

# Client List

A patient list in an adult day care facility is a roster of individuals who are receiving care and support services. It includes their names, medical conditions, care plans, and emergency contacts. This list helps staff coordinate and provide appropriate care, ensuring the safety and well-being of participants during their stay.

[Client >> List](#)

## Referral Details

Click the option  in client list before each patient name to view the referral details of the patient in the system.

Refresh Active Select Bulk Option Select Bulk Option + Patient

Name Status Group(s) Is Draft? Service Type Account # Payor Search Reset

Client	Address	Status	Account #	Assignee	Group(s)	Payor	Actions
<input type="checkbox"/> Clark, Samuel	Aaa Drive Hamilton Township - 08691	Active	3357951852	Admin, Master		Atena,Atena	Action
<input checked="" type="checkbox"/> Hernandez, Brown	1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin, Master		Atena	Action

**Referral Details**

Details	Emergency Contact	Modification Details
Account Number: P-002 Health Plan: Case Manager:	Name: Hernandez, Brown Address: 1000 AAA Drive Phone: 4541254545	Created Date: 03/31/2022 Created By: Admin, Master Updated Date: 07/13/2022 Updated By: D, David

Payor						Authorization Code			
Payor	Start Date	End Date	Precedence	Beneficiary Name	Beneficiary Number	Payor	Authorization Code	Start Date	End Date
Atena	01/01/2023	12/31/2023	1	Medicaid	14587989898	Atena	254874587	02/02/2023	11/05/2023

## Delete Patient

The Patient can be deleted from the system by using the option Disable Selected in Patient List. Select the Patient name by using the check box and click Disable Selected option.

Refresh Active Select Bulk Option **Disable Selected** SendBulkEmail + Patient

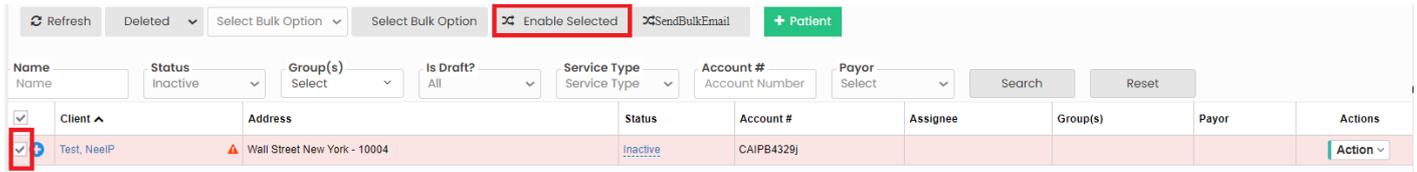
Name Status Group(s) Is Draft? Service Type Account # Payor Search Reset

Client	Address	Status	Account #	Assignee	Group(s)	Payor	Actions
<input type="checkbox"/> Clark, Samuel	Aaa Drive Hamilton Township - 08691	Active	3357951852	Admin, Master		Atena,Atena	Action
<input checked="" type="checkbox"/> Hernandez, Brown	1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin, Master		Atena	Action
<input type="checkbox"/> Test, NeelP	Wall Street New York - 10004	Active	CAIPB4329j				Action

Showing 1 to 3 of 3 records

## Restore Deleted Patient

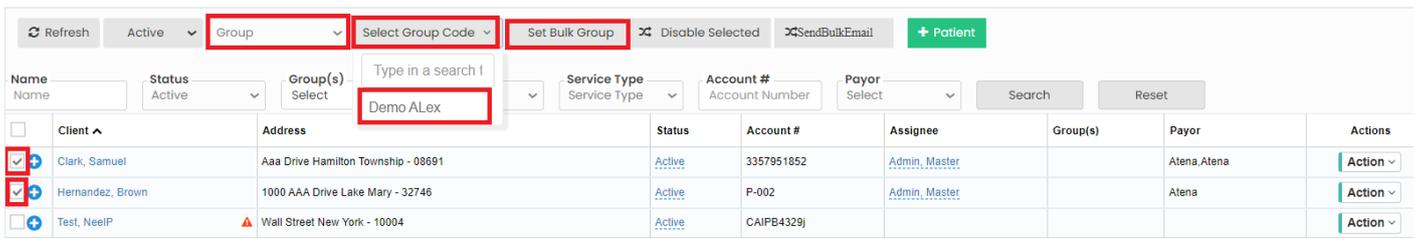
The Deleted Patient can be activated by using the option Enable Selected in Deleted Patient List. Select the Patient name by using the check box and Click Enable Selected option.



Refresh		Deleted	Select Bulk Option	Select Bulk Option	Enable Selected	SendBulkEmail	+ Patient	
Name	Status	Group(s)	Is Draft?	Service Type	Account #	Payor	Search	Reset
Name	Inactive	Select	All	Service Type	Account Number	Select		
<input type="checkbox"/>	Client ^	Address	Status	Account #	Assignee	Group(s)	Payor	Actions
<input checked="" type="checkbox"/>	Test, NeelP	Wall Street New York - 10004	Inactive	CAIPB4329j				Action

## Bulk update Patient Group

The user can bulk update the patient group by using the option Set Bulk Group in patient list. Select the Patient name by using the check box and click Group under Select bulk option. Now select the Group code to be updated and click Set Bulk Group in patient list. Likewise we can Bulk update Assignee and Status for the patient.



