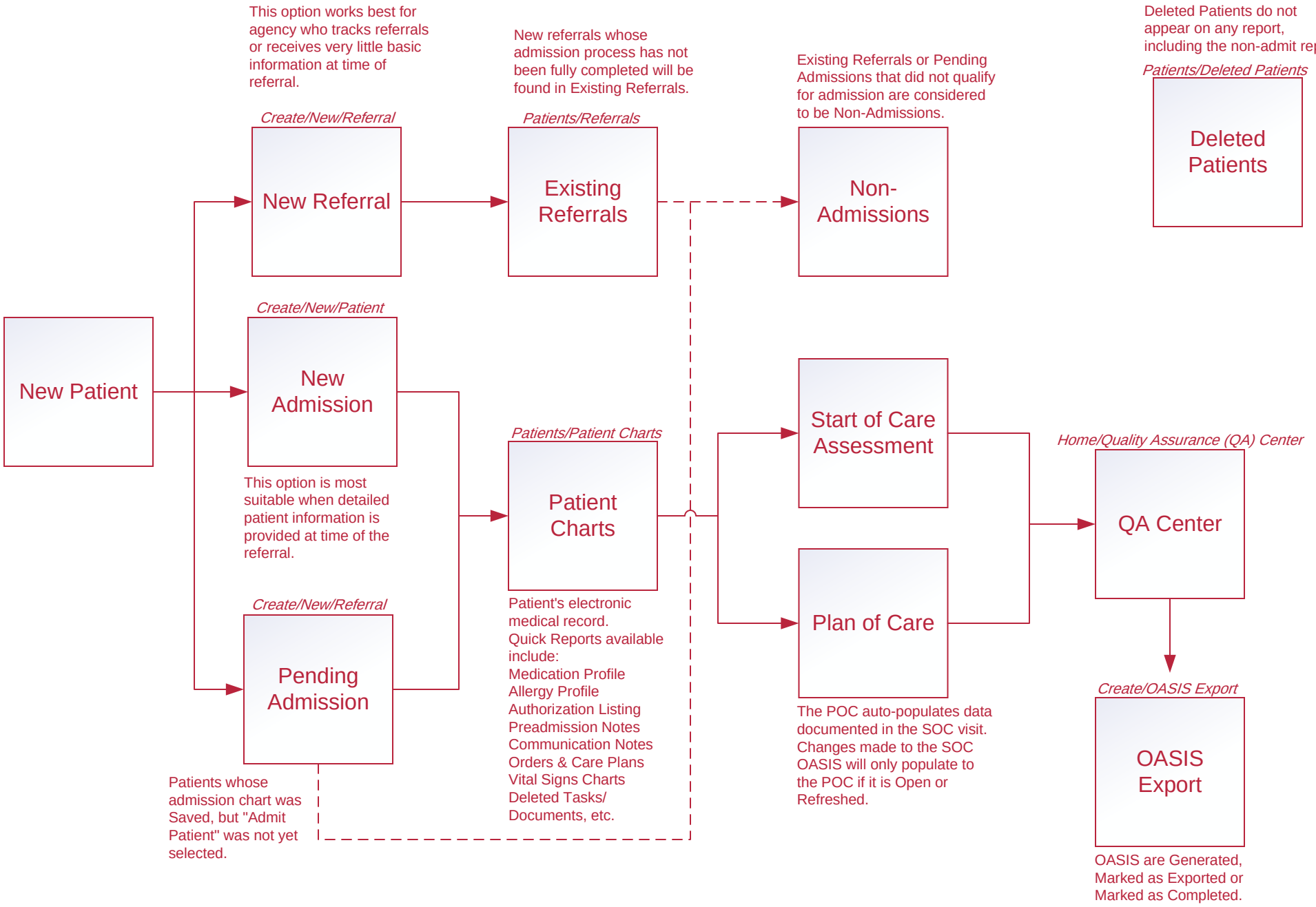
HOME HEALTH
INTAKE & SCHEDULING
FLOW CHART

