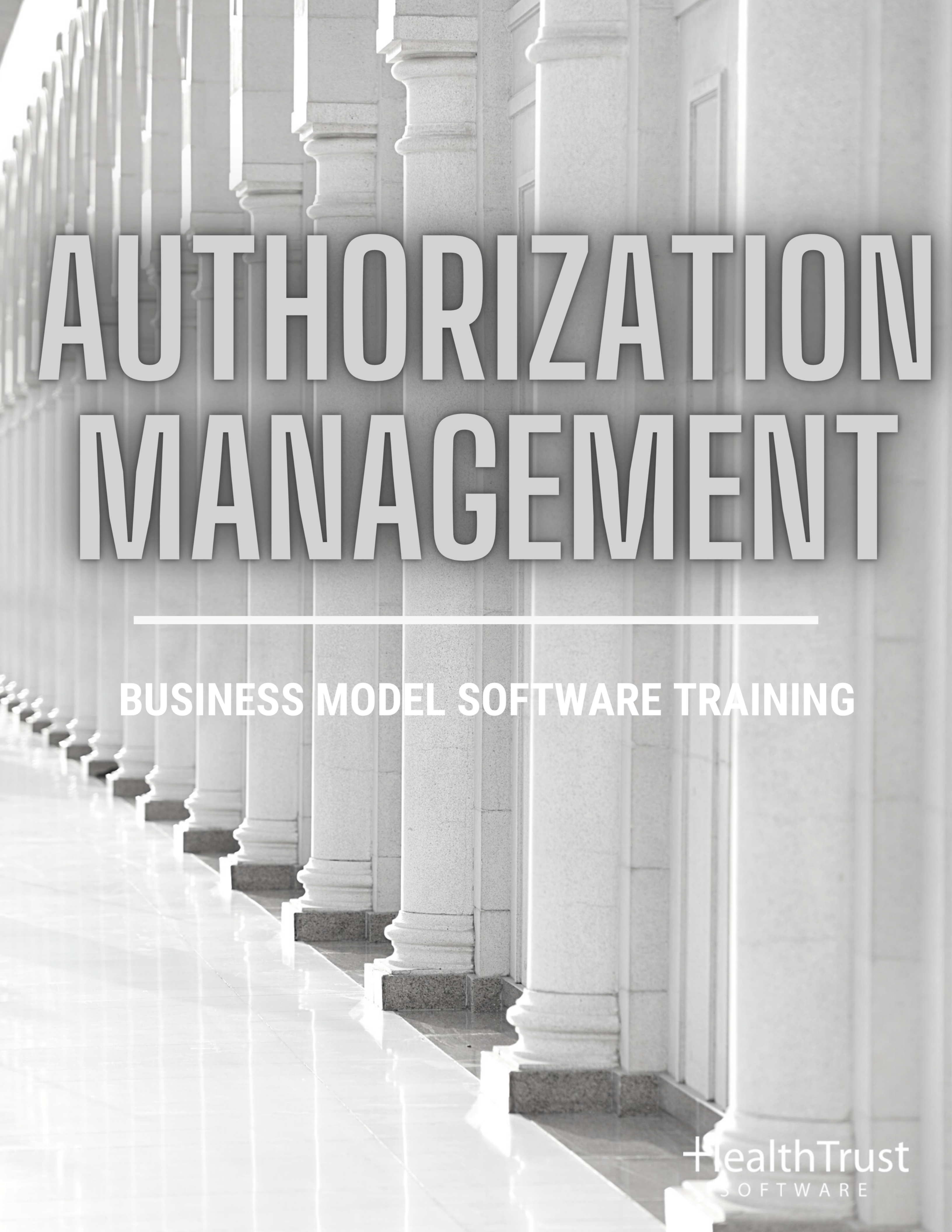


AUTHORIZATION MANAGEMENT

BUSINESS MODEL SOFTWARE TRAINING

HealthTrust
SOFTWARE

Authorization Management: Recommended Training Course Agenda

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how to track patient authorizations through the software. The sequence of courses can be changed based on agency training needs and schedule; however the content of each course should remain as stated.

