

INTAKE & ADMISSION

BUSINESS MODEL SOFTWARE TRAINING

+healthTrust
SOFTWARE

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

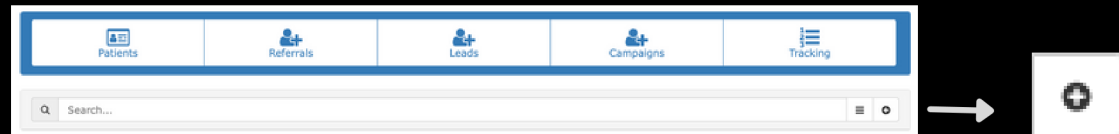
- On your home page, click the 'Patient' tab at the top tool bar



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.

Save

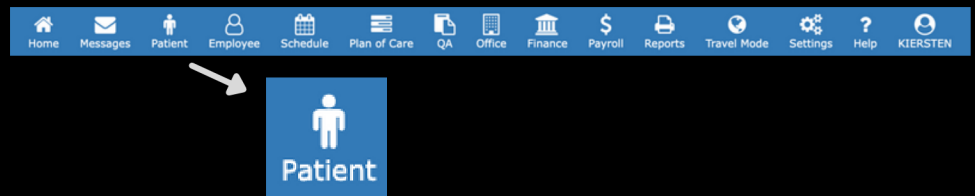




Add a Patient Referral

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.

Client Referral Contacts Services Financial

Office Search... Territory

Last Name First Name M.I.

Address City State Zip

Different Service Address

Phone 1 Cell Phone (Other)

Email Client Portal Access Preferred Method of Contact

Language

Status Status Attribute Search...

Net Promotor Score: NaN Reason...

Advanced

Save

Save



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.

New Lead

Quick View Information Calendar Files Notes

Priority: Urgent High Medium Low None Potential: High Medium Low None

Basic Information

Office: Search...

Last: First: MI: G

Address:

City: State: Zipcode:

Phone: Cell: Phone (Other):

Email: Preferred Method of Contact:

Marketer: Search...

Campaign: Search...

Referral Received By: From:

Referral Source:

Date: HH/DD/YYYY Time: HH:MM

Contact Information

Contact Hours:

Lead Information

Date of Birth: Sex: MALE FEMALE

Race: Smoker: YES NO

Language:

Level:

Likes: Dislikes:

Status:

Status:

Language:

Level:

Likes: Dislikes:

Status:

Status:

Lead Status: Search...

