

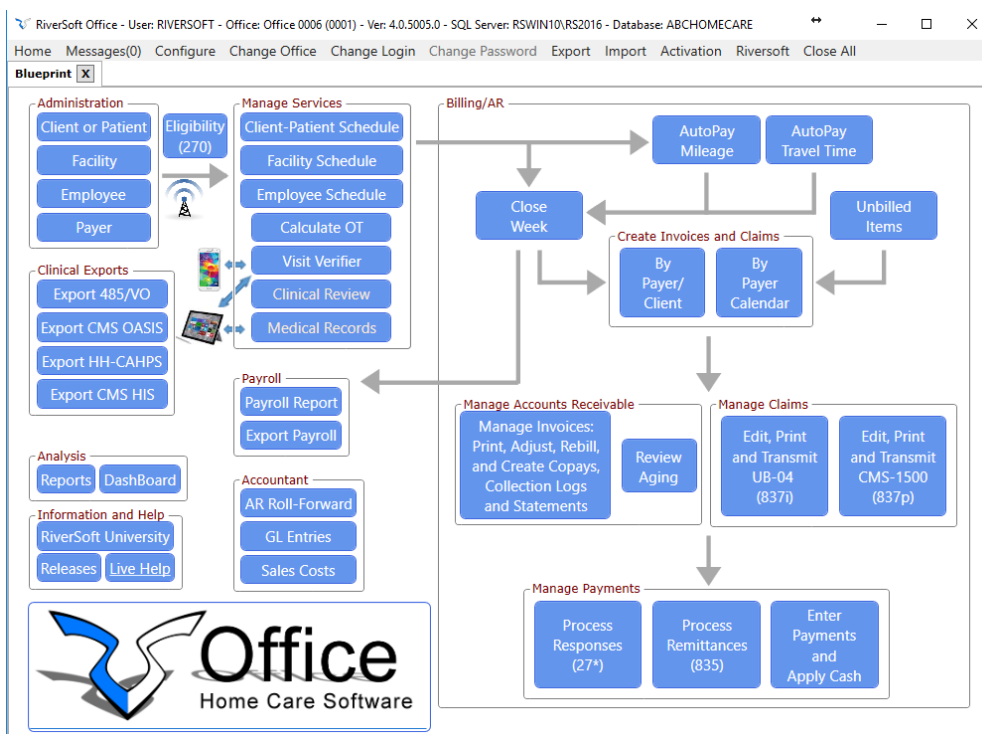
# RiverSoft Primer

## Overview of the RiverSoft Home Care Software Suite



The login screen for RiverSoft Office Home Care Software. It features the RiverSoft logo and the text "Office Home Care Software". Below this, there are input fields for "DB Server:" (RSWIN10\RS2016), "Database:" (ABCHOMECARE), "User Name:" (RIVERSOFT), "Password:" (masked with dots), and "Office:" (Office 0006 (0001)). A "Change" button is next to the DB Server field. Below the input fields, it says "October 1, 2017 Release" and "Check out the new features for October and the coming features in November in the Releases button on the blue print home page!". At the bottom, there are "Login" and "Quit" buttons.

- Each user can only log into the offices they have been granted access to.
- Each user has about 100 different permits, allowing them access only to the features they need.
- The highlight of each month's release is displayed above the login button.
- Users are logged out after 2 hours of inactivity.
- Access to other database servers and databases available via the "Change" button – feature specifically for large organizations to access their archive database.



- The **Blueprint home screen** maps out the operational flow of a typical home health care agency.
- This primer will briefly explain each feature.
- Username, office, software version, database server, and database name are at the top of the screen.
- Messages(0) menu item indicates user has zero new messages. RS messages is an encrypted, HIPAA, user-to-user messaging system.
- Clicking logo takes you to [www.riversoft.net](http://www.riversoft.net).
- RiverSoft University contains all the training materials your users will need.
- This primer provides a broad overview of the RiverSoft software suite. For detailed instructions, refer to RiverSoft University – it defines the typical roles found in a home care agency and details the training materials needed to learn the RiverSoft features pertaining to each role.

Blueprint		Client Schedule List																				
Refresh		Filters: Name Beginning With: <input type="text"/> Type: All Status: Active Payer Class: All Payer: All CSR: All Affiliation: All Attribute: (None)																				
		<input type="checkbox"/> Has visits scheduled between: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Has unassigned visits between: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Has ELVIS cancelled visits between: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Has confirmed unskilled visits earlier this week: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Use Client/Payer CSR																				
Clients (109)	Status	Status Date	Type	U	C	V	P	OC	Case Manager	CSR	Client #	Birth Date	Sex	City	Latitude	Longitude	Lat/Lon	Phone	SSN	Email	Affiliation	Attributes
Alfonso, Dorothy S (01)	Active	09/11/2017	Patient	0	0	0	0	0	0	Maclead, Margaret	CDAVIS	A00724	04/30/1961	F	Alexandria	40.257050	-85.675584	Okay	(555) 274-8316	***-**-8750	None	
Antonson, Elizabeth (0)	Active	09/26/2017	Patient	0	20	0	0	0	0	Salvato, Donna	CDAVIS	A00741	09/02/1959	F	New Castle	39.909510	-85.355389	Okay	(555) 200-3236	***-**-6261	None	
Arelzaga, Edward A (A)	Active	04/09/2016	Patient	0	8	0	0	1	0	Salvato, Donna	CDAVIS	A00027	11/14/1964	M	Elwood	40.279809	-85.832867	Okay	(555) 717-6376	***-**-5867	None	
Arns, Sharon (01)	Active	08/18/2017	Patient	0	0	0	0	0	0	Leveille, Anthony	CDAVIS	A00714	10/07/1971	F	Anderson	40.101590	-85.732087	Okay	(555) 217-1731	***-**-8748	None	
Belinsky, Carol (01)	Active	08/09/2017	Patient	0	7	0	0	3	0	Kalla, Sandra	CDAVIS	A00710	03/08/1962	F	Noblesville	40.045927	-86.076558	Okay	(555) 671-6421	***-**-4799	None	
Bold, Elizabeth E (01)	Active	06/20/2017	Patient	0	1	0	0	0	0	Ekstein, David	CDAVIS	A00657	11/03/1928	F	Muncie	40.217880	-85.377779	Okay	(555) 284-1439	***-**-6238	None	
Bonjorno, Daniel W (0)	Active	03/05/2015	Patient	0	0	0	0	0	0	Kalla, Sandra	PFANKLIN	A00146	09/09/1947	M	Indianapolis	39.892937	-86.196243	Okay	(555) 735-7452	***-**-0551	None	
Braband, James (A2)	Active	08/23/2017	Patient	0	24	0	0	12	0	Maclead, Margaret	CDAVIS	A00646	08/07/1946	M	Anderson	40.095063	-85.669464	Okay	(555) 623-9336	***-**-9800	None	
Briganti, Patricia (01)	Active	10/13/2017	Patient	0	26	0	0	0	0	Leveille, Anthony	CDAVIS	A00758	04/18/1933	F	Alexandria	40.270186	-85.725269	Okay	(555) 754-6588	***-**-0302	None	
Burries, David (01)	Active	10/17/2017	Patient	0	16	0	0	0	0	Matice, John	CDAVIS	A00765	11/28/1949	M	Summitville	40.339991	-85.639466	Okay	(555) 536-4262	***-**-4502	None	
Busacca, Laura (01)	Active	09/12/2016	Patient	0	18	0	0	12	0	Leveille, Anthony	CDAVIS	A00453	04/30/1965	F	Anderson	40.084265	-85.684308	Okay	(555) 622-8087	***-**-6639	None	
Calder, Karen (01)	Active	05/20/2017	Patient	0	16	0	0	1	0	Isassi, Barbara	CDAVIS	A00389	07/18/1969	F	Muncie	40.197516	-85.351082	Okay	(555) 212-0535	***-**-2930	None	
Calk, George (01)	Active	10/10/2017	Patient	0	22	0	0	4	0	Salvato, Donna	CDAVIS	A00754	11/16/1950	M	Anderson	40.038585	-85.665814	Okay	(555) 649-3056	***-**-6570	None	
Campagnone, Kenneth	Active	07/17/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00689	08/27/1961	M	Muncie	40.185626	-85.380950	Okay	(555) 808-8088	***-**-2751	None	
Casls, Susan (01)	Active	10/16/2017	Patient	0	19	0	0	17	0	Salvato, Donna	CDAVIS	A00756	12/05/1959	F	Muncie	40.193600	-85.408989	Okay	(555) 212-8652	***-**-6796	None	
Clery, Jason (A3)	Active	10/06/2017	Patient	0	12	0	0	12	0	Isassi, Barbara	PFANKLIN	A00240	06/14/1967	M	Muncie	40.146296	-85.333919	Okay	(555) 288-7800	***-**-6863	None	
Collingswood, Sandra (C)	Active	10/19/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00767	08/20/1958	F	Anderson	40.116155	-85.591650	Okay	(555) 387-4860	***-**-8686	None	
Copen, Helen (01)	Active	09/05/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00720	08/26/1940	F	Alexandria	40.284788	-85.634904	Okay	(555) 602-8475	***-**-2754	None	
Copher, Carol L (01)	Active	08/08/2017	Patient	0	28	0	0	8	0	Leveille, Anthony	CDAVIS	A00706	11/09/1976	F	Tipton	40.284435	-85.946025	Okay	(555) 606-5249	***-**-6011	None	
Czaplicki, Kenneth (01)	Active	07/20/2016	Patient	0	1	0	0	1	0	Kalla, Sandra	CDAVIS	A00431	11/18/1942	M	Lebanon	40.058481	-86.455543	Okay	(555) 894-8349	***-**-4454	None	
Deltrick, Lisa (01)	Active	10/12/2017	Patient	0	12	0	0	3	0	Leveille, Anthony	CDAVIS	A00748	06/30/1920	F	Anderson	40.071719	-85.667648	Okay	(555) 644-7306	***-**-7106	None	
Delloff, Michelle (01)	Active	06/30/2017	Patient	0	0	0	0	0	0	MARIETTA	CDAVIS	A00492	03/28/1964	F	Huntsville	40.046994	-86.028958	Okay	(555) 219-2106	***-**-0000	Speaks French	
Deluzio, Karen (A3)	Active	01/31/2017	Patient	0	5	0	0	1	0	Isassi, Barbara	CDAVIS	A00420	11/28/1939	F	Frankton	40.221254	-85.765409	Okay	(555) 754-9205	***-**-2497	None	
Depaoli, Sandra (A2)	Active	02/08/2017	Patient	0	9	0	0	0	0	Salvato, Donna	CDAVIS	A00472	08/23/1951	F	Breezewood	40.146296	-85.333919	Okay	(555) 288-0087	***-**-1625	None	
Dingel, Christopher (0)	Active	10/04/2017	Patient	0	17	0	0	0	0	Leveille, Anthony	CDAVIS	A00746	11/27/1930	M	Muncie	40.235598	-85.424761	Okay	(555) 286-0825	***-**-2285	None	
Doniel, Mary (01)	Active	10/22/2016	Patient	0	12	0	0	0	0	Leveille, Anthony	CDAVIS	A00501	05/22/1947	F	Anderson	40.078503	-85.696360	Okay	(555) 278-2326	***-**-2770	None	
Doring, Mark (A3)	Active	07/19/2017	Patient	2	8	0	0	0	0	Kalla, Sandra	CDAVIS	A00079	01/07/1930	M	Westfield	40.049877	-86.146696	Okay	(555) 867-3834	***-**-2360	None	
Dubach, Donald (01)	Active	01/06/2016	Patient	0	11	0	0	2	0	Salvato, Donna	PFANKLIN	A00303	04/15/1932	M	Indianapolis	39.924287	-86.139163	Okay	(555) 848-4753	***-**-5168	None	
Dunlevy, Ronald D (01)	Active	12/14/2016	Patient	4	23	0	0	27	0	Leveille, Anthony	CDAVIS	A00542	08/06/1935	M	Anderson	40.070309	-85.663446	Okay	(555) 644-9293	***-**-5365	None	
Duos, James (01)	Active	05/08/2017	Patient	0	0	0	0	0	0	Leveille, Anthony	CDAVIS	A00625	10/15/1944	M	Elwood	40.261550	-85.785713	Okay	(555) 552-1253	***-**-6432	None	
Emlay, Jason L (A2)	Active	07/23/2015	Patient	0	1	0	0	1	0	Kalla, Sandra	CDAVIS	A00198	02/22/1953	M	Noblesville	40.011989	-85.972535	Okay	(555) 457-4678	***-**-7315	None	
Erickson, Deborah D (C)	Active	09/08/2017	Patient	0	6	0	0	0	0	Isassi, Barbara	CDAVIS	A00595	02/22/1951	F	Muncie	40.146296	-85.333919	Okay	(555) 288-7800	***-**-2691	None	
Fedde, Daniel (01)	Active	07/02/2017	Patient	0	24	0	0	0	0	Isassi, Barbara	CDAVIS	A00678	04/12/1965	M	Muncie	40.158418	-85.432313	Okay	(555) 212-6811	***-**-6748	None	
Ferguson, Christopher	Active	09/28/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00672	04/09/1953	M	Muncie	40.146296	-85.333919	Okay	(555) 288-7800	***-**-0521	None	
Filzen, Dorothy (01)	Active	10/10/2017	Patient	0	0	0	0	0	0	Leveille, Anthony	CDAVIS	A00755	04/04/1971	F	Muncie	40.193696	-85.340682	Okay	(555) 216-5187	***-**-4958	None	
Fingar, Sharon (01)	Active	02/27/2017	Patient	4	12	0	0	16	0	Kalla, Sandra	CDAVIS	A00418	12/20/1934	F	Noblesville	40.049500	-86.001809	Okay	(555) 773-7552	***-**-4472	None	
Folkers, Elizabeth (01)	Active	07/25/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00694	04/10/1956	F	Muncie	40.146296	-85.333919	Okay	(555) 288-7800	***-**-1122	None	
Fuentes, David (01)	Active	10/17/2017	Patient	0	12	0	0	0	0	Leveille, Anthony	CDAVIS	A00760	06/08/1951	M	Anderson	40.054525	-85.661446	Okay	(555) 278-8438	***-**-8558	None	
Gahr, Sarah C (01)	Active	01/30/2017	Patient	0	19	0	0	3	0	Kalla, Sandra	CDAVIS	A00566	05/05/1968	F	Noblesville	40.035216	-86.013353	Okay	(555) 674-6428	***-**-6688	None	
Garro, Sandra (01)	Active	08/31/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00719	03/12/1974	F	Muncie	40.173847	-85.351446	Okay	(555) 381-7936	***-**-8896	None	
Gotter, Laura L (A3)	Active	08/11/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00559	04/23/1953	F	Muncie	40.173026	-85.349562	Okay	(555) 720-8176	***-**-2710	None	
Gupta, Patricia S (01)	Active	08/29/2017	Patient	0	9	0	0	2	0	Isassi, Barbara	CDAVIS	A00072	07/29/1955	F	New Castle	39.913263	-85.363742	Okay	(555) 393-5977	***-**-6658	None	
Hafner, Jason (01)	Active	10/14/2017	Patient	0	6	0	0	0	0	Leveille, Anthony	CDAVIS	A00764	04/09/1971	M	Anderson	0.000000	0.000000	Okay	(555) 278-4750	***-**-4984	None	
Helle, Jennifer (A2)	Active	06/13/2017	Patient	0	8	0	0	0	0	Ekstein, David	CDAVIS	A00605	06/25/1951	F	Arcadia	40.175826	-86.073070	Okay	(555) 250-3797	***-**-9122	None	
Hessling, Sharon (01)	Active	10/30/2015	Patient	0	5	0	0	0	0	Leveille, Anthony	CDAVIS	A00273	04/16/1957	F	Indianapolis	39.892373	-86.190865	Okay	(555) 253-7625	***-**-2452	None	
Hindes, David (01)	Active	08/06/2017	Patient	0	2	0	0	2	0	Kalla, Sandra	CDAVIS	A00332	06/08/1955	M	Kokomo	40.489455	-86.133727	Okay	(555) 865-8275	***-**-8987	None	
Holohan, Lisa (01)	Active	09/22/2017	Patient	0	4	0	0	4	0	Leveille, Anthony	CDAVIS	A00731	07/11/1978	F	Muncie	40.186462	-85.416255	Okay	(555) 283-1205	***-**-4855	None	
Horace, Donald (01)	Active	09/21/2017	Patient	0	1	0	0	0	0	Leveille, Anthony	CDAVIS	A00733	02/01/1962	M	Muncie	40.179283	-85.405667	Okay	(555) 587-0974	***-**-6765	None	
Jentry, Mary (01)	Active	10/11/2017	Patient	0	0	0	0	0	0	Matice, John	CDAVIS	A00682	09/15/1964	F	Muncie	40.146296	-85.333919	Okay	(555) 288-7800	***-**-2912	None	
Karsnak, Charles (01)	Active	02/07/2017	Patient	0	3	0	0	2	0	Leveille, Anthony	CDAVIS	A00569	03/05/1948	M	Lapel	40.074274	-85.848762	Okay	(555) 534-6573	***-**-6330	None	
Keehan, Carol (01)	Active	01/06/2017	Patient	0	11	0	0	11	0	Leveille, Anthony	CDAVIS	A00555	07/09/1928	F	Summitville	40.338206	-85.645913	Okay	(555) 536-1514	***-**-8888	None	
Kemfort, Robert (																						

**Client Demographics List** | Client Copher, Carol

**Vital Information**

Type: Patient | Entry Date: 8/7/2017 4:57:32 PM

Name: Carol | L Copher | 0001-A00706-01

NickNm: | Use Office Addr: | \*Sex: Female | \*Birth Date: 11/09/1976

Address: 1700 Persimmon Way

Zip Code: 46072 | Tipton, IN / Tipton 46072

Phone 1: (555) 606-5249 | Phone 2: ( ) - | Phone 3: ( ) - | Phone 4: ( ) -

Verify Address: Verified by MapQuest on 08/07/2017

Current Status: Active | 08/08/2017

\*SSN: 308-43-6011 | \*Medicare ID: | \*Medicaid ID: | Referral Source: | \*Date: | Select

Service Location: Home | Affiliation: (None) | Marital Status: None | Relationship: | Phone: ( ) -

Marketer: | Empty Stat: None | Acc/Denial: None | CSR: CDAVIS | \*Disaster: | Inj/Denial Dt: | Auto Ins State: | BO Case Mgr: |

Billing Case Mgr: | Email: |

Scheduling Comment: | Next of Kin: Name: | Phone: ( ) - | Address: | Zip Code: -

**Active Payers**

Name: | Payer Class: Medicaid Waiver (A2) (H) Medicaid (A1) (H) Medicaid

**Self-pay Billing Info**

Name: Carol Copher | Address: 1700 Persimmon Way | Zip Code: 46072 | Tipton, IN / Tipton 46072

Pay Meth: | Bill Freq: Weekly | Srv Line: Private Pay | Supervisory Visit Freq: 0 Weeks

Billing Notes: | Show start and end times for visits on invoices

Differentials: Holiday: 1.00 Overtime: 1.00 Doubletime: 2.00 Wknd Hourly: \$0.00

**Clinical Intake**

\*Physicians: Primary: Wisely, Lori | Secondary: | Database: | \*Diagnosis: ICD-9: ICD-10: I5022 Chronic systolic (congestive) heart f | ICD-9: ICD-10: | Surg9: Surg10: | Delete Diag: |

**Face To Face Information**

Physician: Wisely, Lori | Date: | Sent: 08/08/2017 | Received: | Method: Faxed | Print New F2F | Print Old F2F

\*Date Physician Ordered SOC/ROC: 08/08/2017 | Date of Last Pneumococcal Vaccination: | Date of Last Influenza Vaccination: | Pharmacy: | Ph: ( ) -

\*Race (OASIS M0140): ☐ American Indian or Alaska National ☐ Asian ☐ Black or African-American ☐ Hispanic or Latino ☐ Native Hawaiian or Pacific Islander ☒ White ☐ Unknown

**Client Attributes**

Client Wants... | Client Does Not Want... | Edit Client Attributes

**Current Aide Plan (for ELVIS)**

Attn: Active ROM | Attn: Assist with Dressing | Attn: Comb Hair - prn | Attn: Light Housekeeping | Attn: Passive ROM | Edit Tasks

**Non-Scheduling Comments**

**Payers, Services, Allergies, Special Needs, Etc**

**Hospital/Facility Admit Reason**

**Hospital/Facility Course**

- A **Client/Patient** is someone that receives service from the agency. A **client** receives services not requiring clinical documentation, whereas a **patient** requires clinical documentation. A patient appears on the agency census reports – a client does not.
- The address is the place the client receives service. If they pay for their own services, the Self-Pay billing address is entered on the far right. Most likely, a third-party payer will be billed for the services – that payer relationship is created via the Edit Client's Payers button.
- Make sure to verify the address – only valid addresses can be Lat/Long encoded – this is needed for employee matching and automatic mileage/travel time calculations.
- Labels in **\*red** are important because they flow to the Start of Care clinical field note that the nurse or therapist will complete for the patient. Enter the information here so they will not need to.
- Select the place that referred this facility to your agency using the Referral Source select button. This will allow sales and census reporting by referral source.
- The scheduling comment appears at the bottom of the client's schedule.
- Use "Edit Tasks" to create a patient's Aide Care Plan – this is used by the ELVIS phone app to gather which tasks were done and not done on every visit. The aide care plan can be entered in the office or in the field by the Start of Care nurse or therapist.
- Use "Edit Client Attributes" to add attributes to the patient.
- The Email: field is used to enter the email address to which the patient's Care Statements sent.
- Print the patient's Face Sheet and Aide Care Plan via buttons at top of the screen.
- Access the Patient's Schedule and Medical Record from buttons at top of the screen.
- If patient is discharged and they come back, Re-Admit the patient using button at top of screen (only visible for discharged patients).

Blueprint X
Client Demographics List X
Client Copher, Carol X
Payers for Copher, Carol X

New Save Delete Undo i Upd: A00, 08/07/17 05:06 PM -1000001169

Client: Carol L Copher (A00706-01) Agency SoC: 08/08/2017 Agency Discharge:

Client's Payer Relationships

☒ Show Discharged, Do Not Use, and Ended Payer Relationships

Payer Name (2)	Payer Class	PayerSet	SoC Dt	Discharge Dt	Start	End	DNU
Medicaid Waiver (A2) (N)	Medicaid Waiver	A2				12/31/50	
Medicaid (A1) (N)	Medicaid	A1				12/31/50	

Select Payer: Medicaid Waiver (N)

Payer Relationship Information

Payer Vitals

☐ Do Not Use

Bill Name: Medicaid Waiver

Use Payer Defaults

Contact:

Address: 813 Westfield Rd

Suite 200

Zip Code: 46062-8901

Phone 1: (111) 111-1111 Extension:

Phone 2: ( ) - -

CSR: CDAVIS

Policy Information

Start: End: 12/31/2050

SoC: Discharge:

Authorization #:

Insured's ID: 104394524399

Group Name:

Group Number:

Policy Number:

Insured's Information

Relation: Patient is Insured

Name: Carol Copher

Employer:

DOB: 11/09/1976 Sex: Female

Active Allowed Skills with Bill Codes and Bill Rates

Skill/Sub-Skill (2)	Pay Unit	Bill Unit
HHA/Respite	Hour	Hour
RN/Supervisory	Visit	Hour

Edit Allowed Skills

Invoicing Information and Billing Requirements

Billing Notes:

Supervisory Visit Frequency: 14 Days

Fraction Payer is Responsible For: 1.00

Authorizations

Type	Start	End	AuthNo	Skill	Subskill	Min	Max	H/V	Days of Week	Per	Every	DWM	For	DWM
I	11/01/2017	10/31/2018		HHA	Respite	1	14	H		WK	0		12	M
I	10/01/2017	10/31/2017		HHA	Respite	1	55	H		MO	0		1	M
I	09/01/2017	09/30/2017		HHA	Respite	1	55	H		MO	0		1	M
I	08/11/2017	08/31/2017		HHA	Respite	1	55	H		MO	0		1	M

Edit Authorizations

- A patient may have MANY payer relationships at the same time.
- Each payer relationship may have its own **Start of Care** and **Discharge date**.
- Each payer relationship has a set of allowed skills – **ONLY ALLOWED SKILLS CAN BE SCHEDULED, PAYROLLED, AND INVOICED**.
- Bill rates are stored with the payer allowed skills and can be overridden at client-payer level (Edit Allowed Skills button).
- Each payer relationship may have its own supervisory visit frequency and co-pay fraction that the payer is responsible for – if the payer pays 100%, the fraction is 1.00.
- Each allowed skill can have many authorizations that control compliance checking and billing.



Blueprint ☒
Client Demographics List ☒
Client Copher, Carol ☒
Payers for Copher, Carol ☒
Authorizations (Medicaid Waiver (N)) ☒

New Save Delete Undo **i** Upd: Schedule

Compliance Rule
Rule Type: Authorization
Skill:
SubSkill:
Authorization #:
Start and End: 10/07/2017 12/05/2017

Client/Payer
(A00706-01) Copher, Carol L
(A2) Medicaid Waiver (N)
Cert Period: 10/07/2017 - 12/05/2017

Frequency, Duration, and Interval
Frequency/Total Amount
Interval
Duration
Sun Mon Tue Wed Thu Fri Sat

Comment:

☐ Assign me to the visits loaded for my skill - I understand once assigned I must call office to unassign
☐ Assign Case Manager to visits

Type	Start	End	AuthNo/PoCNo	Skill	Subskill	Min	Max	H/V	Days	Per	Every	DWM	For	DWM
I	11/01/2017	10/31/2018		HHA	Respite	1	14	H		WK	0		12	M
I	10/01/2017	10/31/2017		HHA	Respite	1	55	H		MO	0		1	M
I	09/01/2017	09/30/2017		HHA	Respite	1	55	H		MO	0		1	M
I	08/11/2017	08/31/2017		HHA	Respite	1	55	H		MO	0		1	M

- Each allowed skill can have many [Authorizations](#), of many types. Insurance authorizations should not overlap or else the compliance checking will not be able to accurately show compliance.
- Besides insurance authorizations, there are **Skilled Visit Count** and **Total Hour or Visit Count** types of rules. These can be used in conjunction with insurance authorizations so that a situation like “2 to 4 HHA visits per week for 12 weeks not to exceed 30 visits total” can be accommodated.
- By entering the authorizations as they are received by a patient’s payer, not only will everyone in the agency easily see when or if a client’s schedule is out of compliance, you will also be able to generate a report of expiring authorization so that you can be pro-active in getting more authorizations from the payer.
- RiverSoft can create invoices by authorization, so if an authorization ends on a Tuesday and another starts on the next day, one invoice will be created through Tuesday and a second invoice will be created beginning on Wednesday. This is controlled by one of the hundreds of payer switches that allow RiverSoft to create exactly the correct invoice/claim that the payer needs to pay quickly.



[Blueprint](#) [X](#)
[Facility Demographics List](#) [X](#)
[Facility AAA Rest Home](#) [X](#)

[New](#)
[Save](#)
[Delete](#)
[Undo](#)
[i](#)
[K](#)
[K](#)
1 of 1
[>](#)
[>](#)
Last Updated RS, 11/07/17 06:49 AM -1000000963
[Facility's Schedule](#)

**Facility Information**

**Name:** AAA Rest Home 0001-A00773-01  
[Use Office Address](#)

**Address:** 528 Bahama Drive **Phone 1:** (321) 555-5555  
**Phone 2:** ( ) - -  
**Phone 3:** ( ) - -  
**Phone 4:** ( ) - -

**Zip Code:** 32937- Indian Harbor Beach, FL / Brevz  
[Verify Address](#) Verified by MapQuest [Status](#) Incomplete

**Affiliation:** (None) **CSR:** RIVERSOFT  
**Marketer:** DROGERS

**Scheduling Comment**

**Referral Source**  
[Select](#)

**Facility Preferences**

**Facility wants...** **Facility does not want...**  
[Edit Facility Preferences](#)

**Self-pay Billing Info**

**Name:** AAA Rest Home  
**Address:** 528 Bahama Drive  
**Zip Code:** 32937- Indian Harbor Beach, FL / Brevz  
**Service Location:** Hospital  
**Payment Method:**  
**Billing Frequency:** Weekly  
**Supervisory Visit Frequency:** 0 Weeks  
**Tax Exempt ID:**  
☐ Show start and end times for visits on invoices

**Differentials**

**Holiday:** 1.00 **Overtime:** 1.00  
**Doubletime:** 2.00 **Wknd Hourly:** \$0.00

**Billing Notes:**

**Self-Pay Skills, Codes, Rates**

Skill/Sub-Skill (0)	Pay Unit	Bill Unit

[Edit Skills, Codes, Rates](#)

**Payers**

Payer Name (0)	Payer Class	Billing Frequency

[Edit Facility's Payers](#)

- A **Facility** is a service location that an agency sends employees to. Some agencies staff facilities in addition to providing home care services.
- The address is the service address of the facility. If they pay for their own services, the Self-Pay billing address is entered on the far right. If there is a corporate office or third-party payer that will be billed for the services – that payer relationship is created via the Edit Facility's Payers.
- Make sure to verify the address – only valid addresses can be Lat/Long encoded – this is needed for employee matching and automatic mileage/travel time calculations.
- Select the place that referred this facility to your agency using the Referral Source select button. This will allow sales and census reporting by referral source.
- If the facility pays for their own service, you must enter the skills that your agency will be providing to this facility before any visit can be scheduled and billed to this facility.
- If a third party pays for the service, use the Edit Facility's Payers to enter that payer relationship and allowed skills.
- If the facility has unique requirements, like a special orientation for anyone who works on their premises, enter that via Edit Facility Preferences. This will be important when matching employees to open visits for the facility.
- Access the Facility's Schedule from the button at the top of the screen.

Blueprint		Employee Schedule List																													
Run LEIE Check	Hour Totals	Potential OT	OT Report	Refresh	Filters																										
					Name Beginning With:		Status: Active		Skill: All		Type: All		Affiliation: All		Attribute: (None)																
					Has visits scheduled between: (11/12/2017 - 12/23/2017)																										
Employees (56)				Emp No	Status	Primary Skill	UserName	C	V	CI	CA	CB	CC	CD	CE	CF	CG	CH	Type	Sex	Birth Date	City	Lat/Lon	Phone	SSN	Affiliation	LEIE	Attributes			
Abelman, Michael N				A00005	Active	Office Staff	NFRANKLIN	0	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	M	04/18/1951	White Cloud	Okay	(555) 798-8282	***-**-8465	None	None	OK		
Ahlers, Edward				A00133	Active	OT		14	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	04/26/1981	Noblesville	Okay	(555) 513-7458	***-**-9202	None	OK'd		Clinical Review	
Bagu, Helen				A00148	Active	HHA	JAPPLE	36	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	10/11/1963	Noblesville	Okay	(555) 933-3633	***-**-0892	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Ballingier, Michelle H				A00123	Active	Office Staff	ADAVIS	0	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	F	01/16/2000	Castletown	Okay	(555) 810-3626	***-**-1277	None	OK			
Bendix, Patricia				A00006	Active	RN		0	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	F	02/06/1958	Marion	Okay	(555) 673-0714	***-**-6606	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Bonventre, Ruth				A00151	Active	HHA		6	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	06/05/1968	Indianapolis	Okay	(555) 531-6109	***-**-3583	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Bunetta, Donna				A00002	Active	Office Staff	CDAVIS	0	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	F	08/01/1975	Anderson	Okay	(555) 635-5860	***-**-6942	None	OK		Clinical Review	
Castillanos, Kimberly				A00150	Active	HHA	PBALFOUR	6	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	F	06/24/1966	Noblesville	Okay	(555) 228-2795	***-**-0768	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Craighead, Donald				A00125	Active	PT		0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	05/24/1971	Yorktown	Okay	(555) 760-2105	***-**-5195	None	OK			
Defide, Steven T				A00140	Active	PT	HSESTOSO	2	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	09/04/1976	Yorktown	Okay	(555) 749-5246	***-**-9277	None	OK		Clinical Review	
Descamps, Sharon				A00134	Active	HHA	S.KAISER	0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	05/08/1995	Tipton	Okay	(555) 434-7104	***-**-1106	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Desiga, Sarah L				A00001	Active	RN	PFRANKLIN	0	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	F	10/08/1953	Indianapolis	Okay	(555) 679-8629	***-**-6467	None	OK			
Ekstein, David				A00008	Active	PT	PANONCILLO	37	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	09/10/1969	Muncie	Okay	(555) 760-9274	***-**-8078	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Escudero, Kimberly				A00110	Active	PT		0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	03/29/1971	Muncie	Okay	(555) 212-2104	***-**-8035	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Fallago, Sarah				A00154	Active	HHA	ASMITH	28	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	12/14/1984	Elwood	Okay	(555) 701-8158	***-**-4916	None	Exclude		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Fanara, Karen E				A00104	Active	OT	AROTT	44	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	01/01/1800	Carmel	Okay	(555) 654-6198	***-**-8015	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Filburn, Sarah				A00153	Active	HHA	IBOONE	0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	01/06/1993	Anderson	Okay	(555) 937-6734	***-**-3163	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Fraction, Margaret				A00117	Active	Homemaker	BBHOUSE	14	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	11/16/1970	Sheridan	Okay	(555) 384-5185	***-**-1257	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Gianetti, Lisa				A00111	Active	Office Staff		0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	11/27/1957	Muncie	Okay	(555) 744-6547	***-**-6764	None	OK			
Grett, Michelle A				A00128	Active	HHA	KGEE	15	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	02/24/1983	Anderson	Okay	(555) 215-8134	***-**-0991	None	OK		Adverse to Cats/Dogs, Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Hazelrigg, Deborah				A00057	Active	HHA		55	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	06/04/1970	Elwood	Okay	(555) 730-8697	***-**-2922	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Helming, Dorothy				A00010	Active	HHA	TNEAL	41	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	04/03/1988	Gaston	Okay	(555) 661-2496	***-**-4078	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Hiatt, Daniel				A00127	Active	PT		0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	06/09/1973	Fishers	Okay	(555) 410-7351	***-**-1296	None	OK'd			
Holgrafer, Sarah				A00049	Active	Office Staff		0	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	F	11/20/1995	Anderson	Okay	(555) 274-4367	***-**-7143	None	OK			
Hoople, Dorothy				A00095	Active	HHA	DPOOLE	0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	02/12/1982	Anderson	Okay	(555) 517-0512	***-**-8891	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Inocente, Sharon				A00146	Active	HHA		49	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	04/22/1965	Muncie	Okay	(555) 435-1339	***-**-6714	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Iossa, Dorothy				A00099	Active	HHA	JCOLLIER	0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	10/22/1971	Noblesville	Okay	(555) 748-5642	***-**-8880	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Isassi, Barbara R				A00083	Active	RN	STRUMBO	67	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	04/16/1972	Muncie	Okay	(555) 748-5195	***-**-8771	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Kalla, Sandra				A00090	Active	RN	JLEER	54	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	12/08/1972	Arcadia	Okay	(555) 400-4372	***-**-0440	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Karras, Nancy				A00055	Active	OT	LSTAFKO	51	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	07/22/1965	Fishers	Okay	(555) 965-7739	***-**-2852	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Krivt, Donald A				A00141	Active	PTA	GREES	0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	04/05/1967	Muncie	Okay	(555) 744-4921	***-**-8821	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Laboe, Donna				A00129	Active	Office Staff		0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	09/20/1994	Alexandria	Okay	(555) 610-9408	***-**-5158	None	OK			
Lecuyer, Laura M				A00155	Active	HHA		15	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	07/12/1990	Noblesville	Okay	(555) 691-0882	***-**-1139	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Levialis, Anthony				A00025	Active	RN	RTILLSON	77	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	04/30/1957	Anderson	Okay	(555) 621-9818	***-**-6933	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Link, Karen				A00101	Active	HHA		17	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	04/01/1963	Carmel	Okay	(555) 993-2396	***-**-3181	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Mackey, Robert L				A00152	Active	PTA	EJOHNSON	34	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	07/02/1968	Breezewood Pl	Okay	(555) 702-7905	***-**-8852	None	OK'd		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Madead, Margaret				A00062	Active	PT	CTAPP	82	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	01/25/1985	Noblesville	Okay	(555) 881-7617	***-**-8004	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Matic, John O				A00116	Active	PT	JH	50	0	0	0	0	0	0	0	0	0	0	0	Field Employee	M	01/03/1974	Muncie	Okay	(555) 702-8979	***-**-2088	None	OK		Clinical Review	
Minton, Sharon				A00113	Active	HHA	ABRIER	0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	05/27/1976	Elwood	Okay	(555) 426-6437	***-**-2844	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Mulgrew, Mary				A00112	Active	PTA		0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	08/04/1967	Marion	Okay	(555) 506-2970	***-**-8893	None	OK'd		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Murzycki, Susan R				A00067	Active	HHA		32	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	08/01/1994	Elwood	Okay	(555) 431-8836	***-**-5156	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Pallet, Elizabeth				A00138	Active	HHA	DRIGERS	10	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	05/10/1960	Westfield	Okay	(555) 677-3092	***-**-6703	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Radiske, Mary C				A00089	Active	HHA	RAYNES	0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	06/20/1983	Anderson	Okay	(555) 729-9611	***-**-4958	None	OK		Adverse to Cats/Dogs, Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Reese, Elizabeth				A00052	Active	Office Staff		0	0	0	0	0	0	0	0	0	0	0	0	Staff Employee	F	02/28/1976	Fort Pierce	Okay	(555) 408-8410	***-**-6998	None	OK			
Rehberger, Patricia				A00077	Active	HHA	JPAGE	7	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	09/25/1962	Indianapolis	Okay	(555) 414-9552	***-**-8510	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Roback, Barbara				A00143	Active	ST	SWINN	6	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	01/01/1800	Breezewood Pl	Okay	(555) 434-2332	***-**-6085	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Rosenlof, Carol				A00139	Active	HHA	DPERICE	30	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	05/19/1991	Daleville	Okay	(555) 639-7187	***-**-1161	None	OK		Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Salvato, Donna				A00007	Active	RN	MARIETTA	55	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	03/28/1964	Middletown	Okay	(555) 465-1030	***-**-0879	None	OK		Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Seaberg, Carol				A00004	Active	Office Staff		0	0	0	0	0	0	0	0	0	0	0	0	Field Employee	F	03/03/1950	White Cloud	Okay	(555) 698-1514	***-**-4555	None	OK			
Thornborrow, Margaret				A00103	Active	HHA	JCONNERON																								

- **Employee Demographics list** lets you go directly to an employee by typing in just the first few characters of the last name.
- List is filterable by status, skill, type, affiliation, or attribute. Affiliation is for creating client and employee groups.



