lasso


Verify Patient

Is this a Make Up Visit?

No Yes

Make Up Date

12/20/2021



Verify Image

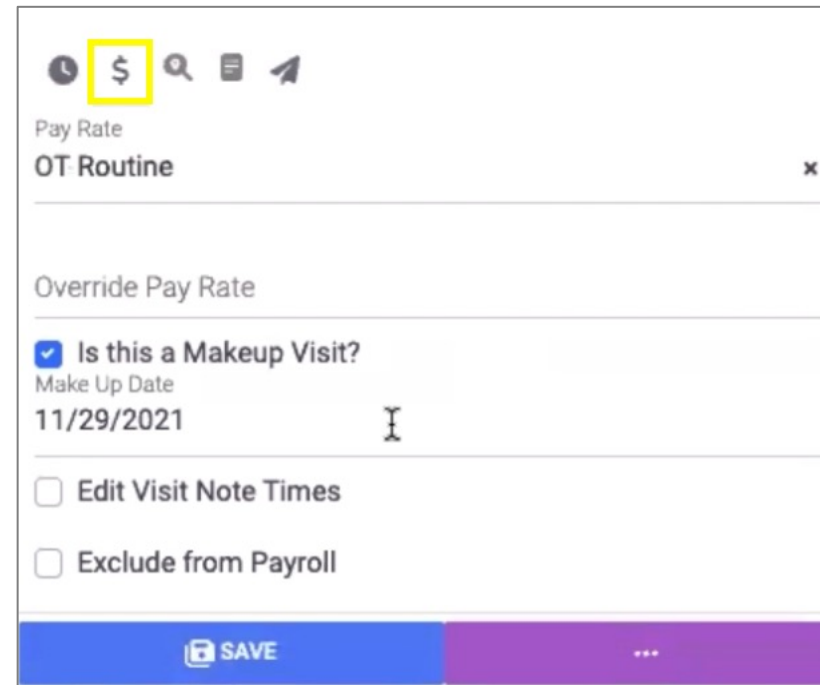
Verify Name: Ted Lasso

Verify MRN: GR000012

Verify Birthday: 10/29/2011

If the date entered is incorrect, it can be corrected in the Payroll section of the calendar visit.

Calendar> Select visit> Payroll section> Change date> Save



🕒 \$ 🔍 ☰ ↗

Pay Rate

OT Routine

Override Pay Rate

☒ Is this a Makeup Visit?

Make Up Date

11/29/2021

☐ Edit Visit Note Times

☐ Exclude from Payroll

SAVE

Calendar: Service Type Filter, Unit Count, & Phone Icon

Calendar> Advanced Filter>
Service Type> Select type> Apply

Advanced Filter

Team Filter
Ft. Worth

Care Manager

Admin Manager


Service Type
FCNA
OT
PDN
PT
SNV
ST


RESET APPLY

Calendar> Select Visit w/assigned
employee> Phone Icon beside number>
Call from device

Calendar

VISIT CLIENT AUTH(S) EMPLOYEE

 RN
Karen Hecate
Female | 0 Hours

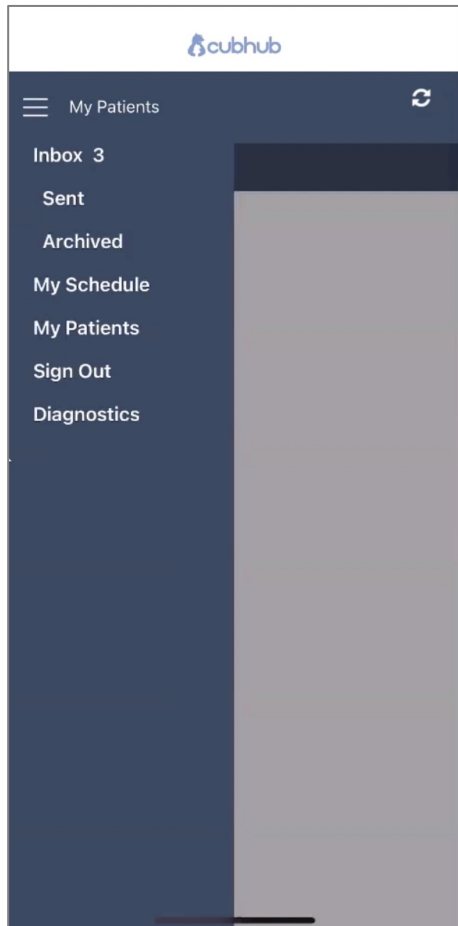
 (817) 422-0672

Calendar> View assignment> Units
listed beside scheduled hours

WED 22	THU 23	FRI 24
Visits - 1 Hours - 1.25 Annie Lewis 07:00-08:22 (5) OT-TCHP Eval LC	Visits - 1 Hours - 1 Annie Lewis 07:00-08:00 (4) OT-TCHP-Routin	Visits - 1 Hours - 1 Casey Musgrave 08:00-09:00 (4) SLP-TCHP Visit

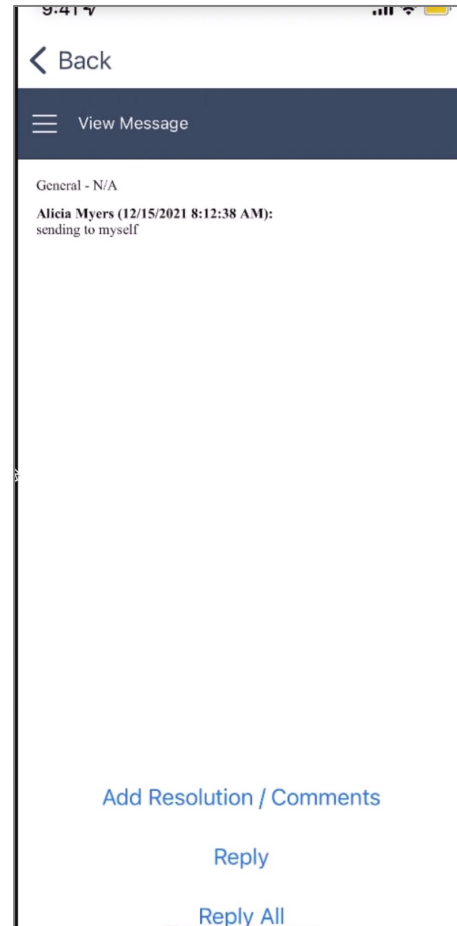
Mobile: Inbox

Users who have permission to Inbox and access the mobile app, will be able to access their Inboxes in the app.



Access the Inbox in the hamburger menu. Sent & Archived communication can also be accessed here.

Once in a note, add resolution/comments, reply and reply all.



Create a new note by clicking the green 'New' button

