INTAKE & ADMISSION

BUSINESS MODEL SOFTWARE TRAINING

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Intake & Admission: Recommended Training Course Agenda

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how to enter new referrals and admit new patients through the GoodLooking Software. The sequence of courses can be changed based on training needs; however, the content of each course should remain as stated.

Recommended Course Attendees: Management, Office Staff, Intake & Schedulers

Estimated Duration: 1 hour 30 minutes

TOPIC	DESCRIPTION	
Set Up Your First Patient	How to set up your first patient in the system	15 Minutes
Add a Patient	How to add a patient and patient info into the system	30 Minutes
Patient Portal	How to use the patient portal in the system	30 Minutes
Tracking Requirements: Patients	How to create and add new patient tracking items in the system	15 Minutes

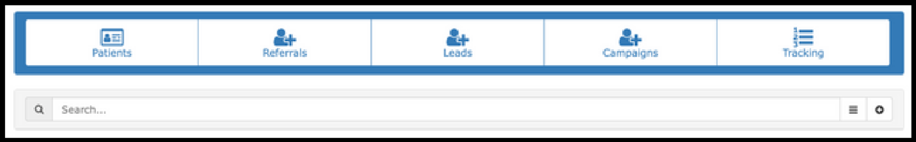
Set Up Your First Patient

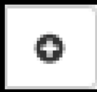
1 Go to 'Patient' Tab

- On your home page, click the 'Patient' tab at the top tool bar

2 Add New Patient

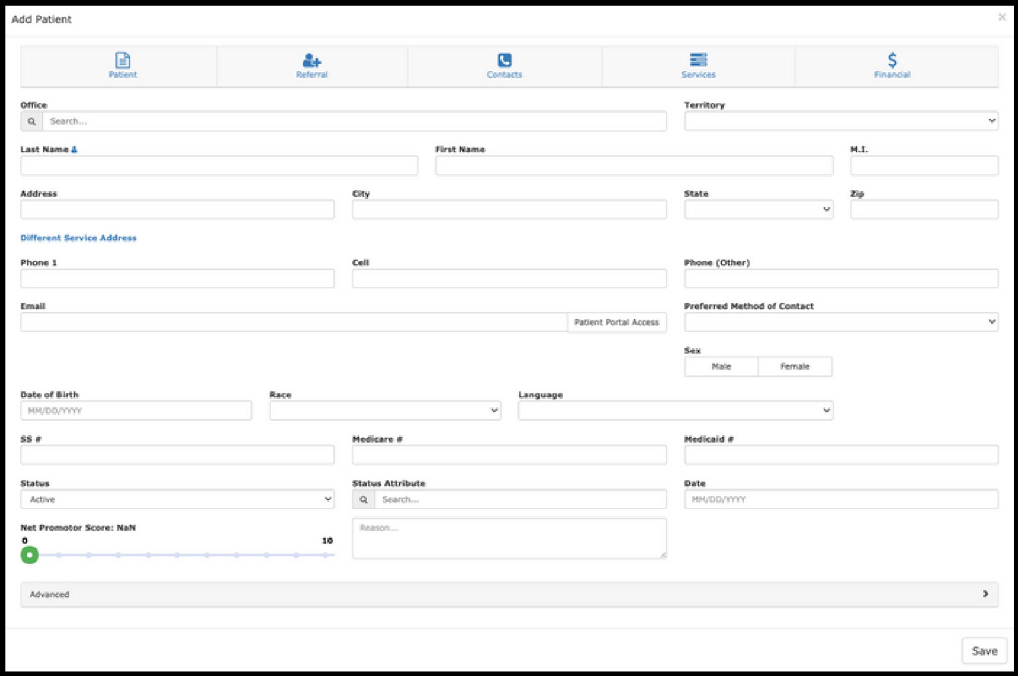
- Click the '+' icon on the far right to the search bar.
- A form page will open up.





3 Complete the Form

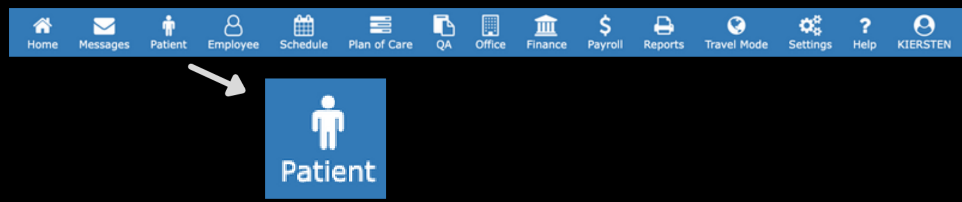
- Fill out the required fields with the patient's information.
- Don't forget to click 'Save' on the bottom right of the form.



Add a Patient Referral

1 Go to 'Patient' Tab

- On your home page, click the 'Patient' tab at the top tool bar

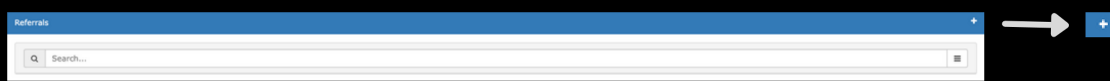


2 Go to 'Referrals'

- Click the 'Referral' icon in the top sub menu bar.

