

Release v2.6.4.1

March 2021



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Section	Feature	Details
Admin	Employee Last Day	Employee Last Day worked: auto-filled based on calendar (may be overridden) & is reportable
Billing	E-File Occ Code	Institutional claims (UB04) occurrence codes added to e-file options
Billing	Aging Summary	Insurance type added to the Aging Summary Download & MEC Aging Summary
Clin Admin	OASIS xml	May download multiple patient(s) OASIS xml files from orders
Clin Admin	OASIS response	May mark multiple OASIS assessments as accepted or rejected by CMS in orders manager; accepted marks OASIS as completed In chart; rejected remains in orders until marked accepted
Clin Admin	LPR: Med Interactions	PDF of Med Interactions may be previewed or sent to Orders with clinician signed review
Clin Admin	LPR: Med Reconciliation	PDF of Med Reconciliation may be previewed or sent to Orders with clinician signed review
Clin Admin	Orders	Med Rec & Interactions now order types; may be processed through patient orders
Clin Admin	Pharmacy Info	If contact type: pharmacy exists in patient contacts will populate on both Med Rec & Med Interactions
Clin Admin	Patient Report	Patient SOC Date & Admit Date reportable per service type in Patient Details Report
Employee	Disciplines	New PCA Disciplines: Live-In HHA, Live-In-CNA, Live-In-CHHA

Employee 'Last Day Worked'

Employee 'Last Day Worked' will auto-fill from the calendar into an employee's profile. A user may override this date, if needed, and the field is reportable.

Shifts that are in Working, Completed, and/or Verified status will prompt the system to pull this as the date for the 'Last Date Worked' field. If needed, the date may be overridden.

The Employee Detail Report also has a field that can be selected to show 'Last Date Worked.'

Employee Information	
Exclude From QA	<input checked="" type="checkbox"/>
Payroll ID: (last used: 002)	98767
Recruited By	ICH
Hire Date	03/03/2019
Last Day Worked	03/17/2021
Employment Status	Active
Referral Source	None
Referral Source Details	
Employee Details:	
Exclude from OT:	<input type="checkbox"/>
Exclude from Payroll:	<input type="checkbox"/>
NPI	1154591253

Billing

E-File Options for Institutional Claims (UBO4) now include Occurrence Code fields.

Boxes 31-34 as seen here:

Box 31 Date Type	Send Blank
Box 31 Occurrence Code	
Box 32 Date Type	Send Blank
Box 32 Occurrence Code	
Box 33 Date Type	Send Blank
Box 33 Occurrence Code	
Box 34 Date Type	Send Blank
Box 34 Occurrence Code	

Click Steps: Ops> Billing> Payers> Click on payer> E-File Options

Users may select Plan of Care Start Date or Admit Date

✓ Send Blank

Send as POC Start Date

Send as Admit Date

OASIS

Users have ability to download OASIS xml file(s) from Orders.

Start Date

End Date

Order Type

✕ Oasis

Reset

Search

<input checked="" type="checkbox"/>	ID	Patient	Type	Drug Name	Physician	Order Date	Last Note		
<input checked="" type="checkbox"/>	250339	Merietta Nelson	Oasis			03/17/2021	03/17/2021 18:02:48 CDT		
<input checked="" type="checkbox"/>	250340	Merietta Nelson	Oasis			03/17/2021	03/17/2021 18:04:20 CDT		
<input checked="" type="checkbox"/>	250343	Rick Morty	Oasis		DR. Doctor	03/01/2021	03/17/2021 12:31:19 MDT		
<input checked="" type="checkbox"/>	250342	Cole Nelson	Oasis		KELLY HEATH	02/28/2021	03/17/2021 12:30:30 MDT		

Archive

Send to MD

Complete without MD Signature







Download XML

* indicates an unattached physician

OASIS

Users have ability to mark OASIS assessment(s) as Accepted or Rejected by CMS in Orders manager.



Click Steps: from the Orders: Pending MD Signature page> select one or multiple OASIS assessments> Mark OASIS

<input type="checkbox"/>	ID	Patient	Type	Physician	Date Sent to MD	Days Open	Last Note	Fax	
<input checked="" type="checkbox"/>	250339	Merietta Nelson	Oasis		03/17/2021	0	03/17/2021 18:02:48 CDT	--	 
<input type="checkbox"/>	250342	Cole Nelson (Rejected)	Oasis	KELLY HEATH	02/28/2021	17	03/17/2021 12:30:30 MDT	--	 
<input type="checkbox"/>	246461	Merietta Nelson (Rejected)	Oasis		08/20/2019	575	--	--	 

