HOMETRAK COMPANION

Relationship Module: Client Inquiry, Client & Payer Modules

This training guide is going to address the functionality and purpose of the Client Inquiry and the Client Module.

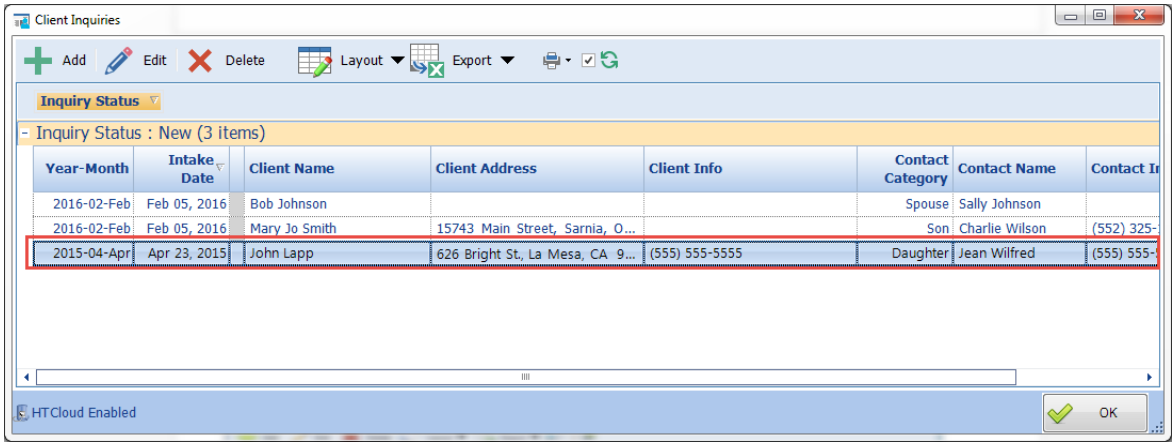
Why use the Client Inquiries Screen?

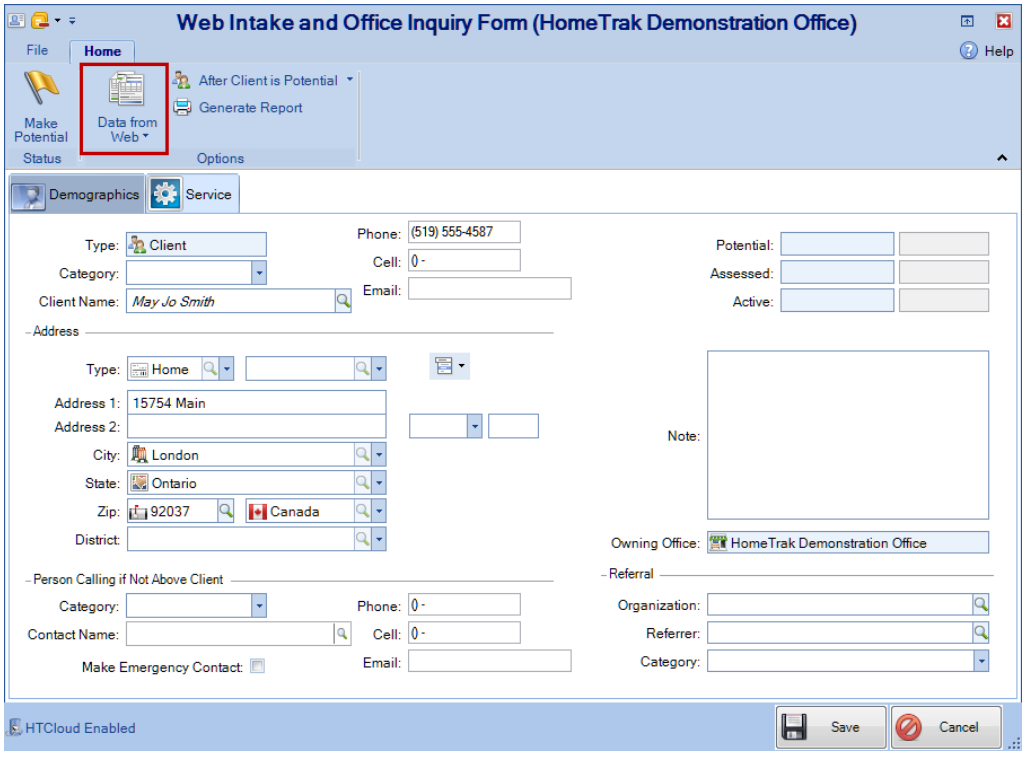
The Client Inquiries screen allows you to manage clients who have made an inquiry about your business either through a web application process from your company website or by calling into your office. (For information on how to configure your web applications, please go to Online Web Applications)

New Client Inquiries are not automatically added to the Client Module. This is so the Client Module does not become cluttered with inquiries that may never actually become active Clients.