Refresh		Active	Group	Select Group Code	Set Bulk Group	Disable Selected	SendBulkEmail	+ Patient
Name	Status	Group(s)	Type in a search f	Service Type	Account #	Payor	Search	Reset
Name	Active	Select	Demo ALEX	Service Type	Account Number	Select		
<input type="checkbox"/>	Client ^	Address	Status	Account #	Assignee	Group(s)	Payor	Actions
<input checked="" type="checkbox"/>	Clark, Samuel	Aaa Drive Hamilton Township - 08691	Active	3357951852	Admin, Master		Atena,Atena	Action
<input checked="" type="checkbox"/>	Hernandez, Brown	1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin, Master		Atena	Action
<input type="checkbox"/>	Test, NeelP	Wall Street New York - 10004	Active	CAIPB4329j				Action

## Features under Action

The following features are uploaded for the patient under Action in client list.

- Edit
- Delete
- Client Face Sheet
- Incident Report
- Add Notes
- Vital Sign Tracking

PATIENT LIST Census ▾

Total Payor 2    United Healthcare 2

Refresh   Active ▾   Select Bulk Option ▾   Select Bulk Option   + Patient

Name: Name    Status: Active ▾    Group(s): Select ▾    Is Draft?: All ▾    Service Type: Service Type ▾    Account #: Account Number    Payor: Select ▾    Search    Reset

<input type="checkbox"/>	Client ▲	Address	Status	Account #	Assignee	Group(s)	Payor	Actions
<input type="checkbox"/>	Clark, Samuel	Aaa Drive Hamilton Township - 08691	<a href="#">Active</a>	3357951852	<a href="#">Admin_Master</a>	Demo ALEX	Un	<input type="checkbox"/> Edit
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	<a href="#">Active</a>	A098674545	<a href="#">Admin_Master</a>	Demo ALEX		<input type="checkbox"/> Delete
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	<a href="#">Active</a>	P-002	<a href="#">Admin_Master</a>	Demo ALEX		<input type="checkbox"/> Client FaceSheet
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	<a href="#">Active</a>	A09867456	<a href="#">Admin_Master</a>	Demo ALEX	Un	<input type="checkbox"/> Incident Report

Showing 1 to 4 of 4 records

- Add Notes
- Vital Sign Tracking

## Census

The number of Payor for the list of patients can be viewed by using the option Payor under Census.

PATIENT LIST Census ▾

Total Payor 2    United Healthcare 2

Refresh   Active ▾   Select Bulk Option ▾   Select Bulk Option   + Patient

Name: Name    Status: Active ▾    Group(s): Select ▾    Is Draft?: All ▾    Service Type: Service Type ▾    Account #: Account Number    Payor: Select ▾    Search    Reset

<input type="checkbox"/>	Client ▲	Address	Status	Account #	Assignee	Group(s)	Payor	Actions
<input type="checkbox"/>	Clark, Samuel	Aaa Drive Hamilton Township - 08691	<a href="#">Active</a>	3357951852	<a href="#">Admin_Master</a>	Demo ALEX	United Healthcare	<input type="checkbox"/> Action ▾
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	<a href="#">Active</a>	A098674545	<a href="#">Admin_Master</a>	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	<a href="#">Active</a>	P-002	<a href="#">Admin_Master</a>	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	<a href="#">Active</a>	A09867456	<a href="#">Admin_Master</a>	Demo ALEX	United Healthcare	<input type="checkbox"/> Action ▾

- By Payor
- By Status
- By CareType

The number of patients according to their Status can be viewed by using the option By Status in Census.

PATIENT LIST Census ▾

Total Status 7    Active 4    Pro Bono 1    Discharged 1    New Referral 1

Refresh   Active ▾   Select Bulk Option ▾   Select Bulk Option   + Patient

Name: Name    Status: Active ▾    Group(s): Select ▾    Is Draft?: All ▾    Service Type: Service Type ▾    Account #: Account Number    Payor: Select ▾    Search    Reset

<input type="checkbox"/>	Client ▲	Address	Status	Account #	Assignee	Group(s)	Payor	Actions
<input type="checkbox"/>	Clark, Samuel	Aaa Drive Hamilton Township - 08691	<a href="#">Active</a>	3357951852	<a href="#">Admin_Master</a>	Demo ALEX	United Healthcare	<input type="checkbox"/> Action ▾
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	<a href="#">Active</a>	A098674545	<a href="#">Admin_Master</a>	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	<a href="#">Active</a>	P-002	<a href="#">Admin_Master</a>	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	<a href="#">Active</a>	A09867456	<a href="#">Admin_Master</a>	Demo ALEX	United Healthcare	<input type="checkbox"/> Action ▾

- By Payor
- By Status
- By CareType

The user can sort the number of patient in the list according to their Care type by using the option By Care Type in Census.

Total CareType 16   Personal Care 5   Respite Care 4   Service Facilitation 3   RN supervisory 2

Refresh   Active ▾   Select Bulk Option ▾   Select Bulk Option   + Patient

Name	Status	Group(s)	Is Draft?	Service Type	Account #	Payor	Search	Reset
<input type="checkbox"/> Client ^	Active ▾	Select ▾	All ▾	Service Type ▾	Account Number	Select ▾		
<input type="checkbox"/> Clark, Samuel	Active				3357951852	Admin_Master		
<input type="checkbox"/> dev, Rahul	Active	▲ jkhksjc lúna - 29390			A098674545	Admin_Master		
<input type="checkbox"/> Hernandez, Brown	Active	▲ 1000 AAA Drive Lake Mary - 32746			P-002	Admin_Master		
<input type="checkbox"/> T, Rahul	Active	jkhksjc lúna - 29390			A09867456	Admin_Master		

Revision #3

Created 8 November 2023 17:11:55 by Thamarai

Updated 10 November 2023 17:50:32 by Thamarai