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

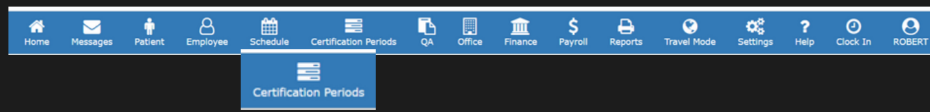
Estimated Duration: 1 hour 30 minutes

TOPIC	DESCRIPTION	
Adding a New Authorization Request	How to add a new authorization request for a specific patient	30 Minutes
Adding a New Payer Form	How to add a new payer form for a specific patient	30 Minutes
Add a Physician	How to add a new physician into the system	15 Minutes
Physician Portal	How to use and make edits to the physician portal in the system	15 Minutes

Adding a New Authorization Request

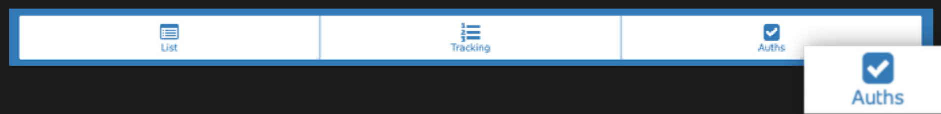
1 Go to 'Certification Periods' Tab

- On your home page, click the 'Certification Periods' tab at the top tool bar.



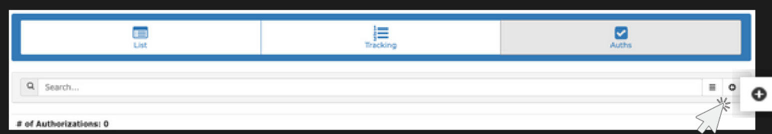
2 Authorizations

- Click on the 'Auths' option in the submenu bar.



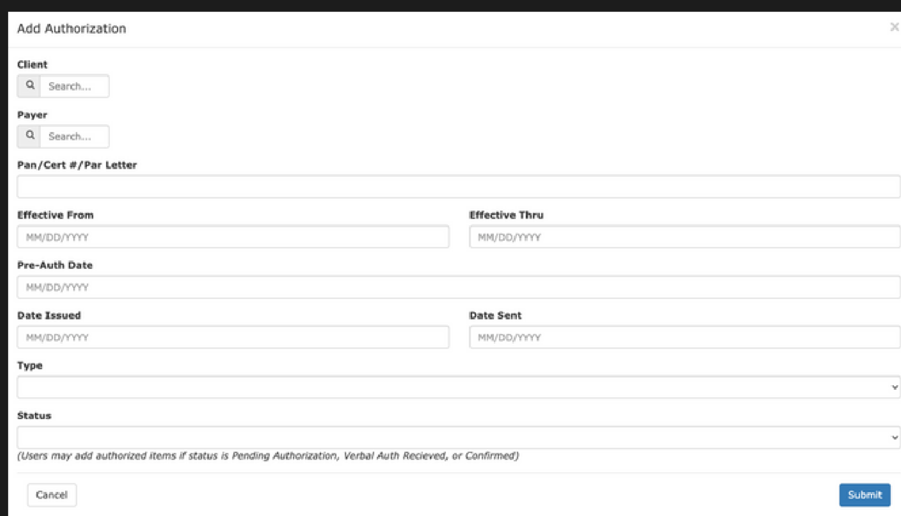
3 Add an Authorization

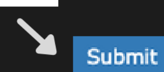
- To add a new authorization, click on the '+' button next to the search bar.



4 Complete the Form

- A form will open. Use the drop down options and open fields to input the required information for the Auth you are adding.
- When you have completed the form, click the 'Submit' button on the bottom right.