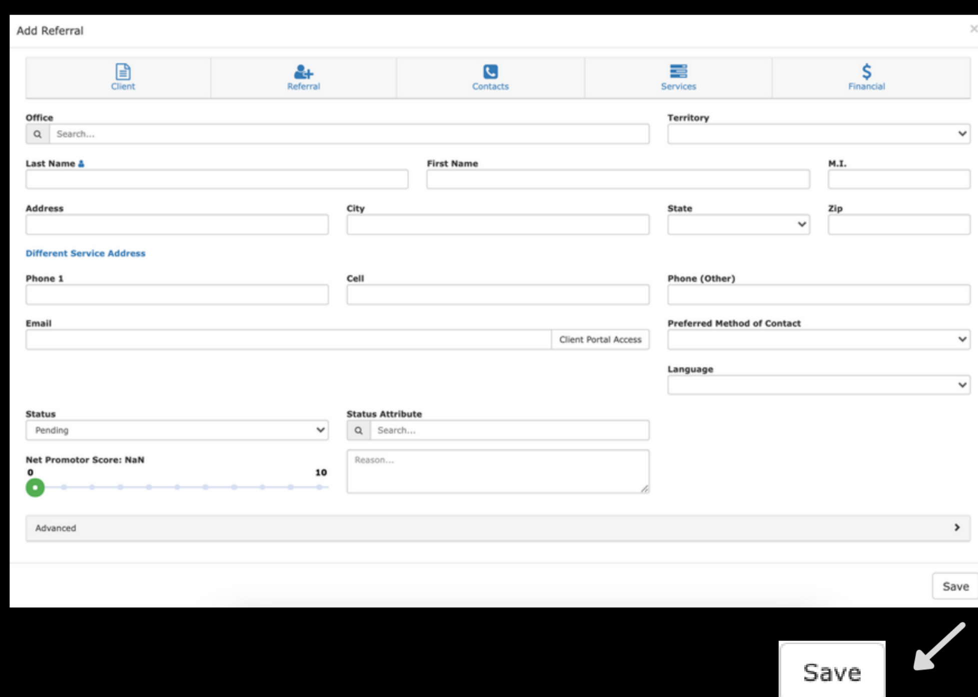
3 Add a Referral

- Click the '+' icon on the far right of the search bar.
- A form page will open up.



4 Complete the Form

- Fill out the required fields with the patient's information.
- Don't forget to click 'Save' on the bottom right of the form.



Add a Patient Lead

1 Go to 'Patient' Tab

- On your home page, click the 'Patient' tab at the top tool bar

2 Go to 'Lead'

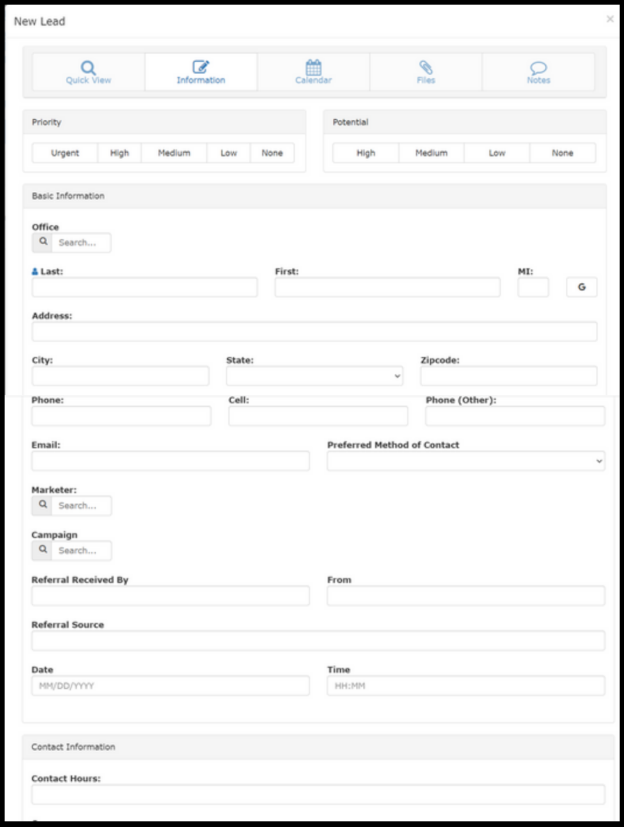
- Click the 'Lead' icon in the top sub menu bar.

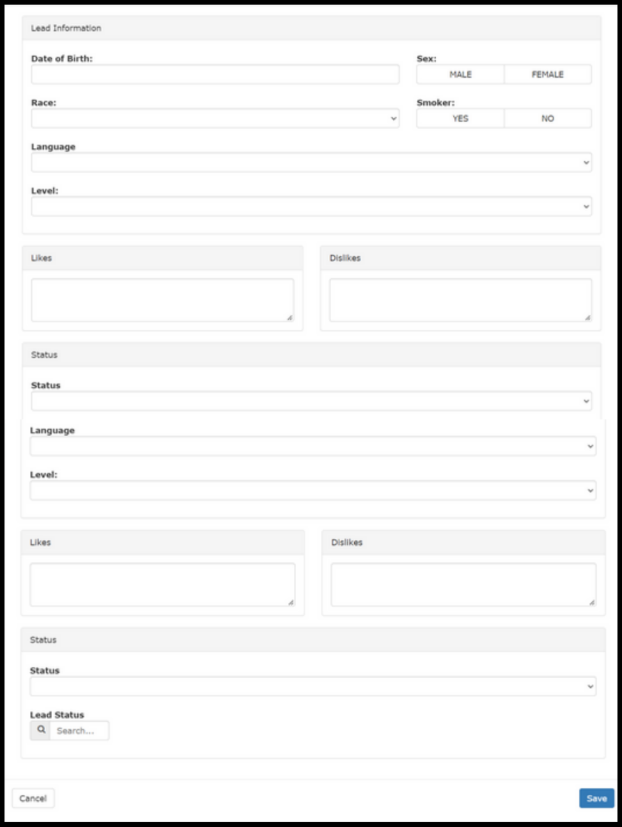
3 Add a Lead

- Click the '+' icon on the far right of the search bar.
- A form page will open up.