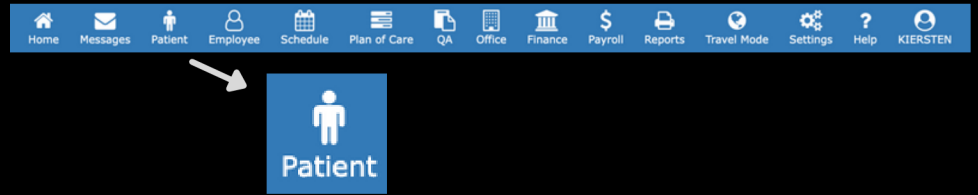
Cancel Save



Patient Portal

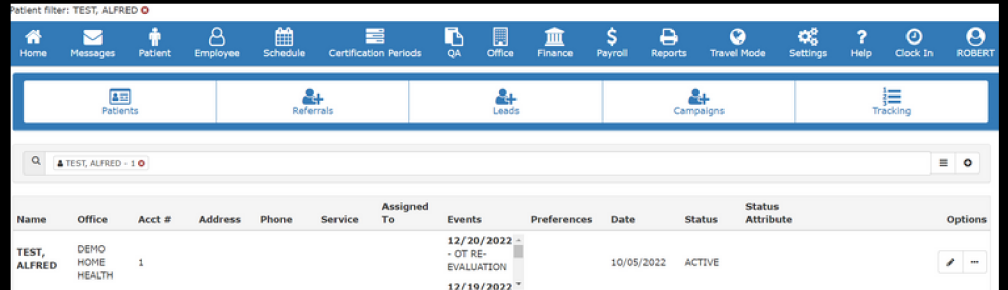
1 Go to 'Patient' Tab

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



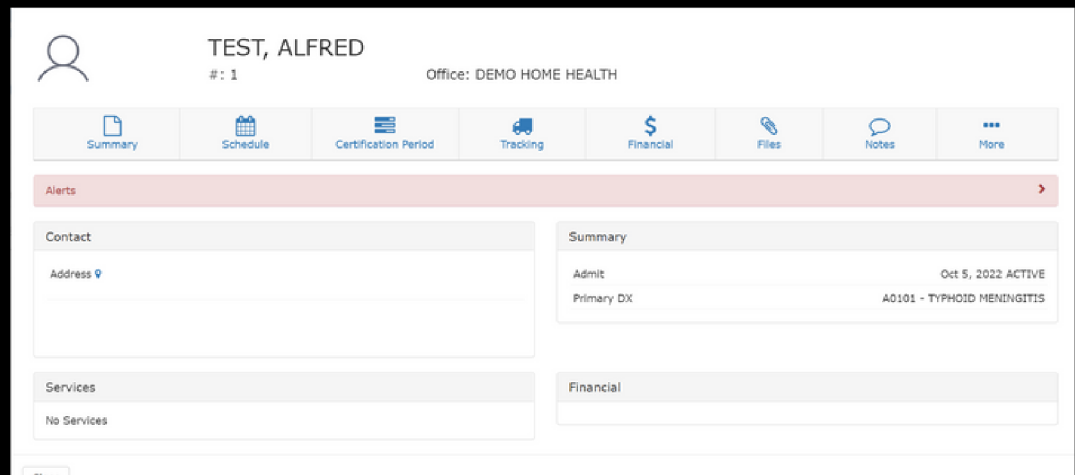
2 Choose the Patient

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



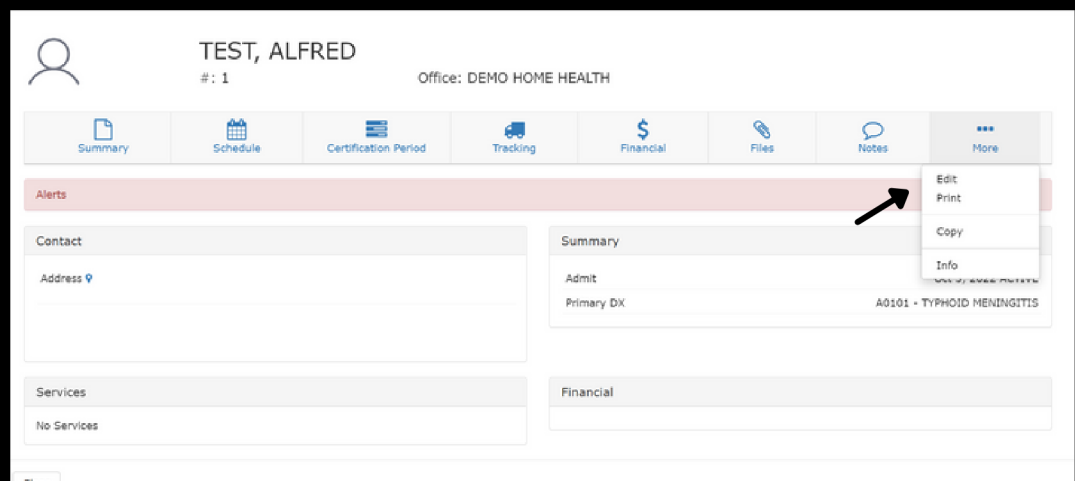
3 Review Patient Profile

- 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

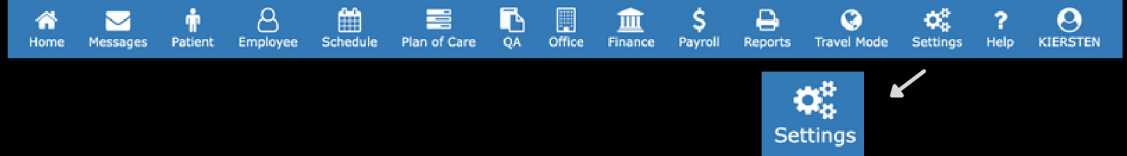
- Select the 'More' button on the right side.
- Select the 'Edit' button from the drop down menu.