To review the completed inquiries, go to the **Main Module,** click on **My Tabs** on the ribbon and select the **Client Inquiries tab.** To save this layout click on the gold star (⭐) in the top left-hand corner to add it to your *Favorites*.

Next, choose the person you want to review by clicking the line item in the list. Then click the **Edit** button on the toolbar. In the example below, I clicked on *John Lapp's* line to review.

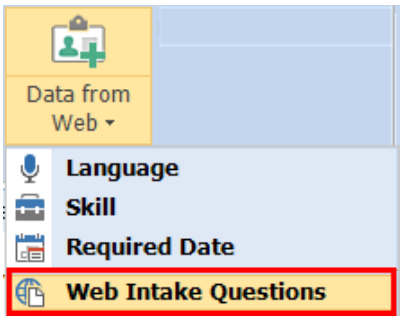




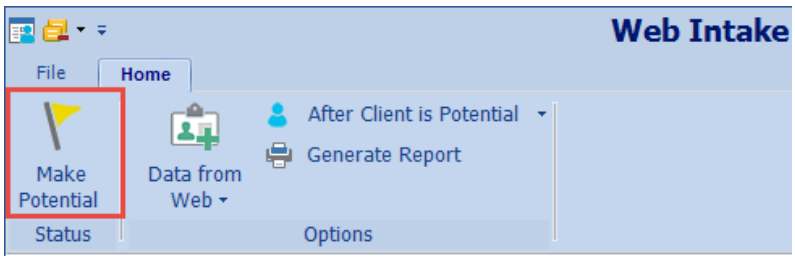
The *Web Intake and Office Inquiry Form* screen opens to display the demographic information.

If the client completed the online form, you will want to review their responses to the questions.

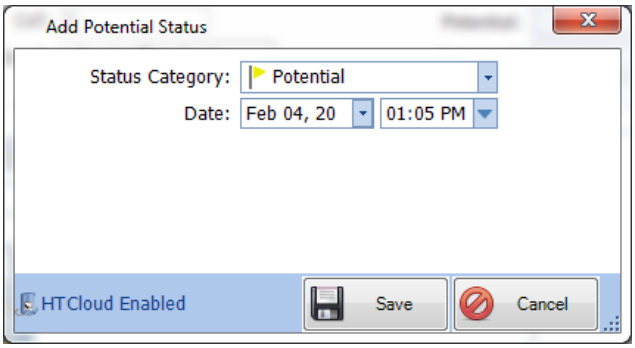
To do so, click on the **Data from Web** drop-down button then click the *Web Intake Questions* tool.



If the prospective client was added manually, there will be no questions to review.
When and if you decide to move them into the Client Module, you have the option to 'Make Potential'



The *Add Potential Status* screen opens. You can change the date and time, if needed. Click the **Save** button.



You will see two question prompts. You can say **no** to these questions and complete them later.

- Add a Referral Source?
- Add Task?

Now the Potential Client is ready to move to the next stage of your Intake process and all future documentation will be completed from the Client Module.

NOTE: If you prefer not use the *Client Inquiry screen* to enter prospective clients, you can add them directly into the *Client Module* with the status of Potential.

Client Module:

If you entered the client through the Client Inquiry process as outlined above you can search for the client within the result panel. You can bypass the client inquiry screen and add a client directly into the Client Module.
From the **Main Module**, click the **Relationship Management** icon, then click the *Client* tab.
Click **Add** on the Scenarios Panel on the left-hand side of the screen.

All fields on the Profile screen are optional except for the *Name, Status,* and *Status Date* fields.

ⓘ Remember to select the appropriate status for the Client and adjust the *Status Date* if needed. (By default, the *Status* is Potential and the *Status Date* is today's date.) To be able to add the Client into schedules prior to today's date, you must backdate the Active Status Date.