4 Complete the Form

- Fill out the required fields with the patient's information.
- Don't forget to click 'Save' on the bottom right of the form.

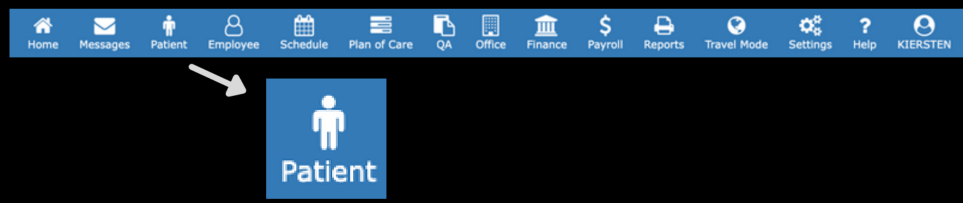




Patient Portal

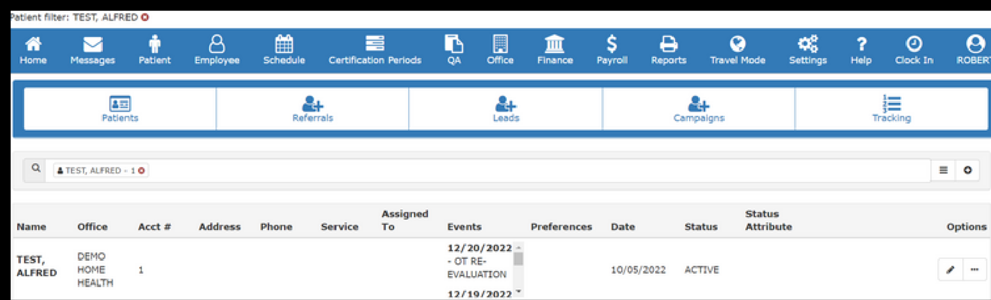
1 Go to 'Patient' Tab

- On your home page, click the 'Patient' tab at the top tool bar



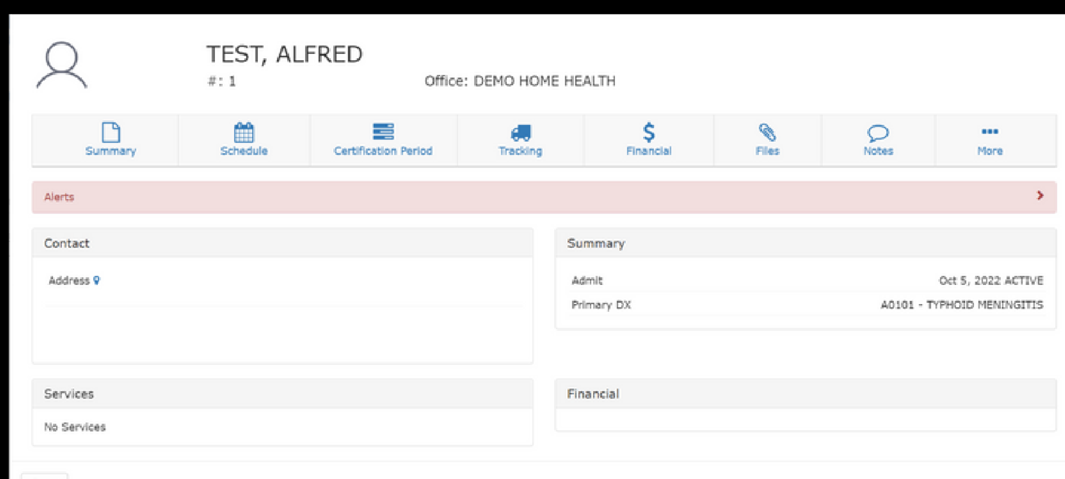
2 Choose the Patient

- On the Patient Page, choose the patient you want to view in the list.



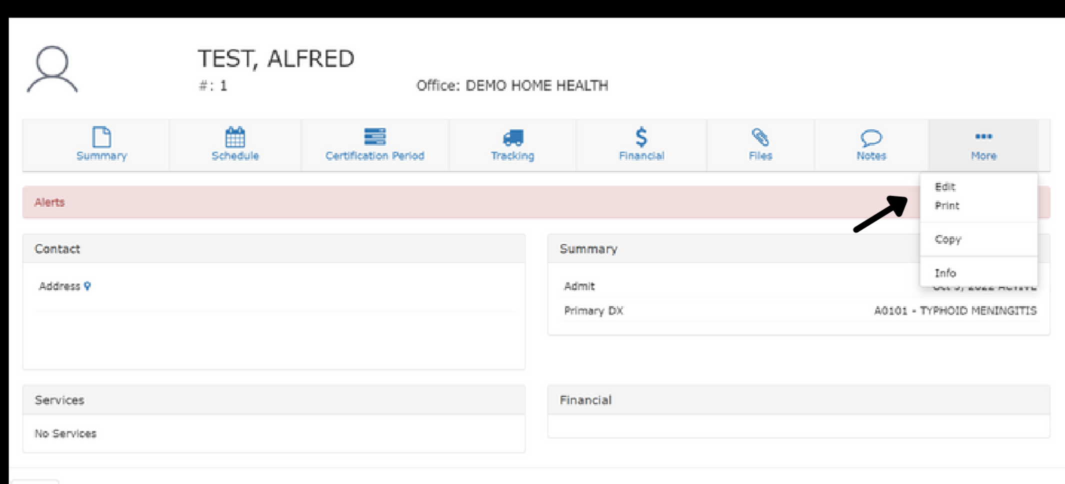
3 Review Patient Profile

- The patient profile will open.
- Navigate through the top tool bar to review their individual:
  - Patient summary
  - Schedule
  - Certification Period
  - Tracking
  - Financial Details
  - Any files attached
  - Notes history