Tracking Requirements: Patients

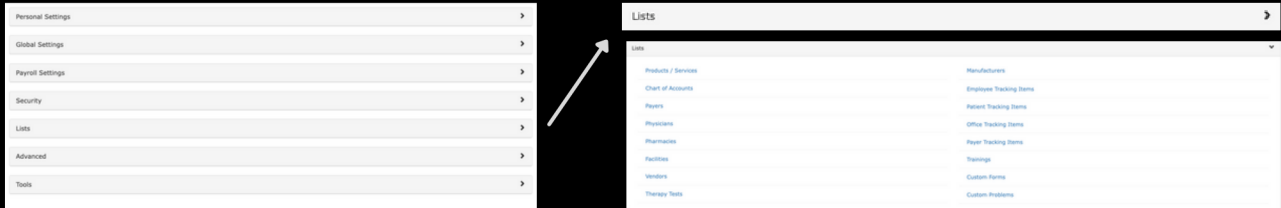
1 Go to 'Settings' Tab

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



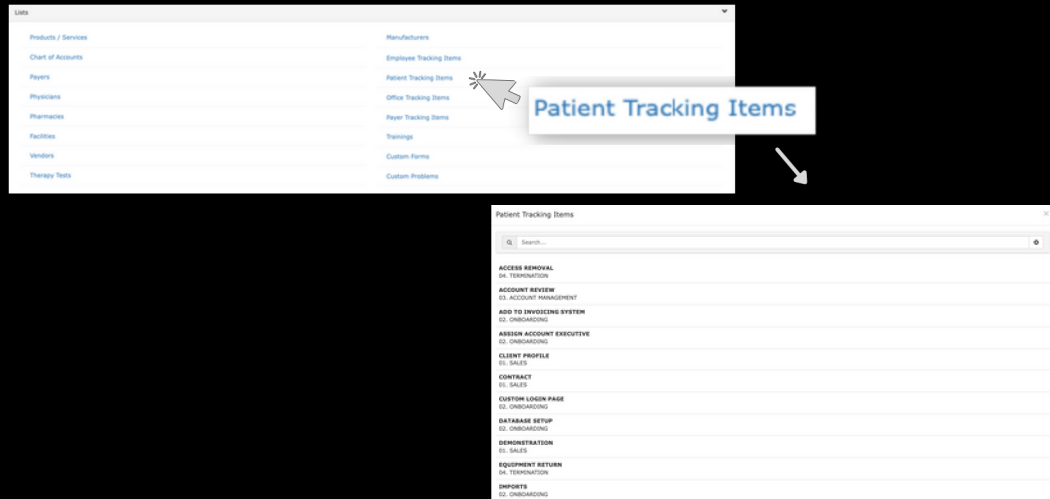
2 Lists

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



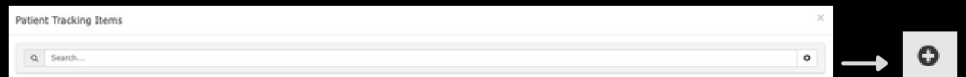
3 Go to Patient Tracking Items

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