NOTE: The Client ***must have*** a current status of **ACTIVE** to be added as the Client in a schedule.

Client Profile Information Screen

You may want to indicate if the client needs **Holiday Coverage.**

If the client speaks multiple languages, you can add them to the **Language** section of the profile. Using the *Caregiver Suggestion* feature gives you the option of matching caregivers and clients by the languages they speak.

Demographic Menu:

Relationships:

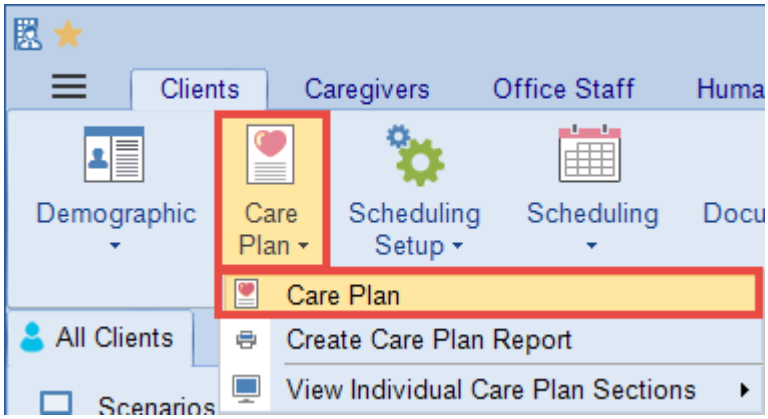
- It is a good practice to add the *Emergency Contact*
- (optional) Add an *Individual* which can be a relative, doctor, lawyer etc.
- (optional) Add a specific *Manager* from your office who may be managing this Client

The Emergency Contact and/or Individual can be used to send the invoice to.

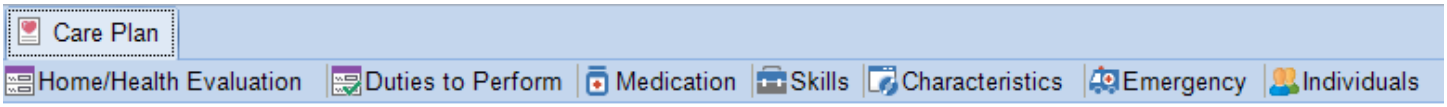
How to create a Care Plan for a Client (if using this feature):

The Client's Care Plan specifies important health information about the Client and the care that is required. It is meant to be completed when the Client is assessed.

Go to the *Client Module* and click the **Care Plan** icon on the ribbon then click **Care Plan.**



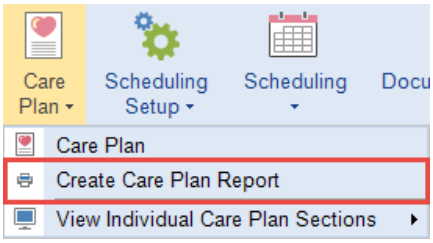
For information about each section of the Care Plan click here.



> ⓘ **It is important to note that the categories and items are completely customizable in the User Defined section. Click here for instructions on how to make changes to the default template.**

How to print a Care Plan Report

If you do your assessments on site, you could use a portable printer and print the Care Plan report while on site.
To run the Care Plan report you will go to the client module ribbon and click the *Care Plan* drop-down arrow, then click Create Care Plan Report. You can also create a saved report that can be viewed on the mobile app by your Caregivers. Please go to Save Reports for Mobile Viewing for setup information.



When you have completed the client's assessment, you can go to the Client's Profile screen and add the new status ***Assessed*** with the date the assessment was completed to have a history record of when this milestone was completed.

The Assessment has been completed. Now it's time to make the Client Active.