4 Edit Patient Profile

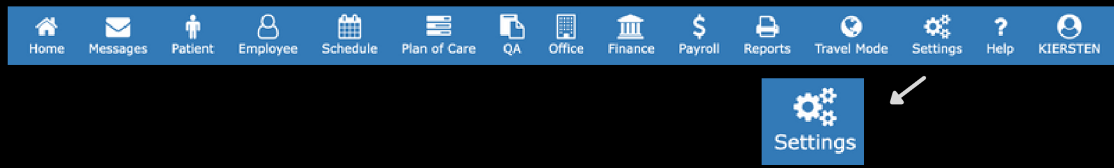
- Select the 'More' button on the right side.
- Select the 'Edit' button from the drop down menu.



Tracking Requirements: Patients

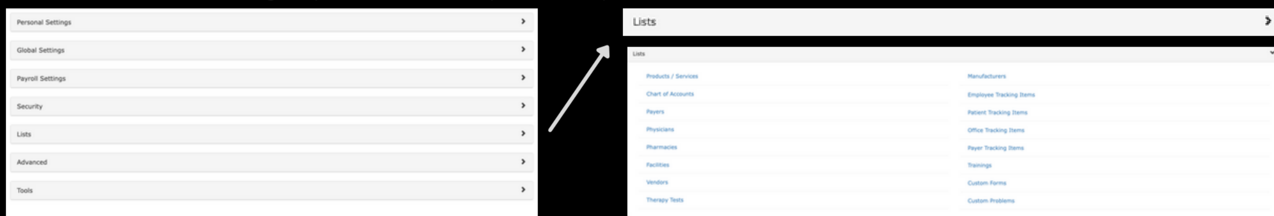
1 **Go to 'Settings' Tab**

- On your home page, click the 'Settings' tab at the top tool bar



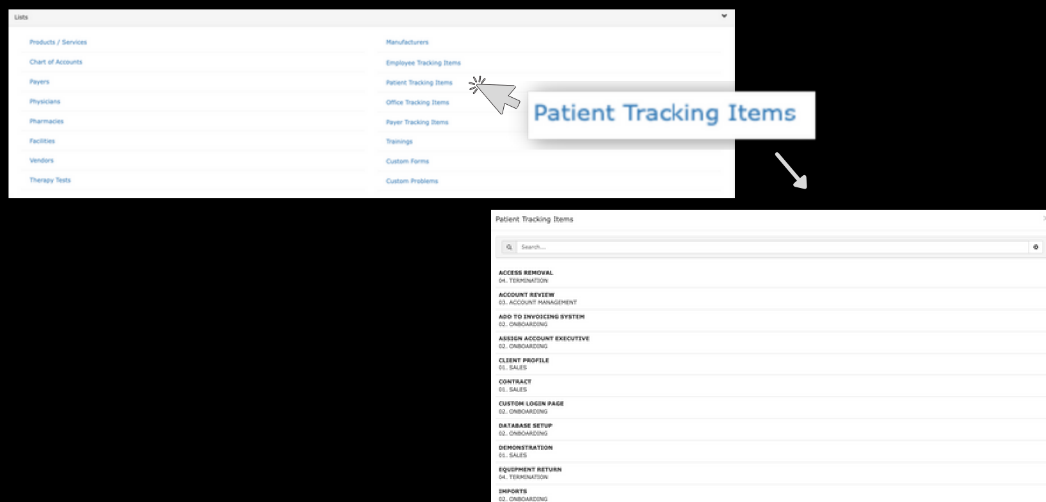
2 **Lists**

- Click 'Lists' in the settings options so a drop down opens.



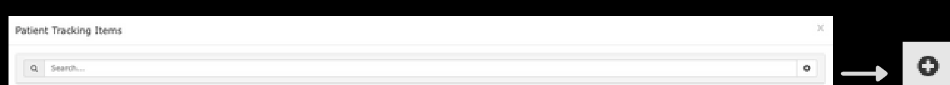
3 **Go to Patient Tracking Items**

- Click 'Patient Tracking Items' in the Lists section.
- A page will open listing all your patient tracking items.



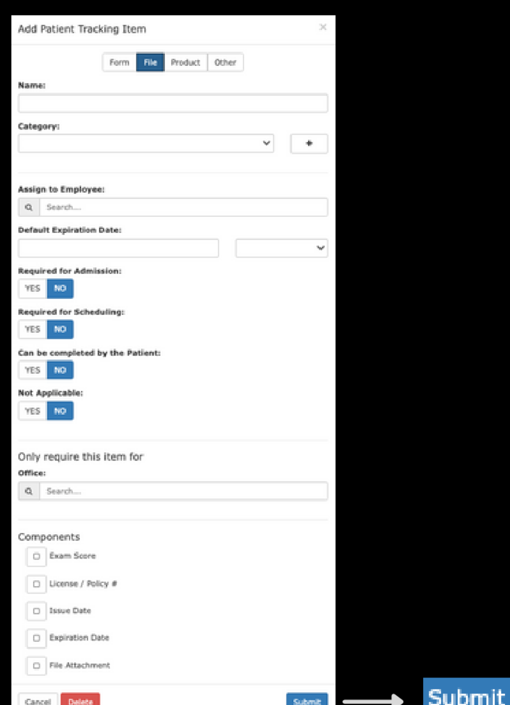
4 **Add a Tracking Item**

- To add a tracking item, click the '+' button to the far right of the search bar.