ArchiveSend to MDResend to MDComplete without MD SignatureDownload XMLMark OASIS

* Indicates an unattached physicianFax NowCreate Fax Batch

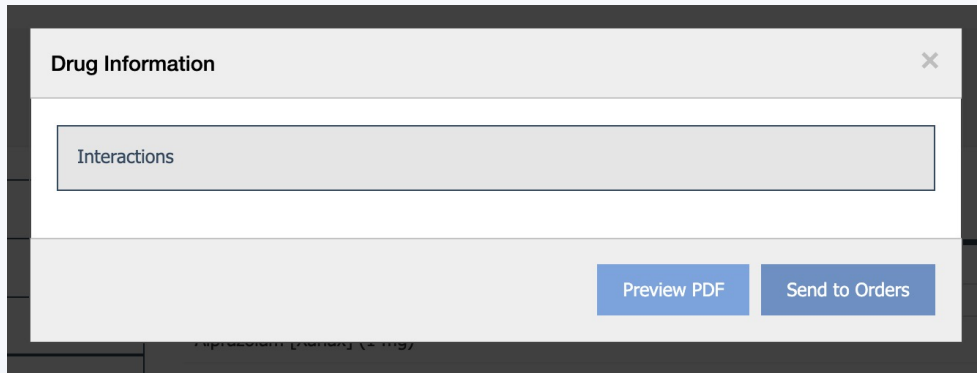
Accepted assessments go in to patient chart as Completed.

<input type="checkbox"/>	250343	03/01/2021	DR. Doctor	Ann Upchurch	Completed	--	Oasis (Accepted)	0	 
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Rejected assessments stay in orders until marked accepted.

Med Interactions


From the LPR, users may create a PDF of medication interactions to be previewed and/or sent to Orders.



Sample Med Interaction PDF

Click Steps: Patient> Chart> LPR> Medications> Orange ! Icon> Preview PDF OR Send to Orders

Pharmacy name, address and phone number will populate to PDF of Med Rec & Med Interaction. The pharmacy has to be in the Patient> Chart> Contacts to allow it pull to PDF.



Med Reconciliation

From the LPR, users may create a PDF of med reconciliation to be previewed and/or sent to Orders.

Medication Reconciliation

Input password to Create Signed Med Profile in Orders or Click Preview

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Preview PDF

Send to Orders

Click Steps: Patient> Chart> LPR> Medications> Printer icon> Preview PDF OR Send to Orders

Pharmacy name, address and phone number will populate to PDF of Med Rec & Med Interaction. The pharmacy has to be in the Patient> Chart> Contacts to allow it pull to PDF.

Sample Med Reconciliation PDF

Client:

Address:

Diagnosis:

Pharmacy:

Rick Morty

917 Sherwood Arlington, TX 76013

Target Pharmacy - 700 North Main Ft. Worth, TX 76104 - (817) 222-1876

MR#:

DOB:

SOC Date:

Medication Profile

010

10/29/2017

11/30/2020

Physician:

Address:

Allergies:

DR. Doctor

1000 8th St Ft. Worth, TX 76107

	Medication	Strength	Route	Dose	Frequency	Side Effects / Interactions	Routine/PRN	High Risk	Ordering MD
Order/D.C. Date Classification Indication	Alprazolam [Xanax] 07/16/2020 Alcohols	1 mg	Oral	1mg	Q6	Y	R	N	DR. Doctor
Order/D.C. Date Classification Indication	tramadol 07/28/2020 Alcohols	50 mg	Oral	100mg	Q8	Y	R	N	DR. Doctor
Order/D.C. Date Classification Indication	trazodone 10/25/2020 Adrenergic alpha-1 Receptor Antagonists	50 mg	Oral	50mg	bedtime	Y	R	N	DR. Doctor

Patient Detail Report

SOC Date and Admit Date are reportable by service type in the Patient Detail Report.

Patient Report

✕ Dallas ✕ Greece, Inc

Select Reports ✕ Patient Detail Report

Patient None Selected

Service Types None Selected

Start Date End Date Status Active

Team ☐ Ordering Physician ☐ Date of Birth ☐ SOC Date ☒

Admit Date ☒ Medical Record Number ☐ Email ☐ Certification ☐

Sample Report:

	A	B	C	D	E	F
1	Patient First Name	Patient Last Name	SOC Date (PDN)	SOC Date (PCA)	Admit Date (PDN)	Admit Date (PCA)
2	Rick	Morty	11/30/20		11/27/20	
3	Merietta	Nelson	7/1/18	7/1/18	7/1/18	7/1/18