Blueprint X Employee Demographics List X Employee Bagu, Helen X

New Add Edit 3 of 56 Last Updated: A00, 06/18/17 11:38 AM -1000000148 Face Sheet Employee's Schedule

**Employee Vitals**

Name: Helen Bagu 0001-A00148 Start Date: 06/26/2017

Address: 1400 Banana Court Main Skill: HHA Sex: Female

Cell/Phone 1: (555) 933-3633 License 1: CNA0807548

Zip Code: 46060 Cell Company: AT&T License 2: HHA1703315

Noblesville, IN / Hamilton 4606 Phone 2: ( ) - ( ) Affiliation: (None)

Verify Address Verified by MapQuest on 06/26/2017 Phone 3: ( ) - ( ) Check Handling: Blank

Email: Janracolta@yahoo.com Phone 4: ( ) - ( ) Federal ID: ( )

SSN: 307-27-0892 LEIE Type: Field Employee Payroll ID: ( )

Statuses

Status: Active on 06/25/2017 06:56 PM Birth Date: 10/11/1963 ELVIS/RSM User: JAPPLE

Change Photo Delete Photo

**Employee Tracking**

Tracking Item	Val	Exp Date
90 Day Eval	0	09/01/2017
Auto Insurance	0	02/27/2018
Background Check	0	06/22/2017
Inservice - Confidentiality	0	01/01/2018
Inservice - Emergency Preparedness	0	01/01/2018

**Employee Specific Pay Rates**

Skill/Sub-Skill (0)	Pay Rate	Pay Unit	Pay Date
Match not found in LEIE on 8/18/2017. Current LEIE (OK)			

**Scheduling: Employee Matching by Attribute and Skill, Availability, and Client Preferences**

**Attributes**

Calculate Mileage  
Pay Travel Home  
Pay Travel Home Route

**Skill/Subskill**

CNA  
Companion  
HHA  
HHA/ATTC  
HHA/Respite  
Homemaker

**Availability**

From Date	To Date	Comment

**Client Preferences**

Client Name	Prefs

Edit Attributes Edit Match Skill/Subskill Edit Availability Referral Edit Pref

- An **Employee** is someone that provides service on behalf of the agency. There are three types of employees: field (paid by the timeslip), staff (paid a salary), and contractor (paid by 1099).
- The address is the employee's residence.
- Make sure to verify the address – only valid addresses can be Lat/Long encoded – this is needed for employee matching and automatic mileage/travel time calculations.
- The LEIE button matches the employee name against the office of the inspector general's list of excluded individuals and entities. This can be done in bulk from the employee list screen.
- The employee status is shown on this screen and can be updated by clicking the status button.
- The employee's main skill is important for matching the employee to open visits and for storing employee specific pay rates.
- The cell phone and cell company fields must be entered to text visit offers to the employee.
- Field employees can be associated with a specific number of expected daily visits – this is important when matching an open visit to the employee.
- Contractor and staff employees can be associated with a specific number of goal visits. (For these type of employees, the **Daily** Visit label changes to **Goal**). The salaried visits report shows which employees are meeting their goal number of visits and those that are not.
- It is a good idea to enter the employee's photo – it will appear at the top of their schedule and on their face sheet. Since most employees will be using either Mobile or ELVIS, you will not see them around the office much – the photo will keep their face in your mind.
- ELVIS/RSM User: - this is the RiverSoft Username associated with this employee. When the user logs into RS Mobile or ELVIS, this employee's schedule will be available to them.
- At a glance you can see the employee's HR tracking items, attributes, skills/subskills, availability entries, and client preferences – for more information on these go to each of these features and read the information button and/or watch the videos - all affect matching this employee to open visits.
- Print the employee's Face Sheet and access the Employee's Schedule from buttons at top of the screen.



Blueprint X
270 Eligibility X

**Filters**  
 Subscriber Dates:  -  Payer: MN DHS - Medicaid

Build or Refresh List of Patients Eligibility List - Click This Whenever You Change the Subscriber Date Range or Payer

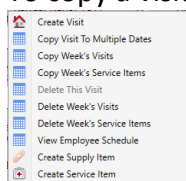
Patient Name (279)	Off Code	Client No	Admit No	Entry Date	Status	Insurance ID	Birth Date	Sex
Afake, Patient (01)	0003	A00002	01	03/20/17	Active		01/01/1960	M
Aldrich, Marjory (A2)	0003	A00035	A2	08/09/17	Active	00319781	08/19/1937	F
Ali, Huzaifa (01)	0003	A00043	01	03/20/17	Active	04293298	01/21/2013	M
Alston, Ida (01)	0003	A00053	01	03/20/17	Active	00502445	04/06/1938	F
Anderson, Erik (01)	0003	A00091	01	03/20/17	Active	02109117	01/25/1973	M
Anderson, Wayne M (01)	0003	A01099	01	09/11/17	Active	02799802	09/14/1942	M
Audahir, Jamal (01)	0003	A00956	01	07/25/17	Active	04532096	01/01/1988	M
Bakken, Elva (01)	0003	A01125	01	09/19/17	Active	03991052	07/03/1927	F
Baldwin, Paula (A2)	0003	A00802	A2	06/23/17	Active	01215391	08/08/1956	F
Bas, Mikhail B (01)	0003	A00038	01	03/20/17	Active	02801912	04/02/1941	M
Beffel, David (01)	0003	A00838	01	06/23/17	Active	00927264	02/15/1978	M
Ben, Amel (01)	0003	A00074	01	03/20/17	Active	04390799	09/14/2013	F
Bentsen, Jodi (01)	0003	A00096	01	03/20/17	Active	01015420	12/28/1958	F
Bjorge, Luann (01)	0003	A00144	01	03/20/17	Active	03304763	09/22/1957	F
Block, Delores (01)	0003	A00198	01	03/20/17	Active	03166559	03/04/1945	F
Bohnen, Mary (01)	0003	A00703	01	05/23/17	Active	03780622	08/04/1939	F
Bolds, Nathan (01)	0003	A00884	01	07/06/17	Active	01293571	11/03/1942	M
Borell, Shirlee (01)	0003	A00033	01	03/20/17	Active	02896288	02/24/1946	F
Boualouang, Feng (01)	0003	A00715	01	05/24/17	Active	00126509	07/06/1932	M
Brooks, Dallas (01)	0003	A00297	01	03/21/17	Active	02419635	01/14/2001	M
Brown, Andrea (01)	0003	A00007	01	03/20/17	Active	04489394	02/19/2014	F
Brown, William (01)	0003	A00901	01	07/11/17	Active	01868608	09/08/1935	M
Burns, Virginia (01)	0003	A00645	01	05/08/17	Active	03323284	09/13/1933	F
Buschou, Deborah (01)	0003	A00180	01	03/20/17	Active	03474333	11/01/1955	F
Chaffee, Cheryl (01)	0003	A00501	01	04/05/17	Active	00134651	08/11/1946	F
Chester, Betty (01)	0003	A00230	01	03/20/17	Active	01623005	02/03/1930	F
Cholopray, Dearest (A2)	0003	A01015	A2	08/28/17	Active	03278231	11/21/1991	F
Christopherson, Evelyn (01)	0003	A00012	01	03/20/17	Active	00603384	08/13/1949	F
Clark, Alice (01)	0003	A00755	01	06/05/17	Active	02739414	04/07/1939	F
Combs, Andrew (01)	0003	A00094	01	03/20/17	Active	02956798	12/16/2003	M
Cooper, Timothy (01)	0003	A00108	01	03/20/17	Active	00860902	01/12/1954	M
Cottrell, Pam (01)	0003	A00134	01	03/20/17	Active	01301727	02/15/1961	F

- The **Eligibility** feature creates a 270-file suitable for sending to a payer to get a responding 271 file containing eligibility information for each patient selected.
- One file per payer should be generated and sent to your major payers for each upcoming billing period.
- The Process Responses (27\*) feature available on the **Blueprint home screen** reads the responding 271 file that you will receive from the payer.

Blueprint		Client Schedule List																					
Refresh		<div> <div>Filters</div> <div> Name Beginning With: <input type="text"/> Type: <b>All</b> Status: <b>Active</b> Payer Class: <b>All</b> Payer: <b>All</b> CSR: <b>All</b> Affiliation: <b>All</b> Attribute: <b>(None)</b> </div> <div> <input type="checkbox"/> Has visits scheduled between: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Has unassigned visits between: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Has ELVIS cancelled visits between: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Has confirmed unskilled visits earlier this week: (11/12/2017 - 12/23/2017) <input type="checkbox"/> Use Client/Payer CSR </div> </div>																					
Client #	Status	Status Date	Type	U	C	V	ci	onc	Case Manager	CSR	Client #	Birth Date	Sex	City	Latitude	Longitude	Lat/Lon	Phone	SSN	Email	Affiliation	Attributes	
Alfonso, Dorothy S (01)	Active	09/11/2017	Patient	0	0	0	0	0	Madread, Margaret	CDAVIS	A00724	04/30/1961	F	Alexandria	40.257050	-85.675584	40.257050 -85.675584	Okay	(555) 274-8316	****,8750	None		
Antonson, Elizabeth (0)	Active	09/26/2017	Patient	0	20	0	0	0	Salvato, Donna	CDAVIS	A00741	09/02/1959	F	New Castle	39.909510	-85.355389	39.909510 -85.355389	Okay	(555) 200-3236	****,6261	None		
Arelzaga, Edward A (A)	Active	04/09/2016	Patient	0	8	0	0	0	Salvato, Donna	CDAVIS	A00027	11/14/1964	M	Elwood	40.279809	-85.832867	40.279809 -85.832867	Okay	(555) 717-6376	****,5867	None		
Arms, Sharon (01)	Active	08/18/2017	Patient	0	0	0	0	0	Leveille, Anthony	CDAVIS	A00714	10/07/1971	F	Anderson	40.101590	-85.732087	40.101590 -85.732087	Okay	(555) 217-1731	****,8748	None		
Belinsky, Carol (01)	Active	08/09/2017	Patient	0	7	0	0	0	Kalla, Sandra	CDAVIS	A00710	03/08/1962	F	Noblesville	40.045927	-86.076558	40.045927 -86.076558	Okay	(555) 671-6421	****,4799	None		
Bold, Elizabeth E (01)	Active	06/20/2017	Patient	0	1	0	0	0	Ekstein, David	CDAVIS	A00657	11/03/1928	F	Muncie	40.217880	-85.377779	40.217880 -85.377779	Okay	(555) 284-1439	****,6238	None		
Bonjorno, Daniel W (0)	Active	03/05/2015	Patient	0	0	0	0	0	Kalla, Sandra	PFRANKLIN	A00146	09/09/1947	M	Indianapolis	39.892937	-86.196243	39.892937 -86.196243	Okay	(555) 735-7452	****,0551	None		
Braband, James (A2)	Active	08/23/2017	Patient	0	24	0	0	12	Madread, Margaret	CDAVIS	A00646	08/07/1946	M	Anderson	40.095063	-85.669464	40.095063 -85.669464	Okay	(555) 623-9336	****,9800	None		
Briganti, Patricia (01)	Active	10/13/2017	Patient	0	26	0	0	0	Leveille, Anthony	CDAVIS	A00758	04/18/1933	F	Alexandria	40.270186	-85.725269	40.270186 -85.725269	Okay	(555) 754-6588	****,0302	None		
Burries, David (01)	Active	10/17/2017	Patient	0	16	0	0	0	Matice, John	CDAVIS	A00765	11/28/1949	M	Summitville	40.339991	-85.639466	40.339991 -85.639466	Okay	(555) 536-4262	****,4502	None		
Bussacca, Laura (01)	Active	09/12/2016	Patient	0	18	0	0	12	Leveille, Anthony	CDAVIS	A00453	04/30/1965	F	Anderson	40.084265	-85.684308	40.084265 -85.684308	Okay	(555) 622-8087	****,6639	None		
Calder, Karen (01)	Active	05/20/2017	Patient	0	16	0	0	1	Isassi, Barbara	CDAVIS	A00389	07/18/1969	F	Muncie	40.197516	-85.351082	40.197516 -85.351082	Okay	(555) 212-0535	****,2930	None		
Calc, George (01)	Active	10/10/2017	Patient	0	22	0	0	4	Salvato, Donna	CDAVIS	A00754	11/16/1950	M	Anderson	40.038585	-85.665814	40.038585 -85.665814	Okay	(555) 649-3056	****,6570	None		
Campagnone, Kenneth	Active	07/17/2017	Patient	0	0	0	0	0	Matice, John	CDAVIS	A00689	08/27/1961	M	Muncie	40.185626	-85.380950	40.185626 -85.380950	Okay	(555) 808-8088	****,2751	None		
Casias, Susan (01)	Active	10/16/2017	Patient	0	19	0	0	17	Salvato, Donna	CDAVIS	A00656	12/05/1959	F	Muncie	40.193600	-85.408989	40.193600 -85.408989	Okay	(555) 212-8652	****,6796	None		
Clery, Jason (A3)	Active	10/06/2017	Patient	0	12	0	0	12	Isassi, Barbara	PFRANKLIN	A00640	06/14/1967	M	Muncie	40.146296	-85.333919	40.146296 -85.333919	Okay	(555) 288-7800	****,6863	None		
Collingwood, Sandra (C)	Active	10/19/2017	Patient	0	2	0	0	0	Matice, John	CDAVIS	A00720	08/20/1958	F	Anderson	40.116155	-85.591650	40.116155 -85.591650	Okay	(555) 387-4860	****,6866	None		
Copen, Helen (01)	Active	09/05/2017	Patient	0	0	0	0	0	Matice, John	CDAVIS	A00720	08/26/1940	F	Alexandria	40.284788	-85.634904	40.284788 -85.634904	Okay	(555) 602-8475	****,2754	None		
Copher, Carol L (01)	Active	08/08/2017	Patient	0	28	0	0	8	Leveille, Anthony	CDAVIS	A00706	01/09/1976	F	Tipton	40.284435	-85.946025	40.284435 -85.946025	Okay	(555) 606-5249	****,6011	None		
Czaplicki, Kenneth (01)	Active	07/20/2016	Patient	0	1	0	0	1	Kalla, Sandra	CDAVIS	A00431	11/18/1942	M	Lebanon	40.058481	-86.455543	40.058481 -86.455543	Okay	(555) 894-8349	****,4454	None		
Deitrick, Lisa (01)	Active	10/13/2017	Patient	0	12	0	0	3	Leveille, Anthony	CDAVIS	A00748	06/30/1920	F	Anderson	40.071719	-85.667648	40.071719 -85.667648	Okay	(555) 644-7306	****,6570	None		
Deloff, Michelle (01)	Active	06/30/2017	Patient	0	0	0	0	0	MARIETTA	A00492	03/28/1964	F	Huntsville	40.046994	-86.028958	40.046994 -86.028958	Okay	(555) 219-2106	****,0000	None	Speaks French		
Deluzio, Karen (A3)	Active	01/31/2017	Patient	0	5	0	0	1	Isassi, Barbara	CDAVIS	A00420	11/28/1939	F	Frankton	40.221254	-85.765409	40.221254 -85.765409	Okay	(555) 544-9205	****,2497	None		
Deppao, Sandra (A2)	Active	02/08/2017	Patient	0	9	0	0	0	Salvato, Donna	CDAVIS	A00472	08/23/1951	F	Breezewood	40.146296	-85.333919	40.146296 -85.333919	Okay	(555) 288-0087	****,1625	None		
Dingel, Christopher (0)	Active	10/04/2017	Patient	0	17	0	0	0	0	CDAVIS	A00746	11/27/1930	M	Muncie	40.235598	-85.424761	40.235598 -85.424761	Okay	(555) 286-0825	****,2285	None		
Doniel, Mary (01)	Active	10/22/2016	Patient	0	12	0	0	0	Leveille, Anthony	CDAVIS	A00501	05/22/1947	F	Anderson	40.078503	-85.696360	40.078503 -85.696360	Okay	(555) 278-2326	****,2770	None		
Doring, Mark (A3)	Active	07/19/2017	Patient	0	2	8	0	0	0	Kalla, Sandra	CDAVIS	A00079	01/07/1930	M	Westfield	40.049877	-86.146696	40.049877 -86.146696	Okay	(555) 867-3834	****,2360	None	
Dubach, Donald (01)	Active	01/06/2016	Patient	0	11	0	0	2	Salvato, Donna	PFRANKLIN	A00303	04/15/1932	M	Indianapolis	39.924877	-86.139163	39.924877 -86.139163	Okay	(555) 848-4753	****,5168	None		
Dunlevy, Ronald D (01)	Active	12/14/2016	Patient	0	23	0	0	27	Leveille, Anthony	CDAVIS	A00542	08/06/1935	M	Anderson	40.070309	-85.663446	40.070309 -85.663446	Okay	(555) 644-9293	****,5365	None		
Duos, James (01)	Active	05/08/2017	Patient	0	0	0	0	0	Leveille, Anthony	CDAVIS	A00625	10/15/1944	M	Elwood	40.261550	-85.785713	40.261550 -85.785713	Okay	(555) 552-1253	****,6432	None		
Emlay, Jason L (A2)	Active	07/23/2015	Patient	0	1	0	0	1	Kalla, Sandra	CDAVIS	A00198	02/22/1953	M	Noblesville	40.011989	-85.972535	40.011989 -85.972535	Okay	(555) 457-4678	****,7315	None		
Erickson, Deborah D (C)	Active	09/08/2017	Patient	0	6	0	0	0	Isassi, Barbara	CDAVIS	A00595	02/22/1951	F	Muncie	40.146296	-85.333919	40.146296 -85.333919	Okay	(555) 288-7800	****,2691	None		
Fedde, Daniel (01)	Active	07/02/2017	Patient	0	24	0	0	0	Isassi, Barbara	CDAVIS	A00678	04/12/1965	M	Muncie	40.158418	-85.432313	40.158418 -85.432313	Okay	(555) 212-6811	****,6748	None		
Ferguson, Christopher	Active	09/28/2017	Patient	0	0	0	0	0	Matice, John	CDAVIS	A00672	04/09/1953	M	Muncie	40.146296	-85.333919	40.146296 -85.333919	Okay	(555) 288-7800	****,0521	None		
Filzen, Dorothy (01)	Active	10/10/2017	Patient	0	0	0	0	0	0	CDAVIS	A00755	04/04/1971	F	Muncie	40.193696	-85.340682	40.193696 -85.340682	Okay	(555) 216-5187	****,4958	None		
Fingar, Sharon (01)	Active	02/27/2017	Patient	0	12	0	0	16	Kalla, Sandra	CDAVIS	A00418	12/20/1934	F	Noblesville	40.049500	-86.001809	40.049500 -86.001809	Okay	(555) 773-7552	****,4472	None		
Folkers, Elizabeth (01)	Active	07/25/2017	Patient	0	0	0	0	0	Matice, John	CDAVIS	A00694	04/10/1956	F	Muncie	40.146296	-85.333919	40.146296 -85.333919	Okay	(555) 288-7800	****,1122	None		
Fuentes, David (01)	Active	10/17/2017	Patient	0	12	0	0	0	Leveille, Anthony	CDAVIS	A00760	06/08/1951	M	Anderson	40.054525	-85.661446	40.054525 -85.661446	Okay	(555) 278-8438	****,8558	None		
Gahr, Sarah C (01)	Active	01/30/2017	Patient	0	19	0	0	3	Kalla, Sandra	CDAVIS	A00566	05/05/1968	F	Noblesville	40.035216	-86.013353	40.035216 -86.013353	Okay	(555) 674-6428	****,6688	None		
Garro, Barbara (01)	Active	08/31/2017	Patient	0	0	0	0	0	Matice, John	CDAVIS	A00719	03/12/1974	F	Muncie	40.173847	-85.351446	40.173847 -85.351446	Okay	(555) 381-7936	****,8896	None		
Gotter, Laura L (A3)	Active	08/11/2017	Patient	0	0	0	0	0	Matice, John	CDAVIS	A00559	04/23/1953	F	Muncie	40.173026	-85.349562	40.173026 -85.349562	Okay	(555) 730-8176	****,2710	None		
Gupta, Patricia S (01)	Active	08/29/2017	Patient	0	9	0	0	2	Isassi, Barbara	CDAVIS	A00072	07/29/1955	F	New Castle	39.913263	-85.363742	39.913263 -85.363742	Okay	(555) 393-5977	****,6558	None		
Hafner, Jason (01)	Active	10/14/2017	Patient	0	6	0	0	0	0	CDAVIS	A00764	04/09/1971	M	Anderson	0.000000	0.000000	0.000000 0.000000	Okay	(555) 278-4750	****,4984	None		
Helle, Jennifer (A2)	Active	06/13/2017	Patient	0	8	0	0	0	Ekstein, David	CDAVIS	A00605	06/25/1931	F	Arcadia	40.175826	-86.073070	40.175826 -86.073070	Okay	(555) 250-3797	****,9122	None		
Hessling, Sharon (01)	Active	10/30/2015	Patient	0	5	0	0	0	Leveille, Anthony	CDAVIS	A00273	04/16/1957	F	Indianapolis	39.892373	-86.190865	39.892373 -86.190865	Okay	(555) 253-7625	****,2452	None		
Hindes, David (01)	Active	08/06/2017	Patient	0	2	0	0	2	Kalla, Sandra	CDAVIS	A00332	06/08/1955	M	Kokomo	40.489455	-86.133727	40.489455 -86.133727	Okay	(555) 865-8278	****,8987	None		
Holohan, Lisa (01)	Active	09/22/2017	Patient	0	4	0	0	4	Leveille, Anthony	CDAVIS	A00731	07/11/1978	F	Muncie	40.186462	-85.416255	40.186462 -85.416255	Okay	(555) 283-1205	****,4855	None		
Horace, Donald (01)	Active	09/21/2017	Patient	0	1	0	0	0	Leveille, Anthony	CDAVIS	A00733	02/01/1962	M	Muncie	40.179283	-85.405667	40.179283 -85.405667	Okay	(555) 587-0974	****,6765	None		
Jentry, Mary (01)	Active	10/11/2017	Patient	0	0	0	0	0	Matice, John	CDAVIS	A00682	09/15/1964	F	Muncie	40.146296	-85.333919	40.146296 -85.333919	Okay	(555) 288-7800	****,2912	None		
Karsnak, Charles (01)	Active	02/07/2017	Patient	0	3	0	0	2	Leveille, Anthony	CDAVIS	A00569	03/05/1948	M	Lapel	40.074274	-85.848762	40.074274 -85.848762	Okay	(555) 534-6573	****,6330	None		
Keenan, Carol (01)	Active	01/06/2017	Patient	0	11	0	0	11	Leveille, Anthony	CDAVIS	A00555	07/09/1928	F	Summitville	40.338206	-85.645913	40.338206 -85.645913	Okay	(555) 536-1514	****,8888	None		
Kemfort, Robert (01)	Active	08/17/2017	Patient	0	1	0	0	1	Isassi, Barbara	CDAVIS	A00711	10/02/1962	M	Muncie	40.181365	-85.395193	40.181365 -85.395193	Okay	(555) 660-9140	****,7255	None		
Kersibaumer, Betty (0)																							



- The **Patient Schedule** shows the schedule of visits, supplies, services, and pay items for a patient from the Start of Care through Discharge.
- You can view the schedule for a week, month, or episode. There is also a special view to quickly manually verify visits that are not automatically verified from timeslip information from Mobile or ELVIS feeding into the Visit Verifier.
- Days before the patient's Start of Care and after their Discharge are clearly denoted.
- Visit colors indicate status as shown in the legend in the screen shot above.
- A green arrow in a day's grey heading indicates the beginning of a cert period and a red arrow indicates the end. A black square indicates the payer was discharged prior to the end of the certification period.
- A red-flag at the top of the screen indicates the schedule is out of compliance – clicking on the red flag provides a detailed report of exactly what is out of compliance.
- Scroll up to look at the past and scroll down to look at the future.
- To edit a visit, click on the little house icon.
- To move a visit, drag it to the new day. To copy a visit, control-drag it to the new day.



- Right click a visit to get the visit menu
- One week can be copied to subsequent weeks or one visit can be copied to multiple dates.
- Visits, supply items, service items, pay items, and travel locations can all be scheduled.
- Symbols on a visit indicate non-regular hours, adjusted, verified by Visit Verifier (ELVIS Monitor), supervisory visit, comment, invoiced or marked Do Not Bill.
- The information button on the schedule screen contains a complete tutorial with videos on the schedule screen, from both the client and employee perspectives.
- Closed visits are tied directly to the clinical field notes and to the invoices and claims.

Save
Delete
Undo
Void Pay
Do Not Bill
Copy Visit (50 Pay)
View All Invoices
Statement
Phone Log
Clinical Note
i
Last Updated DE, 10/30/17 10:03 AM -1000220201
Verified

Visit
Visit #: 0001-A03373-A0019 Status: Verified Compliance: Verified By: Ruth Stain
TeleVisit Guid: fe686fa2-5365-4220-84bf-6679eb061da8 Disassociate Televisit Payer Set: A1

Vitals
Sub-Skill
Client: Braband, James (A00646-A2)
Payer-Skill: Humana Medicare PPO [OT]
Emp: Karras, Nancy (OT) (A00055)
Date-Times
Visit Date: 10/27/2017 Friday
Hours: 0.75 Start Visit: 04:00 PM End Break: End Visit: 04:45 PM
☐ Specific Times ☐ Supervisory ☐ Already Paid Exception: No exception

Pay and Bill
Pay
Unit: Per Visit Total: \$0.00
Regular
Hours: 0.75 Rate: \$0.00
Holiday
Hours: 0.00 Rate: \$0.00
Overtime
Hours: 0.00 Rate: \$0.00
Rate Source: None
Mileage: 0.00 X Rate: 0.000 Travel: \$0.00
Bill
Unit: Per Visit Total: \$200.00
Rate: \$200.00
Rate: \$200.00
Rate: \$200.00
Rate Source: Payer/skill/subskill level
Mileage: 0.00 X Rate: 0.000 Travel: \$0.00
Payroll Date: Payroll Exported: Invoice Description:

Visit Comment
AutoELVIS Visit From Riversoft Office (10/30/2017 10:03:34 AM) by User (ALYSSA).
Visit Note (OT) (10/27/2017 04:00 PM)

- The **Visit** shows the details of an employee visiting a patient. The visit shown has been automatically verified by the Visit Verifier when it received the timeslip information from a completed clinical field note from a RiverSoft Mobile user.
- Each visit is defined by the client it is done for, the payer, the skill being performed, the employee that performed the visit, the date and times of the visit.
- The total hours of the visits may be broken into regular, holiday, and overtime hours for payroll. The pay rates are derived from the pay rates configured for the agency, payer, employee, and client and the source is shown just to the right of the label **Rate Source**.
- The visit may be billed by the visit or hour and the bill rates are derived from the bill rates configured for the agency, client, and payer and the source is shown just to the right of the label **Rate Source**.
- Mileage may be manually entered or automatically calculated via the Calculate Mileage feature.
- Clicking the “Clinical Note” button displays the clinical note from which the visit was verified.
- If the visit is closed and billed, clicking the “Invoices” button shows the invoices the visit was ever billed on.
- If the visit is unassigned or confirmed, the “Match” button is available, providing a sophisticated employee matching feature to find the ideal employee to perform the visit.



**Employee Match**

**Visit Note Information**  
 Client: **Braband, James (A00646-A2)**  
 Employee: **Karras, Nancy (OT) (A00055)**  
 Visit Skill: **OT**  
 Visit Date: **10/31/2017** From Time: **09:00 AM** To Time: **10:00 AM**  
 Affiliation: **none**

**Client Attributes**  
 Client Wants... Client Does Not Want...  
 Edit Client Attributes ☒ Ignore Client Attributes When Building Employee List

**Active Employees List (to schedule a terminated/inactive employee, temporarily change their status on the employee screen)**  
 Right Click Employee to enter a phone log!

Number of Employees Filtered: **56** Per Column: **52** **0** **0** **0** **0** **0** **9** **0** **0** **0** **0** **0**

Name Beginning With:  Filters: Skill  All  All  All  Either  < Limit  < OT  All  No  All  None Exp  Client Prefers to See

Employees After Filtering (4)	Skill	Type	Affiliation	Sex	Visits/Limit	Week Hours	Month Hours	Visit Overlap	Visited Client	Exp Track Items	Employee Preferences	Availability	Distance From Home	Expired Tracking Items List
Ahlens, Edward (A00133)	OT	Field Employee	(None)	Male	0/0	10.00	24.50	No	No	0			013.7 miles	
Fanara, Karen E (A00104)	OT	Field Employee	(None)	Female	0/0	11.25	43.25	No	No	0			020.5 miles	
<b>Karras, Nancy (A00055)</b>	<b>OT</b>	<b>Field Employee</b>	<b>(None)</b>	<b>Female</b>	<b>0/0</b>	<b>18.00</b>	<b>47.50</b>	<b>No</b>	<b>Yes</b>	<b>0</b>			<b>014.6 miles</b>	
Willmschen, Linda (A00058)	OT	Field Employee	(None)	Female	0/0	20.00	83.25	No	No	0			006.5 miles	

- **Employee Matching** provides a list of employees to perform the visit filtered by 13 separate matching criteria: skill, employee type, affiliation, sex, daily visit limit, weekly OT, monthly hours < 130, visit overlap, visited client before, no expired tracking items, client-employee preferences, employee availability, and employee distance from client.
- At the top of each filter element the number of employee filtered out because of that element is shown. Each filter can be turned off so that all employees can be accessed.
- Right-clicking on the employee displays the **Phone Log** screen.

**Phone Log**

Office: Main Office (0001) Visit: A00373-A0033 Client: Braband, James (555) 623-9336 Employee: Karras, Nancy (555) 965-7739 Refuse: Doctor:

Select to view phone log record or click here to add new phone log entry:

Date	CSR	Type	Employee	Message
11/07/2017 11:31:59 AM	RS	Refused	Fanara, Karen	Karen said she was too busy.

Log Details:

Message Type: **Refused**  Cell: (555) 965-7739 Provider: AT&T

Log Text: Enter new phone log (Right-click for text editor with spell-check)

Pay rate offered is \$65.00

James, would you like this visit?

- **Phone Log** provides a log of offers made to employees. Offers can be texted directly to employee from the phone log screen. Logging offers makes it easy to provide proof of offers of work when an unemployment compensation claim is brought against your agency.

**James (A2), SoC 08/23/2017** Compliance: **Out** Status: **Out**

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8/21/17 2.50h 0.00h 11/1 2.50h 1						
Margaret (PT) Humana Medicare PPO						
Nancy (OT) Humana Medicare PPO						
8/27/17 2.00h 1.00h TODAY 3.00h 1						
Nancy (OT) Humana Medicare PPO						
9/14/17 2.00h 1.00h 11/15 3.00h 1						
Nancy (OT) Humana Medicare PPO						

Blueprint ☒ Client Schedule List ☒ Client Schedule For Braband, James (A2) ☒ Supply Item Braband, James ☒

New

Last Updated: RS, 11/08/17 05:21 AM -1000001117

Edit Supply Item

Client: Braband, James

Choose from the Master Supply List

Description	Category	SKU
Alcohol Prep	Dressings	MDS090670Z
Algesite 4 x 4	Dressings	
Allevyn 4 x 4 thin	Dressings	47578
Allevyn Adhesive, 5 x 5	Dressings	000223438395
Allevyn, 2 x 2	Dressings	7643
Applicator - Cotton Tipped	Dressings	30080196745412
Aquacell 6 x 6	Dressings	
Barrier Cream + Zinc 16 oz tube	Dressings	807586
Bordered Gauze, 4 x 4	Dressings	10080196743056
Calcium Alginate 4 x 4	Dressings	846367
Central Line Dressing Change Tray	Dressings	DYND74661
Coban Adherent Wrap 4 in x 5 yd	Dressings	
Cutimed Sorbact 4 x 4	Dressings	
Derma-Gel 4 x 4	Dressings	1008019670789
Foam Dressing, 4 x 4	Dressings	838870

Selected Supply: **Barrier Cream + Zinc 16 oz tube** SKU: **807586**

Payer: **(A1) Humana Medicare PPO**

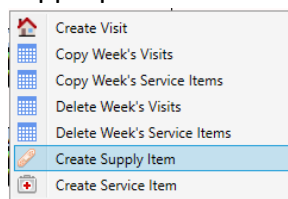
Date: **11/01/2017** Close Date:

Unit Bill: **\$33.00** Unit Cost: **\$16.94** Quantity: **1.00**

Bill Description:

Revenue Code:  HCPCS Code:  Modifier:

- A **Supply Item** is a medical supply used in the care of a patient. Each agency creates their own master supply list, complete with description, category, SKU, unit bill, unit cost, revenue code, HCPCS code, and modifier.
- Supply Items are created directly on the client schedule, just like visits, and when closed they appear on invoice and claims. Unlike visits that have a little house in their upper left corner, supplies have a band-aid in their upper left corner. Clicking on the band-aid opens the supply item editor where that supply item can be edited or new supplies added.
- To add a new supply to the schedule, on the appropriate client schedule, right click on the day the



supply was used to get the schedule menu:

and click Create Supply Item. On the supply item editor that appears, click the new button, select the supply from the master list, and then override whatever is needed.

- Hospice supplies can be imported directly from the pharmacist's medication file via the Supply Item List report and can save data entry time and mistakes.
- When the week is closed, the Supply Item report will show all supply items entered during the period to be closed so that it can be scanned for anomalies prior to closing.