5 **Complete the Add Patient Tracking Item Form**

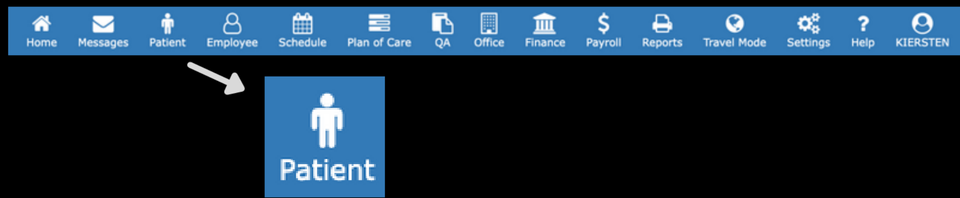
- When the 'Add Patient Tracking Item' form opens, you will select the type and complete the open fields.
- Input the Requirement settings and Components for the tracking item.
- Don't forget to click 'Submit'.



Review/Edit Patient Tracking Items

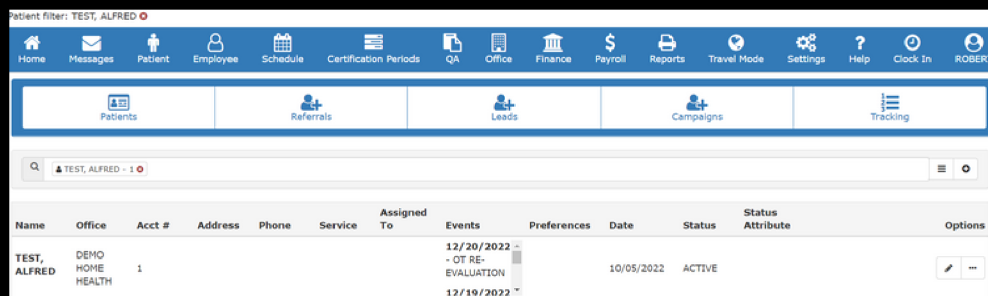
1 Go to 'Patient' Tab

- On your home page, click the 'Patient' tab at the top tool bar



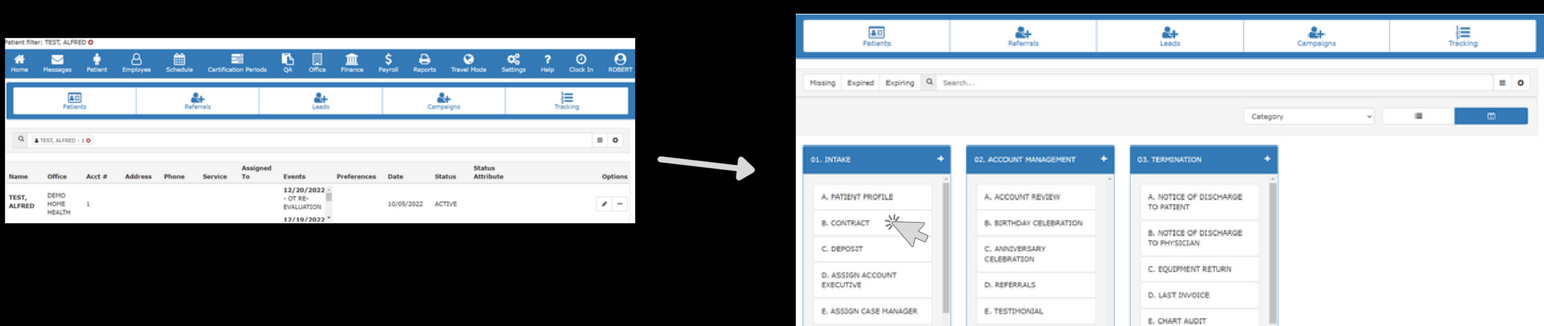
2 Choose the Patient

- On the Patient Page, choose the patient you want to view in the list.



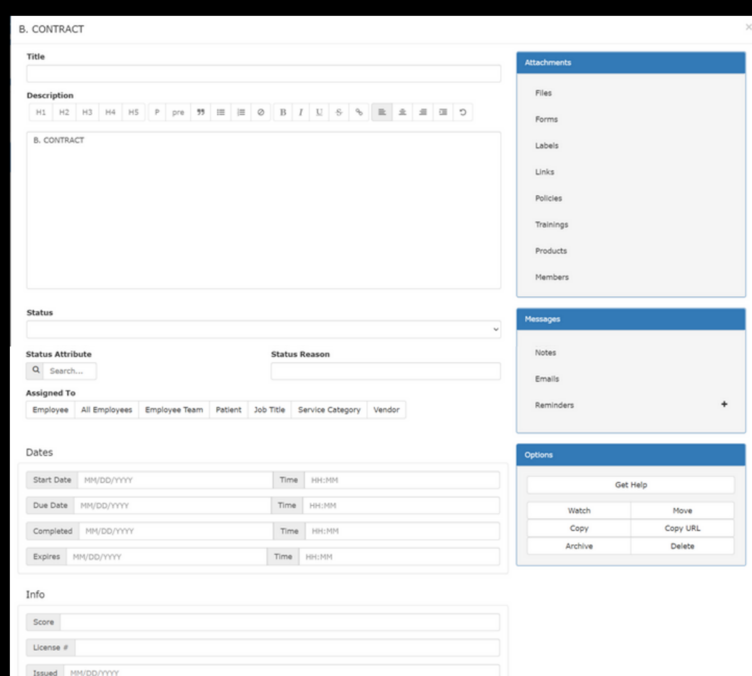
3 Select Tracking Section

- Select the 'Tracking' section above the search bar.