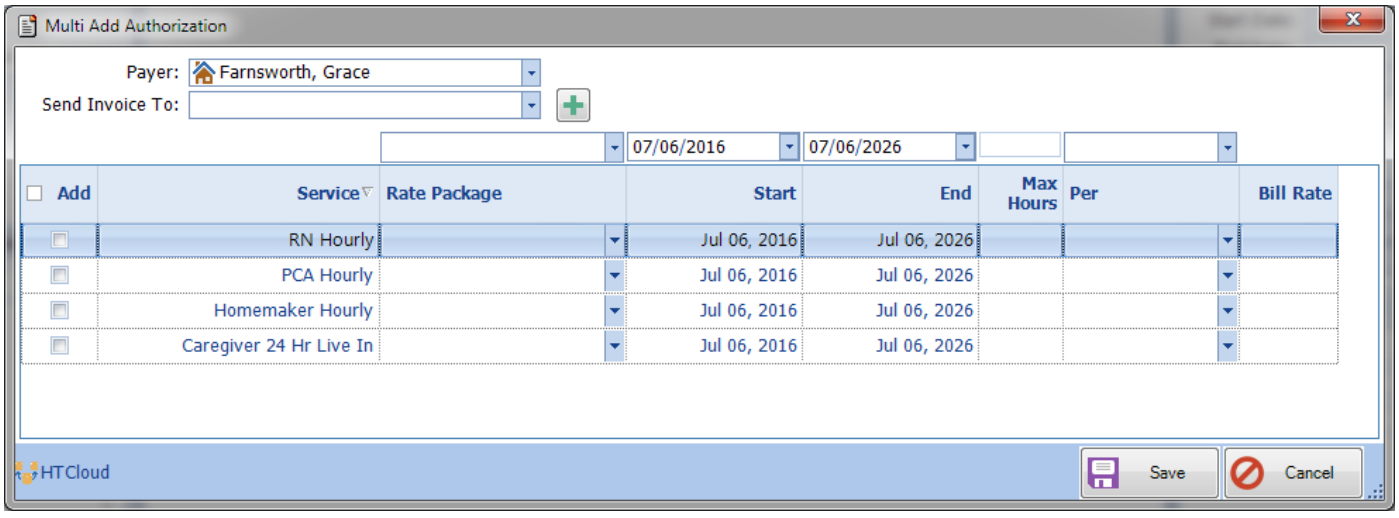
Now that you have completed the assessment you will need to make the client Active. Go to the Client's Profile screen and add the new status ***Active*** with the date the client is starting service with you.

Once the client is Active, we can add the Authorizations (or sometimes referred to as Contracts) for the service(s) you are providing. (An Authorization is mandatory to create schedules for clients.)

An ***Authorization*** is the contract, or permission, to provide care for a client. You must have an active Authorization in order to create schedules for a client. Authorizations specify the type of care provided, how long the care is to last, and who should be billed for the care.

Go to the *Client Module* and click the **Scheduling Setup** menu on the ribbon.

Next, go to the Authorization screen and click the **Quick Add** to add you're Authorizations. If you're not sure how to create the authorization click the following link for assistance. Who should receive the Invoice for services rendered?



If the client or a relative is paying for the services rendered, then the billing rates and billing options will be setup and maintained in the Client Module.

If a third party payer (insurance companies, government program or trust funds) are paying for the client's services rendered, then the billing rates and options will be setup and maintained in the Payer Module. Help system documentation for setting up billing rates and billing options.

How to Add a Third Party Payer (Non-Private Payers)

Non-Private (Third Party) Payers: A non-private payer includes insurance companies, government programs, trust funds or other such organizations. Non-private (third party) payers are entered in the *Payer Module* and then they can be added as a possible payer on a client's record.

Payer Module:

From the **Main Module**, click the **Relationship Management** icon, then click the *Payer* tab.