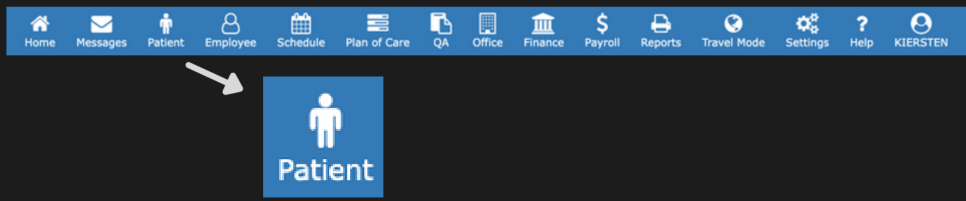




Adding a New Payer Form

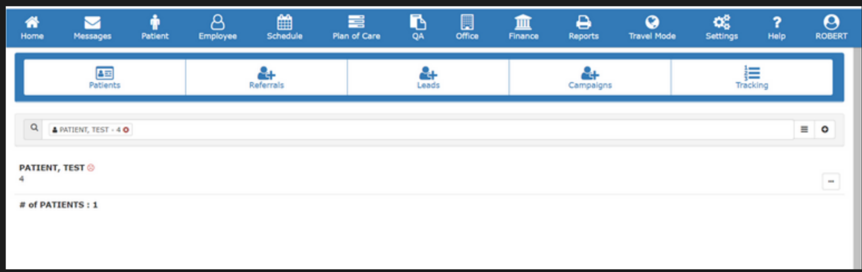
1 Go to 'Patient' Tab

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



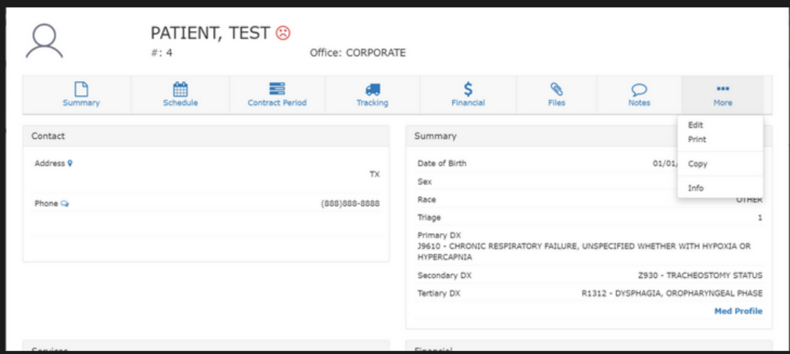
2 Choose the Patient

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



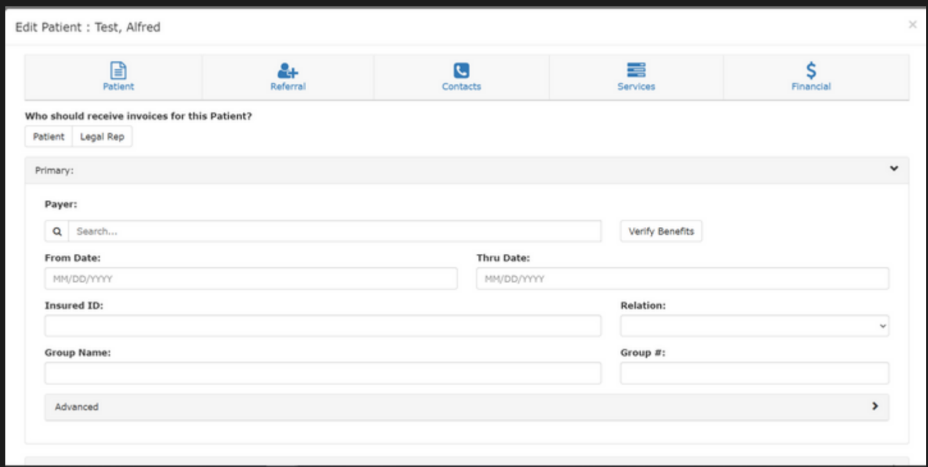
3 Edit the Patient Profile

- When the Patient Information form opens up, click on the "More" option to the far right so a drop down opens. Click on 'Edit.'



4 Select the Financial Tab

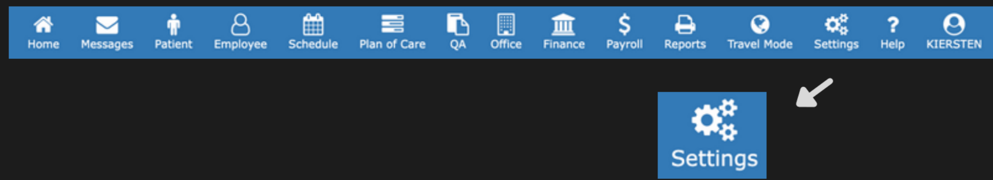
- Select the Financial Tab in the 'Edit Patient' Form.
- Then select the 'Primary' drop down menu.
- Complete the open fields and then press 'Save' at the bottom right.