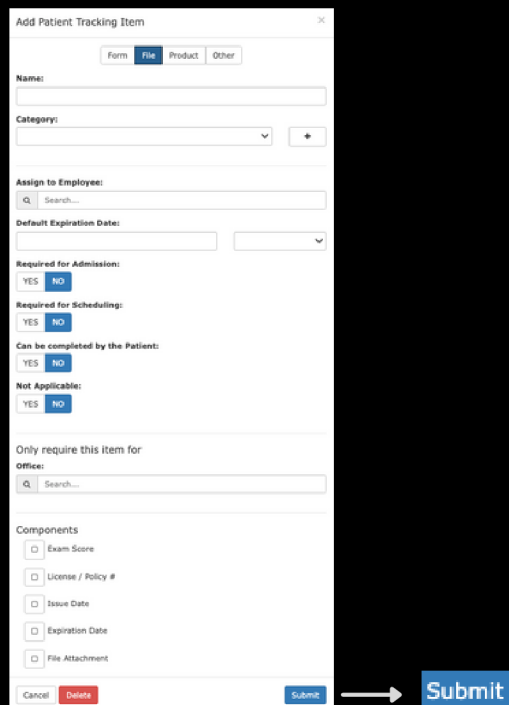
4 Add a Tracking Item

- 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

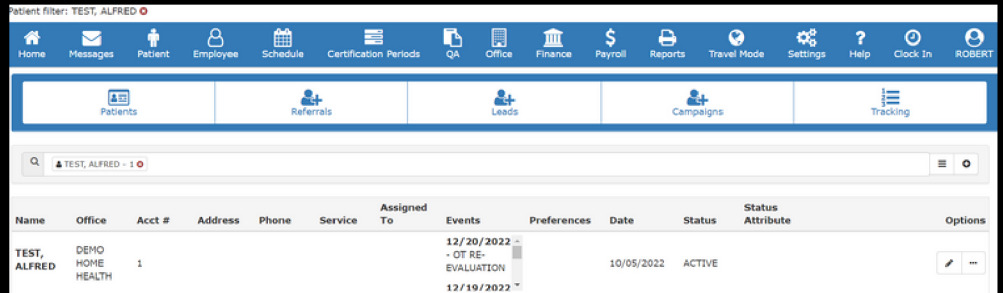
1 Go to 'Patient' Tab

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



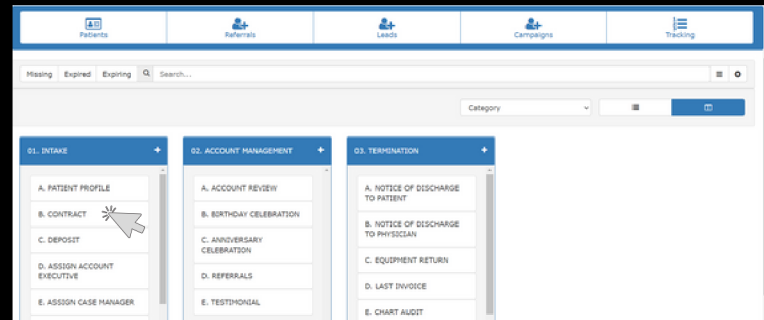
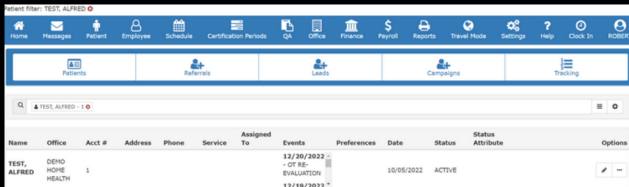
2 Choose the Patient