4 Select a Tracking Item

- Select the tracking item/document you would like to edit/review for the patient.
- This will bring up the tracking item page.
- Use the tracking item page to add comments, attach files, assign to a specific employee, etc.



Add a Patient Recruiting Campaign

1 **Go to 'Patient' Tab**

- On your home page, click the 'Patient' tab at the top tool bar

2 **Go to 'Campaigns'**

- Click the 'Campaigns' icon in the top sub menu bar.

3 **Add a New Campaign**

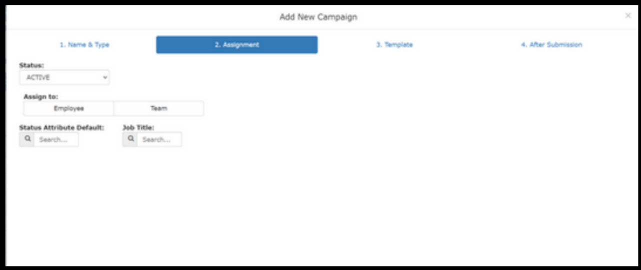
- Click the '+' icon on the far right above the search bar.
- A form will open up.

4 **Complete the Form**

1. Name the Campaign and select the 'Campaign Type'. Press the 'Next Step' button on the bottom right of the screen.
2. In the 'Assignment' page, enter the Status and assign to Employee/Team or add a Status Attribute Default/Job Title. Press the 'Next Step' button.
3. Fill out the information in the 'Template' screen. Press the 'Next Step' button.
4. Select information in the 'After Submission' screen. Press the 'Save' button.

1.

2.



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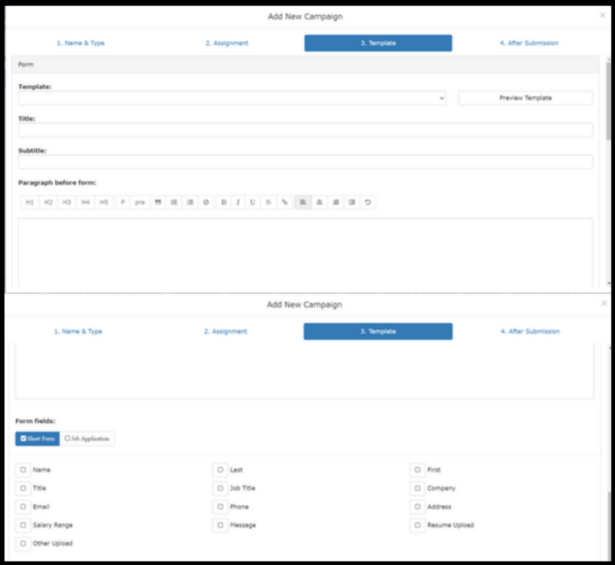

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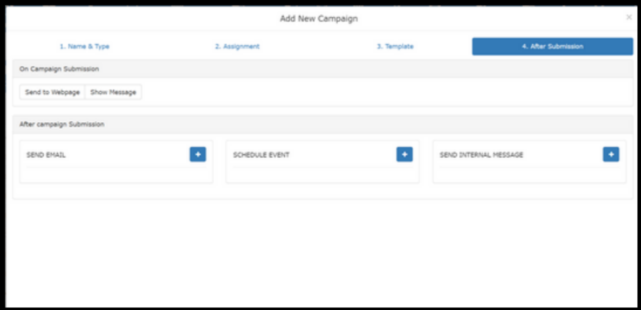


