

Instructions



CORRECTING MISTAKES and Entering CHANGES

I. General Rules

- a. When the “gear” appears at the end of a row in any grid, It indicated that there is more than one option associated with that line item.
 - i. click the gear to ‘Delete” or choose “Details” to access the details of the file. Information can be added or changed. See this in ADMIN/Persons, Facilities or in PATIENT/Caregivers.
 - ii. In Claims Management widget there are a number of options associated with claims (post payment, make adjustment, view details, etc)
- b. A ‘pencil” icon at the end of a row indicates that there is only one option. See this in ADMIN/Physicians in which the only option is “Details”.
- c. If an “Effective Date” is associated with data, then adding a new effective date will update the information. Entering the same effective date will change the information. See this in ADMIN/Roles/Rates or PATIENT/History.
- d. Drag a diagnosis or a caregiver to change the order.

II. Change Referral/Admission/Discharge dates

- a. Change Referral Date: Go to Demographics tab, scroll down to referral date and change. Note: you cannot change a referral date to be AFTER the admission date. If admission date has been entered, un-admit pt to change referral date.
- b. Change Admission Date:
 - i. Un-admit patient by clicking the “Un-admit” button. **Unadmitting the patient will remove all elections for the admission as well as any information entered since admission date was entered.**
 - ii. Once back in “Referral “ status, click ‘Admit” and enter the correct admission date.
- c. Change Discharge Date: Click “Undischarge”. Once patient returns to “Admission” status, the discharge date can be reentered correctly.

- III. **Clear a Date:** To clear a date, click in the MM field and scroll to the “MM” at the top of the list and click. For example if the date is 01 15 16, clicking 01 and scrolling up and choosing MM will clear the date.

IV. Error or Change in Attending Physician

- a. If an error was made when entering the attending physician upon entering a new patient into PIM, go to History tab, enter the effective date and click in “Physician” field. Choose the correct physician. NOTE: if patient has been admitted, choose the

patient's admission date. If patient is still in referral status, use the referral date as the effective date. Check under the Demographic tab to ensure that the 'Attending Physician' field now holds the correct physician.

- b. If the Attending Physician changes: go to History tab, enter the effective date of the change. Click in the 'Physician' field and choose the new attending physician.
- c. The Attending physician will display in the certification record if it has been entered on the demographic page.
 - i. You cannot change the attending physician from the cert record; you would need to follow the instructions in IV.a (above).
 - ii. If the attending has not yet been entered (on Demographic page) it may be entered in the cert record; the Attending would then display on the Demographic page.

V. Error or Change in Primary Diagnosis

- a. If the effective date is entered correctly but the order of diagnoses is incorrect, hover cursor over the "ranking" number until it turns from a pointer to a cross. Drag the correct diagnosis to the 1 Ranking position.
- b. If the primary diagnosis has changed, enter the new effective date. Enter the diagnosis code. Drag to 1 Ranking position. If this causes a duplicate, delete the duplicate by clicking the trash can on the right.
- c. Primary diagnosis has no trash can icon and thus cannot be removed. If it needs to be removed, add the correct diagnosis, move the corrected dx into the #1 position, then delete the other.

VI. Error or Change in Allergies:

- a. To Correct an allergy: Have one of the agency's HB Admins delete the incorrect allergy by clicking the trashcan. NOTE: a history is kept of each change in allergy (even though the history may not be visible).
- b. When a new allergy is id'd, simply add the allergy. The program creates and stores the effective date.

VII. Error or Change in staff assignment

- a. If an error was made in a staff assignment, click in the "Name" field and choose the correct staff member.
- b. If a change is made in staff assignment, enter an "End date" for the current assignment. The "Name" field will then be blank. Enter the new effective date as well as the new assigned staff.

VIII. Error or Change in Caregiver

- a. To remove a caregiver added in error, click on "Caregiver" tab; click the gear and choose "Remove".
- b. To change the order and make another caregiver "primary", drag another caregiver to the first position.

- XIV. **To Correct Certification Period:** There are only 3 reasons that a patient's certification periods would be incorrect: 1) admission date is wrong; 2) prior hospice information is wrong; or 3) Insurance (other than Medicare) election criteria is set up incorrectly.
- a. To correct admission date: see above
 - b. To correct prior benefit:
 - i. Go to Insurance tab. Click "Gear" and choose "Eligibility"
 - ii. Under "Prior Hospice" click to choose None, Transfer, or Revoke.
 - iii. Answer the remaining questions correctly.
 - iv. Click Close and Accept changes.
 - v. Check new certification periods (under Insurance tab/Elections). If the cert periods did not automatically re-calculate and are still incorrect, contact support.
 - c. To set up a non-Medicare carrier for certifications:
 - i. Navigate to ADMIN/Hospice Election Definition. Create an election for the pattern needed (ie q 90d, etc).
 - ii. Now go to ADMIN/Insurance Carriers. Find the insurance carrier on the grid and click the gear/Details.
 - iii. Under Hospice Election Definition, choose the pattern created in step c.i above.
 - iv. Navigate back to PATIENT/Insurance tab. Your certification periods should have recalculated. Notify support if they did not.

XV. To Correct Interaction Data

- a. In the Interaction Widget (stored in the Widget Drawer, on right side of Home Page), you will see all staff and physician interactions (visits).
- b. To modify, expand the widget and click the "'Search and Edit' tab. Search to find the interaction in question. Modify the data or delete using the trash can icon.
- c. For a physician visit which was entered as a non-billable visit that should have been a billable visit, once you find the visit under the "Search and Edit" tab, click the "stethoscope" icon. A floating window will open to allow the HCPCS code and rate to be entered.