Move Schedule To: 11/02/2017 Print Screen

Status: **Active** Phone: (555) 623-9336

Thursday		Friday	
1.00h	11/2	3.50h	11/3
Flu shots		Overhead	
Karras, Nancy (OT)			
09:00A-10:00A (Humana Medicare PPO)			
1.00h	11/9	4.00h	11/10
Karras, Nancy (OT)			
09:00A-10:00A (Humana Medicare PPO)			
1.00h	11/16	4.00h	11/17
Karras, Nancy (OT/Eval)			
09:00A-10:00A (Humana Medicare PPO)			

Blueprint Client Schedule List Client Schedule For Braband, James (A2) Service Item Braband, James

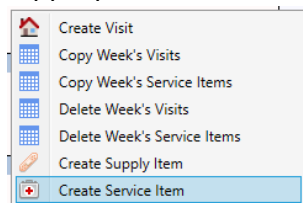
Save Delete Undo Void Pay Do Not Bill View Services Automated

Last Updated RS, 11/08/17 05:45 AM -1000008587

Edit Service Item

Client: Braband, James  
Service: Overhead  
Payer: Self-Pay  
Date: 11/03/2017 Close Date:  
Unit Bill: \$62.00 Unit Cost: \$0.00 Quantity: 1.00  
Bill Description:  
Revenue Code: HCPCS Code: Modifier:

- A **Service Item** is an instance of service to the patient that does not involve a caregiver. Each agency creates their own master service list, complete with description, unit bill, unit cost, revenue code, HCPCS code, and modifier. Examples of service items include RAP (request for anticipated payment), EOE (End of Episode), Overhead (claim line item allowed by various state and private providers), and flu shot.
- Service Items are created directly on the client schedule, just like visits, and when closed they appear on invoice and claims. Unlike visits that have a little house in their upper left corner, service items have a clinical case embossed with a red cross in their upper left corner. Clicking on the red cross opens the service item editor where that service item can be edited, or new service items added.
- To add a new service item to the schedule, on the appropriate client schedule, right click on the day the



service item was done to get the schedule menu: and click Create Service Item. On the service item editor that appears, click the new button, select the service from the master list, and then override whatever is needed.

- RAP and EOE service items are automatically created by RiverSoft Billing engine.
- When the week is closed, the Service Item report will show service items entered during the period to be closed so that it can be scanned for anomalies prior to closing.

Office Change Login Change Password Export Import Developers Activation Riversoft Close All

Client Schedule For Braband, James (A2) Employee Schedule List Employee Schedule For Maclead, Margaret

Face Sheet Payer Rules

Client: Braband, James (A2), SoC 08/23/2017

Monday	Tuesday	Wednesday
10/30 Maclead, Margaret (PT) 08:30A-09:00A (Humana Medicare PPO)	10/31 Maclead, Margaret (PT) 08:00A-09:00A (Humana Medicare PPO)	11/1 Straight Cath Kit, each 8
11/6 Maclead, Margaret (PT) 09:00A-10:00A (Humana Medicare PPO)	11/7 Karras, Nancy (O) 09:00A-10:00A (Humana Medicare PPO)	
11/13 Maclead, Margaret (PT) 09:00A-10:00A (Humana Medicare PPO)	11/14 Karras, Nancy (O) 09:00A-10:00A (Humana Medicare PPO)	
11/20 Maclead, Margaret (PT) 09:00A-10:00A (Humana Medicare PPO)	11/21 Karras, Nancy (O) 09:00A-10:00A (Humana Medicare PPO)	

Create Visit  
Copy Visit To Multiple Dates  
Copy Week's Visits  
Copy Week's Service Items  
Delete This Visit  
Delete Week's Visits  
Delete Week's Service Items  
View Employee Schedule  
Create Service Item

Blueprint Client Schedule List Client Schedule For Braband, James (A2) Employee Schedule List Employee Schedule For Maclead, Margaret

Face Sheet Move Schedule To: 10/29/2017 Print Screen

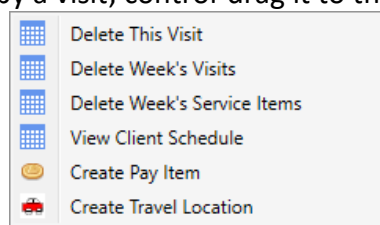
October 29, 2017 Employee: Maclead, Margaret (PT) Compliance: In Status: Active Phone: (555) 881-7617 December 9, 2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
10/29 Braband, James (PT) 08:30A-09:00A (Humana Medicare PPO)	10/30 Braband, James (PT) 08:30A-09:00A (Humana Medicare PPO)	10/31 Braband, James (PT) 08:00A-09:00A (Humana Medicare PPO)	11/1 Braband, James (PT) 08:00A-09:00A (Humana Medicare PPO)	11/2 Braband, James (PT) 08:00A-09:00A (Humana Medicare PPO)	11/3 Braband, James (PT) 08:00A-09:00A (Humana Medicare PPO)	11/4 Braband, James (PT) 08:00A-09:00A (Humana Medicare PPO)
11/5 Alfonso, Dorothy S (SPT-PT/Eval) 09:00A-10:00A (Medicare PGBA)	11/6 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/7 Belinsky, Carol (SPT-PT) 09:00A-10:00A (Medicare PGBA)	11/8 Braband, James (PT) 09:00A-10:00A (Humana Medicare PPO)	11/9 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/10 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/11 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)
11/12 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/13 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/14 Belinsky, Carol (SPT-PT) 09:00A-10:00A (Medicare PGBA)	11/15 Braband, James (PT) 09:00A-10:00A (Humana Medicare PPO)	11/16 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/17 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/18 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)
11/19 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/20 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/21 Belinsky, Carol (SPT-PT) 09:00A-10:00A (Medicare PGBA)	11/22 Braband, James (PT) 09:00A-10:00A (Humana Medicare PPO)	11/23 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/24 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/25 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)
11/26 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/27 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	11/28 Belinsky, Carol (SPT-PT) 09:00A-10:00A (Medicare PGBA)	11/29 Braband, James (PT) 09:00A-10:00A (Humana Medicare PPO)	11/30 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	12/1 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	12/2 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)
12/3 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	12/4 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	12/5 Belinsky, Carol (SPT-PT) 09:00A-10:00A (Medicare PGBA)	12/6 Braband, James (PT) 09:00A-10:00A (Humana Medicare PPO)	12/7 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	12/8 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)	12/9 Kershbaumer, Betty (SPT-PT) 09:00A-10:00A (Humana Medicare PPO)

Match not found in LIEE on 2/23/2015. CurrentLIEE(OK) Yes Match not found in LIEE on 7/11/2016. CurrentLIEE(OK) Yes Match not found in LIEE on 7/11/2016. CurrentLIEE(OK) Yes Match not found in LIEE on 7/11/2016. C...

- The **Employee Schedule** is the view of visit and pay items from the employee's perspective. RiverSoft recommends scheduling from the client schedule because it is only from the client's perspective can compliance issues with doctor orders, insurance authorizations, therapy evaluation visits, and supervisory visits be easily seen. However, the employee schedule is needed for entering pay items and to resolve visits entered for the employee that require the employee to break the laws of physics and be in two places at once.
- The most popular way to get to an employee's schedule is directly from a client's schedule. Right clicking on a employee's visit to that client will show the scheduling menu allowing you to click the View Employee Schedule. The other way is from the **Blueprint home screen** feature **Employee Schedule**.

- The **Employee Schedule** shows the schedule of visits and pay items for an employee from the time they were hired until the end of their employment.
- You can view the schedule for a week, month, or episode (10 weeks). There is also a special view to quickly manually verify visits that are not automatically verified from timeslip information from Mobile or ELVIS feeding into the Visit Verifier.
- A red-flag at the top of the screen indicates that the employee has tracking items that have expired or is missing one or more tracking items – clicking on the red flag provides a detailed report. A green flag indicates all tracking items are up to date.
- Scroll up to look at the past and scroll down to look at the future.
- To edit a visit, click on the little house icon.
- To move a visit, drag it to the new day. To copy a visit, control-drag it to the new day.



- Right click a visit to get the schedule menu...
- The information button on the schedule screen contains a complete tutorial on the schedule screen, from both the client and employee perspectives.
- **From the employee perspective of scheduling, visits cannot be created. This is because creating them in this view WOULD BE BLIND TO THE CONSEQUENCES OF CLIENT COMPLIANCE.** From the employee view you can move visits, edit visits, end create pay items and travel locations. If a visit is out of compliance because of client rules, the visit will show with a black background and be out of compliance, but you will need to switch to the client view of scheduling to determine why.
- The **Face Sheet +** button at the top of the screen will create a PDF of the employee's face sheet plus their schedule.
- The **Phone Log** button at top of the screen lets you create an employee phone log.
- The **Edit Demographic** information button takes you to the employee's demographic editor. To the right of this button is a picture of the employee if one has been added.

Face Sheet + **Move Schedule To:** 10/29/2017

Employee: **Maclead, Margaret (PT)** Compliance: **In** Status: **Active** Phone: **(555) 881-71**

Tuesday	Wednesday	Thursday
10/31	11/1	11/2
08:00A-09:00A (Humana Medicare PPO)		
Kershbaumer, Betty (SPT-PT)		
09:00A-09:30A (Medicaid)		
Manvelito, Donna (SPT-PT)		
10:00A-11:00A (Medicare PGBA)		
Stevey, Lisa (SPT-PT)		
12:00P-01:00P (Managed Health Care)		
Briganti, Patricia (SPT-PT)		
10P (United Health Care - AARP Complete Choice PPO)		
11/7	11/8	11/9
13.50h	2.00h	15.50h

Context Menu:

- Delete Week's Service Items
- Create Pay Item
- Create Travel Location

Blueprint [X] Employee Schedule List [X] Employee Schedule For Maclead, Margaret [X] Pay Item Maclead, Margaret [X]

Save Delete Undo Void Do Not Bill View Invoices Last Updated

Employee: **Maclead, Margaret (A00062)**

Edit Pay Item

Item Type: **Show Up (Amount) (Billable)**

Date: 11/01/2017

Amount Paid

Pay Amount: 10.00 Calc

OR

Rate \$ 0.00 X Hours 0.00 = \$0.00

Bill Pay Item

Client: -None-

Payer: Self-Pay

Bill Amount: 0.00

Inv Desc:

Pay Item Payroll Information

Payroll Date:

Payroll Exported:

- A **Pay Item** is an instance of pay to an employee, not related to a visit.
- These are the types of pay items available:
 

Bonus (affects Overtime) (Amount) (Billable)  
 Bonus (doesn't affect Overtime) (Amount) (Billable)  
 Holiday (Hourly)  
 Hourly Travel (Hourly) (Subject to OT)  
 In-House Training (Hourly) (Subject to OT)  
 In-Office Temp (Hourly) (Subject to OT)  
 On-Call (Amount)  
 Other No Tax (Amount)  
 Other Tax (Amount)  
 Reimbursement (Amount) (Billable)  
 Show Up (Amount) (Billable)  
 Sick (Hourly)  
 Staffing Travel (Amount) (Hourly)  
 Uniform Allowance (Amount)  
 Vacation (Hourly)
- To create a pay item from an employee's schedule, right click the desired day and select Create Pay Item.
- On the pay item editor, choose the type of pay item and the pay amount (or a pay rate and number of hours).
- Optionally, choose a client and payer to bill the pay item to.
- When the week is closed, the Pay Item report will show all pay items entered during the period to be closed so that it can be scanned for anomalies prior to closing.
- Most hourly pay items may affect an employee's overtime calculation that is done automatically when the week is closed.
- The AutoPay Travel Time feature will automatically create pay items to account for the time an employee travels in between their visits.





Blueprint		Employee Schedule List													
Run LEIE	Hour	Potential	OT	Report	Refresh										
Check	Totals														
Filters															
Name Beginning With:						Status:	Active	Skill:	All	Type:	All	Affiliation:	All	Attribute:	(None)
<input type="checkbox"/> Has visits scheduled between:						(10/29/2017 - 12/09/2017)									
Employees (56)	Emp No	Status	Primary Skill	UserName	Type	Sex	Birth Date	City	Lat/Lon	Phone	SSN	Affiliation	LEIE	Attributes	
Abelman, Michael N	A00005	Active	Office Staff	NFRANKLIN	Staff Employee	M	04/18/1951	White Cloud	Okay	(555) 798-8282	***-**-8465	None	OK		
Ahlers, Edward	A00133	Active	OT		Field Employee	M	04/26/1981	Noblesville	Okay	(555) 513-7458	***-**-9202	None	OK'd	Clinical Review	
Bagu, Helen	A00148	Active	HHA	JAPPLE	Field Employee	F	10/11/1963	Noblesville	Okay	(555) 933-3633	***-**-0892	None	OK	Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Ballinger, Michelle M	A00123	Active	Office Staff	ADAVIS	Staff Employee	F	01/16/2000	Castletown	Okay	(555) 810-7626	***-**-1277	None	OK		
Bendix, Patricia	A00006	Active	RN		Staff Employee	F	02/06/1958	Marion	Okay	(555) 673-0714	***-**-6606	None	OK	Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Bonventre, Ruth	A00151	Active	HHA		Field Employee	F	06/05/1968	Indianapolis	Okay	(555) 531-6109	***-**-3583	None	OK	Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Bunetta, Donna	A00002	Active	Office Staff	CDAVIS	Staff Employee	F	08/01/1975	Anderson	Okay	(555) 635-5860	***-**-6942	None	OK	Clinical Review	
Castillanos, Kimberly	A00150	Active	HHA	PBALFOUR	Staff Employee	F	06/24/1966	Noblesville	Okay	(555) 228-2795	***-**-0768	None	OK	Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Craighead, Donald	A00125	Active	PT		Field Employee	M	05/24/1971	Yorktown	Okay	(555) 760-2105	***-**-5195	None	OK		
Defide, Steven T	A00140	Active	PT	HSESTOSO	Field Employee	M	09/04/1976	Yorktown	Okay	(555) 749-5246	***-**-9277	None	OK	Clinical Review	
Descamps, Sharon	A00134	Active	HHA	S.KAISER	Field Employee	F	05/08/1995	Tipton	Okay	(555) 434-7104	***-**-7106	None	OK	Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Desiga, Sarah L	A00001	Active	RN	PFRANKLIN	Staff Employee	F	10/08/1953	Indianapolis	Okay	(555) 679-8293	***-**-8467	None	OK		
Ekstein, David	A00008	Active	PT	PANONCILLO	Field Employee	M	09/10/1969	Muncie	Okay	(555) 760-9274	***-**-8078	None	OK	Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Escudero, Kimberly	A00110	Active	PT		Field Employee	F	03/29/1971	Muncie	Okay	(555) 212-2104	***-**-8035	None	OK	Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Fallago, Sarah	A00154	Active	HHA	ASMITH	Field Employee	F	12/14/1984	Elwood	Okay	(555) 701-8158	***-**-4916	None	Exclude	Calculate Mileage, Pay Travel Home, Pay Travel Home Route	
Fanara, Karen E	A00104	Active	OT	AROTT	Field Employee	F	01/01/1800	Carmel	Okay	(555) 654-6198	***-**-8015	None	OK'd	Calculate Mileage, Clinical Review, Pay Travel Home, Pay Travel Home Route	
Filburn, Sarah	A00153	Active	HHA	IBOONE	Field Employee	F	01/06/1993	Anderson	Okay	(555) 937-6734	***-**-3163	None	OK	Calculate Mileage, Pay Travel Home, Pay Travel Home Route	

## Employees scheduled for more than 40 hours this week

employee	Office	EmpNo	skill	ssn	hours	NbrOfficesWorked
Fallago, Sarah	0001-Main Office	A00154	HHA	***-**-4916	70	1
Hazelrigg, Deborah	0001-Main Office	A00057	HHA	***-**-2922	48.5	1
Rediske, Mary C	0001-Main Office	A00089	HHA	***-**-4958	52	1
Rehberger, Patricia	0001-Main Office	A00077	HHA	***-**-8510	42	1

- **Potential OT** is overtime that may occur if the visits that are currently scheduled this week become verified and closed as they are.
- When scheduling visits, whenever a visit is moved, an employee is assigned, or the duration of the visit is changed, a calculation is run for the employee to see if they are in an overtime situation. The check happens even if the employee works in other offices because it uses their SSN across offices. If overtime is detected, the user is given a message because whenever possible overtime should be avoided – it overworks the employee and unfairly denies work from other employees not in an overtime situation.
- Even though overtime is alerted in real-time on the schedule, it is a good idea for a supervisor to run this report from time to time to make sure the schedulers are doing a good job at keeping overtime to a minimum.

Blueprint X Employee Schedule List X Overtime X

Filters  
Report Type: Verified Visits and Pay Items Only

Report Type: Verified Visits and Pay Items Only  
Payroll Date: 11/04/2017

### Overtime

Employee	Office	Client	Visit/Item	Date	Times	OT Hours	Charged
Fallago, Sarah (HHA) (A00154) (***-**-4916)	Main Office	Lopeman, Elizabeth A (A00652-01)	A03111-A0179	10/26/2017	08:00A-04:00P	4.00	Y
Fallago, Sarah (HHA) (A00154) (***-**-4916)	Main Office	Lopeman, Elizabeth A (A00652-01)	A03113-A0149	10/26/2017	04:00P-06:00P	2.00	Y
Fallago, Sarah (HHA) (A00154) (***-**-4916)	Main Office	Lopeman, Elizabeth A (A00652-01)	A03111-A0185	10/27/2017	10:00A-06:00P	8.00	Y
Fallago, Sarah (HHA) (A00154) (***-**-4916)	Main Office	Lopeman, Elizabeth A (A00652-01)	A03113-A0148	10/27/2017	06:00P-08:00P	2.00	Y
Fallago, Sarah (HHA) (A00154) (***-**-4916)	Main Office	Lopeman, Elizabeth A (A00652-01)	A03111-A0191	10/28/2017	08:00A-04:00P	8.00	Y
Fallago, Sarah (HHA) (A00154) (***-**-4916)	Main Office	Lopeman, Elizabeth A (A00652-01)	A03113-A0147	10/28/2017	04:00P-06:00P	2.00	Y
Subtotal:						26.00	
Rediske, Mary C (HHA) (A00089) (***-**-4958)	Main Office	Rohlf, Michael (A00717-01)	A03390-A0092	10/27/2017	10:00A-07:00P	4.00	Y
Rediske, Mary C (HHA) (A00089) (***-**-4958)	Main Office	Rohlf, Michael (A00717-01)	A03389-A0079	10/28/2017	08:15A-09:15A	1.00	Y
Rediske, Mary C (HHA) (A00089) (***-**-4958)	Main Office	Rohlf, Michael (A00717-01)	A03390-A0086	10/28/2017	09:15A-06:15P	9.00	Y
Subtotal:						14.00	
Hoople, Dorothy (HHA) (A00095) (***-**-8891)	Main Office	Ottey, Kenneth (A00033-01)	A01333-A0810	10/26/2017	09:00A-06:00P	2.50	Y
Hoople, Dorothy (HHA) (A00095) (***-**-8891)	Main Office	Ottey, Kenneth (A00033-01)	A01333-A0815	10/27/2017	09:15A-05:45P	8.50	Y
Hoople, Dorothy (HHA) (A00095) (***-**-8891)	Main Office	Ottey, Kenneth (A00033-01)	A01333-A0784	10/28/2017	10:00A-06:00P	8.00	Y
Subtotal:						19.00	
Minton, Sharon (HHA) (A00113) (***-**-2844)	Main Office	Vellie, Helen (A00737-01)	A03468-A0066	10/28/2017	08:30A-11:30A	0.50	Y
Minton, Sharon (HHA) (A00113) (***-**-2844)	Main Office	Vellie, Helen (A00737-01)	A03474-A0068	10/28/2017	11:30A-02:15P	2.75	Y
Minton, Sharon (HHA) (A00113) (***-**-2844)	Main Office	Vellie, Helen (A00737-01)	A03473-A0063	10/28/2017	02:30P-03:15P	0.75	Y
Subtotal:						4.00	
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Fingar, Sharon (A00418-01)	A02589-A0369	10/26/2017	12:00P-03:00P	0.50	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Busacca, Laura (A00453-01)	A02239-A0164	10/26/2017	03:30P-04:30P	1.00	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Fuentes, David (A00760-01)	A03541-A0005	10/26/2017	05:00P-08:00P	3.00	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Areizaga, Edward A (A00027-A2)	A02272-A0232	10/27/2017	08:00A-10:00A	2.00	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Emlay, Jason L (A00198-A2)	A01331-A0342	10/27/2017	10:45A-12:45P	2.00	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Emlay, Jason L (A00198-A2)	A01032-A0411	10/27/2017	12:45P-01:45P	1.00	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Fingar, Sharon (A00418-01)	A02589-A0379	10/27/2017	02:00P-04:30P	2.50	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Fuentes, David (A00760-01)	A03541-A0031	10/28/2017	09:30A-10:30A	1.00	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Fuentes, David (A00760-01)	A03543-A0002	10/28/2017	10:30A-12:30P	2.00	Y
Murzycki, Susan R (HHA) (A00067) (***-**-5156)	Main Office	Fingar, Sharon (A00418-01)	A02589-A0354	10/28/2017	01:00P-04:00P	3.00	Y
Subtotal:						18.00	
Hazelrigg, Deborah (HHA) (A00057) (***-**-2922)	Main Office	Tjarks, Anthony L (A00648-A2)	A03283-A0120	10/26/2017	01:00P-04:00P	1.00	Y
Hazelrigg, Deborah (HHA) (A00057) (***-**-2922)	Main Office	Tjarks, Anthony L (A00648-A2)	A03284-A0117	10/26/2017	04:00P-05:00P	1.00	Y
Hazelrigg, Deborah (HHA) (A00057) (***-**-2922)	Main Office	Rivadeneira, Karen (A00561-A3)	A03565-A0023	10/27/2017	09:00A-11:00A	2.00	Y
Hazelrigg, Deborah (HHA) (A00057) (***-**-2922)	Main Office	Antonson, Elizabeth (A00741-01)	A03475-A0027	10/27/2017	02:30P-03:30P	1.00	Y
Hazelrigg, Deborah (HHA) (A00057) (***-**-2922)	Main Office	Mayfield, Barbara (A00662-01)	A03159-A0039	10/27/2017	04:45P-06:45P	2.00	Y
Subtotal:						7.00	
Grand Total:						184.25	

11/09/2017

03:55



RIVERSOFT

Page 1 of 1

- **Calculate OT** updates visits – it moves regular hours into overtime hours where appropriate for all verified visits that are in an overtime situation due to other verified or closed visits.
- This feature runs automatically as a part of the close week feature, but can be run separately.
- An employee's hours in every office work in are used in the calculations – as long as the employee has the same SSN in each office.
- The pay rate subject to the 1.5 multiplier is the employee's calculated average pay rate for the week. This algorithm is dictated by Federal Wage and Hourly laws.
- RiverSoft must calculate the overtime so that the cost of each visit can be known – this is needed by the Sales-Cost report to show gross margin.
- The closed visits and pay items can be exported to more than 20 different payroll vendors, saving hours of manual data entry each week. See the Export Payroll for more information.



RiverSoft Office - User: RIVERSOFT - Office: Main Office (0001) - Ver: 4.0.5020.0 - SQL Server: RSWIN10\RS2016 - Database: ABCHOME CARE

Home Messages(0) Configure Change Office Change Login Change Password Export Import Activation Riversoft Close All

Blueprint ELVIS Monitor

Stop Report Save Values User Guide ELVIS Performing ELVIS Monitor

ELVIS Monitor is pausing for 10 minutes. Click Stop to cancel monitor.

Options

Monitor => Process By Office: False In Time Tolerance (Minutes): 15 Duration Tolerance (Minutes): 30 Max Duration (Minutes): 1,440 Display Voided Visits

ELVIS App => Signature Required Distance between Arrival and Departure Location Tolerance (Feet): 1000

Alerts - Configured and sent for the logon office Main Office (0001) (0001)

Email CSR Alert Email: Alert Email cc:

ELVIS Visits (52)

Office Code	Client Name (Admit No)	Date	In	Out	Within x Feet	Employee	CSR	Visit Processing Type [SubSkill]	ELVIS Com
0001	Rivadeneira, Karen (A3)	10/25/2017	03:15 PM	04:00 PM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/25/2017 03:15 PM)	
0001	Lundrigan, Maria (01)	10/25/2017	03:55 PM	04:40 PM	0	Willmschen, Linda	CDAVIS	Visit Note (OT) (10/25/2017 03:55 PM)	
0001	Samora, Joseph (01)	10/25/2017	04:15 PM	04:50 PM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/25/2017 04:15 PM)	
0001	Holohan, Lisa (01)	10/25/2017	05:10 PM	06:00 PM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/25/2017 05:10 PM)	
0001	Vrieze, George A (01)	10/26/2017	08:15 AM	09:00 AM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/26/2017 08:15 AM)	
0001	Vellie, Helen (01)	10/26/2017	09:10 AM	09:55 AM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/26/2017 09:10 AM)	
0001	Casis, Susan (01)	10/26/2017	10:05 AM	10:50 AM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/26/2017 10:05 AM)	
0001	Timmerberg, Sandra (01)	10/26/2017	11:55 AM	12:30 PM	0	Mackey, Robert L	PFRANKLIN	Visit Note (PT) (10/26/2017 11:55 AM)	
0001	String, Michelle (01)	10/26/2017	12:50 PM	01:27 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/26/2017 12:50 PM)	
0001	Burries, David (01)	10/26/2017	01:30 PM	02:10 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/26/2017 01:30 PM)	
0001	Dingel, Christopher (01)	10/26/2017	02:40 PM	03:15 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/26/2017 02:40 PM)	
0001	Weddington, Michael (01)	10/26/2017	03:23 PM	04:05 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/26/2017 03:23 PM)	
0001	Zic, Ruth (01)	10/27/2017	09:30 AM	10:15 AM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/27/2017 09:30 AM)	
0001	Holohan, Lisa (01)	10/27/2017	10:30 AM	11:15 AM	0	Ekstein, David	CDAVIS	Evaluation (PT) (10/27/2017 10:30 AM)	
0001	Rivadeneira, Karen (A3)	10/27/2017	10:45 AM	11:30 AM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/27/2017 10:45 AM)	
0001	String, Michelle (01)	10/27/2017	10:50 AM	11:25 AM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/27/2017 10:50 AM)	
0001	Burries, David (01)	10/27/2017	11:30 AM	12:15 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/27/2017 11:30 AM)	
0001	Simkulet, Sandra (A4)	10/27/2017	12:35 PM	01:10 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/27/2017 12:35 PM)	
0001	Vario, Karen L (01)	10/27/2017	01:40 PM	02:15 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/27/2017 01:40 PM)	
0001	Rohlf, Michael (01)	10/27/2017	01:45 PM	02:30 PM	0	Ekstein, David	CDAVIS	Visit Note (PT) (10/27/2017 01:45 PM)	
0001	Dingel, Christopher (01)	10/27/2017	02:55 PM	03:38 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/27/2017 02:55 PM)	
0001	Lundrigan, Maria (01)	10/27/2017	03:20 PM	04:10 PM	0	Willmschen, Linda	CDAVIS	Evaluation (OT) (10/27/2017 03:20 PM)	
0001	Weddington, Michael (01)	10/27/2017	04:00 PM	04:35 PM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/27/2017 04:00 PM)	
0001	Folkers, Elizabeth (01)	10/27/2017	04:15 PM	05:05 PM	0	Willmschen, Linda	CDAVIS	Visit Note (OT) (10/27/2017 04:15 PM)	
0001	Scroggin, Karen (01)	10/27/2017	05:00 PM	06:00 PM	0	Ekstein, David	CDAVIS	Discharge From Agency (PT) (OASIS) (10/2	
0001	Vario, Karen L (01)	10/28/2017	11:15 AM	11:55 AM	0	Mackey, Robert L	CDAVIS	Visit Note (PT) (10/28/2017 11:15 AM)	
0001	Kratky, Joseph (01)	10/30/2017	08:28 AM	10:25 AM	192700	Castillanos, Kimberly	PFRANKLIN		
0001	Dunlevy, Ronald D (01)	10/30/2017	09:13 AM	01:13 PM	127	Rosenlof, Carol	CDAVIS		
0001	Rivadeneira, Karen (A3)	10/30/2017	10:21 AM	10:25 AM	0	Zeni, Nancy	CDAVIS	she said she didnt need me today.	
0001	Briganti, Patricia (01)	10/30/2017	10:49 AM	11:52 AM	99	Zeni, Nancy	CDAVIS		
0001	Copher, Carol L (01)	10/30/2017	11:56 AM	02:13 PM	52	Bagu, Helen	CDAVIS		
0001	Liles, Steven (01)	10/30/2017	12:17 PM	01:17 PM	0	Fanara, Karen E	CDAVIS	Visit Note (OT) (10/30/2017 12:17 PM)	
0001	Mayfield, Barbara (01)	10/30/2017	12:38 PM	03:41 PM	18658	Minton, Sharon	Visit was verified in schedule!		
0001	Szlosek, Christopher (01)	10/30/2017	01:37 PM	02:25 PM	98	Zeni, Nancy	CDAVIS		
0001	Czaplicki, Kenneth (01)	10/30/2017	03:14 PM	06:14 PM	1124	Bagu, Helen	CDAVIS	He is in need of finger nails and toenails to	
0001	Mayfield, Barbara (01)	10/30/2017	03:41 PM	05:51 PM	18741	Minton, Sharon	CDAVIS		

- **Visit Verifier/ELVIS Monitor** receives visit time in/out information from the ELVIS phone app, RiverSoft Mobile clinical field notes, and third-party telephony vendors like Vesta and Sandata.
- Nursing and Therapy visit data from RiverSoft Mobile is used to find a matching visit during the same day for the same client and employee – if one is found the visit in the schedule is verified and the time entry in the Visit Verifier turns blue and then disappears because there is no more need for processing. If a matching visit is not found, the entry turns red and must be manually processed.
- Aide and Companion visit data from the ELVIS phone app must meet the In-Time and Duration tolerances shown at the top of the screen because payers require these services to tightly adhere to schedules. Visit data from the ELVIS phone app contains location data - these entries will show the distance in feet the entry logged from the client's recorded Lat/Lon. Large distances point to the fact that the client's recorded Lat/Lon may be incorrect.
- This monitor is designed to run constantly and if the agency pre-schedules for their clients, most of the verification of schedules will be done by the Visit Verifier.

Blueprint	Patients																							
Refresh Patient List	Name Beginning With:	Patient Status:	Active	Payer Class:	All	Payer:	All	Affiliation:	All	Ptev shows last PT Eval date and PTD shows * if PT Discharged														
Patients (109)	Status	Case Manager	Client #	Mobile Grams	In Use Notes	Comp. Notes	Locked Notes	Birth Date	Sex	City	Phone	Entry Date	Agency SOC Date	Admit Date	Cert End	Last Sup	Ptev	PTd	OTev	OT d	STev	STD	Cert Days	Discharge Date
Alfonso, Dorothy S (01)	Active	Maclead, Margaret	A00724	0	1	1	12	04/30/1961	F	Alexandria	(555) 274-8316	09/08/2017	09/11/2017	09/11/2017	11/09/2017		10/12							0
Antonson, Elizabeth (01)	Active	Salvato, Donna	A00741	0	15	0	26	09/02/1959	F	New Castle	(555) 200-3236	09/26/2017	09/26/2017	09/26/2017	11/24/2017	10/20/2017	10/27		10/26					15
Areizaga, Edward A (A2)	Active	Salvato, Donna	A00027	0	1	0	11	11/14/1964	M	Elwood	(555) 717-6376	04/08/2016	04/09/2016	04/09/2016	11/24/2017	10/19/2017								15
Arns, Sharon (01)	Active	Leveille, Anthony	A00714	0	1(1)	6	2	10/07/1971	F	Anderson	(555) 217-1731	08/17/2017	08/18/2017	08/18/2017	10/16/2017					*				-24
Belinsky, Carol (01)	Active	Kalla, Sandra	A00710	0	4(4)	3	44	03/08/1962	F	Noblesville	(555) 671-6421	08/08/2017	08/09/2017	08/09/2017	12/06/2017		10/05	*	10/19					27
Bold, Elizabeth E (01)	Active	Ekstein, David	A00657	0	2	0	63	11/03/1928	F	Muncie	(555) 284-1439	06/19/2017	06/20/2017	06/20/2017	12/16/2017		10/12	*	10/16					37
Bonjorno, Daniel W (01)	Active	Kalla, Sandra	A00146	0	0	0	0	09/09/1947	M	Indianapolis	(555) 735-7452	03/05/2015	03/05/2015	03/05/2015	08/25/2016									-441
Braband, James (A2)	Active	Maclead, Margaret	A00646	0	0	3	41	08/07/1946	M	Anderson	(555) 623-9336	08/23/2017	08/23/2017	08/23/2017	12/20/2017		10/17		10/20					41
Briganti, Patricia (01)	Active	Leveille, Anthony	A00758	0	2	0	12	04/18/1933	F	Alexandria	(555) 754-6588	10/11/2017	10/13/2017	10/13/2017	12/11/2017	10/25/2017	10/16		10/20					32
Burries, David (01)	Active	Matic, John	A00765	0	3	5	4	11/28/1949	M	Summitville	(555) 536-4262	10/13/2017	10/17/2017	10/17/2017	12/15/2017		10/17		10/19					36
Busacca, Laura (01)	Active	Leveille, Anthony	A00453	0	9	0	62	04/30/1965	F	Anderson	(555) 622-8087	08/16/2016	08/17/2016	08/17/2016	10/10/2017									-30
Calder, Karen (01)	Active	Isassi, Barbara	A00389	0	0	0	12	07/18/1969	F	Muncie	(555) 212-0535	05/12/2016	05/13/2016	05/13/2016	11/07/2017	10/06/2017								-2
Calk, George (01)	Active	Salvato, Donna	A00754	0	1	5	4	11/16/1950	M	Anderson	(555) 649-3056	10/06/2017	10/10/2017	10/10/2017	12/08/2017		10/16		10/25					29
Campagnone, Kenneth E (01)	Active	Matic, John	A00689	0	0	0	2	08/27/1961	M	Muncie	(555) 808-8088	07/14/2017	07/17/2017	07/17/2017	09/14/2017									-56
Casiz, Susan (01)	Active	Salvato, Donna	A00756	0	1	0	9	12/05/1959	F	Muncie	(555) 212-8652	10/10/2017	10/16/2017	10/16/2017	12/14/2017		10/18		10/17					35
Clery, Jason (A3)	Active	Isassi, Barbara	A00240	0	1	1	53	06/14/1967	M	Muncie	(555) 288-7800	09/05/2017	09/06/2017	09/06/2017	11/04/2017	10/25/2017			10/13					-5
Collingwood, Sandra (01)	Active	Matic, John	A00767	0	0	1	0	08/20/1958	F	Anderson	(555) 387-4860	10/18/2017	10/19/2017	10/19/2017	12/17/2017		10/19							38
Copen, Helen (01)	Active	Matic, John	A00720	0	1	1	26	08/26/1940	F	Alexandria	(555) 602-8475	09/01/2017	09/05/2017	09/05/2017	11/03/2017	10/20/2017	10/20		*					-6
Copher, Carol L (01)	Active	Leveille, Anthony	A00706	0	1	1	9	11/09/1972	F	Tipton	(555) 606-5249	08/07/2017	08/08/2017	08/08/2017	12/05/2017	10/06/2017								26
Czaplicki, Kenneth (01)	Active	Kalla, Sandra	A00431	0	0	0	8	11/18/1946	M	Lebanon	(555) 894-8349	07/08/2016	07/20/2016	07/20/2016	11/11/2017	10/12/2017								2
Deitrick, Lisa (01)	Active	Leveille, Anthony	A00748	0	0	3	6	06/30/1920	F	Anderson	(555) 644-7306	10/05/2017	10/12/2017	10/12/2017	12/10/2017									31
Deloff, Michelle (01)	Active		A00492	0	1	0	3	03/28/1964	F	Huntsville	(555) 219-2106	10/12/2016	06/30/2017	06/30/2017	11/30/2017									21
Deluzio, Karen (A3)	Active	Isassi, Barbara	A00420	0	0	0	8	11/28/1939	F	Frankton	(555) 754-9205	01/30/2017	01/31/2017	01/31/2017	11/26/2017	09/27/2017								17
Depauli, Sandra (A2)	Active	Salvato, Donna	A00472	0	1	0	10	08/23/1951	F	Breezewood Park	(555) 288-0087	02/08/2017	02/08/2017	02/08/2017	12/04/2017	10/02/2017								25
Dingel, Christopher (01)	Active		A00746	0	3(1)	14	10	11/27/1930	M	Muncie	(555) 286-0825	10/04/2017	10/04/2017	10/04/2017	12/02/2017		10/05		10/06					23
Doniel, Mary (01)	Active	Leveille, Anthony	A00501	0	0	0	8	05/22/1947	F	Anderson	(555) 278-2326	10/21/2016	10/22/2016	10/22/2016	12/15/2017	10/16/2017								36
Doring, Mark (A3)	Active	Kalla, Sandra	A00079	0	1	0	60	01/07/1930	M	Westfield	(555) 867-3834	07/19/2017	07/19/2017	07/19/2017	11/15/2017	09/13/2017								6
Dubach, Donald (01)	Active	Salvato, Donna	A00303	0	0	0	11	04/15/1932	M	Indianapolis	(555) 848-4753	01/06/2016	01/06/2016	01/06/2016	10/26/2017	09/26/2017								-14
Dunlevy, Ronald D (01)	Active	Leveille, Anthony	A00542	0	1	0	26	08/06/1935	M	Anderson	(555) 644-9293	12/13/2016	12/14/2016	12/14/2016	12/08/2017	09/20/2017								29
Duos, James (01)	Active	Leveille, Anthony	A00625	0	0	2	38	10/15/1944	M	Elwood	(555) 552-1253	05/05/2017	05/08/2017	05/08/2017	11/03/2017		09/27							-6
Emay, Jason L (A2)	Active	Kalla, Sandra	A00198	0	1	0	6	02/22/1953	M	Noblesville	(555) 457-4678	08/03/2015	07/23/2015	07/23/2015	11/08/2017	10/12/2017								-1
Ericksen, Deborah D (01)	Active	Isassi, Barbara	A00595	0	0	0	11	02/22/1951	F	Muncie	(555) 288-7800	03/23/2017	03/24/2017	03/24/2017	11/18/2017	10/18/2017								9
Fedde, Daniel (01)	Active	Isassi, Barbara	A00678	0	1	0	72	04/12/1965	M	Muncie	(555) 212-6811	06/30/2017	07/02/2017	07/02/2017	12/28/2017									49
Ferguson, Christopher (01)	Active	Matic, John	A00672	0	8	0	43	04/09/1953	M	Muncie	(555) 288-7800	06/28/2017	07/01/2017	07/01/2017	10/28/2017				10/27	*				-12
Filzen, Dorothy (01)	Active		A00755	0	0	1	4	04/04/1971	F	Muncie	(555) 216-5187	10/10/2017	10/10/2017	10/10/2017	12/08/2017		10/10							29
Fingar, Sharon (01)	Active	Kalla, Sandra	A00418	0	0	0	39	12/20/1934	F	Noblesville	(555) 773-7552	06/28/2016	06/30/2016	06/30/2016	11/24/2017									15
Folkers, Elizabeth (01)	Active	Matic, John	A00694	0	0	10	47	04/10/1956	F	Muncie	(555) 288-7800	07/20/2017	07/25/2017	07/25/2017	11/21/2017	09/22/2017	09/22		10/20					12
Fuentes, David (01)	Active	Leveille, Anthony	A00760	0	0	0	1	06/08/1951	M	Anderson	(555) 278-8438	10/11/2017	10/17/2017	10/17/2017	12/15/2017									36
Gahr, Sarah C (01)	Active	Kalla, Sandra	A00566	0	4(1)	0	59	05/05/1968	F	Noblesville	(555) 674-6428	01/30/2017	01/30/2017	01/30/2017	11/25/2017	10/20/2017								16
Garro, Barbara (01)	Active	Matic, John	A00719	0	1	0	17	03/12/1974	F	Muncie	(555) 381-7936	08/29/2017	08/31/2017	08/31/2017	10/29/2017									-11
Gotter, Laura L (A3)	Active	Matic, John	A00559	0	0	0	1	04/23/1953	F	Muncie	(555) 730-8176	08/09/2017	08/11/2017	08/11/2017	10/09/2017									-31
Gupta, Patricia S (01)	Active	Isassi, Barbara	A00072	0	1	1	14	07/29/1955	F	New Castle	(555) 393-5977	10/22/2014	10/22/2014	10/22/2014	12/04/2017	10/25/2017								25
Hafner, Jason (01)	Active		A00764	0	4	0	1	04/09/1971	M	Anderson	(555) 278-4750	10/13/2017	10/14/2017	10/14/2017										9999
Helle, Jennifer (A2)	Active	Ekstein, David	A00605	0	0	0	69	06/25/1931	F	Arcadia	(555) 250-3797	06/07/2017	06/13/2017	06/13/2017	12/09/2017		10/09		09/28	*				30
Hessling, Sharon (01)	Active	Leveille, Anthony	A00273	0	1(1)	0	25	04/16/1957	F	Indianapolis	(555) 253-7625	10/27/2015	10/30/2015	10/30/2015	12/17/2017									38
Hindes, David (01)	Active	Kalla, Sandra	A00332	0	1	0	22	06/08/1955	M	Kokomo	(555) 865-8278	03/02/2016	03/04/2016	03/04/2016	10/24/2017	10/18/2017								-16
Holohan, Lisa (01)	Active	Leveille, Anthony	A00731	0	0	2	24	07/11/1978	F	Muncie	(555) 283-1205	09/20/2017	09/22/2017	09/22/2017	11/20/2017	10/19/2017	10/27		09/25					11
Horace, Donald (01)	Active	Leveille, Anthony	A00733	0	0	0	10	02/01/1962	M	Muncie	(555) 587-0974	09/20/2017	09/21/2017	09/21/2017	11/19/2017		09/25		09/29					10
Jentry, Mary (01)	Active	Matic, John	A00682	0	0	6	34	09/15/1964	F	Muncie	(555) 288-7800	07/06/2017	07/08/2017	07/08/2017	11/04/2017									-5
Karsnak, Charles (01)	Active	Leveille, Anthony	A00569	0	0	0	8	03/05/1948	M	Lapel	(555) 534-6573	02/06/2017	02/07/2017	02/07/2017	12/03/2017	10/02/2017								24
Keehan, Carol (01)	Active	Leveille, Anthony	A00555	0	2	0	103	07/09/1928	F	Summitville	(555) 536-1514	01/05/2017	01/06/2017	01/06/2017	11/01/2017	10/27/2017								-8
Kemfort, Robert (01)	Active	Isassi, Barbara	A00711	0	0	2	25	10/02/1962	M	Muncie	(555) 660-9140	08/16/2017	08/17/2017	08/17/2017	12/14/2017									35
Kershbaumer, Betty (01)	Active	Maclead, Margaret	A00705	0	1	0	11	12/15/1954	F	Anderson	(555) 643-1615	08/04/2017	08/07/2017	08/07/2017	12/04/2017		10/05							25
Kratky, Joseph (01)	Active	Kalla, Sandra	A00223	0	1	0	76	08/09/1921	M	Fishers	(555) 578-4137	07/19/2015	07/20/2015	07/20/2015	11/05/2017									-4
Kuzminski, Elizabeth (A2)	Active	Leveille, Anthony	A0068																					