Add a Physician

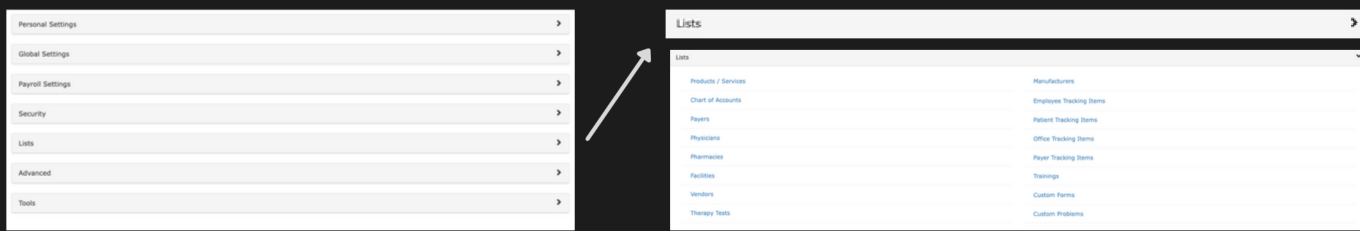
1 Go to 'Settings' Tab

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



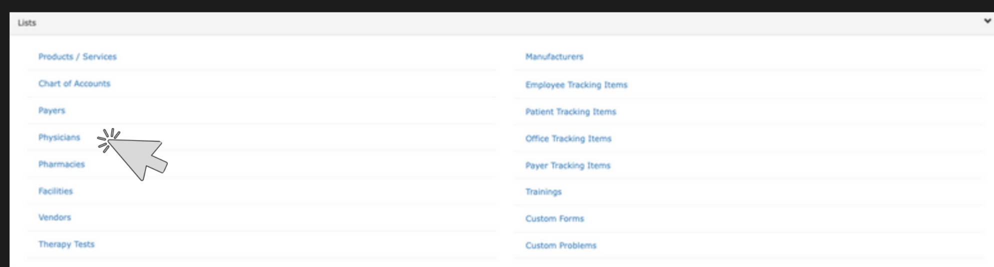
2 Select Lists

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



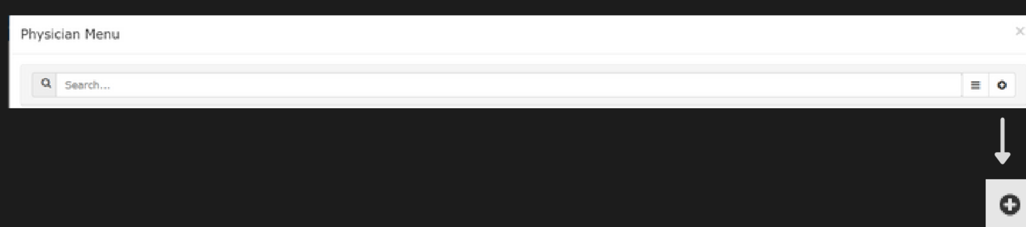
3 Go to Physicians

- Click 'Physicians' in the Lists section.
- A page will open listing all of the physicians in your database.



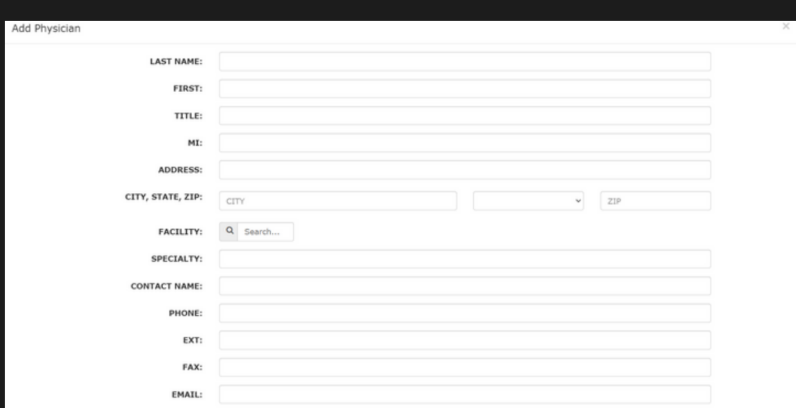
4 Add a Physician

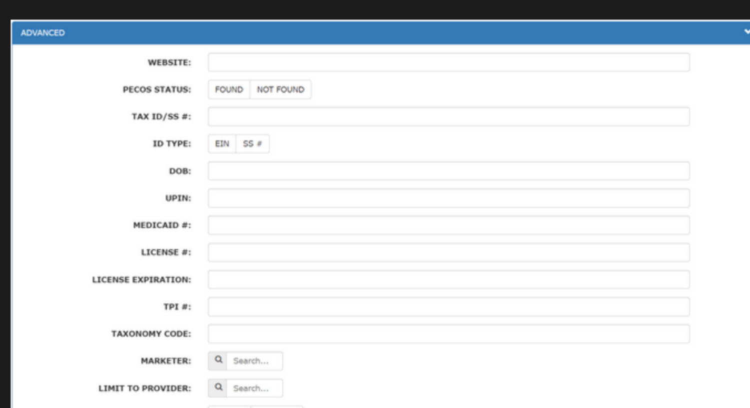
- Click the '+' icon on the far right of the search bar.
- A form page will open up.