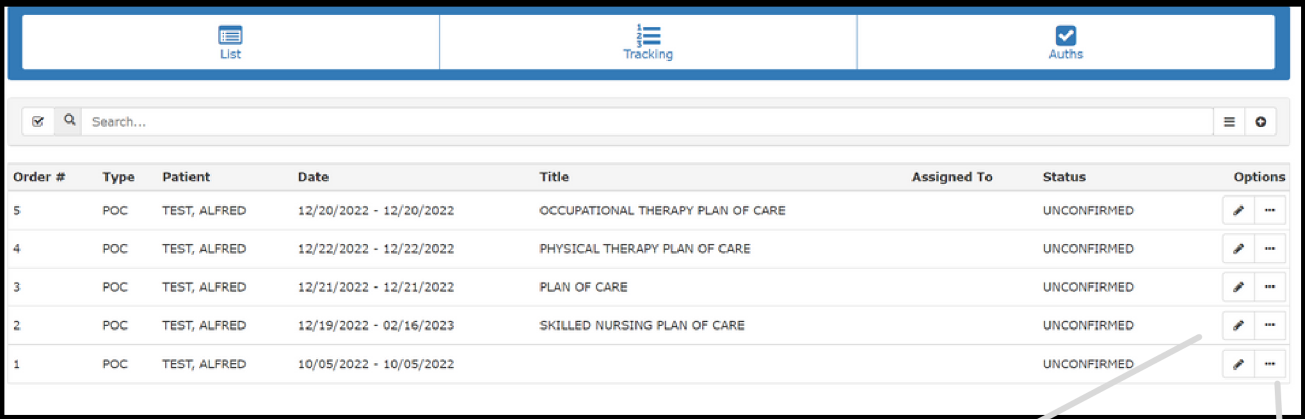
Add a Patient Plan of Care

1 Go to 'Plan of Care' Tab

- On your home page, click the 'Plan of Care' tab at the top tool bar

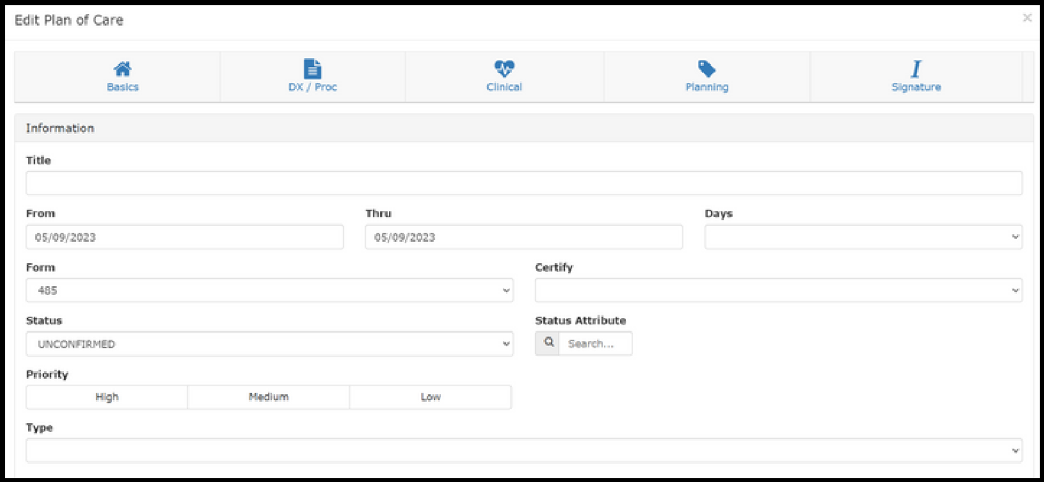
2 Go to 'List'

- Click on the 'List' tab to show all Plans of Care

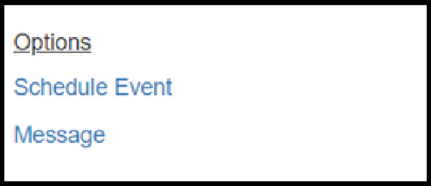


Order #	Type	Patient	Date	Title	Assigned To	Status	Options
5	POC	TEST, ALFRED	12/20/2022 - 12/20/2022	OCCUPATIONAL THERAPY PLAN OF CARE		UNCONFIRMED	
4	POC	TEST, ALFRED	12/22/2022 - 12/22/2022	PHYSICAL THERAPY PLAN OF CARE		UNCONFIRMED	
3	POC	TEST, ALFRED	12/21/2022 - 12/21/2022	PLAN OF CARE		UNCONFIRMED	
2	POC	TEST, ALFRED	12/19/2022 - 02/16/2023	SKILLED NURSING PLAN OF CARE		UNCONFIRMED	
1	POC	TEST, ALFRED	10/05/2022 - 10/05/2022			UNCONFIRMED	

Selecting the Pencil icon will bring up the 'Edit Plan of Care' screen.

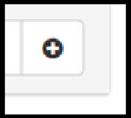


Selecting the '...' button will bring up the options menu.



3 Add a New Plan of Care

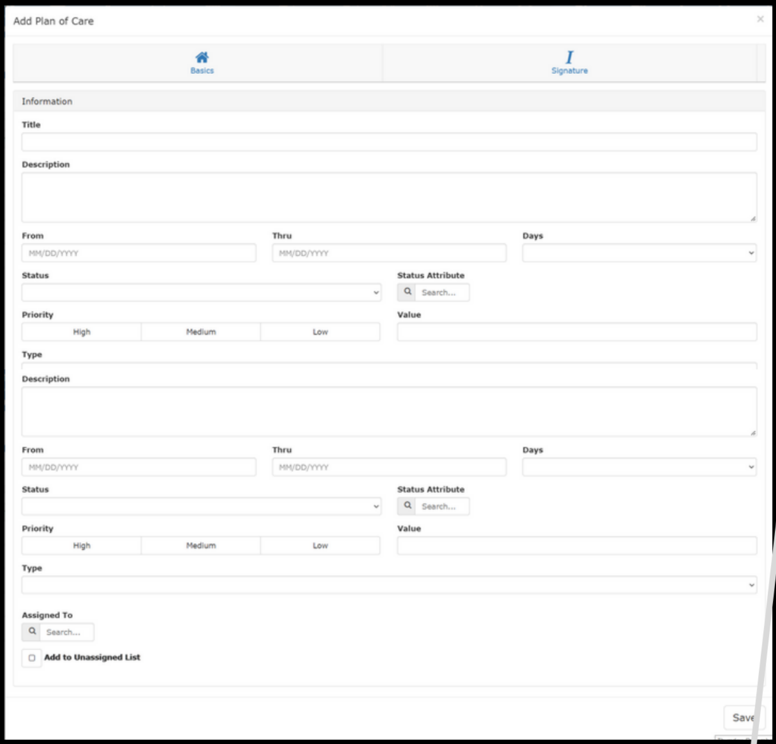
- Click the '+' icon on the far right above the search bar.
- A form will open up.