September 2021

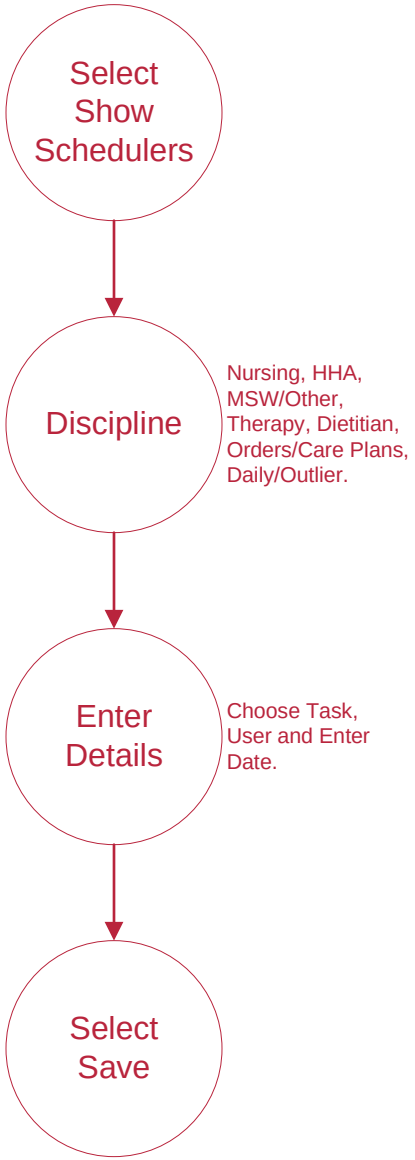
Intake Process



Scheduling Tasks*

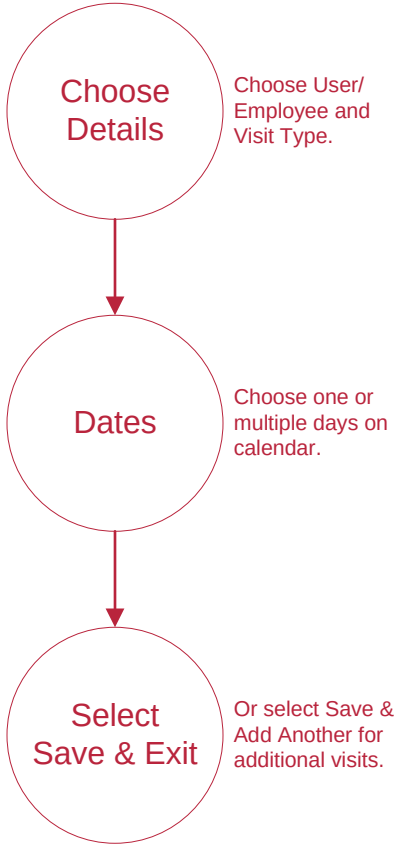
Schedule Single Task

Schedule/Schedule Center



Schedule Multiple Tasks

Schedule/Schedule Center/Schedule Manager/Schedule Employee



*Permissions Based

Reassigning and Deleting Tasks*

Reassign Single Task

Schedule/Schedule Center/Menu/Reassign

Choose New User/ Employee

↓

Select Reassign

Reassign Multiple Tasks

Schedule/Reassign Schedule

Enter Details — Choose Employee From & To and Date From & To.

↓

Select Reassign

Delete Multiple Tasks

Schedule/Schedule Center/Schedule Manager/ Delete Multiple Tasks

Select Box(es) — Select Check/ Uncheck All checkbox to select all.

↓

Select Delete — Choose one or multiple days on calendar.

↓

Select OK — Confirm.

Alternative Reassign Single Task

Patients/Patient Charts/Menu/Reassign

Choose New User/ Employee → Select Reassign

Retrieve Deleted Tasks

Patients/Patient Charts/Quick Links/Deleted Tasks

Select Restore → Select OK — Confirm.

*Permissions Based

Authorizations*

New Authorization

Schedule/Schedule Center/Authorizations/Add Authorization
OR *Patient/Patient Charts/New/Authorization*

- **Confirm Type and Status** — Patient's name and insurance will populate. auto-selects Authorization Status of "Active."
- **Enter Details** — Enter Start Date. End Date, Authorization Number.
- **Visits or Hours Authorized** — Choose Discipline, HCPC Code, Authorized Units and Unit Type. Select **Add More Disciplines** (if necessary).
- **Add Attachments** — Select Browse, find document, select Open, then select **Attach Document.**
- **Select Save**

Authorize Multiple Tasks

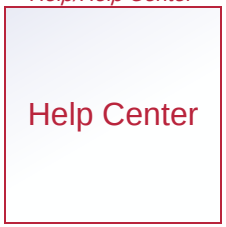
Patient/Patient Charts/Quick Links/Authorization Listing
OR *Schedule/Schedule Center/Authorizations*

- Hyperlink on the far right. — **Select Edit**
- At the bottom of the page. — **Select Show Unauthorized Visits**
- Select visits to attach to the authorization. — **Select Visits**
- **Select Authorize**
- Verify all authorized visits are included. — **Select Save**

*Permissions Based

Help Center Process

Help/Help Center



This center will provide step-by-step instructions on areas of the software, as well as instructional videos.