Blueprint X Patients X Medical Record for Patient Dunlevy, Ronald D (A00542-01) X

Save Study i K 29 of 109 Last Updated A00, 03/24/17 10:13 AM -1000000703

Face Sheet Med Profile MAR Case Analysis Patient Chart PDF Data History Analyzed Items

**Patient**  
Dunlevy, Ronald D (A00542-01)  
2100 Midnight Drive  
Anderson IN 46013  
(555) 644-9293 DoB: 08/06/1935  
Male, Entry Date: 12/13/2016

**Clinical Information**  
Patient Type: Home Health  
Disaster Code: 3-High Risk  
Admit Source: 2-Clinic or Physician  
☐ Do Not Resuscitate

**Client Comment**

**Agency Patient Status History**  
Admission Date 12/14/2016 No Discharge Date  
Start of Care: 12/14/2016 Edit Status

Date	Status	Reason
12/14/2016 10:42 AM	Active	
12/13/2016 03:50 PM	Incomplete	

**Payer Specific Starts of Care and Discharges**  
Edit Client's Payers

Name	SoC	Discharge
Medicaid (A1) (N)		

**Hospital Stays**  
Edit Hospital Stays

Start Date	End Date	Planned	Comment
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**OASIS Documents**  
New CMS OASIS

Info Comp	Assessment Reason
08/09/2017	4-Recertification (follow-up)
06/07/2017	4-Recertification (follow-up)
04/12/2017	4-Recertification (follow-up)
02/08/2017	4-Recertification (follow-up)
12/14/2016	1-Start of Care-further visits planned

**Care Plans and Revisions (VOs)**  
Edit Care Plans and Revisions

Type	CertBegin	CertEnd	VO Date	BenPrd	PchNo
VO	08/11/17	10/09/17	09/07/17	0	A0008268
PoC	08/11/17	10/09/17		0	A0008112
VO	06/12/17	08/10/17	07/26/17	0	A0007830
VO	06/12/17	08/10/17	06/21/17	0	A0007401
PoC	06/12/17	08/10/17		0	A0007250
PoC	04/13/17	06/11/17		0	A0006738
PoC	02/12/17	04/12/17		0	A0006379
PoC	12/14/16	02/11/17		0	A0005887

**Clinical Field Notes**  
Create New Field Note i Visit Start of Care Recert/Resumption Discharge Other

☐ Only show deleted notes

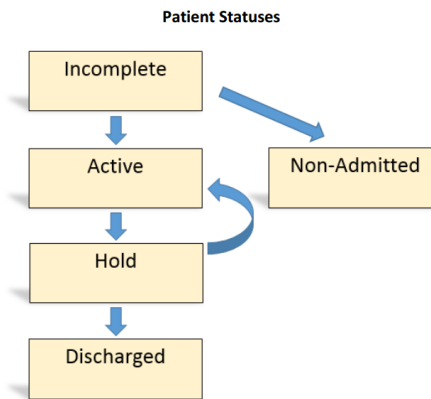
Notes (27)	Status	Date	Created By	Locked On	Locked By	485/VO
Visit Note (Aide)	Locked	10/26/2017 09:07 AM	DPIERCE	10/26/2017 12:58 PM	DPIERCE	
Visit Note (Aide)	Locked	10/25/2017 09:15 AM	DPIERCE	10/25/2017 12:57 PM	DPIERCE	
Visit Note (Aide)	Locked	10/24/2017 09:03 AM	DPIERCE	10/24/2017 12:59 PM	DPIERCE	
Visit Note (Aide)	Locked	10/21/2017 09:03 AM	ABRIER	10/21/2017 12:50 PM	ABRIER	
Recertification (SN) (OASIS)	In Use	10/05/2017 01:30 PM	MARIETTA			A0008612
Visit Note (Aide)	Locked	09/30/2017 09:31 AM	ABRIER	10/02/2017 11:20 AM	ABRIER	
Visit Note (SN)	Locked	09/20/2017 01:45 PM	STRUMBO	10/01/2017 06:13 PM	PFRANKLIN	
Visit Note (SN)	Locked	09/07/2017 09:00 AM	RTILLSON	09/12/2017 10:18 AM	PFRANKLIN	A0008268
Visit Note (SN)	Locked	08/23/2017 12:13 PM	MARIETTA	09/04/2017 01:38 PM	PFRANKLIN	
Recertification (SN) (OASIS)	Locked	08/09/2017 11:00 AM	MARIETTA	09/04/2017 01:37 PM	PFRANKLIN	A0008112
Visit Note (SN)	Locked	07/26/2017 12:30 PM	STRUMBO	08/13/2017 08:01 PM	PFRANKLIN	A0007830
Visit Note (SN)	Locked	07/14/2017 10:00 AM	MARIETTA	08/13/2017 08:00 PM	PFRANKLIN	
Visit Note (SN)	Locked	06/21/2017 10:10 AM	MARIETTA	06/27/2017 03:49 PM	PFRANKLIN	A0007401
Visit Note (SN)	Locked	06/15/2017 08:30 AM	RTILLSON	06/27/2017 03:48 PM	PFRANKLIN	
Recertification (SN) (OASIS)	Locked	06/10/2017 11:30 AM	RTILLSON	06/27/2017 03:48 PM	PFRANKLIN	A0007250
Visit Note (SN)	Locked	05/31/2017 10:15 AM	MARIETTA	06/27/2017 03:35 PM	PFRANKLIN	
Visit Note (SN)	Locked	05/17/2017 09:00 AM	MARIETTA	06/27/2017 03:34 PM	PFRANKLIN	
Visit Note (SN)	Locked	05/03/2017 09:00 AM	MARIETTA	06/24/2017 07:11 PM	PFRANKLIN	
Visit Note (SN)	Locked	04/19/2017 09:15 AM	MARIETTA	04/22/2017 06:50 PM	MARIETTA	
Recertification (SN) (OASIS)	Locked	04/12/2017 09:00 AM	MARIETTA	05/02/2017 02:32 PM	PFRANKLIN	A0006738
Visit Note (SN)	Locked	03/22/2017 09:00 AM	MARIETTA	04/22/2017 05:32 PM	MARIETTA	
Visit Note (SN)	Locked	02/22/2017 09:30 AM	MARIETTA	03/06/2017 08:16 PM	MARIETTA	
Recertification (SN) (OASIS)	Locked	02/08/2017 09:40 AM	MARIETTA	03/10/2017 11:09 AM	PFRANKLIN	A0006379
Visit Note (SN)	Locked	01/25/2017 09:30 AM	MARIETTA	01/25/2017 08:03 PM	MARIETTA	
Visit Note (SN)	Locked	01/11/2017 09:00 AM	MARIETTA	01/11/2017 10:09 AM	MARIETTA	
Visit Note (SN)	Locked	12/28/2016 09:00 AM	MARIETTA	02/17/2017 12:37 PM	PFRANKLIN	
Start Of Care (SN) (OASIS)	Locked	12/14/2016 09:00 AM	MARIETTA	02/17/2017 11:40 AM	PFRANKLIN	A0005887

- The **Medical Records screen** shows the clinical data for the patient – the demographic and payer information for the patient is on the client screen, covered earlier.
- In the upper left corner is the name, address, phone number, date of birth, sex, and entry date that are entered on the client screen.
- Under that are the patient type (used to categorize patient for census reporting), disaster code (used to categorize patients when generating patient list for disaster planning), and the Admit Source (critical for Medicare and Episodic Insurance billing).
- The client comment is below (which is also on the client screen and featured prominently at the bottom of the patient's schedule), and below that is either patient OASIS information or HIS information (HIS information shows for hospice patients).
- At the top middle of the screen is the patient status history, admission and discharge dates.
- Next is the list of the patient's current payer relationships. This is also available from the client screen.
- Next is the history of the patient's hospital stays. These are automatically added when certain Transfer clinical field notes are locked.
- Next are the patient's nursing care plans (485s) and revisions (Vos), ordered with most recent first.
- At the top right are buttons to produce PDFs for the patients face sheet, medication profile (patient current medications), Medication Administration Record (MAR), Case Analysis (clinical case analysis of the clinical field notes), Patient Chart (all field notes including 485s, Vos, and OASIS to one PDF), and the history of all data changes to the patient's clinical data.
- The Analyzed Items button creates a PDF of all the clinical checks done by RiverSoft.
- To the right are the patient's clinical field notes, ordered with most recent first. Although almost all notes are created in the field via RiverSoft Mobile, notes can be created here as well.



### Medical Records screen (continued)

- OASIS and Care Plans/Revisions (485s/Vos) are required to bill most payers. These can be entered directly into RiverSoft Office. **HOWEVER, it is highly recommended instead to have RiverSoft create OASIS and Care Plans/Revisions (485s/Vos) AUTOMATICALLY, by utilizing RiverSoft Mobile to allow your field staff to enter their notes at the patient's location.**



- Best practice is to enter the patient information at time of referral into the client screen with an **incomplete** status. The next step is to schedule an employee to perform a Start of Care visit for the patient. The employee will see this visit in their schedule and create and complete a Start of Care note with RiverSoft Mobile on their tablet or laptop. Once they complete their note it will appear in the list of completed notes in the Clinical Review feature on the Blue Print home page. When the reviewer locks the Start of Care note, both a Start of Care OASIS and a Care Plan (485) will appear in the patient medical record and the patient status will change to **active**. The clinical field note process is covered in detail in RiverSoft University. If instead a Visit Not Admitted note is completed and locked, patient status will be set to **non-admitted**.
- When the office locks a clinical field note the patient's status will change and the billing for the patient will occur nearly automatically. For instance, locking a Medicare patient's Start of Care note will create the OASIS and 485. The first billable visit will have already been verified in the schedule because when the author of the note completed it the timeslip data was processed by the Visit Verifier. When the person responsible for billing clicks the billing button, the RAP invoice and claim for the patient will automatically be created.
- The processing of Transfer notes changes the patient status to **hold** and adds a hospital stay entry.
- The processing of notes with verbal orders creates VO's in the medical record, ready to send to the doctor for signature. For some payers, all care plans (485s) and VO's must be received back signed from the doctor to bill – RiverSoft performs this check for you as part of the billing engine. There are dozens of checks done at the time of billing that ensure when an invoice is created, the payer's requirements have been met. The unbilled report can be run at any time showing items being held from billing because a payer's requirements are not met.
- Locking a Discharge note will optionally set the patient status to **discharged**.
- There are also notes to discharge a skill (like PT, OT, ST) and to discharge a payer.
- When both Medicare and another payer is involved with a patient's care at the same time, when the Medicare service comes to an end, the locking of the Discharge from Agency (OASIS) note provides the user with the ability to JUST DISCHARGE MEDICARE and leave the patient active in the agency.
- In cases where a patient has multiple payers active at the same time, pre-scheduling becomes even more important because the payer is designated on the pre-scheduled visit. This designation is respected by the Visit Verifier. Pre-scheduling visits to clients with the proper payer allows the billing process to operate efficiently.
- For Medicare and Episodic insurance payers, it is important that the payer be selected on the Start of Care 485 because this alerts the billing process that the 485 must be processed.

Blueprint ☒ Patients ☒ Medical Record for Patient Dunlevy, Ronald D (A00542-01) ☒ 485 for Dunlevy, Ronald D (A00542-01) (Note caba17553485) ☒

New  Upd: 006, 07/09/17 03:28 PM ~100005887

**To edit the poc/vo on the right half of the screen, the note status must be 'In Use'.**

Care Plans / Verbal Orders

Issue	Type	Cert Dates	VO Date	BenPrd	Signed	Payer Nm	Poc #
VO	08/11/17 - 10/09/17	09/07/17	0		09/06/17	A1-Medicaid	A0008268
PoC	08/11/17 - 10/09/17		0		08/16/17	A1-Medicaid	A0008112
VO	06/12/17 - 08/10/17	07/26/17	0		06/29/17	A1-Medicaid	A0007830
VO	06/12/17 - 08/10/17	06/21/17	0		06/29/17	A1-Medicaid	A0007401
PoC	06/12/17 - 08/10/17		0		08/16/17	A1-Medicaid	A0007250
PoC	04/13/17 - 06/11/17		0		06/29/17	A1-Medicaid	A0006738
PoC	02/12/17 - 04/12/17		0		03/14/17	A1-Medicaid	A0006379
PoC	12/14/16 - 02/11/17		0		02/21/17	A1-Medicaid	A0005887

This Care Plan/VO Nurse's Signature

Nurse's Name  Clear

Payer and PPS Invoices

Payer: (A1) Medicaid

RAP Invoice:  None Final Invoice:  None

Secondary Physician, Case Manager, and Hospice Benefit Period

Secondary Physician  Benefit Period:  0

Case Manager:

☐ Box 23: use case manager not nurse signature

Comment:

Dates, Phone Log, and Finalize

Mailed:  02/17/2017 ☒ Finalized

Received Signed:  02/21/2017

Face To Face Date:  F2F Received Date:

Verbal SoC:  12/14/2016 Time:  12:00 AM

This Care Plan's History

Status	New Date	User Name	TimeStamp

HOME HEALTH CERTIFICATION AND PLAN OF CARE

90 Days 60 days POC #: A0005887

1. Patient's HI Claim No. 100492162199 2. Start of Care Date 12/14/2016 3. End of Care Date 12/14/2016 4. Medical Record No. A00542-01 5. Provider No. 777

6. Patient's Name and Address Dunlevy, Ronald D 2100 Midnight Drive Anderson, IN 46013 (555) 644-9293

7. Provider's Name, Address and Telephone Number Compassionate Caring Services 700 Green Lane Suite 200 Noblesville, IN 46062-9901 (555) 219-2106

8. Date of Birth 08/05/1935 9. Sex ☒ M ☐ F

10. Medications: Dose/Frequency/Route (New/Changed)

Medication	Dose/Frequency/Route	Date
AMLODIPINE 10 MG ORAL TABLET	1 PO Q AM	12/14/2016
ASPIRIN 81 MG ORAL TABLET	1 PO A AM	12/14/2016
ATORVASTATIN 20 MG ORAL TABLET	1 PO Q AM	12/14/2016
ATORVASTATIN 20 MG ORAL TABLET	1 PO Q HS	12/14/2016
CYMBALETA 20 MG ORAL DELAYED RELEASE CAPSULE	1 PO Q AM	12/14/2016
FUROSEMIDE 20 MG 1 PO AT 2PM FOR LOWER	1 PO Q AM	12/14/2016
EXTRIMITY EDEMA	1 PO Q AM	12/14/2016
FUROSEMIDE 20 MG ORAL TABLET	1 PO Q AM	12/14/2016
SPONAL ANESTHESIA	1 PO Q AM	12/14/2016

11. ICD Principal Diagnosis F10 Mild intellectual disabilities (E) 12/14/2016

12. ICD Surgical Procedure none none

13. ICD Other Pertinent Diagnoses F819 Developmental disorder of scholastic ski 12/14/16 E1165 Type 2 diabetes mellitus with hyperglycemia 12/14/16 I10 Essential (primary) hypertension (E) 12/14/16 R339 Retention of urine, unspecified (E) 12/14/16

14. PMF and Supplies CANE, WALKER, SHOWER BENCH

15. Safety Measures EMERGENCY PHONE NUMBERS DISPLAYED, MEDICATION SAFETY, DIABETIC SAFETY, BATHROOM SAFETY, WALKER

16. Multisystem Assessments Appetite: Good Special diet: NAS LCS

17. Abolition N/A

18.A Functional Limitations

Limitation	Score	Notes
1. Amputation	5	Paralysis
2. Bowel/Bladder (incontinence)	6	Endurance
3. Contracture	7	Amputation
4. Hearing	8	Speech
5. Legally Blind	9	Dyspnea With
6. Minimal Exertion	10	Other (Specify)

18.B Activities Permitted

Activity	Score	Notes
1. Complete Bedrest	1	Partial Weight Bearing
2. Bedrest BRP	2	Independent At Home
3. Up As Tolerated	3	Crutches
4. Transfer Bed/Chair	4	Cane
5. Exercises Prescribed	5	No Restrictions
6. Other	6	Other (Specify)

19. Mental Status

Status	Score	Notes
1. Oriented	1	Forgetful
2. Comatose	2	Depressed
3. Disoriented	3	Agitated
4. Lethargic	4	Other
5. Fair	5	Excellent
6. Good	6	Excellent

20. Prognosis

Prognosis	Score	Notes
1. Poor	1	Guarded
2. Guarded	2	Good
3. Fair	3	Excellent
4. Good	4	Excellent
5. Excellent	5	Excellent

21. Orders for Discipline and Treatments (Specify Amount/Frequency/Duration)

SN: EVERY OTHER WEEK FOR 9 WEEKS  
HHA: 3 W 1, 7 W 8  
TO ASSIST WITH ADLS AND IADLS PER HOME HEALTH AIDE CARE PLAN. EACH VISIT TO LAST 3-4 HOURS.

VISITS MAY BE ALTERED D/T WEATHER EMERGENCIES, MD APPOINTMENTS, PATIENT/FAMILY REQUEST WITHOUT NOTIFYING PHYSICIAN TO CHANGES TO PLAN OF CARE.

(Problems and => Interventions:  
(Diabetes (Knowledge Deficit) [Knowledge Deficit])  
=> SN to Assess for effects of diabetes and instruct patient/caregiver in S/S of hyper/hypoglycemia, peripheral neuropathy, circulation, and skin breakdown including proper foot care with regular inspection of feet.  
(General Assessment SN [1 time only nursing visit])  
=> SN to a SN to ASSESS AND EVALUATE VITAL SIGNS, INCLUDING O2 SATURATIONS.  
=> SN to SN to ASSESS AND EVALUATE SAFETY IN OWN HOME.  
=> SN to SN to ASSESS AND EVALUATE PAIN LEVEL AND PAIN CONTROL.  
=> SN to SN VISIT EVERY TWO WEEKS FOR SUPERVISION OF HOME HEALTH AIDE.  
=> SN to 1 PRN VISIT FOR OASIS/ASSESSMENT COMPLETION IN THE LAST 5 DAYS OF CERTIFICATION.  
(General Nursing [1])  
=> SN to SET UP MEDICATION BOXES FOR 2 WEEKS EVERY 2 WEEKS

22. Goals/Rehabilitation Potential/Discharge Plans

(Status) and => Goals:  
(Ongoing) => Patient/caregiver verbalizes self-care to prevent complications: skin, foot, eye, oral care and patient/caregiver verbalize compliance with appropriate measures of diabetic foot care by 02/11/17.  
(Ongoing) => VITAL SIGNS WILL BE WITHIN PATIENT'S NORMAL RANGE THROUGHOUT CERT. PERIOD. PATIENT WILL HAVE STABLE CARDIOPULMONARY AND RESPIRATORY STATUS THROUGHOUT CERT. PERIOD AS EVIDENCED BY CLEAR BREATH SOUNDS, NO EDEMA, NO REPORTED CHEST PAIN. OXYGEN SATURATIONS WILL BE MAINTAINED ABOVE 92%.  
(Discharge) => PATIENT WILL LIVE SAFELY IN OWN HOME, TOLERATE INCREASED LEVEL OF ACTIVITY WITH NO REPORTED FALLS

23. Clinician's Signature and Date of Verbal SOC Where Applicable

24. Physician's Name and Address Edit Lamb, Chad P (765) 641-7100 141 W 22nd Street Suite 201 Anderson IN 4601 F (765) 641-7115

25. Date Agency Received Signed POT

26. Attending Physician's Signature and Date Signed

- The **485/VO screen** shows the nursing care plans (485) and revisions (VO) for a patient.
- The patient's 485s and VOs are listed at the top left. Clicking on one displays it on the right side.
- Below on the left is information about the current 485/VO.
- On the right side is the WYSIWYG 485 editor.
- When editing a VO, boxes 14 through 20 will be obliterated.
- Normally 485s and VOs are not entered in RiverSoft Office. Instead, they are automatically created by locking a reviewed clinical field note.
- The mailed and received signed date are important because they can affect billing. The mail date is normally set by the Export 485/VO feature on the Blueprint home screen and the received signed date is set when the bar code on the 485/VO is scanned in that same feature.
- The information button on this screen contains more detailed information.

Blueprint ☒ Patients ☒ Medical Record for Patient Dunlevy, Ronald D (A00542-01) ☒ OASIS for Dunlevy, Ronald D (Note caba17553485) ☒

Upd: RS, 11/09/17 06:19 AM -1000001494 Print OASIS

Patient Name: Dunlevy, Ronald D Date of Birth: 0

(M0100) Assessment Reason: 1-[ICD-10] Start of care - further visits planned (V2)

OASIS Tracking

OASIS Status: Exported Locked: 02/17/2017 Exported: 02/20/2017

OASIS Assessment

Patient Tracking M0020-M0150	<input checked="" type="checkbox"/>	Patient History M1000-M1018	<input checked="" type="checkbox"/>	Diagnosis M1021-M1025	<input checked="" type="checkbox"/>	Therapy at Home M1030	<input checked="" type="checkbox"/>
Risk M1033-M1036	<input checked="" type="checkbox"/>	Living Situations M1100	<input checked="" type="checkbox"/>	Sensory M1200-M1230	<input checked="" type="checkbox"/>	Pain M1240-M1242	<input checked="" type="checkbox"/>
Integumentary M1300-M1350	<input checked="" type="checkbox"/>	Respiratory Status M1400-M1410	<input checked="" type="checkbox"/>	Elimination M1600-M1630	<input checked="" type="checkbox"/>	Cognitive M1700-M1720	<input checked="" type="checkbox"/>
Depression M1730	<input checked="" type="checkbox"/>	Behavioral M1740-M1750	<input checked="" type="checkbox"/>	ADL/IADL M1800-M1910	<input checked="" type="checkbox"/>	Medication Management M2000-M2040	<input checked="" type="checkbox"/>
Care Management M2102-M2110	<input checked="" type="checkbox"/>	Therapy Need And Poc M2200-M2250	<input checked="" type="checkbox"/>	Review			

Clinical Note Review

M0150 must be Medicare to calculate pps payment.

PPS Plus OASIS Analysis PDF Analysis of this OASIS by PPSPlus. First analysis begins a 30 free trial; Call PPSPlus at (888) 897-9136 to arrange service at \$299 per Medicare branch ID per month.

SHP OASIS Analysis PDF Analysis of this OASIS by SHP. You must have an SHP account and contact RiverSoft to access this OASIS Analysis tool.

- The **OASIS (Outcome and Assessment Information Set)** screen shows OASIS assessment data for this patient.
- There are OASIS records marking a patient's Start of Care, Transfer, Resumption, Recertification, and Discharge.
- These records can be manually entered in RiverSoft Office, but normally this data is automatically generated upon the locking of a clinical field note that contains OASIS data.
- The "Review" button subjects the data to both CMS dictated consistency checks and RiverSoft's own checking. Additional analysis is available real-time by clicking the PPS Plus OASIS Analysis button. This will send the OASIS data to the PPS Plus server which responds in just a few seconds with a complete analysis to both clinically and financially optimize the OASIS. There is additional charge for this – please contact PPS Plus directly for this additional feature.
- OASIS data is required to bill any Perspective Payment System (PPS) payer, like Medicare and Medicare Advantage replacement payers.
- Once an OASIS is locked, it must be exported to the state. This is done in the Export CMS OASIS feature on the Blueprint home screen.
- Hospice patients have their own flavor of CMS data name HIS. Hospice patients will have HIS entries on the medical record screen instead of OASIS.

Messages(0) Change Login Change Password Lookup Close All

Caregiver's Patients ☐

Clinical Notes	Care Plans	Case Analysis	Face Sheet	Med Profile	Patient Schedule	Travel	Refresh List	Search:	Get: Alfonso, Dorothy S [0001-	Self Schedule	New Patient	Old Patient	i			
								Status:	All (But Discharged / Non Admitted)							
Patients (44)	Status	In Use Notes	Issues	Mobile Grams	Case Manager	Client #	Birth Date	Sex	City	SOC	Sup	PT Eval	OT Eval	ST Eval	Cert End	Auth End
Antonson, Elizabeth (0	Active	0	0	0	Salvato, Dc	A00741	09/02/59	F	New Castl	09/26/17	10/20	10/27	10/26		11/24	
Burries, David (01)	Active	0	0	0	Maticc, Jo	A00765	11/28/49	M	Summitvi	10/17/17		10/17	10/15		12/15	
Campagnone, Kenneth	Active	0	0	0	Maticc, Joh	A00689	08/27/61	M	Muncie	07/17/17					09/14	
Clery, Jason (A3)	Active	0	0	0	Willmscher	A00240	06/14/67	M	Muncie	09/06/17	10/25		10/13		11/04	11/03/17
Collingwood, Sandra (I	Active	0	0	0	Maticc, Joh	A00767	08/20/58	F	Anderson	10/19/17		10/19			12/17	
Copen, Helen (01)	Active	0	0	0	Maticc, Joh	A00720	08/26/40	F	Alexandri	09/05/17	10/20	10/20			11/03	
Dingel, Christopher (0	Active	0	0	0		A00746	11/27/30	M	Muncie	10/04/17		10/05	10/06		12/02	
Donez, Mary E (01)	Incom	0	0	0		A00670	11/24/46	F	Anderson							
Dornhelm, Lisa (01)	Incom	0	0	0		A00514	10/10/30	F	Westfield							
Dyal, Ruth (01)	Hold	0	0	0	Maticc, Joh	A00593	12/20/48	F	Muncie	03/15/17					11/09	
Ferguson, Christophe	Active	0	0	0	Maticc, Joh	A00672	04/09/53	M	Muncie	07/01/17			10/27		10/28	
Folkers, Elizabeth (01)	Active	0	0	0	Maticc, Joh	A00694	04/10/56	F	Muncie	07/25/17		09/22	10/20		11/21	
Garro, Barbara (01)	Active	0	0	0	Maticc, Joh	A00719	03/12/74	F	Muncie	08/31/17					10/29	11/30/17
Gotter, Laura L (A3)	Active	0	0	0	Maticc, Joh	A00559	04/23/53	F	Muncie	08/11/17					10/09	
Heffington, Karen (01)	Incom	0	0	0		A00771	03/17/59	F	Muncie							
Hilb, Christopher (01)	Incom	0	0	0		A00769	04/04/50	M	Muncie							
Jentry, Mary (01)	Active	0	0	0	Maticc, Joh	A00682	09/15/64	F	Muncie	07/08/17					11/04	
Kost, Helen (01)	Incom	0	0	0		A00772	08/13/71	F	New Castl							
Loft, Susan (A2)	Active	0	0	0		A00691	07/27/21	F	New Castl	10/23/17		10/23			12/21	
Lundrigan, Maria (01)	Active	0	0	0	Maticc, Joh	A00704	10/15/54	F	Muncie	08/05/17		10/28	09/29		12/02	
Maccheyne, Linda L (A	Incom	0	0	0		A00536	02/03/40	F	Muncie							
Macconaghy, Betty (01	Active	0	0	0	Willmscher	A00701	06/22/49	F	New Castl	08/02/17		09/29	10/26		11/29	
Miranda, Maria M (A5)	Active	0	0	0		A00212	09/13/51	F	Anderson	10/18/17	10/28	10/24			12/16	09/30/18
Monks, Mary (01)	Incom	0	0	0		A00766	08/13/84	F	Anderson							

- **RiverSoft Mobile** provides nurses and therapists with access to their patient's electronic medical record (EMR). It is specifically designed to work well on laptops and tablets with internet access.
- Once the user logs in, the home screen is their patient list. Patients they are scheduled to see or have created notes for in the past are displayed. Also, all incomplete patients are displayed.
- From the patient list the user can access and create clinical notes, care plans and VOs, and view the patient's case analysis, face sheet, medication profile, and schedule. They can also enter their own travel locations (for the AutoPay Mileage and Travel Time features).
- Self-Schedule lets the user see and change their schedule as well as assign themselves to open visits. It also provides the employee access to their Facesheet+, which includes their demographics, PDF calendar view of their schedule, and a payroll report showing their last two weeks of payroll.
- The New Patient button let's on-call users add brand new patients to the RiverSoft.
- The Old Patient button provides access to discharged patient records.
- The information button provides a detailed tutorial of how to use RiverSoft Mobile.
- Once a clinical note is completed, it will only be available to the Clinical Review in the office. If it is sent back to author for re-work, that corresponding patient's row in author's home screen will become red, calling their attention to any patient that has a note that requires re-work and re-completing.
- Training materials and a comprehension test for RiverSoft Mobile are in RiverSoft University. We strongly recommend that all agencies use the test to ensure their nurses and therapists understand the tools available to them prior to using RiverSoft mobile. Training takes less than 2 hours.
- Messages(0) menu item indicate user has zero new messages. RS messages is an encrypted, HIPAA, user-to-user messaging system.
- Refer to page 59 for a more detailed description of RiverSoft Mobile.

