


# 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

<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		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

Account Number: P-002  
Health Plan:  
Case Manager:

Emergency Contact

Name: Hernandez, Brown  
Address: 1000 AAA Drive  
Phone: 4541254545

Modification Details

Created Date: 03/31/2022  
Created By: Admin, Master  
Updated Date: 07/13/2022  
Updated By: D, David

Payor

Payor	Start Date	End Date	Precedence	Beneficiary Name	Beneficiary Number
Atena	01/01/2023	12/31/2023	1	Medicaid	14587989898

Authorization Code

Payor	Authorization Code	Start Date	End Date
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

Send Bulk Email

+ Patient

Name

Status

Group(s)

Is Draft?

Service Type

Account #

Payor

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		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: Name Status: Inactive 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 checked="" type="checkbox"/>	Test, NeelP	Wall Street New York - 10004	Inactive	CAIPB4329				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: Name Status: Active Group(s): Select Type in a search: Demo ALex Service Type: Service Type Account #: Account Number Payor: Select Search Reset

<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	CAIPB4329				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	Active	3357951852	Admin, Master	Demo ALex	Un	<div>Edit</div> <div>Delete</div> <div>Client FaceSheet</div> <div>Incident Report</div> <div>Add Notes</div> <div>Vital Sign Tracking</div>
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	Active	A098674545	Admin, Master	Demo ALex		Action ▾
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin, Master	Demo ALex		Action ▾
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	Active	A09867456	Admin, Master	Demo ALex	Un	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	Action ▾
<input type="checkbox"/>	dev, Rahul	▲ jkhksjc lúna - 29390	Active	A098674545	Admin, Master	Demo ALex		Action ▾
<input type="checkbox"/>	Hernandez, Brown	▲ 1000 AAA Drive Lake Mary - 32746	Active	P-002	Admin, Master	Demo ALex		Action ▾
<input type="checkbox"/>	T, Rahul	jkhksjc lúna - 29390	Active	A09867456	Admin, Master	Demo ALex	United Healthcare	Action ▾

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

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

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

## 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.

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