


# 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 | 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: 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 | 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 Payor2

United Healthcare2

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 Payor2

United Healthcare2

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 Status7

Active4

Pro Bono1

Discharged1

New Referral1

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 CareType16

Personal Care5

Respite Care4

Service Facilitation3

RN supervisory2

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 | Demo ALEX | United Healthcare | Action  |
| <input type="checkbox"/> | dev, Rahul       | jkhsjc 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         | jkhsjc lúna - 29390                 | Active | A09867456  | Admin_Master | Demo ALEX | United Healthcare | Action  |