Blueprint Review Clinical Notes													
Note Status: Completed Note Type: All Refresh List Only notes belonging to the logged-in office are listed.													
Notes (161)	Status	Note Date	Created On	Created By	Office	Patient	Patient Status	Case Manager	Affiliation	Payer	Diag Codes	VO	Issue
Discharge (General, Non-OASIS)	Completed	10/11/2017	10/13/2017	STRUMBO	0001	Rivadeneira, Karen	Discharged	Isassi, Barbara	None	Medicaid			*
Discharge From Agency (OASIS)	Completed	10/24/2017	10/29/2017	STRUMBO	0001	Kemfort, Robert	Active	Isassi, Barbara	None	Anthem Healthy Indiana Plan			*
Discharge From Agency (OT) (OASIS)	Completed	10/13/2017	10/13/2017	LSTAFKO	0001	Sommerfeld, Steven	Active	Isassi, Barbara	None	Medicaid			*
Discharge From Agency (OT) (OASIS)	Completed	10/19/2017	10/19/2017	AROTT	0001	Belinsky, Carol	Active	Kalla, Sandra	None	Medicare PGBA			*
Discharge From Agency (PT) (OASIS)	Completed	08/30/2017	08/30/2017	CTAPP	0001	Arns, Sharon	Active	Leveille, Anthony	None				
Discharge From Agency (PT) (OASIS)	Completed	10/10/2017	10/10/2017	CTAPP	0001	Stoy, Jennifer	Active	Maclead, Margaret	None				
Discharge From Agency (PT) (OASIS)	Completed	10/27/2017	10/30/2017	PANONCILLO	0001	Scroggin, Karen	Active	Leveille, Anthony	None	Medicaid			*
Discharge OT	Completed	08/30/2017	09/02/2017	DROYSTON	0001	Arns, Sharon	Active	Leveille, Anthony	None				
Discharge PT	Completed	10/12/2017	10/12/2017	PANONCILLO	0001	Sommerfeld, Steven	Active	Isassi, Barbara	None	Medicaid			*
Discharge PT	Completed	10/19/2017	10/19/2017	CTAPP	0001	Belinsky, Carol	Active	Kalla, Sandra	None				
Discharge PT	Completed	10/30/2017	10/30/2017	CTAPP	0001	Wilbert, Michelle	Active	Leveille, Anthony	None				
Discharge SN	Completed	09/08/2017	10/14/2017	RTILSON	0001	Hietala, Ruth	Discharged	Salvato, Donna	None				*
Evaluation (OT)	Completed	08/23/2017	08/23/2017	DROYSTON	0001	Arns, Sharon	Active	Leveille, Anthony	None	Medicare PGBA			*
Evaluation (OT)	Completed	09/06/2017	09/06/2017	DROYSTON	0001	Clery, Jason	Active	Isassi, Barbara	None	Managed Health Care			*
Evaluation (OT)	Completed	09/29/2017	09/30/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None	Medicare PGBA			*
Evaluation (OT)	Completed	10/06/2017	10/07/2017	DROYSTON	0001	Dingel, Christopher	Active	None	None	Self-Pay			*
Evaluation (OT)	Completed	10/20/2017	10/20/2017	DROYSTON	0001	Folkers, Elizabeth	Active	Matice, John	None				
Evaluation (OT) (OASIS)	Completed	10/19/2017	10/20/2017	AROTT	0001	Calik, George	Active	Salvato, Donna	None	Medicare PGBA			*
Evaluation (OT)	Completed	10/20/2017	10/21/2017	LSTAFKO	0001	Braband, James	Active	Maclead, Margaret	None	Humana Medicare PPO			*
Evaluation (OT)	Completed	10/24/2017	10/24/2017	AROTT	0001	Mayfield, Barbara	Active	Isassi, Barbara	None	Medicare PGBA			*
Evaluation (OT)	Completed	10/25/2017	10/25/2017	LSTAFKO	0001	Calik, George	Active	Salvato, Donna	None	Medicare PGBA			*
Evaluation (OT)	Completed	10/26/2017	10/26/2017	DROYSTON	0001	Macconaghy, Betty	Active	Matice, John	None				
Evaluation (OT)	Completed	10/27/2017	10/28/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None				
Evaluation (PT)	Completed	08/28/2017	08/28/2017	CTAPP	0001	Arns, Sharon	Active	Leveille, Anthony	None	Medicare PGBA			*
Evaluation (PT)	Completed	10/05/2017	10/05/2017	CTAPP	0001	Belinsky, Carol	Active	Kalla, Sandra	None	Medicare PGBA			*
Evaluation (PT)	Completed	10/05/2017	10/05/2017	OACADEMIA	0001	Dingel, Christopher	Active	None	None	Medicare PGBA			*
Evaluation (PT)	Completed	10/12/2017	10/12/2017	CTAPP	0001	Alfonso, Dorothy	Active	Maclead, Margaret	None				
Evaluation (PT)	Completed	10/13/2017	10/13/2017	OACADEMIA	0001	Welsh, Mary	Active	None	None	United Health Care - AARP Complete Choice PPO			*
Evaluation (PT)	Completed	10/16/2017	10/16/2017	CTAPP	0001	Calik, George	Active	Salvato, Donna	None	Medicare PGBA			*
Evaluation (PT)	Completed	10/18/2017	10/18/2017	PANONCILLO	0001	Rivadeneira, Karen	Active	Isassi, Barbara	None	Medicare PGBA			*
Evaluation (PT)	Completed	10/18/2017	10/18/2017	OACADEMIA	0001	Timmerberg, Sandra	Active	Kalla, Sandra	None	Humana Medicare PPO			*
Evaluation (PT)	Completed	10/21/2017	10/21/2017	OACADEMIA	0001	Folkers, Elizabeth	Active	Matice, John	None				
Evaluation (PT)	Completed	10/28/2017	10/28/2017	OACADEMIA	0001	Lundrigan, Maria	Active	Matice, John	None				
Evaluation (PT)	Completed	10/27/2017	10/30/2017	PANONCILLO	0001	Holohan, Lisa	Active	Leveille, Anthony	None	Managed Health Care			*
Evaluation (ST)	Completed	10/06/2017	10/06/2017	SWINN	0001	Dingel, Christopher	Active	None	None	Self-Pay			*
Recertification (SN) (Non-OASIS)	Completed	10/10/2017	10/17/2017	JLEER	0001	Maslanka, Mary	Active	Kalla, Sandra	None	Medicaid			
Recertification (SN) (OASIS)	Completed	03/23/2017	03/23/2017	RTILSON	0001	Gaete, Jason	Discharged	Leveille, Anthony	None	Medicaid			
Recertification (SN) (OASIS)	Completed	05/12/2017	05/12/2017	RTILSON	0001	Gaete, Jason	Discharged	Leveille, Anthony	None	Medicaid			*
Recertification (SN) (OASIS)	Completed	06/06/2017	06/06/2017	RTILSON	0001	Gaete, Jason	Discharged	Leveille, Anthony	None	Medicaid			
Recertification (SN) (OASIS)	Completed	10/06/2017	10/06/2017	RTILSON	0001	Copher, Carol	Active	Leveille, Anthony	None	Medicaid			
Recertification (SN) (OASIS)	Completed	10/25/2017	10/29/2017	STRUMBO	0001	Mayfield, Barbara	Active	Isassi, Barbara	None	Medicare PGBA		Missing	
Resumption Of Care (SN) (OASIS)	Completed	10/24/2017	10/24/2017	RTILSON	0001	Calik, George	Active	Salvato, Donna	None	Medicare PGBA			*
Start Of Care (SN) (OASIS)	Completed	02/21/2017	02/23/2017	MARIETTA	0001	Schwemmer, Elizabeth	Non-Admitted	None	None	Medicaid		Missing	
Start Of Care (SN) (OASIS)	Completed	08/18/2017	08/18/2017	RTILSON	0001	Arns, Sharon	Active	Leveille, Anthony	None	Medicare PGBA		Missing	
Start Of Care (SN) (OASIS)	Completed	10/11/2017	10/11/2017	MARIETTA	0001	Welsh, Mary	Active	None	None	United Health Care - AARP Complete Choice PPO		Missing	
Start Of Care (SN) (OASIS)	Completed	10/11/2017	10/17/2017	STRUMBO	0001	Rivadeneira, Karen	Active	Isassi, Barbara	None	Medicare PGBA		Missing	
Start Of Care (SN) (OASIS)	Completed	10/28/2017	10/28/2017	RTILSON	0001	Wickson, Steven	Incomplete	Leveille, Anthony	None	Anthem Hoosier Care Connect		Missing	
Start Of Care PT (OASIS)	Completed	10/10/2017	10/10/2017	OACADEMIA	0001	Filzen, Dorothy	Active	None	None	Managed Health Care		Missing	
Start Of Care PT (OASIS)	Completed	10/19/2017	10/19/2017	OACADEMIA	0001	Collingwood, Sandra	Active	Matice, John	None	Medicaid		Missing	
Visit Note (OT)	Completed	09/06/2017	09/06/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None				
Visit Note (OT)	Completed	10/04/2017	10/04/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None				
Visit Note (OT)	Completed	10/06/2017	10/06/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None				
Visit Note (OT)	Completed	10/13/2017	10/13/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None				
Visit Note (OT)	Completed	10/13/2017	10/13/2017	DROYSTON	0001	Folkers, Elizabeth	Active	Matice, John	None				
Visit Note (OT)	Completed	10/14/2017	10/14/2017	DROYSTON	0001	Folkers, Elizabeth	Active	Matice, John	None				
Visit Note (OT)	Completed	10/14/2017	10/14/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None				
Visit Note (OT)	Completed	10/12/2017	10/15/2017	DROYSTON	0001	Dingel, Christopher	Active	None	None				
Visit Note (OT)	Completed	10/18/2017	10/18/2017	DROYSTON	0001	Folkers, Elizabeth	Active	Matice, John	None				
Visit Note (OT)	Completed	10/19/2017	10/19/2017	DROYSTON	0001	Lundrigan, Maria	Active	Matice, John	None				
Visit Note (OT)	Completed	10/19/2017	10/19/2017	DROYSTON	0001	Dingel, Christopher	Active	None	None				

- The **Clinical Review** screen provides the designated clinical reviewer(s) for an office to see the completed clinical field notes that have been completed and submitted for review.
- When a note is completed, RiverSoft checks hundreds of items for consistency. For a list of the checks, click the Analyzed Items button at the top right of the Medical Records screen. If a note is completed, it has already survived a comprehensive check.
- This feature allows the clinical reviewer a further chance to review notes for quality. The 485 and Verbal order portion of the notes should be reviewed, especially Rehab Potential and Discharge Planning.
- If a note needs rework by the author, the reviewer must enter instructions in the note's reviewer/author conference area. This will cause the note to go back to "In Use". The owning patient will prominently appear in the author's RiverSoft Mobile home screen
- It is not uncommon for field users to only enter diagnosis code descriptions -they can complete their notes without diagnosis codes. Note missing diagnoses codes show the word "Missing" in the Diag Codes column – these must be completed to lock the note. Many agencies have experts to do this specific task.
- If a note contains a verbal order, the VO field will contain a \*. These should be reviewed.
- If a note's reviewer/author conference area contains information, the Issue column will contain a \*.
- Changing the note status pull-down to In Use will show all the notes the field staff is working on.

- **AutoPay Mileage** calculates the mileage traveled by each participating employee between the employee's visit, travel locations, and possibly their home. It then updates each visit with a mileage pay amount based on the number of miles needed to travel to that visit's location times the **Travel Pay Cents per Mile** entered at the top of the screen.
- It is crucial to read the information button on this feature before trying it and to use it only for one or two employees at first until you become accustomed to resolving problems with addresses. To activate an employee for this feature, add the attribute *Calculate Mileage* to their employee record.

- **AutoPay Travel Pay** calculates the time traveled by each participating employee between the employee's visit, travel locations, and possibly their home. It then creates a pay item for the number of hours calculated at the **Base Travel Time Wage** entered at the top of the screen.
- It is crucial to read the information button on this feature before trying it and to use it only for one or two employees at first until you become accustomed to resolving problems with addresses. To activate an employee for this feature, add the attribute *Calculate Travel Pay* to their employee record.
- **AutoPay Mileage and AutoPay Travel Pay BOTH MUST BE USED PRIOR TO CLOSING THE WEEK.**



Blueprint X Close Week X

Close Week Cancel i

THE DEFAULT CLOSE THRU DATE IS YOUR OFFICE'S MOST RECENT WEEK ENDING

Close Visits, Services, Supplies, and Pay Items with care dates thru: 11/04/2017

Close week for selected offices

Office Code	Office Name	Last Closed Thru
0001	Main Office	10/21/2017

- **Close Week** produces the reports used to review the items and then optionally closes the payitems, service items, supply items, and verified visits. Once closed, payroll and billing can proceed in parallel - one person can do payroll and another can create invoices and claims and transmit the new claims.
- Verified visits and newly entered service items, supply items, and pay items will all be closed by this process if their care date is on or before the date at the top of the screen.
- Normally, the verified visit report will be generated including alerts for questionable visits. If unclosed pay items exist, a pay item report will be generated; likewise for service items and supply items. These reports will appear in a separate PDF window so that you can review them on the screen or print them. After the reports appear, another window will appear indicating the number of pre-close reports created. This window will encourage you to review the reports and ask if you want to continue closing the week. If upon review the reports look accurate, click the 'Yes' button to close the week. Otherwise click 'No' and apply any fixes that are needed. Then repeat the close week process.
- A copy of each pre-close report is automatically saved to the SAMSERVER directory in the folder Reports\_CloseWeek.
- If an item is found to be incorrect, like a pay item has a wrong amount, the item can be fixed with a simple edit. But once the item is closed, if the sales amount is wrong it must be adjusted on the invoice, and if the cost is wrong, it must be adjusted on the schedule.
- It is MUCH less work to fix an item before it is closed, so it is STRONGLY recommended to review the pre-close reports prior to closing.
- Items are closed so that they cannot be changed without an audit trail. Because visits are related to paper or electronic documents that prove they were done, closing the item prevents tampering with the financial data. Any change to a closed item must be done with an adjustment that provides a change history.

Do Not Create Export File - Just Create Payroll Export Report ▾
Do Not Create Export File - Just Create Payroll Export Report
ADP Paydata (one row per employee - only Reg and OT)
ADP Autopay(Requires ADP Company in office))
ADP All Pay Types
Account Mate
Advanced Payroll Systems (ED required)
ALLTIME
Ceridian (ED required)
CertiPay
CYMA
GEMS
MAS200 (ED required)
Millenium (ED required)
Navision
OneSource (ED required)
Ovation
Paychex
PayChoice (ED required)
PrimePay
Sage
Simple
Timeclock
Ultipro
Ultipro857
USA
US Personnel (ED required)
PayChex Online

- **Export Payroll** produces a payroll posting file suitable for input into the above third-party payroll systems.
- The Export Payroll feature finds closed visits, pay items, and their adjustments that have not been marked as payrolled and
  1. Creates a Payroll Export Report in PDF format
  2. Optionally creates a posting file matching the specification of the selected vendor
  3. Marks the visits, pay items and their adjustments as posted and stamps them with the date they were exported.

Blueprint X Unbilled Report X

Date and Case Manager  
 Range: 05/09/2017 - 11/09/2017 Case Manager: Any

Filters

Client Types: ☒ Patient ☒ Facility ☒ Client  
 Employee Types: ☒ Field ☒ Contractors ☒ Staff  
 Items: ☒ Visits ☒ Mileage ☒ Supplies ☒ Services ☒ PayItems ☒ Care Plans

Unbilled Reasons:

(0) \*\*\* Ready to Bill \*\*\*  
 (1) \*\*\* Episode/Period Not Ended \*\*\*  
 (2) No Care Plan  
 (4) No Referring Diagnosis  
 (5) Unmailed Plan of Care  
 (6) Care Plan Not Signed By Doctor  
 (7) Verbal Order Not Signed By Doctor  
 (8) Overlapping Care Plans  
 (9) Care Plan Has No Diagnosis Code  
 (10) Care Plan Has No Face to Face Date

☒ Show 'Too Early' Items ☒ Show Redundant Items ☐ Show 'DoNotBill' Items ☐ Show Only First Unbilled Reason

Office: 1 Client (Choose office(s) to see clients):

Main Office (0001)

AAA Rest Home [0001-A00773-01]  
 Abasta, Donna J [0001-A00030-01]  
 Abed, Carol G [0001-A00529-01]  
 Acevado, Maria [0001-A00234-01]  
 Ahlaus, Jennifer [0001-A00100-01]  
 Alfonso, Dorothy S [0001-A00724-01]

Payer Class:

Branch Pay-Nobill  
 Episodic Insurance  
 Facility  
 Government  
 Insurance  
 Medicaid

Skill:

CNA  
 Companion  
 HHA  
 Homemaker  
 LPN  
 LVN  
 MSW  
 NA  
 OTA  
 Office Staff  
 OT  
 PCA  
 PTA  
 PT  
 RN

Payer (Choose office(s) to see payers):

Self-Pay [00019999]  
 Anthem BCBS Blue Access PPO [0001-H016]  
 Anthem BCBS PPO [0001-H006]  
 Anthem Healthy Indiana Plan [0001-H014]  
 Anthem Hoosier Care Connect [0001-H010]  
 Area Five Choice Program [0001-H011]

Sort Options

Sort By: Default (office-class-payer-client)

Display Options

☐ Suppress Details ☐ Office Totals ☐ Client Totals  
☐ PayerClass Totals ☐ Payer Totals

- **Unbilled Items** are the visits, supply items, service items, and pay items that are closed but not invoiced.
- The **Create Invoices and Claims** feature acts upon the pool of unbilled items.
- This report is the primary means of determining and resolving the issues that prevent invoices from being created. This report should be run at least daily and the problems it identifies should be continuously in the process of resolution.
- In RiverSoft Office, a visit, service, supply, or payitem is not considered a sale until it belongs to an invoice. There are more than 50 reasons why a closed visit, service, supply, or payitem may not belong to an invoice, the first among them being that the item is ready to bill and billing has not been performed. The complete list of possible unbilled reasons is in the Reason list by which the report can be filtered.
- To reduce the size of the report, you can choose to suppress the 'To Early' items. These are items that are waiting for their billing end period to pass or to be closed and do not require action to resolve. Choosing not to show redundant items, or items being held from invoicing for the exact same reason as another item, will also greatly reduce the size of the report. Choosing not to show DoNotBill items will suppress the closed items that were marked as Do Not Bill on the schedule and further reduce the size of the report.
- If your case manager employees are mainly responsible for resolving the majority of the issues, selecting a case manager will show only the unbilled items for the patients that have that case manager tied to the patient 485.

Blueprint X
Create Invoices and Claims X

Create Invoices
Quit
i

Filters
Invoice Items Since: 11/09/2015
Office: 1
Payer Class:
Main Office (0001)
Branch Pay-Nobill
Episodic Insurance
Facility
Government
Insurance
Medicaid
Medicaid Waiver
Medicare
Private Pay
Sub-Contract/Agencies
Client (Choose office(s) to see clients):
AAA Rest Home [0001-A00773-01]
Abasta, Donna J [0001-A00030-01]
Abed, Carol G [0001-A00529-01]
Acevado, Maria [0001-A00234-01]
Ahaus, Jennifer [0001-A00100-01]
Alfonso, Dorothy S [0001-A00724-01]
Alsobrooks, Carol E [0001-A00592-01]
Alverado, Margaret [0001-A00067-01]
Amargo, Nancy [0001-A00645-01]
Anagnos, Lisa [0001-A00382-01]
Anding, Anthony P [0001-A00289-01]
Anestos, Jennifer [0001-A00082-01]
Payer (Choose office(s) to see payers):
Self-Pay [00019999]
Anthem BCBS Blue Access PPO [0001-H016]
Anthem BCBS PPO [0001-H006]
Anthem Healthy Indiana Plan [0001-H014]
Anthem Hoosier Care Connect [0001-H010]
Area Five Choice Program [0001-H011]
CareSource Medicare Advantage [0001-H020]
CICOA Choice Program [0001-H018]
CMCS Advantage Health Solutions Inc [0001-H007]
Humana HMO Medicare [0001-H005]
Humana Medicare PPO [0001-H009]
IU Health [0001-H019]

- **Create Invoices and Claims** attempts to create the appropriate invoices and claims for the selected office.
- This feature creates Invoices and claims for printing or electronic transmission. A report is generated in the SERVERSAM directory in the folder Reports\_CreateInvoices summarizing created invoices and items that remain unbilled.
- The **Invoice Item Since** date is how far back the invoice process looks for unbilled items. Both the invoice process and the unbilled report default to looking back two years.
- Medicare and episodic insurance payers are billed by the care plan. Hospice is billed by the month. All other payers (including Self-Pay) are be billed weekly, bi-weekly, monthly, or by their own specific set of periods that are configured on their configuration screen.
- Private payers and self-pay clients normally prefer a bill in the form of an invoice. All other payers normally prefer a claim form: a UB04 or a HCFA 1500.
- Invoicing should normally be done every week after last week's schedules have been verified and closed. For Medicare and Episodic Insurance, billing should be done directly after an item's unbilled reason has been resolved - as much as daily. For instance, if a RAP bill for a Medicare visit has not been billed because the associated plan of care was missing the date received-signed and that date has been entered, you should immediately create invoices for that client and transmit the UB04 that is created.

- **Manage Invoices** is the central control area for keeping your accounts receivable tidy.
- The invoice list can be filtered by date range, by what is owed, by client payment method, or you can enter a specific invoice number (10 digits).
- The invoice list can also be filtered by office, payer class, payer, and client.
- Each invoice rows contains service dates, description (shows the type of claim associated with the invoice), client, payer, affiliation, invoice amount, total cash applied, owed, creation date, invoice date (end date of the billing period), xmit date (date the associated claim was transmitted), xmit age (the number of days since transmission), final (shows blank if still in *draft* mode), deadline (number of days until the bill will not be accepted), denial date (date at which a resubmission will be denied), and last log (the date the last collection log was entered).
- If multiple lines are selected, the dollar total will be displayed at the top of the list.





## Manage Invoices (continued)

- The invoice is the account receivable entity that represents sales in the system and that is aged on the aging report. However, invoices are rarely sent to the payer, because most payer require either a paper or electronic claim. The appropriate claim (UB04 or CMS1500) is automatically created and associated with the invoice and can be edited via the Edit Claim button.

**Edit UB04 Claim**

Page: 1 of 1

Compassionate Care Services  
700 Green Lane Suite 200  
Nashville, TN 37203-4801

INSURANCE: 0001A12388  
POLICY: A00013001  
DATE: 09/22/17

PATIENT NAME: Helen, Helen  
DOB: 10/17/57  
SEX: F

PROVIDER: 3551 219-2106  
NPI: 10014776699

LOCATION: 1400 Banana Court Apt 354  
Mantle, IN 47302

DATE OF SERVICE: 09/22/17

ICD-9 CODE	ICD-9 DESCRIPTION	ICD-9 CODE	ICD-9 DESCRIPTION	DATE	QUANTITY	UNIT	CHARGE	ALLOWED	PAID
552	88 / 80C	9960TD	9960TD	09/22/17	2.00		63.06	0.00	
572	88A	9960D	9960D	09/23/17	3.00		54.93	0.00	

TOTAL CHARGE: \$117.99  
TOTAL ALLOWED: \$0.00  
TOTAL PAID: \$0.00

DATE: 11/02/17

- UB04 WYSIWYG Editor

**Edit CMS-1500 Claim**

Page: 1 of 1

Compassionate Care Services  
700 Green Lane Suite 200  
Nashville, TN 37203-4801

INSURANCE: 0001A12388  
POLICY: A00013001  
DATE: 09/22/17

PATIENT NAME: Karen Rivasdenira  
DOB: 01/26/1949  
SEX: F

PROVIDER: 3551 219-2106  
NPI: 10014776699

LOCATION: 1400 Banana Court Apt 354  
Mantle, IN 47302

DATE OF SERVICE: 09/22/17

ICD-9 CODE	ICD-9 DESCRIPTION	ICD-9 CODE	ICD-9 DESCRIPTION	DATE	QUANTITY	UNIT	CHARGE	ALLOWED	PAID
552	88 / 80C	9960TD	9960TD	09/22/17	2.00		63.06	0.00	
572	88A	9960D	9960D	09/23/17	3.00		54.93	0.00	

TOTAL CHARGE: \$117.99  
TOTAL ALLOWED: \$0.00  
TOTAL PAID: \$0.00

DATE: 11/02/17

- CMS1500 WYSIWYG Editor

- **Manage Invoices – Adjust Details**
- Adjustments to invoice detail lines are done with this screen. You can edit the date, unit, and rate fields OR you can rebill the line item to another payer, but you cannot do both. A visit's subskill may also be changed.
- If you change the date or sub-skill of a visit, not only is the invoice affected, but the scheduled closed visit is updated with the new date and sub-skill - a visit on the schedule shows its adjusted values. This is done so that minor visit entry mistakes that don't affect the cost of the visit but that severely impact billing can be easily corrected. The scheduled visit's billing history on the edit visit screen will show that the date and/or sub-skill has changed. Sub-skills are especially important for Medicare and some state programs, and this feature makes it easy to fix an invoice.
- Once you save your work, a new version of the invoice will be created and the invoice list on the invoices screen will be refreshed. If this screen was invoked from the visit editor, the visit screen will refresh, and you will see the visit's billing history updated with this adjustment.
- If you would like to adjust the total amount of the invoice to account for a contractual allowance, a discount, or a write-off, close this screen and use the Adjust Invoice screen.

**Invoice Adjustment**

Save Adjustment

**Client:** Rohlf, Michael  
**Invoice No:** 0001A12419-01  
**Payer:** Medicaid Waiver  
**Bill From-To:** 09/24/2017-09/30/2017

Enter either the New Invoice Amount OR the Adjustment amount

Current Invoice Amount	New Invoice Amount			Adjustment Amount
\$1,105.92	\$1,105.92	-- OR --		\$0.00

**Adjustment Type:**

**Description (optional, 50 chars displays on invoice):**

- **Manage Invoices – Adjust Invoice**

- This screen allows the entry of write-off, contractual allowance, accrued-interest, and other invoice level adjustments. You have the option of entering the new invoice amount or the adjustment amount, whichever you find easier.
- If you have received payment for the invoice and wish to write-off the remaining balance, it is easier to enter the new amount of the invoice because it is equal to the amount of the payment - you don't need to do any math. The screen will calculate the adjustment amount for you when you enter the new invoice amount.
- If you are entering a contractual allowance adjustment prior to the invoice being paid, it will be easier to enter the adjustment amount and let the screen calculate the new invoice amount.
- The amount owed on an invoice is the amount of the invoice minus the cash applied to the invoice. If you are trying to remove an invoice from the aging, you need to reduce the owed amount to \$0. This is done by entering the negative of the owed amount as the adjustment amount (this will reduce the current invoice to the amount owed).
- Once the amount of the adjustment is entered, you must choose the type of adjustment and optionally enter a reason for the adjustment - this text will appear on the resulting invoice. Saving the screen and exiting back to the invoice list will show you the resulting invoices.
- Write-Off adjustments can be classified into write-off types; when the adjustment type of Write-Off is chosen, a list of Write-Off Reasons will appear. Reporting of write-off adjustments is available on the sales-cost-margin report under as invoice adjust sub types.
- PPS invoices are either RAP (Request Anticipated Payment) or EOE invoices (End of Episode). The RAP invoices may be adjusted like other non-PPS (Perspective Payment System) invoices via a Write Off, Contractual Allowance, Accrued Interest, or Other Invoice Adjustment. EOE adjustment can only be adjusted via a Write Off or Other (PPS Episode Categorization). The final invoices for an episode should be categorized with an episode type so that the PPS Episode Report can provide the required Medicare Cost Reporting statistics. If you choose a RAP invoice, the episode type field will not appear as ONLY the final/EOE invoice should be categorized with an episode type. No change to the invoice amount is required when creating an invoice adjustment to categorize the episode with an episode type. If the episode type field is entered, the adjustment type is set to "other". If you are writing-off the invoice, choose the adjustment type of "write-off" - no episode type is required for write-offs.

Invoice No.	Start Date	End Date	Code	Client	Payer
0001A12515-01	10/03/17	10/06/17	CMS1500	Anthony Tjarks(A2)	Medicaid Waiver (H00)
0001A12516-01					aid waiver (H00)
0001A12517-01					aid waiver (H00)
0001A12518-01					aid waiver (H00)
0001A12519-01					aid waiver (H00)
0001A12520-01					aid waiver (H00)
0001A12521-01					aid waiver (H00)
0001A12522-01					aid waiver (H00)
0001A12523-01					aid waiver (H00)
0001A12524-01					aid waiver (H00)
0001A12525-01					aid waiver (H00)
0001A12526-01					aid waiver (H00)
0001A12527-01					aid waiver (H00)
0001A12528-01					aid waiver (H00)
0001A12529-01					ed Health Care
0001A12530-01	09/22/17	09/22/17	UB04	Lisa Holohan(01)	Managed Health Care
0001A12531-01	09/25/17	09/29/17	UB04	Lisa Holohan(01)	Managed Health Care

Rebill Invoice

Save

i

Client: Anthony Tjarks

Invoice No: A12515

Bill From-To: 10/01/2017 - 10/07/2017

Current Payer: Medicaid Waiver (A2)

Rebill to Payer

- **Manage Invoices – Rebill Invoice** - rebills this invoice's items to another of the client's payers. Every item on the invoice is adjusted to \$0, creating a new version of this invoice with a total of \$0. Each item is associated to the new payer and will appear on a new invoice for the chosen payer when invoices are next created. Invoice adjustments and item adjustment are not carried forward to the new payer's bill. Also, if the item is a visit, the bill rates for the new payer will be used to create the new invoice, so the sum total adjusted from the original bill and the total of the new payer's bill may not be \$0.

Unbill: Are you sure?

?

Are you sure you want to unbill invoice(s)?

Yes

No

- **Manage Invoices – Rebill Invoice(s)** – rebills the selected invoices to the **same** payer. This is handy when a agency begins working with a new payer and you are still learning its unique billing requirements. It may take a few configuration attempts to get claim to adhere precisely to all the payer's requirements. Rebilling adjust the selected invoices to \$0, and frees all of the items on those invoices to be invoiced again using updated payer requirements.



Invoice No	Invoice Date	Invoice Due Date	UB04	Client Name	Payer
0001A12509-01	08/31/17	08/31/17	UB04	John Yago(A2)	Medicaid (H001)
0001A12510-02	09/05/17	09/05/17			
0001A12511-01	09/05/17	09/05/17			
0001A12512-01	09/26/17	09/26/17			
0001A12513-01	10/01/17	10/01/17			
0001A12514-01	10/06/17	10/06/17			
0001A12515-01	10/03/17	10/03/17			
0001A12516-01	10/01/17	10/01/17			
0001A12517-01	09/13/17	09/13/17			
0001A12518-01	09/18/17	09/18/17			
0001A12519-01	09/25/17	09/25/17			
0001A12520-01	10/02/17	10/02/17			
0001A12521-01	10/03/17	10/03/17			
0001A12522-01	10/01/17	10/01/17			
0001A12523-01	10/02/17	10/02/17			
0001A12524-01	10/04/17	10/04/17			
0001A12525-01	10/06/17	10/06/17			
0001A12526-01	10/02/17	10/02/17			
0001A12527-01	10/02/17	10/02/17			
0001A12528-01	10/01/17	10/01/17			
0001A12529-01	10/01/17	10/01/17			
0001A12530-01	09/22/17	09/22/17			
0001A12531-01	09/25/17	09/25/17			
0001A12532-01	10/06/17	10/06/17			
0001A12533-02	10/02/17	10/02/17			
0001A12534-01	10/06/17	10/06/17			
0001A12535-01	10/03/17	10/03/17			
0001A12536-01	10/03/17	10/03/17			
0001A12537-01	10/03/17	10/03/17			
0001A12538-01	10/02/17	10/02/17			
0001A12539-01	10/03/17	10/03/17			
0001A12540-01	07/17/17	09/13/17	UB04-E0E72	George Trevino(A3)	Medicare PGRS (H001)

Create Co-Pay Invoice

Save

i

Client:

Yago, John M

Invoice No:

0001A12509-01

Invoice Amt:

77.91

Payer:

Medicaid

Fraction Payer is Responsible For:

1.00

Bill From-To:

08/31/2017-08/31/2017

Enter the amount you want the Co-Pay To: payer to pay.  
This amount will be subtracted from the Medicaid  
invoice and a new invoice for the Co-Pay To: payer will be created.

Co-Pay Amount:

0.00

Invoice Co-Pay To:

Self-Pay

Description (optional):

- **Manage Invoices – Create Co-Pay** – By entering a co-pay amount, a new version of this invoice will be created reduced by the copay amount and a new invoice for the co-pay will be created for the payer (or self-pay) selected.
- For example, if Medicaid pays for all of a client's services on an invoice except for a \$100 copay, enter \$100 as the copay. When you save and return to the invoice list, you will see that the Medicaid invoice has been reduced by \$100 and that there is a new invoice for the client for \$100.
- A new invoice and claim will be created for the Co-pay payer that includes all of the details on the original payer's claim but for a dollar amount equal to the Co-pay entered. You should transmit this new claim to the new payer. If the copay is to the client, simply mail the client the new invoice.
- **Manage Invoices – Auto Co-Pay** - By entering the **Fraction Payer is Responsible For: 1.00** on a client-payer relationship with a value between 0 and 1.00, you will allow all invoices for that client-payer relationship to use the Auto Co-Pay feature. Payer's that require a client copay can then be accommodated by normally creating invoices then selecting all of the created invoices for that payer and clicking the Auto Co-Pay button. This will adjust the selected invoices downward and create invoices for the client copay.



Offices: All  
Payer Classes: All  
Client: Robert Spannuth(A2)

## Aging Report

Aged by Invoice Created Date As Of: 11/10/2017  
Payers: All  
Totals By: Default

Invoices created and cash applied earlier than 11/10/2015 are excluded

Invoice	Current Original	Billing Dates Service Dates	Created	First xmit Last xmit	30 Days	60 Days	90 Days	120 Days	150 Days	180 Days	>180 Days
Client: Robert Spannuth (0001-A00649-A2) ID:902968415 DoB:04/17/1962 SSN:***-**-1214 Sex:M											
A12179	\$3,491.94 \$3,491.94	08/28/17-08/28/17 08/28/17-08/28/17	09/12/17	09/12/17		\$68.12					
Cash applied on 10/13/17 for \$3423.82() [09/12/17:004]RiverSoftOffice AutoAdd: Claim Transmission Failure => Error: (09/12/17) Submitter ID missing for payer United Health Care - AARP Complete Choice PPO and the payer is using ECS style 42. [10/11/17:004]RiverSoftOffice AutoAdd: Claim Transmission Failure => Error: (10/11/17) Submitter ID missing for payer United Health Care - AARP Complete Choice PPO and the payer is using ECS style 42.											
A12607	\$2,327.96 \$2,327.96	08/28/17-10/10/17 08/28/17-10/10/17	10/18/17		\$2,327.96						
Client Total: Robert Spannuth					\$2,396.08	\$2,327.96	\$68.12				
Total					\$2,396.08	\$2,327.96	\$68.12				
						97.16%	2.84%	0.00%	0.00%	0.00%	0.00%

Days Says Outstanding (DSO)	= Total AR / (Sales During Period / Days in Period)	37.05
Best Possible DSO	= AR During Period / (Sales During Period / Days in Period)	37.05
Days in DSO Period		90.00
Sales During DSO Period		\$5,819.90
AR During DSO Period		\$2,396.08

- **Manage Invoices – Aging** – Selecting an invoice and then clicking the Aging button generates and invoice aging for the client associated with the invoice. This provides one-click access to not only the account receivable profile for the patient and all of the patient's payer relationships, but all of the account/collect logs, cash applications, adjustments, and Days Sales Outstanding (DSO).
- The Aging report available from the Review Aging button on the Blueprint home screen provides access to the Aging Report screen where an agency wide report can be generated.