5 Complete Add Physician Form

- Complete the open fields and select the 'Save' button at the bottom right.

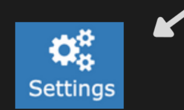




Physician Portal

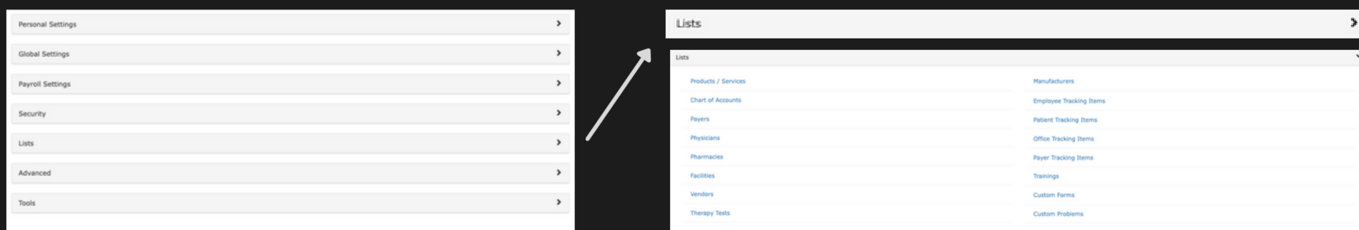
1 **Go to 'Settings' Tab**

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



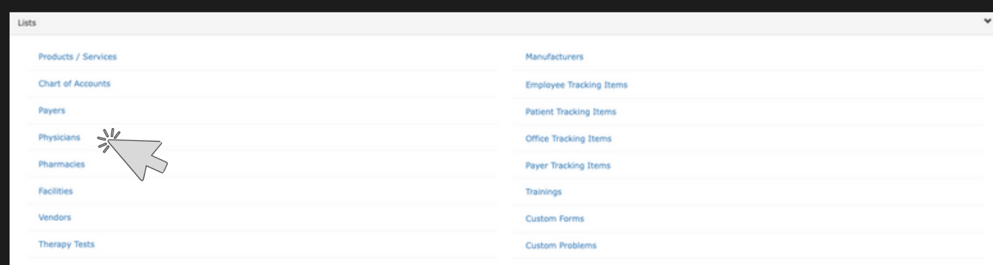
2 **Select Lists**

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



3 **Go to Physicians**

- Click 'Physicians' in the Lists section.
- A page will open listing all of the physicians in your database.

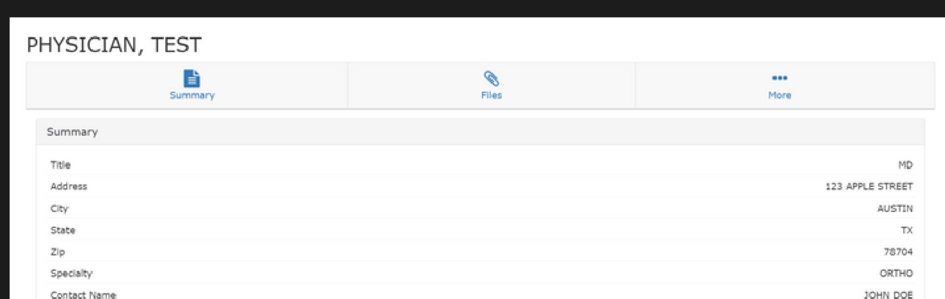


4 **Choose the Physician**

- Choose the Physician you want to view in the list.

5 **Review Physician Portal**

- The physician portal will open.
- You will be able to review the selected physician's information.



Physician Portal Continued

6 Edit a Physician's Info

- Select the 'More' button on the right.
- Then select the 'Edit' button.
- This will open the 'Edit Physician' screen.
- Make edits and then select the 'Save' button at the bottom right.