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



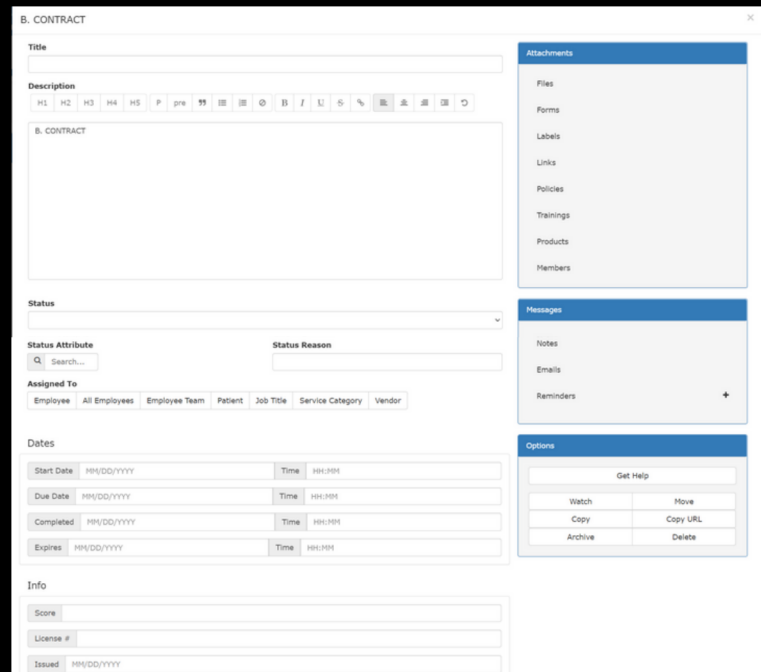
3 Select Tracking Section

- 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

- Name the Campaign and select the 'Campaign Type'. Press the 'Next Step' button on the bottom right of the screen.
- 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.
- Fill out the information in the 'Template' screen. Press the 'Next Step' button.
- Select information in the 'After Submission' screen. Press the 'Save' button.

1.

2.

3.

4.



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

The screenshot shows the 'List' view of the Plan of Care system. At the top, there are three tabs: 'List', 'Tracking', and 'Auths'. Below the tabs is a search bar with a magnifying glass icon and the text 'Search...'. Below the search bar is a table with the following columns: Order #, Type, Patient, Date, Title, Assigned To, Status, and Options. The table contains five rows of data.

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.

The screenshot shows the 'Edit Plan of Care' form. At the top, there are five tabs: 'Basics', 'DX / Proc', 'Clinical', 'Planning', and 'Signature'. Below the tabs is the 'Information' section. The form contains the following fields: Title (text input), From (date input: 05/09/2023), Thru (date input: 05/09/2023), Days (dropdown menu), Form (dropdown menu: 485), Certify (dropdown menu), Status (dropdown menu: UNCONFIRMED), Status Attribute (text input with search bar), Priority (radio buttons: High, Medium, Low), and Type (dropdown menu).

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

[Options](#)
[Schedule Event](#)
[Message](#)

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.

Select an Order to Add

Add Plan of Care

Add Physician Order

Add Aide Care Plan

Cancel

Add Plan of Care

Basics Signature

Information

Title

Description

From Thru Days

Status Status Attribute

Priority High Medium Low Value

Type

Description

From Thru Days

Status Status Attribute

Priority High Medium Low Value

Type

Assigned To

Add to Unassigned List

Save

Add Physician Order

Patient:

Physician:

Date:

Date Sent:

Date Received:

Problem (Why do we need a new order?):

Order Type:

Orders:

Advanced

Clinician Signature

RN Signature / Co-Signature

Update this Plan of Care:

Update Care Path

Save

Add Aide Care Plan

Summary Tasks

Type

Title

Patient

Order Period

Frequency

Status

UNCONFIRMED CONFIRMED

Save

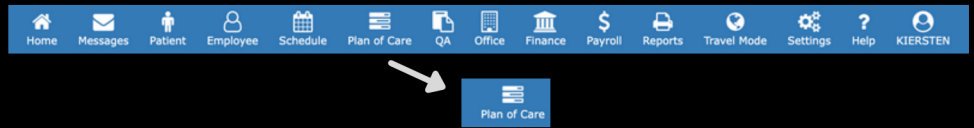


Add a Patient Authorization

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'

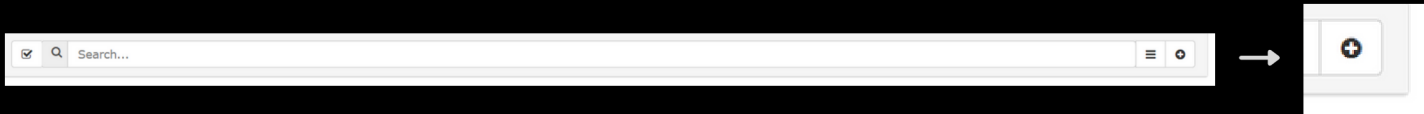
- Click on the 'Auths' tab above the search bar.



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
Q Search...

Payer
Q Search...

Pan/Cert #/Par Letter

Effective From **Effective Thru**

Pre-Auth Date

Date Issued **Date Sent**

Type

Status

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

Patient
Q Search...

Payer
Q Search...

Pan/Cert #/Par Letter

Effective From **Effective Thru**

Pre-Auth Date

Date Issued **Date Sent**

Type

Status

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