Blueprint X

Aging Report X

Date

Type: Invoice Creation Date

As Of Date: 11/10/2017

Exclude Invoices and Cash Prior To

Include Cash Applied After As of Date

Filters

DSO Period Days: 90

Balances Older Than (Days): 0

Show Paid Invoices

Invoice Balances Over (\$99,999.00)

Client Balances Over (\$99,999.00)

Client Balances Under \$99,999.00

Office: 1

Payer Class:

Main Office (0001)

Branch Pay-Nobill

Episodic Insurance

Facility

Government

Insurance

Medicaid

Client (Choose office(s) to see clients):

Payer (Choose office(s) to see payers):

AAA Rest Home [0001-A00773-01]

Abasta, Donna J [0001-A00030-01]

Abed, Carol G [0001-A00529-01]

Acevado, Maria [0001-A00234-01]

Ahaus, Jennifer [0001-A00100-01]

Alfonso, Dorothy S [0001-A00724-01]

Alsobrooks, Carol E [0001-A00592-01]

Alverado, Margaret [0001-A00067-01]

Amargo, Nancy [0001-A00645-01]

Anagnos, Lisa [0001-A00382-01]

Anding, Anthony P [0001-A00289-01]

Anastos, Jennifer [0001-A00082-01]

Self-Pay

Anthem BCBS Blue Access PPO [0001-H016]

Anthem BCBS PPO [0001-H006]

Anthem Healthy Indiana Plan [0001-H014]

Anthem Hoosier Care Connect [0001-H010]

Area Five Choice Program [0001-H011]

CareSource Medicare Advantage [0001-H020]

CICOA Choice Program [0001-H018]

CMCS Advantage Health Solutions Inc [0001-H007]

Humana HMO Medicare [0001-H005]

Humana Medicare PPO [0001-H009]

IU Health [0001-H019]

Order By: Default (office-class-payer-client)

For Client, Order Invoices By: Invoice #

Display Options

Show Payments-Adjustments

Show Account Logs

Show PayerClass Totals

Show Office Totals

New Page by Client

Show Collection Logs

Suppress Details

Show Payer Totals

Show Client Totals

### Account Statement

Client: Dyal, Ruth [Ins ID: 494563719A]  
Payer: Medicare PGBA

Client #: A00593-01

Printed: 11/13/2017 07:00 AM

Created	Type	Transaction Description	Charge	Payment	Balance
04/13/17	0001A10250	Service Dates: 03/15/2017-03/15/2017	3,444.13		
04/21/17	Applied Cash	Ck:EFT4469906; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21710300843007IN8,376.93			
04/21/17	Adjustment (02)	Other Invoice on 04/21/17 Reason: RiverSoftOffice Auto Added	-67.20		
07/17/17	Applied Cash	Ck:EFT4708416; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21710300843007IN8,376.93			
07/18/17	Adjustment (03)	Other Invoice on 07/18/17 Reason: RiverSoftOffice Auto Added	-3,376.93		
					0.00
05/22/17	0001A10658	Service Dates: 03/15/2017-05/13/2017	2,296.08		
07/17/17	Applied Cash	Ck:EFT4708416; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21718001494807IN6,515.66			
07/18/17	Adjustment (02)	Other Invoice on 07/18/17 Reason: EOE Normal, RiverSoftOffice Auto Added	2,219.58		
07/26/17	Applied Cash	Ck:905259977; From: Medicaid; RIVERSOFTOFFICE TCN:2017196008718		0.00	
					0.00
06/01/17	0001A10797	Service Dates: 05/15/2017-05/15/2017	2,962.75		
06/09/17	Applied Cash	Ck:EFT4611318; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21715202720007IN2,904.95			
06/09/17	Adjustment (02)	Other Invoice on 06/09/17 Reason: RiverSoftOffice Auto Added	-57.80		
09/12/17	Applied Cash	Ck:REMIT00551; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21715202720007IN2,904.95			
09/15/17	Adjustment (03)	Other Invoice on 09/15/17 Reason: RiverSoftOffice Auto Added	-2,904.95		
					0.00
07/30/17	0001A11497	Service Dates: 05/15/2017-07/12/2017	2,962.75		
09/12/17	Applied Cash	Ck:REMIT00551; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21723701006607IN4,031.85			
09/15/17	Adjustment (02)	Other Invoice on 09/15/17 Reason: EOE Normal, RiverSoftOffice Auto Added	2,069.10		
09/20/17	Applied Cash	Ck:905308783; From: Medicaid; RIVERSOFTOFFICE TCN:2017255026345		0.00	
					0.00
07/26/17	0001A11492	Service Dates: 07/19/2017-07/19/2017	2,572.19		
07/21/17	Non-Sales	Non-Sales	-2,572.19		
08/03/17	Applied Cash	Ck:EFT4763546; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21720701284007IN2,522.01			
08/04/17	Adjustment (03)	Other Invoice on 08/04/17 Reason: RiverSoftOffice Auto Added	2,522.01		
					0.00
07/31/17	0001A11502	Service Dates: 07/19/2017-07/19/2017	2,572.19		
					2,572.19
09/17/17	0001A12261	Service Dates: 07/19/2017-09/10/2017	2,572.20		
					2,572.20
09/20/17	0001A12319	Service Dates: 09/11/2017-09/11/2017	2,572.19		
09/28/17	Applied Cash	Ck:EFT4921331; From: Medicare PGBA; RIVERSOFTOFFICE TCN:21726301677107IN2,522.01			
09/29/17	Adjustment (02)	Other Invoice on 09/29/17 Reason: RiverSoftOffice Auto Added	-50.18		
					0.00
Page 1 of 1			Unallocated: 0.00	19,735.92	14,591.53 5,144.39

ABC HomeCare  
**ABC Homecare**  
700 Green Lane Suite 200  
Noblesville, IN 46062-8901

**Please Address Inquiries to:**  
ABC Homecare - Main Office  
700 Green Lane Suite 200  
Noblesville, IN 46062-8901  
(555) 219-2106 **Federal ID:** 464157522

Ruth Dyal  
1900 Beige Drive  
Apt 3  
Muncie, IN 47302

- **Manage Invoices – Statement** – Selecting an invoice and then clicking the Statement button generates a statement for the selected client. The financial statement shows all invoices, adjustments, and cash applications providing backing for the client’s account balance.
- The Statement report generates statements for all clients and payers in an agency.

Blueprint ☐
Reports ☐
Account Statement ☒

Self-Pay Statements
All Client Statements
All Client Statements Payer Filter:

**Invoice Date**

Range: 05/14/2017 - 11/10/2017

**Filters**

Client Name Starts With:

Client: ▼

Payer (Choose Client to see payers):

**Display Options**

☒ Show Only Invoices with Non-Zero Balances

☒ Show Only Statements with Non-Zero Balances

☐ Show Payer Address Instead of Client Address

**Statement Memo**

Blueprint

Claims

UB-04

Preview Print Claim

Create 837i File

Edit UB-04

Re-Create Claim

Change To CMS-1500

View Invoice

Statement

Collect Log

Date

09/01/2017

11/10/2017

Date Type

Creation Date

Show Owe

Show All Claims Regardless of Owe

Invoice #

Show Not Transmitted Only

Hide \$0 Invoices

Filters

Office:

Main Office (0001)

Payer Class:

Branch Pay-Nobill

Epicure Insurance

Facility

Government

Insurance

Medicaid

Medicaid Waiver

Medicare

Private Pay

Payer (Choose office(s) to see payers):

Client (Choose office(s) to see clients):

Total Claim \$'s

Selected

\$6,550.01

Claim List

Build or Refresh Claim List - Click This Whenever You Change the Date or Filters

Finalize (DRAFT message not printed)

Print Red Claim Form

Print No Claim Form

0.00

0.00

Show Compliance

Claims (480)	Serv From	Serv To	Client (Admit)	Payer	ECS	NPI	SubmittID	PayID	ReceiveID	ProvID	Claim	Invoice	Owed	Inv Dt	Created Dt	Update Dt	Final Dt	Deadline	Denial Dt	First Xt	Last Xt	Xt Age	Xmit	Xmit Status
000012063-01	05/20/17	07/18/17	Jeff Navarette(01)	Medicare PDBA (H000)	42	126855001	777	\$6,550.01	\$5,655.66	\$0.00	07/18/17	09/01/17	09/06/17	11/06/17	191	09/01/17	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	70	N	Error: (11/06/17)
000012064-01	07/27/17	08/19/17	Jennifer Vivant(01)	Medicare PDBA (H000)	42	126855001	777	\$1,400.01	\$1,474.28	\$1,474.28	08/19/17	09/05/17	09/06/17	10/17/17	259	10/17/17	10/17/17	10/17/17	10/17/17	10/17/17	10/17/17	24	Y	Warning: (10/17/17)
000012065-01	07/27/17	08/19/17	William Kriss(01)	Medicare PDBA (H000)	42	126855001	777	\$1,400.01	\$1,107.82	\$1,107.82	08/19/17	09/05/17	09/06/17	10/17/17	259	10/17/17	10/17/17	10/17/17	10/17/17	10/17/17	10/17/17	24	Y	Warning: (10/17/17)
000012066-01	08/05/17	08/05/17	Maria Lundgrin(01)	Medicare PDBA (H000)	42	126855001	777	\$0.00	\$3,193.72	\$0.00	08/05/17	09/05/17	09/06/17	09/06/17	268	09/05/17	09/05/17	09/05/17	09/05/17	09/05/17	66	Y	Warning: (10/17/17)	
000012067-01	08/14/17	08/14/17	Laura Busacca(01)	Medicare PDBA (H000)	42	126855001	777	\$0.00	\$1,261.12	\$0.00	08/14/17	09/05/17	09/06/17	09/06/17	277	09/05/17	09/05/17	09/05/17	09/05/17	09/05/17	66	Y	Warning: (10/17/17)	
000012068-01	06/13/17	08/13/17	Laura Busacca(01)	Medicare PDBA (H000)	42	126855001	777	\$5,445.01	\$2,471.79	\$0.00	08/13/17	09/05/17	09/06/17	09/27/17	215	09/05/17	09/05/17	09/05/17	09/05/17	09/05/17	44	Y	Warning: (10/17/17)	
000012069-01	08/12/17	08/12/17	Robert Trimble(A2)	Medicare PDBA (H000)	42	126855001	777	\$0.00	\$2,522.01	\$0.00	08/12/17	09/05/17	09/06/17	09/06/17	275	09/05/17	09/05/17	09/05/17	09/05/17	09/05/17	66	Y	Warning: (10/17/17)	
000012070-01	06/13/17	08/10/17	Robert Trimble(A2)	Medicare PDBA (H000)	42	126855001	777	\$2,800.01	\$3,724.24	\$0.00	08/10/17	09/05/17	09/06/17	09/22/17	215	09/05/17	09/05/17	09/05/17	09/05/17	09/05/17	49	Y	Warning: (10/17/17)	
000012071-01	08/18/17	08/18/17	Susan Seggerman(01)	Medicare PDBA (H000)	42	126855001	777	\$0.00	\$0.00	\$0.00	08/18/17	09/05/17	09/06/17	09/06/17	307	09/05/17	09/05/17	09/05/17	09/05/17	09/05/17	66	Y	Warning: (10/17/17)	
000012072-01	06/05/17	07/26/17	James Braband(01)	Humana Medicare PPO (H005)	42	126855001	777	\$4,600.01	\$2,327.96	\$762.14	07/26/17	09/05/17	09/13/17	09/13/17	203	09/13/17	09/13/17	09/13/17	09/13/17	09/13/17	0	N	Error: (09/13/17)	
000012074-01	08/27/17	08/31/17	Richard Stallcup(01)	Medicaid (H001)	83	126855001	777	\$425.20	\$553.72	\$9.84	08/31/17	09/06/17	09/06/17	11/06/17	290	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	4	Y	Warning: (10/17/17)	
000012075-01	09/01/17	09/01/17	Richard Stallcup(01)	Medicaid (H001)	83	126855001	777	\$246.48	\$176.61	(\$4.56)	09/01/17	09/06/17	09/06/17	09/06/17	295	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012078-01	08/28/17	08/31/17	Anthony Tjarks(A2)	Medicaid (H001)	83	126855001	777	\$256.14	\$352.73	(\$7.98)	08/31/17	09/06/17	09/06/17	09/20/17	291	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	51	Y	Warning: (10/17/17)	
000012080-01	09/01/17	09/01/17	Anthony Tjarks(A2)	Medicaid (H001)	83	126855001	777	\$91.55	\$123.68	(\$2.85)	09/01/17	09/06/17	09/06/17	09/20/17	295	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	51	Y	Warning: (10/17/17)	
000012081-01	08/29/17	08/31/17	David Hinde(01)	Medicaid (H001)	83	126855001	777	\$73.24	\$137.50	(\$2.18)	08/31/17	09/06/17	09/06/17	09/06/17	292	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012082-01	09/01/17	09/01/17	David Hinde(01)	Medicaid (H001)	83	126855001	777	\$36.62	\$68.75	(\$1.14)	09/01/17	09/06/17	09/06/17	09/06/17	296	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012083-01	08/28/17	08/28/17	Michelle Charles(A2)	Medicaid (H001)	83	126855001	777	\$18.31	\$50.44	(\$0.17)	08/31/17	09/06/17	09/06/17	09/06/17	291	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012084-01	08/27/17	08/27/17	Sarah Reuteler(01)	Medicaid (H001)	83	126855001	777	\$54.93	\$87.06	(\$1.71)	08/31/17	09/06/17	09/06/17	09/06/17	290	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012085-01	08/27/17	08/27/17	Donald Dubach(01)	Medicaid (H001)	83	126855001	777	\$54.93	\$87.06	(\$1.71)	08/31/17	09/06/17	09/06/17	09/06/17	290	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012086-01	08/07/17	08/07/17	Betty Kerstbaumer(01)	Medicaid (H001)	83	126855001	777	\$50.79	\$0.00	\$0.00	08/07/17	09/06/17	09/06/17	09/20/17	307	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	51	Y	Warning: (10/17/17)	
000012087-01	08/28/17	08/28/17	Karen Calder(01)	Medicaid (H001)	83	126855001	777	\$73.24	\$201.76	(\$2.18)	08/31/17	09/06/17	09/06/17	09/06/17	291	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012088-01	09/01/17	09/01/17	Karen Calder(01)	Medicaid (H001)	83	126855001	777	\$18.31	\$50.44	(\$0.17)	09/01/17	09/06/17	09/06/17	09/06/17	295	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012089-01	08/28/17	08/30/17	Edward Areteaga(A2)	Medicaid (H001)	83	126855001	777	\$73.24	\$137.50	(\$2.18)	08/31/17	09/06/17	09/06/17	09/06/17	291	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012090-01	09/01/17	09/01/17	Edward Areteaga(A2)	Medicaid (H001)	83	126855001	777	\$36.62	\$68.75	(\$1.14)	09/01/17	09/06/17	09/06/17	09/06/17	296	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012091-01	08/28/17	08/28/17	Deborah Erickson(01)	Medicaid (H001)	83	126855001	777	\$54.93	\$151.32	(\$1.71)	08/31/17	09/06/17	09/06/17	09/06/17	291	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012092-01	08/28/17	08/28/17	Sharon Finger(01)	Medicaid (H001)	83	126855001	777	\$192.26	\$320.78	(\$34.30)	08/31/17	09/06/17	09/06/17	09/06/17	291	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012093-01	09/01/17	09/01/17	Sharon Finger(01)	Medicaid (H001)	83	126855001	777	\$64.09	\$131.36	(\$11.43)	09/01/17	09/06/17	09/06/17	09/06/17	295	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012094-01	08/15/17	08/15/17	Steven Sommerfeld(A2)	Medicaid (H001)	83	126855001	777	\$126.17	\$190.43	(\$7.48)	08/15/17	09/06/17	09/06/17	09/06/17	278	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012095-01	08/21/17	08/21/17	Steven Sommerfeld(A2)	Medicaid (H001)	83	126855001	777	\$168.26	\$296.78	(\$12.36)	08/21/17	09/06/17	09/06/17	09/06/17	284	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012096-01	08/29/17	08/31/17	Steven Sommerfeld(A2)	Medicaid (H001)	83	126855001	777	\$168.26	\$232.52	(\$12.36)	08/31/17	09/06/17	09/06/17	09/06/17	292	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012097-01	08/21/17	08/21/17	Carol Cooper(01)	Medicaid (H001)	83	126855001	777	\$168.26	\$296.78	(\$12.36)	08/21/17	09/06/17	09/06/17	09/06/17	286	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012098-01	08/29/17	08/29/17	Carol Cooper(01)	Medicaid (H001)	83	126855001	777	\$168.26	\$296.78	(\$12.36)	08/29/17	09/06/17	09/06/17	09/06/17	292	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012099-01	08/07/17	08/07/17	Sandra Depauli(A2)	Medicaid (H001)	83	126855001	777	\$18.31	\$50.44	(\$0.17)	08/07/17	09/06/17	09/06/17	09/06/17	270	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012100-01	08/31/17	08/31/17	Sandra Depauli(A2)	Medicaid (H001)	83	126855001	777	\$18.31	\$50.44	(\$0.17)	08/31/17	09/06/17	09/06/17	09/06/17	291	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012101-01	09/01/17	09/01/17	Ronald Dunley(01)	Medicaid (H001)	83	126855001	777	\$146.48	\$230.74	(\$4.56)	09/01/17	09/06/17	09/06/17	09/06/17	295	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012102-01	08/11/17	08/11/17	Elizabeth Lopenan(01)	Medicaid (H001)	83	126855001	777	\$292.96	\$387.22	(\$9.12)	08/11/17	09/06/17	09/06/17	09/06/17	274	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65	Y	Warning: (10/17/17)	
000012103-01	08/13/17	08/13/17	Elizabeth Lopenan(01)	Medicaid (H001)	83	126855001	777	\$947.55	\$1,172.44	(\$34.23)	08/13/17	09/06/17	09/06/17	09/06/17	276	09/06/17	09/06/17	09/06/17	09/06/17	09/06/17	65			



Blueprint X
Process Claim Remittances X

Apply Cash
Just Read
Cancel Read
*i*
All Claims
Paid In Full
Denied
Partial
Not Found
Negative
Applied
Adjustments
Provider Adjustments
Move Files

☐ Include Claim Detail Lines (Must select a file and use the Just Read or Apply Cash button)  
☐ Add Claim Adjustment Reasons to Collection Log (Only used when applying cash)

Large files take approximately 1 minute per MB to process

Filters
Browse
C:\SERVERSAM\Claim Remits
\* Applied and Adjustments columns only show values when cash is applied immediately

Files (4)	Payment Date	File Date	Processed / Payments in File	All Claims	Paid In Full	Denied	Partial	Not Found	Negative	Applied	Adjustments	Provider Adjustments
5010835.20170411.0440	04/11/2017	08/28/2017	0/1	31	0	3	16	0	12	0	0	0
9249898963_TRI.dat	01/19/2017	01/20/2017	0/1	2	2	0	0	0	0	0	0	0
1902865835_837p_223830335.dat		02/07/2017		0	0	0	0	0	0	0	0	0
1902865835_837p_223830548.dat		02/07/2017		0	0	0	0	0	0	0	0	0

- **Process Remittance (835)** – This feature is used to translate claim response files which cannot easily be read in their encoded form. It allows you to see which invoices were paid and how much they were paid and to automatically create payments, cash applications, and adjustments.
- Normally, for Medicare, invoices are automatically adjusted to be equal to the cash applied to them because most sites have that setting in their SAM.ini configuration file (Ini\_Auto\_Medicare\_Adjustments, T). RAP invoices are adjusted to \$0 and End of Episode (EOE) invoices are adjusted to the final episode payment
- If the **ADJEOETOEPISODE** payer switch is being used, processing the 835 causes an adjustment to the final invoice to the amount of the episode (the RAP + EOE). This will cause the invoice to be underpaid in most cases, so it will remain on the aging until it is adjusted. You may want this behavior to force you to account for the payment differences for 2% down-coding, or therapy down-coding, or any another reason – the reason is entered when entering the invoice adjustment to remove the EOE invoice from the aging.
- If the **NORAPADJWHENOPAY** payer switch is used, when a \$0 payment is encountered for a RAP, the cash will be applied but no automatic adjustment will be done, forcing the user to take an action to resolve the RAP.
- When you enter this screen, all files in the default directory are translated immediately, unless the file is greater than 1 MB in size. Those files need to be processed manually. Files greater than 1 MB in size are in pink, and if you hover over the filename the tooltip displays the file size. To process a large file, click the filename and press the Just Read button. You can cancel reading the file at any time, but you cannot cancel the Apply Cash function.
- **Process Response (27\*)** – This feature processes claim response files from your payer and creates collection logs that can then be easily seen on the aging.

Blueprint X Reports X Client Dispatch X

Select Clients (86)

All Clients or Manually Multi Select: 1

Alfonso, Dorothy S (A00724-01)  
 Antonson, Elizabeth (A00741-01)  
 Areizaga, Edward A (A00027-A2)  
 Belinsky, Carol (A00710-01)  
 Boid, Elizabeth E (A00657-01)  
 Braband, James (A00646-A2)  
 Briganti, Patricia (A00758-01)  
 Burries, David (A00765-01)  
 Busacca, Laura (A00453-01)  
 Calder, Karen (A00389-01)  
 Calk, George (A00754-01)  
 Casis, Susan (A00756-01)  
 Clery, Jason (A00240-A3)  
 Collingwood, Sandra (A00767-01)  
 Copher, Carol L (A00706-01)  
 Czaplicki, Kenneth (A00431-01)  
 Deitrick, Lisa (A00748-01)  
 Deluzio, Karen (A00420-A3)  
 Depaoli, Sandra (A00472-A2)  
 Dingel, Christopher (A00746-01)  
 Doniel, Mary (A00501-01)  
 Doring, Mark (A00079-A3)  
 Dubach, Donald (A00303-01)

Visit Dates

Range: 11/05/2017 - 11/11/2017

Filters

Affiliation: All

Name Starts With:

Display Options

Layout: Care Statement

One PDF per client will be created in folder n:\reports ClientCareStatement

☐ Email password protected file to each patient

Email Body Text: Hello! Attached please find your Statement of Care from your home ca  
Thanks for your business!

☒ Include visit schedule in Care Statement

☒ Include 485/VOs in Care Statement

☒ Include Medication Profile in Care Statement

☒ Include Self-Pay Statement in Care Statement

Time Format: Show Times

Last Day of Week: Saturday

☐ Show Compliance ☐ Show Only First Name

☒ Show Unassigned Visits

- **Client Care Statements**– Periodically a Care Statement should be given to each patient. A care statement contains the patient's face sheet (demographics and aide care plan) and any combination of the following:
  - 1) patient's schedule in both calendar and list format
  - 2) patient's care plans (485s) and verbal orders - all of them
  - 3) patient's current medication profile
  - 4) patient's self-pay financial statement
- The agency can designate a PDF document to preface each care statement that contains information about the agency, especially clinical contact information for the patient. This should be made to look as professional as possible because all the agency's patients (and probably their families) will see it.
- The care statements can be printed or sent as encrypted email attachments.
- **This is a great alternative over a patient portal because clients are not required to have yet ANOTHER username and password to remember!**

Blueprint X		Reports X		
AR and Billing	Clinical	Items And Payroll	Blank Forms	Other
Aging AR Balancing GL Entries Interim Royalty Invoice Register Payments & Cash Cash Applications Operations Overview Sales/Costs/Margin Cost Statements Unbilled	FaceToFaceTracking Hospice Audit Hospice Patients Medication Profile (MAR) Next Supervisory Visit OASIS Clinical Outcomes OASIS Discharge Disposition and Emergent Care OASIS Missing OASIS Inconsistencies OASIS Tracking Patient List Patient Classification Patient Census By Service (For Survey) Patient Census By Status (For Survey) Patient Admissions/Discharges (For Survey) Patient Medication Profile POC Missing POC Recertification Due POC Tracking POC/Verbal Order PPS Audit PPS Episodes Value Based Purchasing	Calculate Visit Mileage Calculate Travel Pay ELVIS Visits Filled Visits General Visit ObamaCare Qualification Overtime Overtime Audit Pay Item Payroll Salaried Visits Service Item List Service List Supply Item List Supply List Verified Visit Visit Exceptions - Missing Visits Visit Transportation	Blank CMS 1500 Blank UB-04 Blank Face To Face Blank Face To Face #2 Blank Plan of Care (485/487) Blank TX Plan of Care (485/487) Blank Verbal Order Blank Fax Cover Sheet	Bill Rates Client Dispatch Client List Client/Payer List Compliance Summary Custom SQL Query Employee Dispatch Employee List Employee Tracking Expiring Compliance Rules Login Count On Call Payer List Pay Rates Physician List Phone Logs Referrals Strategic Timesheets Unfiled New MAT Episodes User List

- Census and Survey reports
- When a state surveyor walks into your office, you will be expected to provide a list of your active patients, list of your patients admitted during a particular date range, and a list of patients discharged during a particular date range along with each patients discharge disposition and reason.
- The highlighted reports above should be all that your need.
- Because it is a stressful time when the state surveyor visits you, if you struggle with providing the proper report, CALL RIVERSOFT! WE WILL GUIDE YOU THROUGH THE PROCESS IN REAL TIME!

Blueprint X Reports X Sales Report X

Date  
 Inv Creation Dates: 11/03/2017 - 11/10/2017 Overhead Rate: SN PT OT ST MSW OTHER  
 Service Dates: - 12/31/9999 0 % \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00

Filters  
 Client Types: ☒ Patient ☒ Facility ☒ Client Employee Types: ☒ Field ☒ Contractors ☒ Staff Employee: All  
 Item Types: ☒ Visits ☒ Mileage ☒ Supplies ☒ Services ☒ Payitems ☐ Balance Forwards ☐ Use Avg Cost Per Skill ☐ Use 0\$ For Salaried Cost  
 Transaction Types: ☒ Items ☐ Just Rebills ☒ Item Adjustments Invoice Adjustments: All  
 Show Client Data (When Client Totals Shown): ☐ Addr/Phone ☐ Age/Race/Sex ☐ Diagnoses ☐ Affiliation/Refer ☐ SoC/Discharge ☐ Dob ☐ Case Mgr ☐ Doctor ☐ Comment

Office: 1 Payer Class:  
 Main Office (0001)  
 Branch Pay-Nobill  
 Episodic Insurance  
 Facility  
 Government  
 Insurance  
 Medicaid

Client (Choose office(s) to see clients):  
 AAA Rest Home [0001-A00773-01]  
 Abasta, Donna J [0001-A00030-01]  
 Abed, Carol G [0001-A00529-01]  
 Acevado, Maria [0001-A00234-01]  
 Ahaus, Jennifer [0001-A00100-01]  
 Alfonso, Dorothy S [0001-A00724-01]

Payer (Choose office(s) to see payers):  
 Self-Pay [00019999]  
 Anthem BCBS Blue Access PPO [0001-H016]  
 Anthem BCBS PPO [0001-H006]  
 Anthem Healthy Indiana Plan [0001-H014]  
 Anthem Hoosier Care Connect [0001-H010]  
 Area Five Choice Program [0001-H011]

Total Options: Clear Up To 5 Levels of Sorting and Totals Total  
 1st Sort: Office ☒  
 2nd Sort: Payer Class ☒  
 3rd Sort: Payer ☒  
 4th Sort: Client ☒  
 5th Sort: -none- ☐

Display Options:  
☐ Suppress Details ☐ Cost Table Details  
☐ Separate CoPay  
☐ Active Clients Only  
☐ Totals Table (\*not generated for Excel and CSV formats)

- Sales/Cost/Margin report
- Sales are items (visits, services, supplies, and pay items) that are invoiced and invoice adjustments. If an item has been closed but not invoiced, it is not a sale and it is reported on the **unbilled items report**.
- This is the primary sales reporting mechanism in RiverSoft Office and shows sales, the cost of those sales, and gross margin. This report can be filtered by client, employee, item, and transaction type.
- This report provides five levels of sorting/totaling options. By using the feature, most federal (like Medicare) and state (like Medicaid) cost reports can be created using this report. For instance, If you want a report that shows you gross margin by referral with sub-totals by case manager and sub-totals within that by office and payer class, you would select Referral Source from the Total By filter, Case Manager from the Sub-Total By filter, and choose Show Office Totals and Show Payerclass totals.

Payer Classes: All  
Payers: All  
Offices: Main Office (0001)  
Clients: All

## AR Balancing Report

Date Range: 09/01/2017 - 10/01/2017

Total Invoiced Sales For Payer Class	Episodic Insurance	\$14,163.81
Total Invoiced Sales For Payer Class	Insurance	\$14,372.25
Total Invoiced Sales For Payer Class	Medicaid	\$27,686.49
Total Invoiced Sales For Payer Class	Medicaid Waiver	\$12,169.70
Total Invoiced Sales For Payer Class	Medicare	\$109,267.23
Total Invoiced Sales For Payer Class	Self-Pay	\$272.00
Total Invoiced Sales For Office	Main Office	\$177,931.48

Total Cash Applied For Payer Class	Episodic Insurance	\$6,870.93
Total Cash Applied For Payer Class	Insurance	\$19,295.87
Total Cash Applied For Payer Class	Medicaid	\$28,846.03
Total Cash Applied For Payer Class	Medicaid Waiver	\$13,880.20
Total Cash Applied For Payer Class	Medicare	\$119,541.52
Total Cash Applied For Office	Main Office	\$188,434.55

Accounts Receivable as of	09/01/17	=	\$471,380.11
Accounts Receivable as of	10/01/17	=	\$460,605.04
Change in Accounts Receivable Between	9/2/2017-10/01/17	=	(\$10,775.07)

Invoiced Sales	9/2/2017-10/01/17	+	\$177,931.48
Cash Applied During to Invoices Created During or Before	9/2/2017-10/01/17	-	\$188,434.55
Invoiced Sales - Cash Applied	9/2/2017-10/01/17	=	(\$10,503.07)

Total Payments 193048.22	9/2/2017-10/01/17	+	\$193,048.22
Cash Applied From Total Payments	9/2/2017-10/01/17	-	\$188,434.55
Total Change to Unallocated Payments	9/2/2017-10/01/17	=	\$4,613.67

Pmt_Off_Code	Pmt_ID	Payer	Client	Invoice #	Invoice Date	Cash Date	Cash Applied
0001	A01515	Shirley Bibb	Karen Deluzio	0001A12316	09/20/17	08/11/17	\$68.00
0001	A01515	Shirley Bibb	Karen Deluzio	0001A12371	09/27/17	08/11/17	\$68.00
0001	A01515	Shirley Bibb	Karen Deluzio	0001A12140	09/06/17	08/11/17	\$68.00
0001	A01515	Shirley Bibb	Karen Deluzio	0001A12238	09/13/17	08/11/17	\$68.00
Total of Cash Applications applied earlier than the invoice's creation date:							\$272.00

- **AR Roll-forward** / Balancing report
- This report shows you whether you are increasing or decreasing your receivables. This is "MUST HAVE" information to have to manage your agency's cash flow. An AR graph is available on the dashboard.
- **THIS REPORT IGNORES CASH AND SALES ON THE FROM DATE** so that it can balance **two aging as of dates**. Because sales on the first date of the date range are ignored, if you are running a sales report to match this report, the sales report's from date must be the day after the first date of this report. If you are balancing the sales report for June 1 to June 30, enter May 31 to June 30 on this report.
  1. Shows total invoiced sales and total cash applied during a date range and is used to perform an Aging Roll-Forward:
  2. Run an aging report by INVOICE CREATION DATE for a beginning date and another for an ending date, like 12/31/2011 and 1/31/2012.
  3. Run this report for the EXACT same date range.
  4. The first 'Accounts Receivable as of' number on this report should equal the number from the beginning aging.
  5. The second 'Accounts Receivable as of' number on this report should equal the number from the ending aging.
  6. The 'Invoiced Sales Between' number minus the 'Cash Applied During to Invoices Created During or Before' number is the difference between ending and the beginning aging.



Blueprint X General Ledger X

Choose Accounting Period

☐ Recognize cost by transaction date, not invoice creation date

Filters

Office:

- 03-Buffalo (0003)
- 04-Rochester (0004)
- 05-Fairmont (0005)
- 06-Marshall (0006)
- 07-Mankato (0007)
- 08-Hutchinson (0008)
- 09-St. Cloud (0009)
- 10-Blaine (0010)
- Corporate (0001)

Edit Accounting Periods

Edit GL Account Mapping

☒ Show Payments

☒ Show Cash Applications

☒ Show Sales and Costs

☒ Show GL Entries

☒ Show Dept-Emp-Service GL Entry Elements

Blueprint X General Ledger X General Ledger Accounts X

GL Mappings Based on Payer Class

Payer Class: \* The "1" Payer Class holds the default GL Mappings

Item Based Categories

Visits

Sales +	Sales -	Cost +	Cost -	Trn Sales -	Trn Cost +	Stat +

New Save Delete Cancel

Supplies

Sales +	Sales -	Cost +	Cost -
11500	44500	54500	79500

New Save Delete Cancel

Pay Items

Type	Sales +	Sales -	Cost +	Cost -
Bonus (affects Overtime)	11500	41000	55200	51999
Bonus (doesn't affect Overtime)	11500	41000	55200	51999
Holiday	11500	41000	55300	51999
In-House Training	11500	41000	68000	51999
In-Office Temp	11500	41000	72000	51999
On-Call	11500	41000	56500	51999
Other No Tax	11500	41000	68100	51999
Other Tax	11500	41000	68100	51999
Reimbursement	11500	41000	68100	51999
Show Up	11500	41000	68100	51999
Sick	11500	41000	55500	51999
Uniform Allowance	11500	41000	68100	51999
Vacation	11500	41000	55400	51999
All Others	11500	44500	54500	79500

New Save Delete Cancel

Services

Type	Sales +	Sales -	Cost +	Cost -
Flu shots	11500	44900	54900	51999
Hepatitis	11500	41000	54950	51999
In-Touch Installation	11500	46000	56000	50999
In-Touch Monitoring	11500	46050	56050	50999
All Others	11500	41000	72000	51999

New Save Delete Cancel

Sales tax, Adjustments, Payments, and Cash Apps

Sales Tax

Type	Sales +	Sales -
Sales Tax	11500	23600

Save Delete Cancel

Invoice Adjustments

Type	Sales +	Sales -
Write Offs	11999	11500
Contractual Allowance	45600	11500

New Save Delete Cancel

Payments

Type	Sales +	Sales -
Payments	10010	11596

New Save Delete Cancel

Cash Applications

Type	Sales +	Sales -
Cash Applications	11596	11500

New Save Delete Cancel

Other GL Mappings

Visit Skill - Segment 3

Type	#
CNA	600
Companion	700
HHA	600
LPN	100
LVN	100
MSW	500
NA	600
OT	300
PCA	700
PT	200
RN	100
ST	400

New Save Delete Cancel

Visit Unit (Dept) - Segment 5 - Not Editable

V - 010

H - 020

U - 030

Q - 040

## GL Entries

- This feature creates journal entries to import into your General Ledger software.
- Use the Edit GL Account Mapping button to create a mapping for the debit and credit accounts for the sales and cost by payer class for visits, supplies, pay items, and services.
- Run the report and test how the mapped accounts are attached to the selected accounting period's payments, cash, sales, and cost. If any account is wrong, fix the mapping.
- Once the mapping looks correct, click just the "Show GL Entries" option and create an Excel or CSV output file (whichever our GL software prefers) instead of the PDF output.