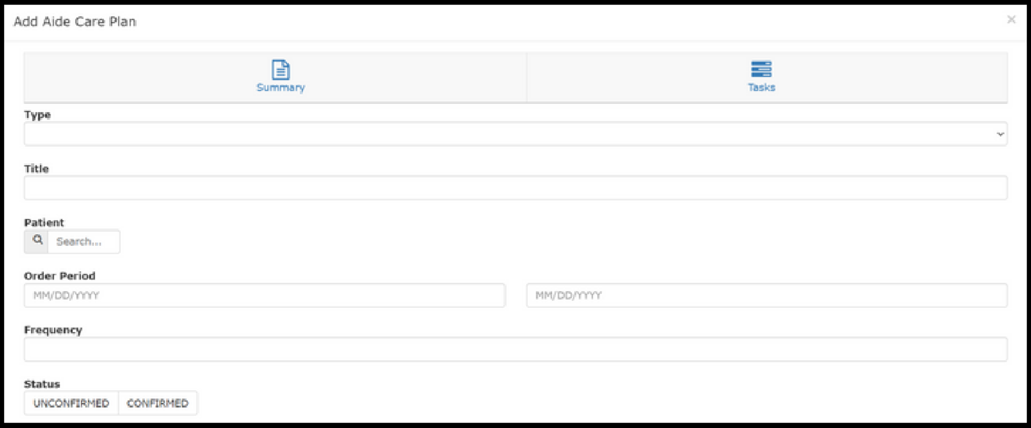


Add a Patient Plan of Care Continued

4 **Select an Order to Add**

- A form will appear asking if you want to add a Plan of Care or Physician Order.

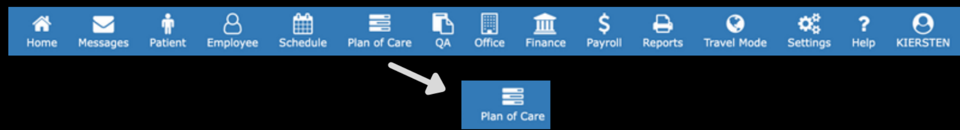




Add a Patient Authorization

1 **Go to 'Plan of Care' Tab**

- On your home page, click the 'Plan of Care' tab at the top tool bar



2 **Go to 'Auths'**

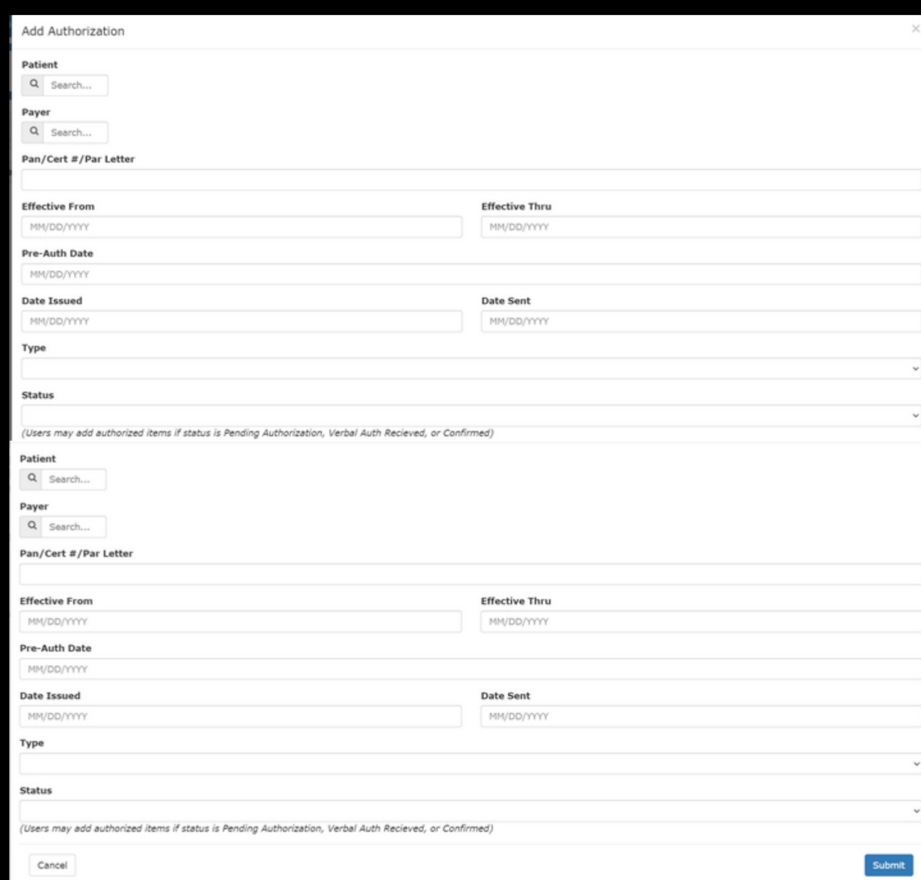
- Click on the 'Auths' tab above the search bar.

3 **Add a New Plan of Care**

- Click the '+' icon on the far right above the search bar.
- A form will open up.

4 **Fill Out the Add Authorization Form**

- Fill out the 'Add Authorization' Form.
- When finished, press the blue 'Submit' button at the bottom right.


Add Authorization

Patient
Search...

Payer
Search...

Pan/Cert #/Par Letter

Effective From MM/DD/YYYY
Effective Thru MM/DD/YYYY

Pre-Auth Date MM/DD/YYYY

Date Issued MM/DD/YYYY
Date Sent MM/DD/YYYY

Type

Status

(Users may add authorized items if status is Pending Authorization, Verbal Auth Recieved, or Confirmed)

Patient
Search...

Payer
Search...

Pan/Cert #/Par Letter

Effective From MM/DD/YYYY
Effective Thru MM/DD/YYYY

Pre-Auth Date MM/DD/YYYY

Date Issued MM/DD/YYYY
Date Sent MM/DD/YYYY

Type

Status

(Users may add authorized items if status is Pending Authorization, Verbal Auth Recieved, or Confirmed)

Cancel
Submit