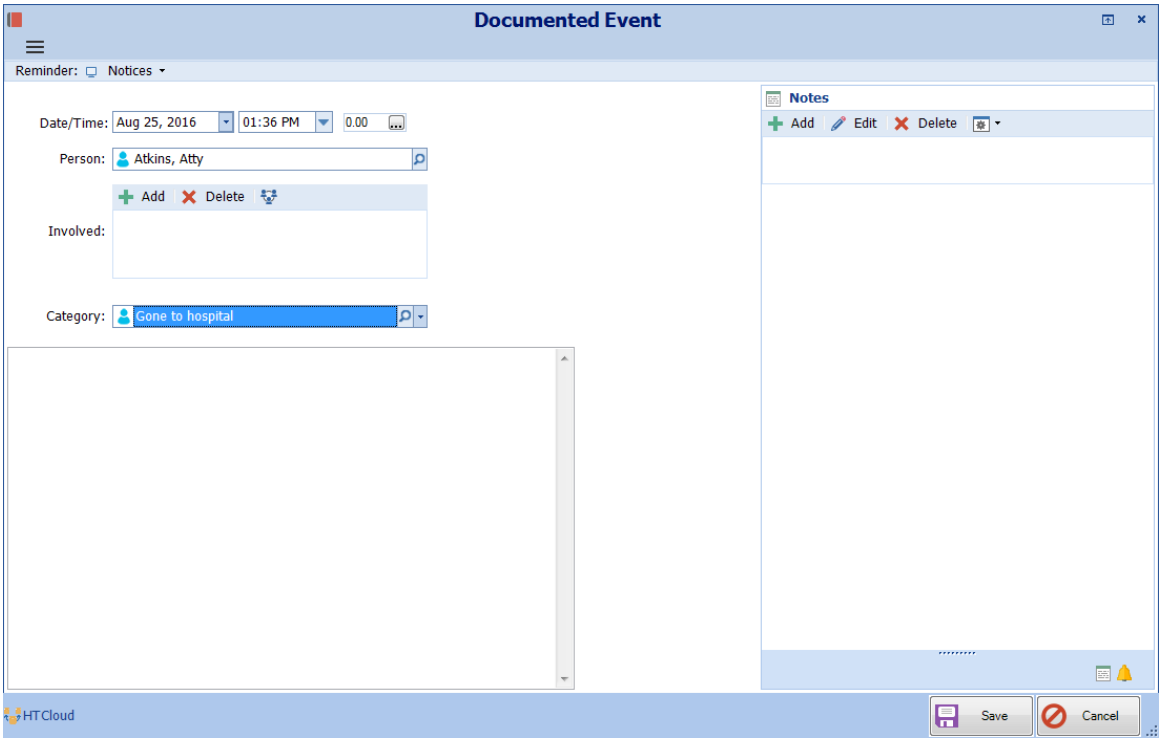
Click **Add** on the Scenarios Panel on the left-hand side of the screen.

All fields on the Profile screen are optional except for the *Name, Status,* and *Status Date* fields.

The *'Add New'* screen will open, where you can select which **Category** the Payer belongs to**.** The category feature (if using it) is the primary way of grouping. (Government Program, Insurance, Trust Fund, Third Party, etc…)
Next, type in the Company's *Name, Address, main Phone, Cell Phone* and *general Email*. Set the *Status, Status Date and Time* if required, then click save.

Documented Events

A Documented Event is used to record and report on any type of event that has occurred (good or bad). You can record the individuals involved with the event and send a Notice to an office staff person to advise them that this event happened. You can also customize your Categories to make it easier to report on these events.



Recommended Reports to help manage your Clients

All reports can be accessed from the Main Module under Reporting.

Report Name	Explanation
Care Plan **(Printed Report)**	The Care Plan details this Client's plan of care. This report can include the Client's general Care Plan information as well as details about their Authorizations and any Care Plan Duties specified on individual Authorizations. The Care Plan report includes optional signature lines for the Client, their physician, the primary Caregiver, and your Office Staff person who is the Client Manager. The signed document may be kept on file as an official care agreement between the Client and your office.
Authorizations	• **Expiring Authorizations** **(Printed Report)** Shows Authorizations that will end within a given date range. • **Under/Over Authorized Hours** **(Printed Report)** Used to view the clients who are over or under their specified Authorization Hours in a given period. Use this report to determine if your office is scheduling clients to their full potential. • **Summary of Authorized Hours** **(Excel Style Report)** A grid that details Clients' weekly scheduled hours for a given date range. This grid is a helpful tool to quickly compare Clients' scheduled hours to their maximum authorized hours. Periods (days, weeks, months, quarters, years; depending on the selection on each individual Authorization) that *start* within the filter date range will be included in the grid.
Required Dates **(Printed Report)**	• **Required Dates Coming Due** Shows Required Dates that are or will be expired within a given date range. • **Required Dates Coming Due Letter** Similar to the *Required Dates Coming Due* report, but in a letter format that you can mail to individual Caregivers. The body text of the letter is configured in the User Defined Module/Reporting/Mail Merge Letter. • **Required Dates Completed** Similar to the *Required Dates Coming Due* report, except this report shows which requirements have been completed within a given date range.
Documented Events **(Printed Report)**	Summarizes Documented Events in which this Client has been involved.
Status Flow **(Excel Style Report)**	The Status Flow grid details the first Potential, Assessed and Active Status dates for each selected person. This grid is a helpful tool for tracking when people became Active, and how long it takes for people to move from first being added as Potential to becoming Active.