## Reports

AR and Billing	Clinical	Items And Payroll	Blank Forms	Other
Aging AR Balancing GL Entries Interim Royalty Invoice Register Payments & Cash Cash Applications Sales/Costs/Margin Statements Unbilled	FaceToFaceTracking Hospice Audit Hospice Patients Medication Profile (MAR) Next Supervisory Visit OASIS Clinical Outcomes OASIS Discharge Disposition and Emergent Care OASIS Missing OASIS Inconsistencies OASIS Tracking Patient List Patient Classification Patient Census By Service (For Survey) Patient Census By Status (For Survey) Patient Admissions/Discharges (For Survey) Patient Medication Profile POC Missing POC Recertification Due POC Tracking POC/Verbal Order PPS Audit PPS Episodes	Calculate Visit Mileage Calculate Visit Mileage (beta) Calculate Travel Pay ELVIS Visits Filled Visits General Visit ObamaCare Qualification Overtime Pay Item Payroll Salaried Visits Service Item Service List Supply Item Supply List Verified Visit Visit Transportation	Blank CMS 1500 Blank UB-04 Blank Face To Face Blank Face To Face #2 Blank Plan of Care (485/487) Blank TX Plan of Care (485/487) Blank Verbal Order Blank Fax Cover Sheet	Bill Rates Custom SQL Query Client Dispatch Client/Facility List Client/Payer List Compliance Summary Employee Dispatch Employee List Employee Tracking Expiring Compliance Rules Login Count On Call Payer List Pay Rates Physician List Phone Logs Referrals Strategic Timesheets Unfiled New MAT Episodes User List

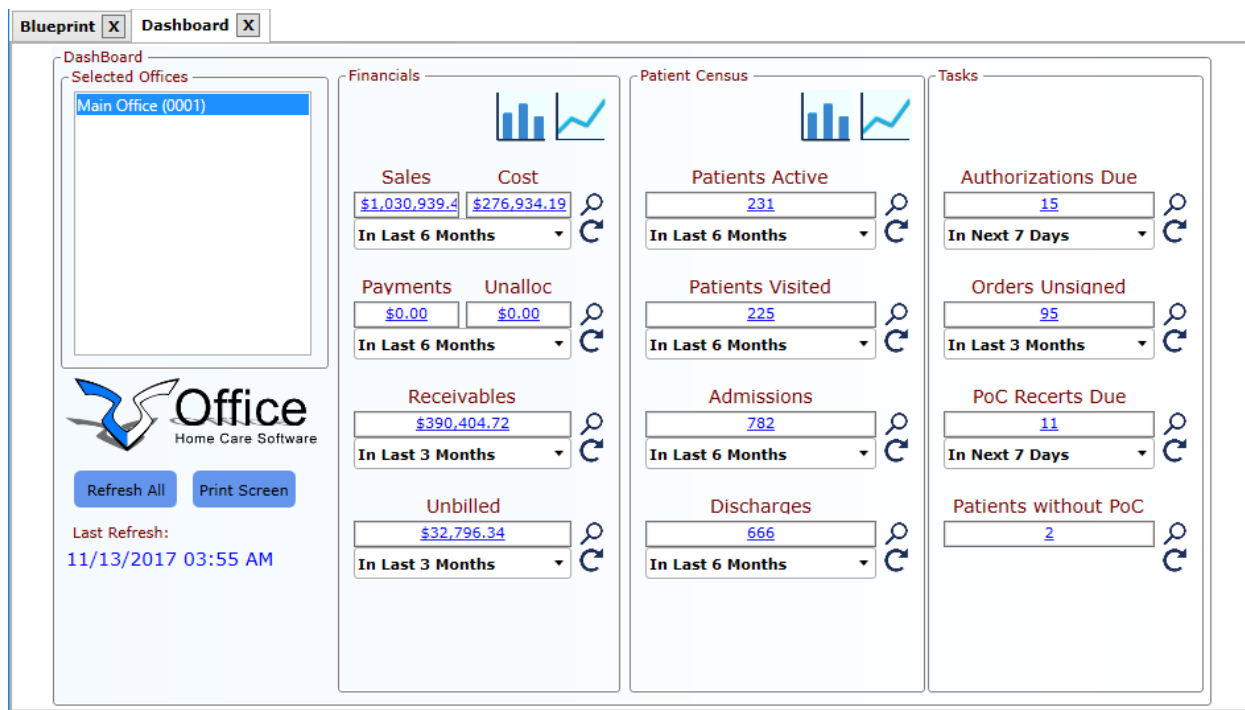
Aging	The invoices that have not been paid.
AR Balancing	The differences between two agings.
GL Entries	Sales and cost organized by GL account number
Interim Royalty	Sales organized specifically for royalty reporting by Interim Franchises
Payments & Cash	Remittances received and cash applied from them to invoices relieving the aging
Cash Applications	Cash applied during a date range
Sales/Costs/Margin	Sales, cost, and margin for all invoiced items
Cost	Cost associated with all items for report's filters and date range.
Account Statement	Statement of a client's billing and payment activity
Unbilled	Visits, services, supplies, pay items, and care plans that are unbilled and why
FaceToFace Tracking	List of face to face sheets that have been mailed but not returned
Hospice Audit	Hospice billing period details that should be reviewed prior to transmitting hospice bill
Hospice Patient	Census type report for Hospice patients
Medication Profile (MAR)	Print medication profiles and medication administration records for multiple patients
Next Supervisory Visit	List of supervisory visits that need to be done
OASIS Clinical Outcomes	Analysis of key OASIS indicators between their Start and Discharge values
OASIS Discharge Disposition and Emergent Care	Analysis of a patient population's discharge disposition and emergent care
OASIS Missing	OASIS information that is not completed
OASIS Inconsistencies	Analysis of OASIS data that is inconsistent with other data in the system
OASIS Tracking	Analysis of the status of OASIS data
Patient List	Simple patient list by status
Patient Census by Service	Patient Census based on patient who were visited
Patient Census by Status	Patient Census based on patient status
Patient Admissions/Discharges	List of patient admitted or discharged or placed on hold during a specific period of time
Patient Medication Profile	List of medication a patient is currently taking

POC Missing	List of active patients with no skilled care plan (485)
POC Recertification Due	List of care plans whose certification end dates are coming up without existing recertifications
POC Tracking	Care plan report by cert begin, cert end, mailed date, physician, and status.
POC/Verbal Order	Feature tied to the Export 485/VOs button for exporting PDF files to doctors
PPS Audit	PPS billing details that should be reviewed prior to transmitting a PPS claim
PPS Episodes	Analysis of your agency's PPS Episodes
Value Based Purchasing (CMS Citation 81 FR 43713)	<p>-- Advance Care Planning --</p> <p>If the user answered 'Does patient have an advance care plan documented in the clinical record or documentation that an advance care plan was discussed, but the patient did not wish or was not able to name a surrogate decision maker or provide an advance care plan?' Yes</p> <p>Denominator - All patients 65 or older who was active within the FromDate-ToDate range.</p> <p>Numerator - All patients 65 or older who was active within the FromDate-ToDate range and answered the questions as described above.</p> <p>-- Herpes Zoster --</p> <p>If the user entered 'Date of last Herpes Zoster Vaccination:' or answered 'If date unknown, have you ever received a Herpes Zoster Vaccination?' Yes</p> <p>Denominator - All patients 60 or older who was active within the FromDate-ToDate range and is a Medicare patient.</p> <p>Numerator - All patients 60 or older who was active within the FromDate-ToDate range and is a Medicare patient and answered the questions as described above.</p>
Calculate Visit Mileage	Feature tied to the AutoPay Mileage button computes mileage between employee visits
Calculate Travel Pay	Calculates paid time between employee visits
ELVIS Visits	Analysis of the visits verified by the ELVIS monitor
Filled Visits	Analysis of your agency's ability to fill schedule visits
General Visits	List of visits by status, office, payer class, payer, employee, client, and skill
Obamacare Qualification	Analysis of the employees that qualify for health insurance based on hours worked per month
Overtime	List of employees that will receive overtime for the current week
Pay Item	List of pay items by employee, affiliation, type, and status
Payroll	Feature tied to Payroll Report button
Salaried Visits	Analysis of how salaried visits are meeting their goal visit number
Service Items	List of service items by client, affiliation, type of service, and status
Supply List	List of supply items by supply type
Verified Visit	List of currently verified visits along with hours and rates to be used to look for errors prior to closing.
Visit Exceptions – Missing Visits	Visits for some payers require Electronic Visit Verification (EVV). If a visit is scheduled and never verified, this report shows that visit as a confirmed visit. A confirmed visit older than today should be exception coded so that this report can provide the reason why a scheduled visit was never done
Visit Transportation	List of visits with transportation pay.
Bill Rates	Listing of the bill rates configured for an office regardless of level
Custom SQL Query	Custom queries built specifically from client requests
Client Dispatch	Report of the visits a client is scheduled to have
Client/Payer List	Simple list of client's payer relationships
Compliance Summary	Analysis of the current client based authorizations and doctor orders
Employee Dispatch	Report of the visits an employee is schedule to do

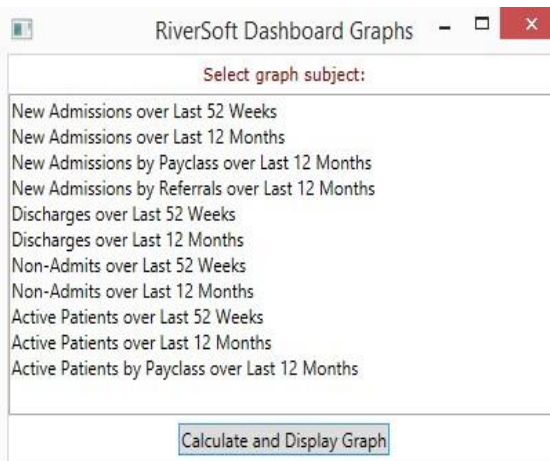
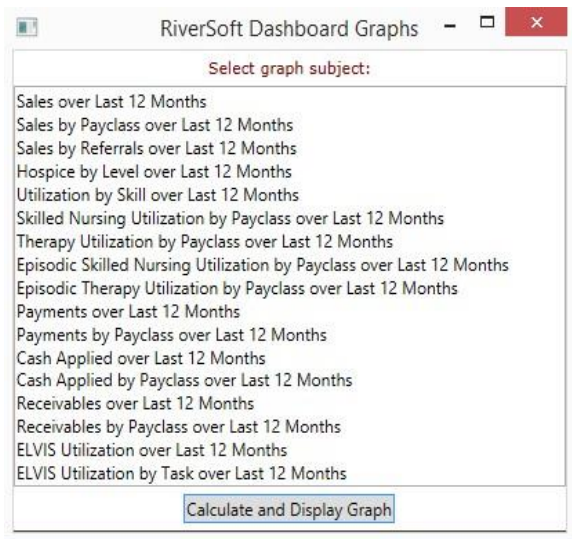
Employee List	Simple list of employees by office, status, skill, type, affiliation, and attribute
Employee Tracking	Shows a list of employees and their tracking items with the dates and/or values of them and is used to determine which tracking items for deficient.
Expiring Compliance Rules	List of the authorizations that will expire during a date range
On Call	List of scheduled visits to be used by the On-Call person
Login Count	Provides real-time report of RiverSoft licenses authorized and in-use
Payer List	Simple list of payers along with their billing profile, requirement, and allowed skills and bill codes
Pay Rates	Listing of pay rates configured for an office regardless of level
Physician List	List of physicians by office and license date
Referrals	List of referral source configured for an office
Strategic	Simple list of newly entered clients
Unfiled New MAT Episodes	List of MAT start of care document that have been completed but not Sent to SAM (going away)
Timesheets	Prints employee timesheets based on employee schedules
User List	List of users that have access to RiverSoft Office

## Dashboard

The Dashboard button activates the RiverSoft Dashboard, a single screen that displays the most critical information concerning your agency. The purpose of the dashboard is to provide a bird's eye view of your agency's operational health. By viewing this a few times a week you can keep current with the financials, census, and issue status and be able to spot deviations.



The bar and line chart buttons at the top of the Financials and Patient Census panels give you access to historical graphs so the you can more easily spot trends.



## RiverSoft University

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**RiverSoft Mobile (RSM)** is the mobile component of RiverSoft Office and supplies mobile access to an agency's patients' electronic medical record (EMR). RSM is cloud-based, which means there is no data on the local device – all the data is stored on a data server. Access to RSM is available two ways: by the cloud or by a Windows app that talks to a data service. Accessing RSM via the cloud requires going to the agency's web site and clicking on the RSM shortcut. This type of access is device independent – most any device with a screen that can handle a resolution of 1024 by 768 will work fine. Accessing RSM via the Windows app requires the app to be installed on a windows device (which takes less than a minute) and the one-time entry of the agency's IP Address and port (which you will need to get from the agency). Both types of RSM access require that you have a valid username and password. We recommend RDWeb for an agency to deliver RSM via the cloud if device independency is important to you (you want to use Android and iPad tablets as well as Windows tablets). For agencies that want to deliver RSM as an app, there is no additional expense and RiverSoft will install the data service as a part of our normal installation. If you are on the RiverSoft Cloud, you will access RSM via RDWeb.

#### Training Videos:

[Introduction To RiverSoft Mobile Video](#)

[Patient Intake](#)

[Login and Patient List](#)

[Choosing a Clinical Note](#)

[Start of Care Note \(Part 1\)](#)

[Start of Care Note \(Part 2 - Body Diagram\)](#)

[Start of Care Note \(Part 3 – Body Systems and Items\)](#)

[Start of Care Note \(Part 4 – Post Assessment - Clinical Summary\)](#)

[Start of Care Note \(Part 5 – 485 Diagnoses and Medications\)](#)

[Start of Care Note \(Part 6 – 485 Locators 14-20\)](#)

[Start of Care Note \(Part 7 – 485 Adding Pathways\)](#)

[Start of Care Note \(Part 8 – 485 Services\)](#)

[Start of Care Note \(Part 9 – Medication Review and Administration\)](#)

[Start of Care Note \(Part 10 – Timeslip and Supplies\)](#)

[Start of Care Note \(Part 11 – Review OASIS and Complete Note\)](#)

[Clinical Review](#)

[Medical Records Screen](#)

[Visit Note](#)

[Patient List – Other Features](#)

[How Clinical Notes Affect Patient Status](#)

[Automatic Note Locking and Locking a Start of Care Note](#)

[Discharge Note](#)

[Configuration Part 1 \(Pathways\)](#)

[Configuration Part 2 \(Note Warnings and Unused Notes\)](#)

[Configuration Part 3 \(Agency Form Pages and Agency Note Pages\)](#)

[Transitioning to RiverSoft EMR](#)

[Maintaining EMR with Patient's Location Lacks Data Service](#)

There are three types of RiverSoft Mobile users:

- 1) **Caregiver** - a nurse or therapist that visits the office's patients and documents the care they render. The patient list presented to a caregiver contains only the patients they have been scheduled to see and the incomplete patients. The caregiver uses the system to enter clinical notes, from Start of Care assessment notes, to visit notes, to transfer and discharge assessment notes. The system administrator can provide access to a complete list of patients to a caregiver by un-checking the user permit "12-MAT/RiverSoft Mobile Active Scheduled Patients Only" for the caregiver's user in the Configure menu, Users screen.
- 2) **Attending Physician** - the doctor that is named on a patient's care plan (485) as the attending physician. The patient list presented to the physician contains only the patients that have a 485 that names the physician as the primary physician. The physician uses the system to review the patient's clinical notes and care plans as well as to sign care plans and verbal orders.
- 3) **Payer** – the entity that is financially responsible for the patient's care. The payer is presented with a list of patients that are tied to their payer source. The payer uses the system to review the patient's clinical notes and care plans.

## Caregiver Usage (Nurses and Therapists)

Nurses and therapists only have access to the patients to which they have been scheduled to visit and to the patients that have not been admitted to the agency (incomplete patients). The caregiver logs in with the username and password that has been created for them from the user screen and assigned to them on the employee screen.

Home Configure Change Office Change Login Export Import Developers Activation Riversoft Close All

Blueprint X Users X User Skip McCoy X

Save Delete Undo i Upd: ALC, 01/22/2016

### User Profile

Full Name: Skip McCoy User Name: SMCCOY Email:

User Code: ALC  Password:  ☒ System Administrator ☐ Do Not Use

### User Permits

Copy Permits from another User

#### Administration and Manage Service Permits

<input checked="" type="checkbox"/> 0 - Scheduling Functions	<input checked="" type="checkbox"/> 6 - View Client SSN	<input checked="" type="checkbox"/> 12 - View Payers	<input checked="" type="checkbox"/> 18 - Run ELVIS Monitor
<input checked="" type="checkbox"/> 1 - Close Week	<input checked="" type="checkbox"/> 7 - Edit Employees	<input checked="" type="checkbox"/> 13 - Add/Delete National Payers	
<input checked="" type="checkbox"/> 2 - Edit Pay Rates	<input checked="" type="checkbox"/> 8 - Edit Employee Statuses	<input checked="" type="checkbox"/> 14 - Verify Visits	
<input checked="" type="checkbox"/> 3 - View Pay Rates	<input checked="" type="checkbox"/> 9 - View Employee SSN	<input checked="" type="checkbox"/> 15 - Edit Client-Payer	
<input checked="" type="checkbox"/> 4 - Edit Bill Rates	<input checked="" type="checkbox"/> 10 - Edit Employee Pay Items	<input checked="" type="checkbox"/> 16 - Edit Referral Sources	
<input checked="" type="checkbox"/> 5 - Edit Clients	<input checked="" type="checkbox"/> 11 - Edit Payers	<input checked="" type="checkbox"/> 17 - Edit Affiliations	

#### Clinical Data, PoC/VO, OASIS, HIS Permits

<input checked="" type="checkbox"/> 0 - Clinical Functions	<input checked="" type="checkbox"/> 6 - MAT Administrator	<input type="checkbox"/> 12 - MAT/RiverSoft Mobile Active Scheduled Patients Only	<input type="checkbox"/> 16 - Mobile New Patient
<input checked="" type="checkbox"/> 1 - View and Print POC/VO	<input checked="" type="checkbox"/> 7 - MAT Send To SAM	<input checked="" type="checkbox"/> 13 - MAT Mobile Select Patients On Demand	<input type="checkbox"/> 17 - Mobile Self-Schedule
<input checked="" type="checkbox"/> 2 - View and Print OASIS	<input checked="" type="checkbox"/> 8 - MAT Travel Pay	<input checked="" type="checkbox"/> 14 - Edit and Export HIS Records	<input checked="" type="checkbox"/> 18 - Edit POC/VO
<input checked="" type="checkbox"/> 3 - Change OASIS Lock Date	<input checked="" type="checkbox"/> 9 - MAT Autoverify	<input checked="" type="checkbox"/> 15 - AutoLink Documents	<input checked="" type="checkbox"/> 19 - Edit OASIS
<input checked="" type="checkbox"/> 4 - Edit Phrases	<input checked="" type="checkbox"/> 10 - MAT View PPS Value		
<input checked="" type="checkbox"/> 5 - MAT User	<input checked="" type="checkbox"/> 11 - MAT App Details Admin		

#### Billing/AR Permits

<input checked="" type="checkbox"/> 0 - AR Functions	<input checked="" type="checkbox"/> 4 - Print/Transmit Invoices/Claims	<input checked="" type="checkbox"/> 8 - Close/Open Accounting Period
<input checked="" type="checkbox"/> 1 - Close Week	<input checked="" type="checkbox"/> 5 - Payments/Apply Cash	<input checked="" type="checkbox"/> 9 - Export Payroll
<input checked="" type="checkbox"/> 2 - Create Invoices	<input checked="" type="checkbox"/> 6 - Create Adjustment	<input checked="" type="checkbox"/> 10 - AutoPay Mileage
<input checked="" type="checkbox"/> 3 - View Invoices	<input checked="" type="checkbox"/> 7 - Review Adjustments (Obsolete)	<input checked="" type="checkbox"/> 11 - Unbilled Items

#### Configuration Permits

<input checked="" type="checkbox"/> 0 - Configuration Functions	<input checked="" type="checkbox"/> 3 - Edit Attributes	<input checked="" type="checkbox"/> 6 - Add/Delete Tracking Items
<input checked="" type="checkbox"/> 1 - Add Standard Supplies	<input checked="" type="checkbox"/> 4 - Edit Sub-Skills	<input checked="" type="checkbox"/> 7 - Data Exchange/Reindex/Archive
<input checked="" type="checkbox"/> 2 - Add Standard Service	<input checked="" type="checkbox"/> 5 - Edit Tracking Items	<input checked="" type="checkbox"/> 8 - Data Exchange Set Defaults

#### Miscellaneous Permits

<input checked="" type="checkbox"/> 1 - Change Password	<input checked="" type="checkbox"/> 2 - Access Archive	<input checked="" type="checkbox"/> 3 - Access RiverSoft Office
---	--	---

#### Reports Permits

<input checked="" type="checkbox"/> 0 - Reports	<input checked="" type="checkbox"/> 4 - Payroll Interface Postings Report	<input checked="" type="checkbox"/> 8 - Adjustment Report
<input checked="" type="checkbox"/> 1 - 401K and Paycheck Reporting	<input checked="" type="checkbox"/> 5 - Pay Rate Report	<input checked="" type="checkbox"/> 9 - Plan of Care/Verbal Order
<input checked="" type="checkbox"/> 2 - State Unemployment Reporting	<input checked="" type="checkbox"/> 6 - Pay Item Report	<input checked="" type="checkbox"/> 10 - Dashboard
<input checked="" type="checkbox"/> 3 - Payroll Report	<input checked="" type="checkbox"/> 7 - Sales Report	<input checked="" type="checkbox"/> 11 - PPS Episode Report

### User Office Mapping

Place a check next to the office(s) to which the user should be granted access.

	Office
<input checked="" type="checkbox"/>	Office 0001
<input checked="" type="checkbox"/>	Office 0002
<input checked="" type="checkbox"/>	Office 0003
<input checked="" type="checkbox"/>	Office 0004

Blueprint X Employee Demographics List X Employee McCoy, Skip X

New Save Delete Undo i 32 of 62 Last Updated RS, 10/09/2015 -1000000090 Face Sheet Employee's Schedule Copy To Selected Office

### Employee Vitals

Name: Skip McCoy 0001-A00090 Hire Date: 08/27/2015

Address: 706 W. Main Street Apt. 21 E Zip Code: 46030- Arcadia, IN / Hamilton 46030

Verify Address Verified by MapQuest on 09/07/2015

Email:  SSN: 400-40-4040 LEIE

Status: Active on 08/27/2015 12:00 AM

Main Skill: RN Sex: Female

Phone 1: (317) 400-2734 License 1: 28119125A

Phone 2: ( ) - - Phone 3: ( ) - - Phone 4: ( ) - - License 2: Affiliation: (None)

Type: Field Employee Check Handling: Blank

Goal Visits: 0 Federal ID: Payroll ID: Payroll Dent:

Birth Date:  ELVIS/RSM User: SKIP

☒ Case Manager ☐ Exempt From OT Change User:

No Photo Change Photo Delete Photo



**Mobile**  
Home Care Software

IP Address: 192.168.1.213  
 Port: 9898  
 User Name: SKIP  
 Password:   
 Office: Main Office (0001)

Message Dated April 3, 2015

Welcome to RiverSoft Mobile! RiverSoft Mobile replaces Mat with more features and an even friendlier user interface. RiverSoft Mobile uses your internet connection to communicate with your office RiverSoft database. Without an internet connection, you cannot use RiverSoft Mobile.

Login Quit

Once logged in, the caregiver is presented with a list of their patients (patients they have been scheduled to see and patients for which they have In Use notes). The patients that have In Use notes created by the logged in user will be highlighted in antique white so that the user can quickly identify the patients that they need to work on. With no patient selected, only the Refresh List, Self-Schedule, New Patient, and information buttons are available.

RiverSoft Mobile - User: KATELYN - Office: Office 0004 (0004) - Ver: 4.0.1962.0 - IP: 192.168.1.213, 9797

Change Login Developers

Caregiver's Patients X

Clinical Notes	Care Plans	Patient Overview	Face Sheet	Mail Profile	Patient Schedule	Refresh List	Search:	Get: Agor, William A [0004-A0]	Status: All (But Discharged / Non Admitted)	Self Schedule	New Patient	i
Patients (86)	Status	In Use Notes	Mobile Grams	Case Manager	Client #	Birth Date	Sex	City	Phone	Agency SOC Date	Discharge Date	
Alberts, Elizabeth M (A3)	Hold	1	0	Ialongo, Deborah	000717	09/01/30	F	Columbia	(555) 228-3273	01/21/2016		
Altreche, Mark A (A5)	Active	1	0	Ialongo, Deborah	002872	12/09/81	M	Willimantic	(555) 418-2199	01/20/2016		
Angold, Ruth V (03)	Active	0	0	Ialongo, Deborah	002599	08/01/24	F	Willimantic	(555) 456-3323	06/29/2011		
Badon, Edward (A6)	Active	0	0	Haislett, Karen	000333	01/22/52	M	Ashford	(555) 429-0856	06/05/2014		
Borror, Kenneth (01)	Incomp	1	0		A01592	11/06/70	M	Brooklyn	(555) 455-8533			
Bridgford, Linda E (01)	Active	0	0	Ialongo, Deborah	A01517	05/15/31	F	Willimantic	(555) 423-0737	11/09/2015		
Cavaliero, Laura I (A2)	Active	0	0	Gullotta, Deborah	A00088	05/31/90	F	Mansfield	(555) 303-2995	02/17/2011		
Charle, Edward (01)	Active	0	0	Ialongo, Deborah	A00887	10/14/74	M	Willimantic	(555) 423-7055	01/13/2014		

If a caregiver needs to see all patients (because they are on-call for some other reason), de-select permit 12 in their Clinical Data permits on their user configuration screen. This will remove the default limitation of only being able to see the patient for which they are scheduled. The user must be given permits to access the New Patient and Self-Schedule buttons – otherwise they are disabled.

#### Clinical Data, PoC/VO, OASIS, HIS Permits

- |  |  |   |  |
|--|--|---|--|
| <input checked="" type="checkbox"/> 0 - Clinical Functions     | <input checked="" type="checkbox"/> 6 - MAT Administrator      | <input type="checkbox"/> 12 - MAT/RiverSoft Mobile Active Scheduled Patients Only | <input type="checkbox"/> 16 - Mobile New Patient     |
| <input checked="" type="checkbox"/> 1 - View and Print POC/VO  | <input checked="" type="checkbox"/> 7 - MAT Send To SAM        | <input checked="" type="checkbox"/> 13 - MAT Mobile Select Patients On Demand     | <input type="checkbox"/> 17 - Mobile Self-Schedule   |
| <input checked="" type="checkbox"/> 2 - View and Print OASIS   | <input checked="" type="checkbox"/> 8 - MAT Travel Pay         | <input checked="" type="checkbox"/> 14 - Edit and Export HIS Records              | <input checked="" type="checkbox"/> 18 - Edit POC/VO |
| <input checked="" type="checkbox"/> 3 - Change OASIS Lock Date | <input checked="" type="checkbox"/> 9 - MAT Autoverify         | <input checked="" type="checkbox"/> 15 - AutoLink Documents                       | <input checked="" type="checkbox"/> 19 - Edit OASIS  |
| <input checked="" type="checkbox"/> 4 - Edit Phrases           | <input checked="" type="checkbox"/> 10 - MAT View PPS Value    |   |  |
| <input checked="" type="checkbox"/> 5 - MAT User               | <input checked="" type="checkbox"/> 11 - MAT App Details Admin |   |  |

The patients that require priority attention of the caregiver bubble to the top of the mobile patient list. The mobile patient list shows patients that have notes with issues (notes that have been sent back from the office to the caregiver for re-work) at the top of the list highlighted in light red. Patients with “mobile grams” for the logged-in caregiver are next in green. Next are the patients with in-use notes belonging to the logged-in caregiver. And finally, all other patients the logged-in caregiver has access to are listed in alpha order.

Caregiver's Patients ☒

Clinical Notes	Care Plans	Case Analysis	Face Sheet	Med Profile	Patient Schedule	Travel	Refresh List	Search:	Get:	Self Schedule	New Patient	Old Patient	i		
								Status:	All (But Discharged / Non Admitted)						
Patients (42)		Status	In Use Notes	Issues	Mobile Grams	Case Manager	Client #	Birth Date	Sex	City	SOC	Last Sup	Last Eval	Cert End	Auth End
McCoy, Beatrice (01)		Incom	2	1	0		A00295	02/02/50	M	Indian Harb	12/22/15			04/18/16	
Abell, Margaret (01)		Active	2	0	2	Blogg, Karer	A00069	09/06/63	F	Lebanon	10/23/14			12/16/16	
AAARiversoft, George		Active	1	0	1		A00311	01/01/55	M	Melbourne	03/06/16			05/04/16	
Akers, Deborah K (01)		Active	1	0	0		A00238	11/09/42	F	Noblesville	08/19/15			03/28/16	
Alair, Carol (01)		Active	1	0	0	Bender, Lind	A00281	04/08/51	F	Muncie	11/10/15			01/08/16	



The “i” button displays this document. The patient list can be filtered to only those names beginning with the letters entered into the “Name Beginning With:” box. The list can also be filtered to contain only those patients matching the selected Patient Status.

RiverSoft Sees All Patients ☒

Clinical Notes	Care Plans	Patient Overview	Face Sheet	Med Profile	Patient Schedule	Refresh List	Search: <input type="text" value="t"/>	Get: <input type="text"/>	Self Schedule	New Patient	i	
							Status: <b>Incomplete</b>					
Patients (3)		Status	Scheduled Visits	Mobile Grams	Case Manager	Client #	Birth Date	Sex	City	Phone	Agency SOC Date	Discharge Date
Tai, Deborah A (01)		Incom	0	0		A01608	04/04/94	F	Sterling	(555) 861-5376		
Terp, James R (A3)		Incom	1	0		001614	07/19/63	M	Willimantic	(555) 207-8104		
Torrillo, Karen (A2)		Incom	0	0		A00557	02/23/92	F	Willimantic	(555) 786-7508		

If a caregiver needs access to an active patient that is normally not in their list, they can add that patient to their list by selecting the patient from the **Get:** list. This patient is only added to their list temporarily. If the patient list is refreshed or another Get: patient is selected, the prior patient will fall out of the list. This prevents users from packing their patient list with other patients.

Search:  Get: **Agor, William A [0004-A0]** **Self**

Status: **All (But Dis)** **Agor, William A [0004-A01116-01]**

Client #	Birth Date	
000717	09/01/30	Ameling, Kenneth W [0004-A01012-01]
002872	12/09/81	Barriga, Karen [0004-A01270-01]
002599	08/01/24	Blethen, Mary A [0004-002566-A3]
000333	01/22/52	Buhite, Helen T [0004-A01477-01]
A01592	11/06/70	Corrick, Margaret L [0004-A01523-A2]
A01517	05/15/31	Coultas, Elizabeth R [0004-A01505-01]
A00088	05/31/90	<b>Degidio, Edward J [0004-A00964-A4]</b>
A00887	10/14/74	Delmundo, Barbara A [0004-A01580-A3]
A01593	01/27/41	Dolgas, Steven E [0004-A01532-01]
003194	12/09/28	Douglass, Anthony [0004-A01617-01]
003122	10/25/46	Enfinger, Linda [0004-A01558-01]
003201	09/01/37	Fawver, Kevin [0004-A01587-01]
		Garcy, Elizabeth [0004-A01542-01]
		Glymph, Kevin D [0004-A00569-A4]
		Kirson, Sharon I [0004-002005-A2]
		Lecaros, Margaret M [0004-A01603-01]
		Levesque, Mary M [0004-A01528-A2]
		Limmer, Deborah O [0004-A01560-01]
		Maish, Lisa M [0004-002771-A2]
		Marcrum, Thomas I [0004-A01550-01]

Clicking a patient in the list will allow you access to these buttons:

<b>Clinical Notes</b>	<b>Care Plans</b>	<b>Patient Overview</b>	<b>Face Sheet</b>	<b>Med Profile</b>	<b>Patient Schedule</b>	<b>Refresh List</b>
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The Clinical Notes button provides access to all of the clinical notes for the selected patient.

The Care Plans button provides access to all 485 and verbal orders for the selected patient.

The Patient Overview displays a PDF summarizing the patient's diagnoses, medication, pathway history, and clinical notes.

The Med Profile displays a PDF of the patient current Medication Profile.

The Patient Schedule displays a PDF of the patient's schedule of visits, in tabular and calendar format.

The Face Sheet button provides a report of all of the information gathered and entered on behalf of the patient at the time of referral and looks like this:



## Client Face Sheet



**Patient: Abell, Margaret (A00069-01) Birth Date: 9/6/1963**  
**Current Status is Active**



<b>Client Demographics</b>											
Name (First,M,Last)		Margaret Abell Nickname:									
Address		900 Violet Lane Apartment A Lebanon IN 46052									
Sex	F	DoB	9/6/1963	Phone 1	(555) 481-0029	Phone 2		Phone 3		Phone 4	
SoC	10/23/2014	Discharge		Entry	10/22/2014	SSN	XXX-XX-0838	M'care ID		M'caid ID	
Referral		Date:									
Service Location	Home	Affiliation	(None)	Marketer		CSR		CDAVIS			
Disaster	2-Average Risk	Billing Case Mgr		BO Case Mgr		Marital Status	None				
Contact Name		Relationship		Phone		Empty Status	None				
Acc/Denial	None	Inj/Denial Date		Auto Ins State							
Next of Kin		Phone: Address:									
Scheduling Comment											
<b>Active Payers</b>											
Client has not payers with allowed skills											
<b>Compliance Rules</b>											
<b>Client Intake</b>											
Primary Physician				Secondary Physician							
<b>Self-Pay Billing Info</b>											
Name (First,M,Last)		Margaret Abell									
Address		900 Violet Lane Apartment A Lebanon IN 46052									
Pay Method		Bill Frequency		Supervisory Visit Freq	0	Per					
Show visit start/end times on invoices				Billing Notes				Code 50 from 4/08/2015 - 5/08/2015			
Diff Holiday	1.5	Diff Overtime	1.5	Diff Doubletime	2	Diff Wknd Hourly	0				
<b>Self-Pay allowed skills =</b>											
<b>Intake - Hospital/Facility: From which of the following was the patient discharged during the last 14 days?</b>											
NA		1-Long term nursing facility (NF)		2-Skill nursing facility (SNF/TCU)		3-Short-stay acute hospital (IPPS)					
4-Long term care hospital (LTCH)		5-Inpatient rehabilitation hospital or unit (IRF)		6-Psychiatric hospital or unit		7-Other					
Last Facility		Admit-Discharge				-					
Other Facility		Admit-Discharge				-					
<b>Hospital/Facility Admit Reason:</b>											
<b>Hospital/Facility Course:</b>											
<b>Current Aide Plan (for ELVIS)</b>											
<b>Non-Scheduling Comments:</b>											
<b>Payers, Services, Allergies, Special Needs, Etc.:</b>											
<b>Client Attributes</b>											

Clicking the Clinical Notes button creates new tab area containing a list of the selected patient's notes. From this list you can either edit an existing note (if you are the author), or you can create a new note.

RiverSoft Mobile - User RIVERSOFT - Noblesville - Ver: 1.0.0.0 - IP: 50.30.59.94,...
X

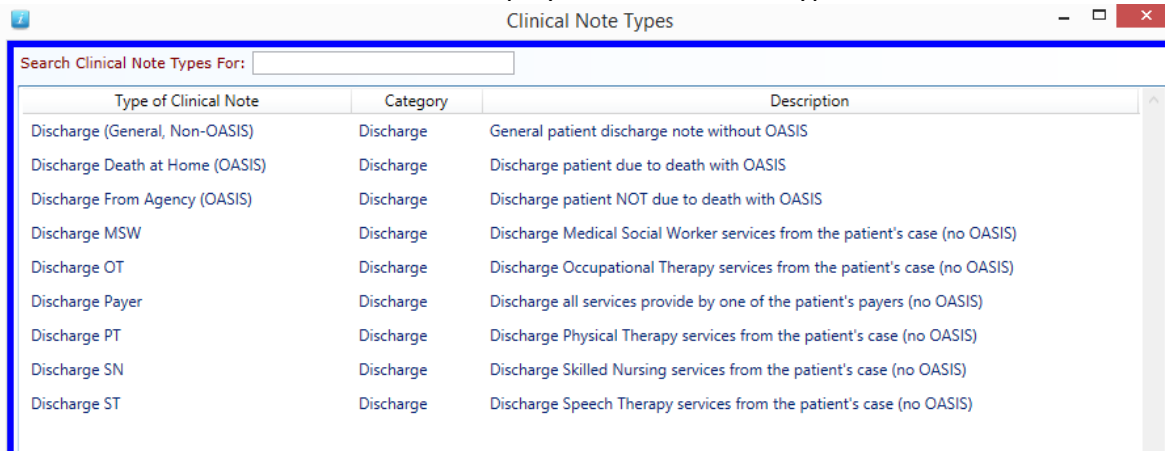
Change Login Developers

RiverSoft Sees All Patients ☒
Clinical Notes for Afake, Elvis (01) ☒

Create New Note
Visit
Start of Care
Recert/Resumption
Discharge
Other

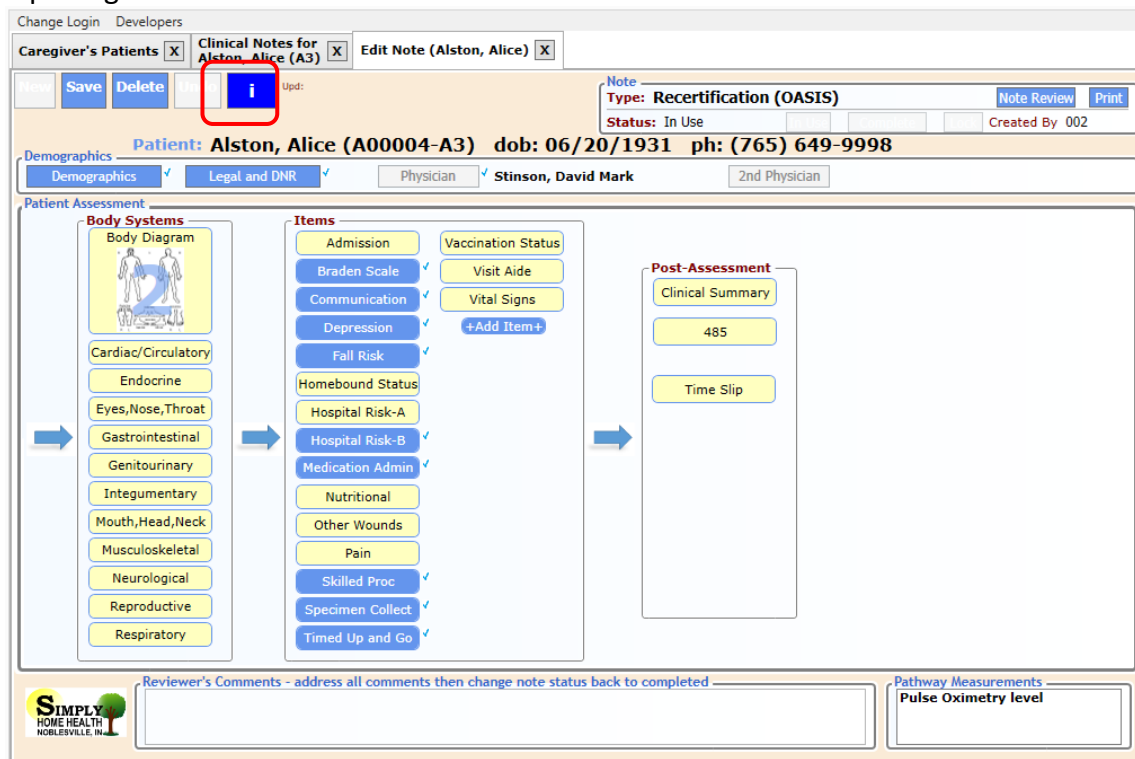
Note Type	Status	Created On	Created By	Locked On	Locked By
Start Of Care (OASIS)	In Use	10/20/15	RS		

Clicking the one of the Create New buttons will display a list of the note types.



