

Client List

The Client List contains the list of homecare patients in the system.

[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	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	CAIPB4329]				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.

The screenshot shows a patient list interface. At the top, there are several buttons: 'Refresh', 'Deleted' (dropdown), 'Select Bulk Option' (dropdown), 'Enable Selected' (highlighted with a red box), 'SendBulkEmail', and '+ Patient'. Below these are filters for Name, Status (Inactive), Group(s) (Select), Is Draft? (All), Service Type (Service Type), Account # (Account Number), and Payor (Select). There are also 'Search' and 'Reset' buttons. The table below has columns: Client, Address, Status, Account #, Assignee, Group(s), Payor, and Actions. The first row is highlighted in red and has a red box around its checkbox. The 'Enable Selected' button is also highlighted in red.

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.

The screenshot shows a patient list interface. At the top, there are several buttons: 'Refresh', 'Active' (dropdown), 'Group' (dropdown, highlighted with a red box), 'Select Group Code' (dropdown, highlighted with a red box), 'Set Bulk Group' (highlighted with a red box), 'Disable Selected', 'SendBulkEmail', and '+ Patient'. Below these are filters for Name, Status (Active), Group(s) (Select), a search box (Type in a search field, containing 'Demo ALEX'), Service Type (Service Type), Account # (Account Number), and Payor (Select). There are also 'Search' and 'Reset' buttons. The table below has columns: Client, Address, Status, Account #, Assignee, Group(s), Payor, and Actions. The first two rows have their checkboxes checked and are highlighted in red. The 'Set Bulk Group' button is also highlighted in red.

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	Active	3357951852	Admin_Master	Demo ALEX	Un	<input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Client FaceSheet <input type="checkbox"/> Incident Report <input type="checkbox"/> Add Notes <input type="checkbox"/> Vital Sign Tracking
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	Active	A098674545	Admin_Master	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin_Master	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	Active	A09867456	Admin_Master	Demo ALEX	Un	<input type="checkbox"/> Action ▾

Showing 1 to 4 of 4 records

The forms updated in Client Face sheet, Incident Report and Vital Sign Tracking are uploaded in Face Sheet folder under patient documents.

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	Active	3357951852	Admin_Master	Demo ALEX	United Healthcare	<input type="checkbox"/> Action ▾
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	Active	A098674545	Admin_Master	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin_Master	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	Active	A09867456	Admin_Master	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	Active	3357951852	Admin_Master	Demo ALEX	United Healthcare	<input type="checkbox"/> Action ▾
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	Active	A098674545	Admin_Master	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin_Master	Demo ALEX		<input type="checkbox"/> Action ▾
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	Active	A09867456	Admin_Master	Demo ALEX	United Healthcare	<input type="checkbox"/> Action ▾

By Status
 By Payor
 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.

PATIENT LIST

Census ▾
By Payor
By Status
By CareType

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	
Client ^	Active	Select	All	Service Type	Account Number	Select			
Clark, Samuel	Active	Aaa Drive Hamilton Township - 08691			3357951852	Admin_Master	Demo ALEX	United Healthcare	Action ▾
dev, Rahul	Active	▲ jkhksjc lúna - 29390			A098674545	Admin_Master	Demo ALEX		Action ▾
Hernandez, Brown	Active	▲ 1000 AAA Drive Lake Mary - 32746			P-002	Admin_Master	Demo ALEX		Action ▾
T, Rahul	Active	jkhksjc lúna - 29390			A09867456	Admin_Master	Demo ALEX	United Healthcare	Action ▾

Bulk Upload Prior Auth

The Bulk Upload Prior Auth feature allows users to efficiently upload multiple prior authorization records into the system using an Excel file, eliminating the need to enter each authorization manually.

Clients >> Clients List

PATIENT LIST

Total Payor 125 AHCCCS 125

Refresh Active Select Bulk Option Select Bulk Option Bulk Upload Prior Auth + Patient
Download Sample Excel

- Download Template: The system provides a standard Excel template format with required fields (e.g., Patient ID, Authorization Number, Start Date, End Date, Units, Payer, etc.).
- Fill in Data: Users populate the Excel file with the necessary authorization details.
- Upload File: The completed file is uploaded into the system through the Bulk Upload interface.

Revision #15

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