Type of Clinical Note	Category	Description
Discharge (General, Non-OASIS)	Discharge	General patient discharge note without OASIS
Discharge Death at Home (OASIS)	Discharge	Discharge patient due to death with OASIS
Discharge From Agency (OASIS)	Discharge	Discharge patient NOT due to death with OASIS
Discharge MSW	Discharge	Discharge Medical Social Worker services from the patient's case (no OASIS)
Discharge OT	Discharge	Discharge Occupational Therapy services from the patient's case (no OASIS)
Discharge Payer	Discharge	Discharge all services provide by one of the patient's payers (no OASIS)
Discharge PT	Discharge	Discharge Physical Therapy services from the patient's case (no OASIS)
Discharge SN	Discharge	Discharge Skilled Nursing services from the patient's case (no OASIS)
Discharge ST	Discharge	Discharge Speech Therapy services from the patient's case (no OASIS)

Selecting a note type will cause a new note of that type to be created and the note editor to be displayed so you can begin completing the note.



Change Login Developers

Clinical Notes for Alston, Alice (A3) Edit Note (Alston, Alice)

Save Delete i Upd: Note Type: Recertification (OASIS) Note Review Print

Status: In Use Created By: 002

Patient: Alston, Alice (A00004-A3) dob: 06/20/1931 ph: (765) 649-9998

Demographics Legal and DNR Physician Stinson, David Mark 2nd Physician

Patient Assessment

Body Systems

Body Diagram

Cardiac/Circulatory

Endocrine

Eyes,Nose,Throat

Gastrointestinal

Genitourinary

Integumentary

Mouth,Head,Neck

Musculoskeletal

Neurological

Reproductive

Respiratory

Items

Admission

Braden Scale

Communication

Depression

Fall Risk

Homebound Status

Hospital Risk-A

Hospital Risk-B

Medication Admin

Nutritional

Other Wounds

Pain

Skilled Proc.

Specimen Collect

Timed Up and Go

Vaccination Status

Visit Aide

Vital Signs

+Add Item+

Post-Assessment

Clinical Summary

485

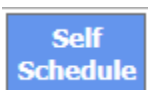
Time Slip

Reviewer's Comments - address all comments then change note status back to completed

Pathway Measurements

Pulse Oximetry level

The “i” button of the Edit Note screen provides all the instructions needed to create and edit clinical notes. It will explain the layout of the editor, note types and statuses, how the sub-editors work, how pathways make creating assessment notes and visit notes easier and faster, how the note analysis features will help with the entry of diagnoses, pathways, and OASIS, and finally how the note review process works. The instructions will take less than 30 minutes to read.



The Self-Schedule button lets a caregiver adjust their own schedule of visits. The top list is the caregiver’s current schedule of visits seven day prior to today. The bottom list contains visits that have not been

assigned to any employee (open visits) and that match the caregiver's skill. If a visit is selected in the bottom list, it will disappear from that list of open visits and will re-appear in the caregiver's current schedule (the top list). To change the date of a visit in the schedule, click the visit, change the **Date**, then click the Save Change button. If the date change causes the visit to violate doctor orders or insurance authorizations, a message will be given and the visit will not be moved.

Your schedule thru next week

Calendar and Tabular PDF

Change Visit Day  

Date:

**Your current schedule thru next week for all offices is below - change a visit's day by selecting it and entering a new day above. Both the PDF and the needed visits are for the office you are logged into.**

Date	From	To	Day	V/H	Skill	SubSkill	Patient	Office	Visit Comment	Distance	
3/16/2016	0900	1000	Wednesd	V	RN	Recert	Altreche, Mark	0004	dc or recert by 3/19 (3/15-3/19) dlf	Unknowr	
3/16/2016	0900	1000	Wednesd	V	RN	PCN	Dudzinski, Maria	0004		Unknowr	
3/16/2016	0900	1000	Wednesd	V	RN	Recert	Hersman, Mary	0004	dc or recert by 3/16 (3/12-3/16) dlf	Unknowr	
3/16/2016	0900	1000	Wednesd	V	RN	PCN	Petzoldt, Brian	0004		Unknowr	
3/16/2016	0900	1000	Wednesd	V	RN	PCN	Scarset, Paul	0004		Unknowr	
3/16/2016	0900	1000	Wednesd	V	RN	PCN	Wickers, Deborah	0004		Unknowr	
3/17/2016	0900	1000	Thursday	V	RN	PCN	Dowsett, Nancy	0004		Unknowr	
3/17/2016	0900	1000	Thursday	V	RN	Medicati	Erleben, Sharon	0004		Unknowr	
3/17/2016	0900	1000	Thursday	V	RN	PCN	Knies, Donna	0004		Unknowr	
3/17/2016	0900	1000	Thursday	V	RN	Medicati	Labarbera, Donna	0004	last week of orders dlf	Unknowr	
3/17/2016	0900	1000	Thursday	V	RN	Recert	Mathur, Michael	0004	dc or recert by 3/17 (3/13-3/17) dlf	Unknowr	
3/17/2016	0900	1000	Thursday	V	RN	Recert	Sunkel, Daniel	0004	dc or recert by 3/19 (3/15-3/19) dlf	Unknowr	
3/17/2016	0900	1000	Thursday	V	RN	PCN	Trubey, Michelle	0004		Unknowr	
3/18/2016	0900	1000	Friday	V	RN	Supervisi	Cavaliero, Laura	0004	dc or recert by 3/21 (3/17-3/21) dlf	Unknowr	
3/18/2016	0900	1000	Friday	V	RN	PCN	Granneman, Kenneth	0004		Unknowr	
3/18/2016	0900	1000	Friday	V	RN	PCN	Laperriere, Anthony	0004		Unknowr	
3/18/2016	0900	1000	Friday	H	RN	PCN	Lumbra, Jennifer	0002		Unknowr	
3/18/2016	0900	1000	Friday	V	RN	PCN	Petzoldt, Brian	0004		Unknowr	

**Needed visits are below; Choose a visit to assign yourself to it and it will dissappear from the list below and appear in your schedule above.**

Date	From	To	Day	V/H	Skill	SubSkill	Patient	Office	Visit Comment	Distance	
3/24/2016	0900	1000	Thursday	V	RN		Longton, Robert	0004		Unknowr	

The Calendar and Tabular PDF button creates a PDF of the caregiver's schedule through next week, in tabular and calendar format.

Employee: Ialongo, Deborah A (RN) (0004-000624)  
Affiliation: All

## Employee Schedule

Visit Dates: 03/12/2016 - 03/25/2016  
Include Phone: No  
Include Comment: Yes

Employee Name (Skill) (#)						
DOW	Visit Date	Times	Skill	Client Name (#)	Address	
Ialongo, Deborah A (RN) (000624)						
Mon	03/14/2016	09:00 A-10:00 A	RN/PCN	Charle, Edward (A00887-01)	1800 Carrot Way, Willimantic, CT 06226	
Mon	03/14/2016	09:00 A-10:00 A	RN/Medication Admi	Erleben, Sharon B (001182-A3)	1900 Beige Drive, Willimantic, CT 06226	
Mon	03/14/2016	09:00 A-10:00 A	RN/PCN	Knies, Donna M (A01282-A2)	1600 Apricot Way, Willimantic, CT 06226	
Mon	03/14/2016	09:00 A-10:00 A	RN/PCN	Petzoldt, Brian (A01601-01)	1900 Beige Drive, Lebanon, CT 06249	
Mon	03/14/2016	09:00 A-10:00 A	RN/Recert	Pfeiffer, Betty (002466-A5)	1300 Cherry Court, Apartment 108, Willimantic, CT 06226	
Visit Comment: dc or recert by 3/16 (3/12-3/16) dif						
Mon	03/14/2016	09:00 A-10:00 A	RN/Recert	Planty, Helen B (A01535-01)	1500 Grape Court, Apt 44, Willimantic, CT 06226	
Visit Comment: dc or recert by 3/16 (3/12-3/16) dif						
Mon	03/14/2016	09:00 A-10:00 A	RN/PCN	Trame, Barbara (A00302-04)	400 Red Street, Apt 19, Willimantic, CT 06226	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Clifford, Carol M (A01593-01)	1700 Persimmon Way, Windham, CT 06280	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Graen, Ronald J (002721-A3)	2100 Midnight Drive, Apartment 410, Willimantic, CT 06226	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Hissem, John L (A01501-01)	200 Black Road, Building 16, Willimantic, CT 06226	
Tue	03/15/2016	09:00 A-10:00 A	RN/Medication Admi	Labarbera, Donna M (001705-A3)	1700 Persimmon Way, Mansfield Center, CT 06250	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Muscarello, Carol (A01500-01)	1800 Carrot Way, Apartment 112, Willimantic, CT 06226	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Rosati, Mark C (001311-01)	1300 Cherry Court, Columbia, CT 06237	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Santellan, James (002661-A2)	100 White Road, Apartment 3, Willimantic, CT 06226	
Tue	03/15/2016	09:00 A-10:00 A	RN/Subsequent Visi	Shaklee, George J (001310-A2)	1600 Apricot Way, Columbia, CT 06237	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Sunkel, Daniel (A01024-01)	1200 Olive Blvd, Apartment A2, Ashford, CT 06278	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Vessels, Sharon J (003049-01)	1900 Beige Drive, North Windham, CT 06256	
Tue	03/15/2016	09:00 A-10:00 A	RN/PCN	Vital, Helen L (002997-A3)	1400 Banana Court, Apartment 2, Willimantic, CT 06226	
Wed	03/16/2016	09:00 A-10:00 A	RN/Recert	Altreche, Mark A (002872-A5)	1400 Banana Court, Apartment 221, Willimantic, CT 06226	
Visit Comment: dc or recert by 3/19 (3/15-3/19) dif						
Wed	03/16/2016	09:00 A-10:00 A	RN/PCN	Dudzinski, Maria (000777-A4)	600 Yellow Street, Willimantic, CT 06226	
Wed	03/16/2016	09:00 A-10:00 A	RN/Recert	Hersman, Mary (A00965-01)	100 White Road, Apartment 329, Willimantic, CT 06226	
Visit Comment: dc or recert by 3/16 (3/12-3/16) dif						
Wed	03/16/2016	09:00 A-10:00 A	RN/PCN	Petzoldt, Brian (A01601-01)	1900 Beige Drive, Lebanon, CT 06249	
Wed	03/16/2016	09:00 A-10:00 A	RN/PCN	Scarsel, Paul M (000478-A5)	1300 Cherry Court, Willimantic, CT 06226	
Wed	03/16/2016	09:00 A-10:00 A	RN/PCN	Wickers, Deborah (A01365-A2)	2400 Melon Trail, Stafford Springs, CT 06076	
Thu	03/17/2016	09:00 A-10:00 A	RN/PCN	Dowsett, Nancy (003033-01)	1200 Olive Blvd, 3rd floor in the back, Windham, CT 06256	
Thu	03/17/2016	09:00 A-10:00 A	RN/Medication Admi	Erleben, Sharon B (001182-A3)	1900 Beige Drive, Willimantic, CT 06226	
Thu	03/17/2016	09:00 A-10:00 A	RN/PCN	Knies, Donna M (A01282-A2)	1600 Apricot Way, Willimantic, CT 06226	
Thu	03/17/2016	09:00 A-10:00 A	RN/Medication Admi	Labarbera, Donna M (001705-A3)	1700 Persimmon Way, Mansfield Center, CT 06250	
Visit Comment: last week of orders dif						
Thu	03/17/2016	09:00 A-10:00 A	RN/Recert	Mathur, Michael J (002369-A2)	300 Brown Road, Apt 116, Willimantic, CT 06226	
Visit Comment: dc or recert by 3/17 (3/13-3/17) dif						
Thu	03/17/2016	09:00 A-10:00 A	RN/Recert	Sunkel, Daniel (A01024-01)	1200 Olive Blvd, Apartment A2, Ashford, CT 06278	
Visit Comment: dc or recert by 3/19 (3/15-3/19) dif						
Thu	03/17/2016	09:00 A-10:00 A	RN/PCN	Trubey, Michelle A (000760-03)	2000 Taupe Drive, 1 Silo Circle, Apt B211, Storrs, CT 06268	
Fri	03/18/2016	09:00 A-10:00 A	RN/Supervisory Rec	Cavaliero, Laura I (A00088-A2)	2100 Midnight Drive, Mansfield, CT 06250	
Visit Comment: dc or recert by 3/21 (3/17-3/21) dif						
Fri	03/18/2016	09:00 A-10:00 A	RN/PCN	Granneman, Kenneth E (A01361-A2)	1600 Apricot Way, Storrs, CT 06268	
Fri	03/18/2016	09:00 A-10:00 A	RN/PCN	Laperriere, Anthony (A01194-01)	2200 Twilight Trail, Apt 2, Coventry, CT 06238	
Fri	03/18/2016	09:00 A-10:00 A	RN/PCN	Petzoldt, Brian (A01601-01)	1900 Beige Drive, Lebanon, CT 06249	
Fri	03/18/2016	09:00 A-10:00 A	RN/Recert	Sevcik, James J (A01546-01)	100 White Road, Apt B, Willimantic, CT 06226	
Visit Comment: dc or recert by 3/22 (3/18-3/22) dif						
Fri	03/18/2016	09:00 A-10:00 A	RN/Recert	Swearingner, Mary (A01548-01)	100 White Road, Apt 5H, Willimantic, CT 06226	
Visit Comment: dc or recert by 3/22 (3/18-3/22) dif						

Total Visits for Week Ending 03/18/2016: 37

## Employee Schedule (List)

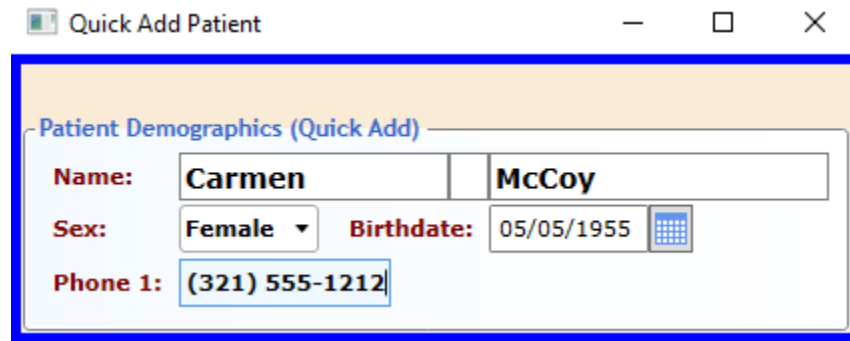
Employee: Ialongo, Deborah A (RN) (000624)

Date Range: 03/12/2016 - 03/25/2016

Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
03/12/2016	03/13/2016	03/14/2016	03/15/2016	03/16/2016	03/17/2016	03/18/2016
		09:00 A-10:00 A Charle, E 09:00 A-10:00 A Erleben, S 09:00 A-10:00 A Knies, D 09:00 A-10:00 A Petzoldt, B 09:00 A-10:00 A Pfeiffer, H 09:00 A-10:00 A Planty, H 09:00 A-10:00 A Trame, B	09:00 A-10:00 A Clifford, C 09:00 A-10:00 A Graen, R 09:00 A-10:00 A Hissem, J 09:00 A-10:00 A Labarbera, D 09:00 A-10:00 A Muscarello, C 09:00 A-10:00 A Rosati, M 09:00 A-10:00 A Santellan, J 09:00 A-10:00 A Shaklee, G 09:00 A-10:00 A Sunkel, D 09:00 A-10:00 A Vessels, S 09:00 A-10:00 A Vital, H	09:00 A-10:00 A Altreche, M 09:00 A-10:00 A Dudzinski, M 09:00 A-10:00 A Hersman, M 09:00 A-10:00 A Petzoldt, B 09:00 A-10:00 A Scarsel, P 09:00 A-10:00 A Wickers, D	09:00 A-10:00 A Dowsett, N 09:00 A-10:00 A Erleben, S 09:00 A-10:00 A Knies, D 09:00 A-10:00 A Labarbera, D 09:00 A-10:00 A Mathur, M 09:00 A-10:00 A Sunkel, D 09:00 A-10:00 A Trubey, M	09:00 A-10:00 A Cavaliero, L 09:00 A-10:00 A Granneman, K 09:00 A-10:00 A Laperriere, A 09:00 A-10:00 A Petzoldt, B 09:00 A-10:00 A Sevcik, J
03/19/2016	03/20/2016	03/21/2016	03/22/2016	03/23/2016	03/24/2016	03/25/2016
		09:00 A-10:00 A Badon, E 09:00 A-10:00 A Erleben, S 09:00 A-10:00 A Longton, R 09:00 A-10:00 A Ponzo, L 09:00 A-10:00 A Trame, B	09:00 A-10:00 A Charle, E 09:00 A-10:00 A Clifford, C 09:00 A-10:00 A Delehoy, G 09:00 A-10:00 A Fowler, B 09:00 A-10:00 A Longton, R 09:00 A-10:00 A Rosati, M 09:00 A-10:00 A Santellan, J 09:00 A-10:00 A Shaklee, G 09:00 A-10:00 A Swindle, D 09:00 A-10:00 A Vital, H 09:00 A-10:00 A Waggoner, K	09:00 A-10:00 A Dudzinski, M 09:00 A-10:00 A Scarsel, P	09:00 A-10:00 A Dowsett, N 09:00 A-10:00 A Erleben, S 09:00 A-10:00 A Ferge, J 09:00 A-10:00 A Hardegree, K 09:00 A-10:00 A Longton, R 09:00 A-10:00 A Longton, R 09:00 A-10:00 A Trubey, M	09:00 A-10:00 A Granneman, K 09:00 A-10:00 A Laperriere, A

## New Patient

The New Patient button allows an “On Call” nurse to quickly add an incomplete patient.



The screenshot shows a window titled "Quick Add Patient" with standard window controls (minimize, maximize, close). Inside the window, there is a section titled "Patient Demographics (Quick Add)". Below this title, there are four fields: "Name:" with two text boxes containing "Carmen" and "McCoy"; "Sex:" with a dropdown menu set to "Female"; "Birthdate:" with a text box containing "05/05/1955" and a calendar icon; and "Phone 1:" with a text box containing "(321) 555-1212". The entire form area is highlighted with a blue border.

After entering name, sex, birth date, and phone number and closing the window, that patient appears in the patient list if the Status filter is changed to “Incomplete”. Because the patient is added this way, most of the demographic information that is normally inherited by the Start of Care will be missing and must be entered by the Start of Care note’s author. Also, because only the office has the authority to associate payers and allowed skills to a patient, the Start of Care author will not be able to enter Dr. Order compliance rules because these rely on the existence of allowed skills for the patient. This part of the Start of Care must be completed after calling the office during work hours to have the office staff add the needed allowed skills for the patient.

## Old Patient

The Old Patient button allows you to get a Case Analysis on Discharged/Hold clients.

## Physician Usage

Physicians that have been given access to RiverSoft Mobile and issued a username and password by the home care agency have access to their patients with 485s naming the physician as the attending physician.

To configure a physician to use RiverSoft Mobile follow these steps:

- 1) Add a user. Configure menu, users, new user. Choose appropriate access to offices and select just one permit – Access RiverSoft Office.

Blueprint [X] Users [X] User John McCoy [X]

New [X] [X] [X] Upd: RS, 05/27/2015

User Profile

Full Name: John McCoy User Name: J [X] Do Not Use  
User Code: 000 [X] Get Unique User Code Password: [X] System Administrator

User Permits

Copy Permits from another User

Administration and Manage Service Permits

- ☐ 0 - Scheduling Functions
- ☐ 1 - Close Week
- ☐ 2 - Edit Pay Rates
- ☐ 3 - View Pay Rates
- ☐ 4 - Edit Bill Rates
- ☐ 5 - Edit Clients
- ☐ 6 - View Client SSN
- ☐ 7 - Edit Employees
- ☐ 8 - Edit Employee Statuses
- ☐ 9 - View Employee SSN
- ☐ 10 - Edit Employee Pay Items
- ☐ 11 - Edit Payers
- ☐ 12 - View Payers
- ☐ 13 - Add/Delete National Payers
- ☐ 14 - Verify Visits
- ☐ 15 - Edit Client-Payer
- ☐ 16 - Edit Referral Sources
- ☐ 17 - Edit Affiliations
- ☐ 18 - Run ELVIS Monitor

Clinical Data, PoC/VO, OASIS, HIS Permits

- ☐ 0 - Clinical Functions
- ☐ 1 - View and Print POC/VO
- ☐ 2 - View and Print OASIS
- ☐ 3 - Change OASIS Lock Date
- ☐ 4 - Edit Phrases
- ☐ 5 - MAT User
- ☐ 6 - MAT Administrator
- ☐ 7 - MAT Send To SAM
- ☐ 8 - MAT Travel Pay
- ☐ 9 - MAT Autoverify
- ☐ 10 - MAT View PPS Value
- ☐ 11 - MAT App Details Admin
- ☐ 12 - MAT/RiverSoft Mobile Active Scheduled Patients Only
- ☐ 13 - MAT Mobile Select Patients On Demand
- ☐ 14 - Edit and Export HIS Records
- ☐ 15 - AutoLink Documents

Billing/AR Permits

- ☐ 0 - AR Functions
- ☐ 1 - Close Week
- ☐ 2 - Create Invoices
- ☐ 3 - View Invoices
- ☐ 4 - Print/Transmit Invoices/Claims
- ☐ 5 - Payments/Apply Cash
- ☐ 6 - Create Adjustment
- ☐ 7 - Review Adjustments (Obsolete)
- ☐ 8 - Close/Open Accounting Period
- ☐ 9 - Export Payroll
- ☐ 10 - AutoPay Mileage
- ☐ 11 - Unbilled Items

Configuration Permits

- ☐ 0 - Configuration Functions
- ☐ 1 - Add Standard Supplies
- ☐ 2 - Add Standard Service
- ☐ 3 - Edit Attributes
- ☐ 4 - Edit Sub-Skills
- ☐ 5 - Edit Tracking Items
- ☐ 6 - Add/Delete Tracking Items
- ☐ 7 - Data Exchange/Reindex/Archive
- ☐ 8 - Data Exchange Set Defaults

Miscellaneous Permits

- ☐ 1 - Change Password
- ☐ 2 - Access Archive
- ☒ 3 - Access RiverSoft Office

Reports Permits

- ☐ 0 - Reports
- ☐ 4 - Report Interface Functions Report
- ☐ 8 - Attachment Report

User Office Mapping

Place a check next to the user should be granted as

Offi

☒ Main Office

- 2) Associate the user to the physician by choosing the user just entered at the bottom right of the Physician screen:

Blueprint [X] Physicians [X] Physician McCoy, John [X]

Save [X] Undo [X] Upd: RS, 05/27/2015

Physician Information

First Name MI Last Name Degree [X] PECOS  
John H McCoy MD [X] Do Not Use LEIE

NPI: 1457555831 License #: 01064187A Taxonomy (From PECOS data):  
UPIN: N1457555831 License Date: 10/31/2015 207Q00000X  
Claim/Group ID: Date Verified: 06/13/2014

Contact Information

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RiverSoft Mobile Username

ELVIS/RSM User: J Change User: J(John McCoy)



When the physician logs in, their list of patients will be presented:

RiverSoft Mobile - User: JM - Office: Office 0004 (0004) - Ver: 4.0.1962.0 - IP: 192.168.1.213, 9797

Change Login Developers

Physician's Patients X

Clinical Notes	Care Plans	Patient Overview	Face Sheet	Med Profile	Patient Schedule	Refresh List	Search:	Get: Abercrombe, Mark A [000]	Status: All (But Discharged / Non Admitted)	Soft	Hard	i
Patients (4)	Status	UnSigned Plans	Mobile Grams	Case Manager	Client #	Birth Date	Sex	City	Phone	Agency SOC Date	Discharge Date	
Rosati, Mark C (01)	Active	0	0	Maffett, George	001311	12/11/48	M	Columbia	(555) 228-5412	12/06/2005		
Sevcik, James J (01)	Active	0	0	Ialongo, Deborah	A01546	12/10/34	M	Willimantic	(555) 456-9151	11/24/2015		
Shaklee, George J (A2)	Active	1	0	Bousum, Lisa	001310	04/09/65	M	Columbia	(555) 228-2145	10/06/2005		
Sunkel, Daniel (01)	Active	0	0	Ialongo, Deborah	A01024	01/23/46	M	Ashford	(555) 933-8436	05/30/2014		

The third column shows how many unsigned care plans/verbal orders the patient has. Any row that has unsigned care plans is highlighted in yellow. Selecting a patient and clicking care plans shows this screen:

Change Login Developers

Physician's Patients X

Care Plans and VOs for Shaklee, George J (A2) (A0018135)

PDF/Print

Use the Print/PDF button to review the care plan or revision (verbal order) and then sign below - click the 'Done' button to record today as the date of your signature.

Care Plans / Verbal Orders List

Type	Cert Begin	VO Date	Payer
PoC	03/03/16		A2-Medicaid
PoC	01/03/16		A2-Medicaid
PoC	11/04/15		A2-Medicaid
PoC	09/05/15		A2-Medicaid
PoC	07/07/15		A2-Medicaid
VO	05/08/15	06/30/15	A2-Medicaid
PoC	05/08/15		A2-Medicaid

Physician Signature

Signed: [Signature] Done Clear

This Care Plan/VO

Date of Verbal Order: [Date]

Payer: (A2) Medicaid - EDS

Second Physician: [Name]

Case Manager: Ialongo, Deborah

☒ Box 23: use case mgr not nurse/pt signature

Comment: [Text]

HOME HEALTH CERTIFICATION AND PLAN OF CARE

1. Patient's HI Claim No. 001254412

2. Start of Care Date 10/06/2009

3. Certification Period 03/03/2016

4. Medical Record No. 001310-A2

5. Provider No. 777

6. Patient's Name and Address Shaklee, George J 1600 Apricot Way Columbia, CT 06237 (555) 228-2145

7. Provider's Name, Address and Telephone Number (555) 456-0053 Compassionate Caring Services 1900 Beige Drive Willimantic, CT 06226-1920

8. Date of Birth 04/09/1965

9. Sex ☒ M ☐ F

10. Medications: Dose/Frequency/Route (New/Changed) CALCIUM 600+D 1 TABLET PO BID COLACE 100MG 2 CAPSULES PO IN AM, 1 CAPSULE PO BEDTIME DEPAKOTE ER 1000 MG PO BID FLUTICASONASE NASAL 2 SPRAYS EACH NOSTRIL DAILY DURING ALLERGY SEASON ONLY. DISCONTINUE IN WINTER IRON 325MG PO BID MAGNESIUM 64 MG PO DAILY 2-30 PM

11. ICD Principal Diagnosis S06890 Intracran inj w/o loss of consciousness, init Date 11/03/15

12. ICD Surgical Procedure 518 ENDOSC SPHINCTEROTOMY Date 03/19/1203/16

13. ICD Other Pertinent Diagnoses R569 Unspecified convulsions (H) 11/03/15 R270 Ataxia, unspecified (H) 11/03/15 G809 Cerebral palsy, unspecified (H) 11/03/15 I10 Essential (primary) hypertension (H) 11/03/15

14. DME and Supplies

15. Safety Measures Clear Pathways, Seizure Precautions, Fall Precautions

16. Nutritional Requirements Appetite: Good Regular diet

17. Allergies No Known Allergies

18.A Functional Limitations 1 ☐ Amputation 5 ☒ Paralysis 9 ☐ Legally Blind 2 ☒ Bowel/Bladder (Incontinence) 6 ☒ Endurance A ☐ Dyspnea With Minimal Exertion 3 ☐ Contracture 7 ☒ Ambulation 8 ☐ Other (Specify) 4 ☐ Hearing 8 ☐ Speech B ☐ Other (Specify)

18.B Activities Permitted 1 ☐ Complete Bedrest 6 ☐ Partial Weight Bearing A ☐ WheelChair 2 ☐ Bedrest BRP 7 ☐ Independent At Home B ☐ Walker 3 ☒ Up As Tolerated 8 ☐ Crutches C ☒ No Restrictions 4 ☐ Transfer Bed/Chair 9 ☐ Cane D ☐ Other (Specify) 5 ☐ Exercises Prescribed

19. Mental Status 1 ☒ Oriented 3 ☒ Forgetful 5 ☐ Disoriented 7 ☐ Agitated 2 ☐ Comatose 4 ☐ Depressed 6 ☐ Lethargic 8 ☐ Other

20. Prognosis 1 ☐ Poor 2 ☒ Guarded 3 ☐ Fair 4 ☐ Good 5 ☐ Excellent

21. Orders for Discipline and Treatments (Specify Amount/Frequency/Duration) Edit Pathways Edit Orders

Services: SN 3 Visits per Week for 10 Weeks

(Problems) and => Interventions: (Hypertension [Risk For Decreased Cardiac Output])

22. Goals/Rehabilitation Potential/Discharge Plans

(Status) and => Goals: (Ongoing)=> Patient / Caregiver will be able to describe the symptoms of relapse or progression of complications reported to the doctor: headache, dizziness, fainting, nausea and vomiting. (Ongoing)=> Patient / Caregiver will report to nurse or MD all BP readings outside of the parameters of <90/50 or >160/100.

23. Nurse's Signature and Date of Verbal SOC Where Applicable

25. Date Agency Received Signed POI

The PDF/Print button provides the ability to quickly review the current care plan. Signing and clicking the done button updates the care plan's received signed date with today's date. The physician continues this process until all plans and revision are signed.

The physician has read-only access to the clinical notes, care plans and verbal orders, the medication profile, patient snapshot, and the patient's schedule.

## Payer Usage

A payer representative that has been issued a username may have access to patients that have been given a relationship to that payer. Payers will have read-only access to review their patient's clinical field notes, care plans, and verbal orders.

To configure a payer representative to use RiverSoft Mobile follow these steps:

- 3) Add a user. Configure menu, users, new user. Choose appropriate access to offices and select just one permit – Access RiverSoft Office.

1)

The screenshot shows the 'User Profile' for John McCoy. The 'User Permits' section is expanded, showing various permission categories. The 'Access RiverSoft Office' checkbox under 'Miscellaneous Permits' is highlighted with a red circle.

- 2) Associate the user to the payer by choosing the user just entered at the bottom left of the Payer screen:

The screenshot shows the 'Payer Managed Health Care' configuration screen. The 'RiverSoft Mobile Username' section at the bottom is highlighted with a red circle, showing the 'Username' field set to 'J' and the 'Change User' dropdown set to 'J(John McCoy)'.

When the payer logs the list of patient's that have been associated with the payer is shown.

RiverSoft Mobile (Local Mode) - User P - Main Office - Ver: 1.0.0.0 - Server: RS213 - DataBase: ABCHOMECARE											
Change Office Change Login Close All Developers											
Payer's Patients X											
Name Beginning With:		Patient Status: Active		Clinical Notes	Care Plans	Patient Snapshot	Med Profile	Patient Schedule	Caregiver Schedule	i	
Patients (27)	Status	Scheduled Visits	Case Manager	Client #	Birth Date	Sex	City	Phone	Agency SOC Date	Discharge Date	
Blakeley, Barbara (01)	Active	69	Spadafino, Margaret	A00151	06/22/61	F	Lebanon	(555) 702-3542	03/10/15	01/01/00	
Borell, Nancy (01)	Active	123	Matterson, Kimberly	A00092	05/22/58	F	Anderson	(555) 810-8454	11/28/14	01/01/00	
Buer, Dorothy A (01)	Active	71		A00145	10/07/35	F	Noblesville	(555) 674-3892	03/05/15	01/01/00	
Bulman, Elizabeth (01)	Active	134	Spadafino, Margaret	A00090	12/13/49	F	Indianapolis	(555) 802-5447	11/17/14	01/01/00	
Calabretta, Anthony (01)	Active	16	Spadafino, Margaret	A00149	10/27/91	M	Kokomo	(555) 609-4389	03/09/15	01/01/00	
Capp, Thomas R (01)	Active	5	Spadafino, Margaret	A00140	05/16/57	M	Noblesville	(555) 773-5241	02/16/15	01/01/00	
Dresbach, Ruth (01)	Active	11		A00168	10/07/48	F	Anderson	(555) 393-0992	04/16/15	01/01/00	
Fadden, Lisa M (A2)	Active	13	Waitkus, Nancy	A00108	03/08/65	F	Indianapolis	(555) 970-6655	03/26/14	01/01/00	
Gamons, Maria (01)	Active	116	Spadafino, Margaret	A00069	09/06/63	F	Lebanon	(555) 481-0029	10/23/14	01/01/00	
Hunsucker, Dorothy (01)	Active	79	Spadafino, Margaret	A00124	02/22/29	F	Indianapolis	(555) 894-3395	01/24/15	01/01/00	
Janos, Mary (A2)	Active	196	Fagin, Donald	A00073	06/09/47	F	Muncie	(555) 273-7388	11/09/14	01/01/00	
Kammerdiener, Donna (01)	Active	133	Spadafino, Margaret	A00109	02/11/39	F	Lebanon	(555) 335-0600	12/22/14	01/01/00	
Krulish, Ruth (01)	Active	120	Spadafino, Margaret	A00068	08/07/55	F	Noblesville	(555) 607-6528	10/21/14	01/01/00	
Langgood, Linda L (01)	Active	62	Putty, Michelle	A00107	10/21/56	F	Elwood	(555) 552-6930	12/17/14	01/01/00	
Lenahan, James A (01)	Active	24		A00166	07/19/53	M	Lebanon	(555) 627-8048	04/16/15	01/01/00	
Pama, Maria (01)	Active	115	Spadafino, Margaret	A00066	05/23/29	F	Jamestown	(555) 946-6180	10/13/14	01/01/00	
Polakowski, Sandra A (A2)	Active	217	Matterson, Kimberly	A00019	11/05/54	F	Anderson	(555) 200-1302	09/02/14	01/01/00	
Rintharamy, Betty J (01)	Active	131	Spadafino, Margaret	A00085	03/13/57	F	Indianapolis	(555) 789-3606	11/13/14	01/01/00	
Rivadulla, Sharon (01)	Active	24	Putty, Michelle	A00158	06/08/54	F	Muncie	(555) 702-3764	03/26/15	01/01/00	
Savka, Donna (01)	Active	16	Spadafino, Margaret	A00100	12/13/74	F	Kokomo	(555) 455-1561	11/30/14	01/01/00	
Scee, Mary (01)	Active	20		A00132	01/06/25	F	Indianapolis	(555) 899-0882	01/30/15	01/01/00	
Serles, Susan (01)	Active	103	Spadafino, Margaret	A00137	02/22/59	F	Lebanon	(555) 336-4589	02/02/15	01/01/00	
Struckhoff, Anthony (01)	Active	864	Fagin, Donald	A00033	07/11/55	M	Muncie	(555) 748-8244	07/29/14	01/01/00	
Sweets, Kenneth A (01)	Active	53	Spadafino, Margaret	A00027	11/14/64	M	Elwood	(555) 717-6736	12/15/14	01/01/00	
Tiller, Donna (01)	Active	203	Spadafino, Margaret	A00098	07/01/58	F	Lebanon	(555) 485-2009	11/25/14	01/01/00	
Vannatta, Elizabeth E (A2)	Active	85	Putty, Michelle	A00036	11/20/46	F	Muncie	(555) 212-7535	01/15/15	01/01/00	
Vaughns, Donna R (A2)	Active	14	Sumption, Michael	A00025	03/24/67	F	Tipton	(555) 292-3021	02/19/15	01/01/00	